



INDUSTRY GUIDE

2026 Guide: Automating Admin & Enhancing Experiences in Professional Services

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The current state of operational efficiency in professional services

In today's professional services world, operational complexity is constantly growing. Hybrid teams, multiple office locations, third-party providers and increasing client expectations demand a need for streamlined, reliable systems that don't just support operations, but enhance them.

But many firms still rely on manual process.

Paper sign-in sheets. Disconnected scheduling tools. Ad-hoc onboarding emails. These inefficiencies cost time, introduce risk, and undermine the seamless experience your clients and staff expect.

The expectation today is simple: less admin, more control and better experiences at every touchpoint.

Familiar pressures. New expectations.

Professional services firms face a unique operational mix:

- Time-sensitive engagements and back-to-back meetings
- Confidential work requiring careful access and oversight
- Frequent third-party contractors and specialists
- Hybrid work models and flexible space usage
- Growing compliance and data privacy obligations

Hybrid work continues to be a dominant model:

around 64% of organizations report using a hybrid model today - making flexibility and coordination a central part of operations.

What's holding firms back?

Too many manual tasks - checking availability, managing schedules, tracking access, chasing paperwork

Disjointed workflows between HR, IT, Operations, and Facilities

Inconsistent onboarding for contractors, consultants, and part-time team members

Limited oversight of who's using spaces, systems, or services - and whether processes are being followed

Strained capacity from back-office teams expected to support more, with less



From manual to managed: unlocking time through automation

You need tools that reduce manual tasks, eliminate blind spots, and support your team - without making their day more complicated. Smart automation doesn't just reduce workload. It improves accuracy, ensures consistency, and gives your teams space to focus on strategic work.

Here's where automation unlocks the biggest impact for professional services firms:

Meeting coordination

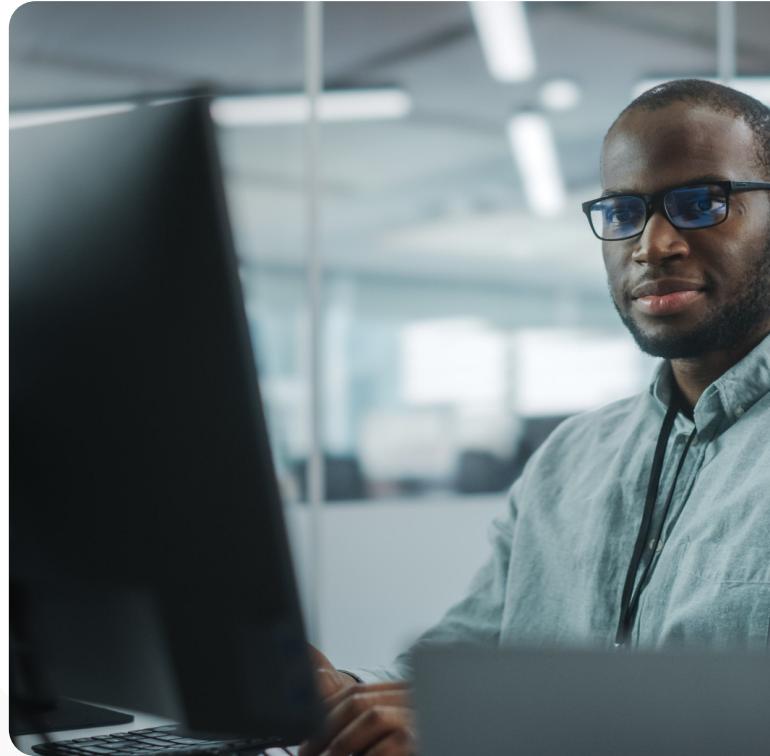
Remove the back-and-forth from booking rooms, notifying hosts, and preparing spaces —while enabling visitors to self-serve bookings when appropriate. Meetings start on time, with everyone in the right place, fully informed.

Hybrid work management

Simplify how teams plan office days, book desks, and coordinate in-person time - so space is used efficiently, and everyone knows who's where, when. Roughly two-thirds of professional services workers prefer a hybrid work model, highlighting the continuing importance of flexible, coordinated scheduling.

Third-party onboarding

Speed up compliance checks, access provisioning, and induction processes so contractors and consultants are fully prepped before they arrive - without the admin drain on internal teams.



Access and authorisation control

Ensure only the right people are in the right places, with the right information logged, without relying on outdated sign-in sheets or manually checking approvals.

Compliance evidence collection

Capture records automatically as people move through your spaces and systems - making audits more about verification than preparation.



Your 90-day plan to streamline operations and reduce admin

You don't need to change everything at once. Start small, stay focused and layer in improvements step by step. This 90-day plan helps you introduce improvements gradually - making your operations smooth without disrupting your team's flow.

Days 1-30: Assess & simplify

- ☐ Map out key operational workflows - from meetings to onboarding
- ☐ Identify manual processes creating bottlenecks & what tools could prevent it
- ☐ Review how space, access, and scheduling are currently managed

Days 31-60: Connect & test

- ☐ Pilot automated tools to manage access, coordination, and documentation
- ☐ Run internal checks on how people, spaces, and systems interact
- ☐ Review compliance gaps and simplify evidence collection

Days 61-90: Embed & optimize

- ☐ Automate recurring tasks (e.g. check-ins, space booking, pre-arrival info)
- ☐ Implement role-specific onboarding and access pathways
- ☐ Train teams and create feedback loops to refine and improve



Seamless workplace operations: where professionalism meets practical efficiency

In professional services, operational excellence goes far beyond client-facing interactions. It's about creating smooth, consistent experiences behind the scenes - where teams can focus on delivering value, not managing admin.

By embedding automation and structured systems - like visitor management, space booking, and compliance management - into your daily workflows, you reduce friction across the board - and turn the steps in your 90-day plan into habits that support both compliance and productivity.



What the right system unlocks:

- Easy coordination of meetings, space, and hybrid schedules
- Onboarding workflows that are fast, consistent, and hands-off
- Configurable access rules that match roles and responsibilities
- Real-time visibility of people, spaces, and permissions

The benefits for professional services firms:

- Less admin, more focus - for every team
- Cleaner handoffs and better collaboration across departments
- Stronger compliance, without the paperwork burden
- Higher confidence from clients, leadership, and regulators
- Smarter use of space and time across hybrid or multi-site operations



Make everyday tasks effortless, not endless



Sign In App helps professional services firms remove complexity from day-to-day operations. Whether you're coordinating meetings, managing hybrid work, onboarding contractors, or preparing for audits, Sign In App offers simple, scalable tools to keep everything running smoothly.

Less admin. More clarity. Better experience - for everyone.

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