CASE STUDY

EMEA Operational Reporting Transformation

How a manual spreadsheet process across 250+ sites was replaced with a fully automated Microsoft 365 pipeline — built and deployed in under one month.

SCALE	REGION	DELIVERED	TOOLS
60 managers 250+ sites	EMEA — multiple countries	Solo — under one month	M365 · Power Automate SharePoint · Power BI

EXECUTIVE SUMMARY

The situation, solved.

Project Dragonstone is a two-stream Microsoft 365 automation initiative built for the EMEA Parts Operations division of a major automotive OEM. The organisation operated across 250+ service sites, with 60 managers spanning multiple regions and countries across EMEA.

Monthly standards audits were being tracked manually — supervisors compiled reports by hand, shared fragmented Excel workbooks across laptops, and chased submissions with no visibility into what was outstanding.

MxN designed and built a fully automated, zero-touch audit pipeline and a consolidated data platform — both delivered within the existing Microsoft 365 licence stack, with no additional tooling spend required.

~1,060	£0	<1 month	100%
hours reclaimed per year	additional tooling cost	design to live deployment	manual aggregation eliminated

The result is a live, real-time system that automatically captures audit submissions, calculates scores, distributes formatted reports to the right people, tracks submission compliance across all regions, and surfaces performance data in an executive-level Power BI dashboard.

THE PROBLEM

The process was manual. The scale was not.

Fragmented, manual reporting

Every month, supervisors across EMEA completed site standards audits using Microsoft Forms. When a form was submitted, nothing happened automatically. A person had to manually extract the form responses, compile results into a report, format and send that report to the relevant advisor and manager, and repeat this for every site across every region.

There was no standard format, no guaranteed delivery time, and no audit trail of what had been sent or received. Report quality and timeliness depended entirely on individual effort.

Data silos across dozens of workbooks

Historical audit data lived across 2–5 separate Excel workbooks, one per region or area. These workbooks used inconsistent column structures, were stored on individual laptops causing significant performance issues, and could not be cross-referenced without manually opening multiple files. Managers had no single place to view compliance performance across their region.

No accountability for submission compliance

There was no mechanism to track whether all sites had submitted their monthly audit. Supervisors had no structured way to know which of their sites were outstanding. Chasing submissions happened ad hoc, via message or email, with no record.

Before and after

	Before	After
Submission method	Individual spreadsheet files emailed or shared manually	Structured form — auto-routed on submission
Chasing submissions	Manual email follow-up across 60 managers each cycle	Automated reminders — no human intervention
Data consolidation	Manual aggregation across 60 files — 2–3 hrs per cycle	Automatic — live in SharePoint on submission
Error handling	Re-submission requests, version confusion	Validated at point of entry — errors prevented
Reporting visibility	Only available once full consolidation was complete	Real time — always current, always accurate

What this was costing — before

Precise time tracking was not in scope for this engagement. The estimates below are derived from displacement analysis — calculating the cost of the process that was replaced, using conservative assumptions throughout.

Manual report generation per site	Monthly, per site	~17 minutes per report
Total report generation across 250+ sites	Monthly	~70 hours per cycle
Data aggregation across regional workbooks	Monthly	2–4 hours per cycle
Chasing outstanding submissions	Monthly	1–2 hours per cycle
Compliance overview preparation	Monthly	1–2 hours per cycle

Based on 17 minutes average completion + distribution time per report, plus 2–3 hours consolidation overhead and ~15% error-correction rate. Annual labour cost of the manual process: approximately £12,000–£49,000 depending on reporting frequency.

THE SOLUTION

Built inside Microsoft 365. Nothing new to license.

The solution was built across two parallel streams, both completed within a single 4-week sprint and extended with Phase 2 enhancements delivered the following month.

Stream	Goal	Primary output
Stream 1 Automate	Automate report generation and distribution on every audit submission	Zero-touch email report to supervisors on form submit
Stream 2 Architect	Replace fragmented workbooks with a unified data platform	SharePoint List + Excel workbook + Power BI dashboard

> *Core principle: The SharePoint List is the single source of truth. Stream 1 writes to it. Stream 2 reads from it. Everything downstream — Excel, Power BI, email reports — is driven by that single list.*

Stream 1 — Automated audit reporting pipeline

A Power Automate flow triggers on every new Microsoft Forms submission and, without any manual action, calculates scores, writes data to SharePoint, and delivers a formatted HTML audit report to the relevant manager — across 250+ sites and 60 managers spanning the EMEA region.

Layer	What was built
Form design	4 scoring categories. Binary and rated questions. 92 location IDs mapped to manager email addresses.
Score calculation	Power Automate calculates category scores and percentage totals on every submission.
Deduplication	Composite Submission_Key (Location + MMM-YYYY) prevents double-counting on re-submissions.
SharePoint write	All submission data written to a structured SharePoint List as the system of record.
Email report	Formatted HTML report assembled via 7 sequential Compose actions. Auto-routed to correct manager.
Folder automation	Region/Area/Location folder hierarchy created and synced daily. Safe to run repeatedly.

Stream 2 — Unified data platform

A consolidated SharePoint List replaced all regional workbooks as the single operational database. Power Query connects Excel to this list for local analysis. Power BI dashboards surface real-time performance data across three management tiers.

Layer	What was built
SharePoint List	Unified schema. All regions. Real-time. Permission-controlled by management tier.
Excel workbook	Power Query refresh from SharePoint. Pace-based RAG logic for current-month accuracy.
Power BI dashboard	Executive dashboard. Regional performance, submission compliance, 12-month trend analysis.
Reminder flow	Mid-month automated reminder on the 15th. Flags outstanding sites. Targets correct supervisors.

THE IMPACT

What the manual process was actually costing.

Precise time tracking was not in scope. The figures below are derived from displacement analysis — calculating the cost of the process that was replaced, using conservative assumptions throughout.

~17 min	250+	~1,000 hrs	~60 hrs
per report, per site, per cycle	reports automated per cycle	reclaimed per year (Stream 1)	reclaimed per year (Stream 2)

Activity	Time before	Time after	Saving
Manual report generation & distribution	~17 min per site per cycle	0 — fully automated	~17 min per submission
Monthly data aggregation across workbooks	2–4 hours	0 (Power Query auto-refresh)	2–4 hours per cycle
Compliance overview for managers	1–2 hours	0 (Power BI live dashboard)	1–2 hours per cycle
Identifying non-submitted sites	30–60 min	~2 min (dashboard view)	28–58 min per cycle
Laptop performance issues	5–10 min per session	Eliminated	Per session

Cumulative annual estimate

Report generation & distribution time saved	**~1,000 hours**
Data management & reporting time saved	**~60 hours**
Total estimated time reclaimed	**~1,060 hours/year**
	£0 — built within existing M365 licences

CAPABILITY DEMONSTRATED

What this project shows.

End-to-end delivery

System designed and built by a single specialist — from problem definition to live deployment. No handoffs. No delays between design and execution.

Enterprise-scale operation

60 users, 250+ sites, multiple countries, delivered in under one month. The system handles real-world complexity without premium tooling.

Full-stack Microsoft 365

SharePoint architecture, Power Automate, Microsoft Forms, Excel 365 (VBA + Power Query), and Power BI — the complete operational ecosystem.

Commercial pragmatism

Meaningful operational improvement delivered within existing infrastructure. Zero additional licensing cost. Built within what the organisation already pays for.

Systems built to be owned

Every component is documented, transferable, and independent of the person who built it. The client owns the system completely.

YOUR TEAM IS PROBABLY DOING SOMETHING SIMILAR RIGHT NOW.

Book a free 20-minute discovery call. If there is nothing worth solving, we will say so.

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Case study prepared by MxN. All client-identifying information has been removed. Data volumes, timelines, and estimates are based on confirmed project scope.