

From Inbox to Menu

How one self-service request page replaced a spreadsheet, a pile of emails and a lot of waiting.

A real project from my 10 years at a global relocation management company

Swipe to see how →

The problem

100+ client business reviews a year — the reporting packages we presented to corporate clients and our executives.

-  **One person, one spreadsheet**
Every review lived in a single analyst's Excel file.
-  **Status by email**
Managers had to ask — and wait — to learn where a review stood.
-  **A hidden rework loop**
Reports reran until four teams cleaned up the data.
-  **No executive view**
No count of planned, scheduled or completed reviews.

It was all manual

Before any review could be produced, data had to be clean across four teams:

Accounting

Home sale

Tax gross-up

Van line partner

If a report didn't run clean, the analyst went back to the team, waited, and ran it again. Nobody could see where the time went.

The idea: order it like fast food

Every review starts from a standard base. Then you add only what that client uses.

☒ Standard business review shell

☒ Domestic

☐ International

☒ Home sale

☐ Core Flex (à la carte)

Checkboxes, not free-form notes — so every request becomes clean, reportable history.

The new process

A self-service request page in SharePoint — software the company already owned.

- 1 Client Service Managers order the review and set the production date — no meeting needed.
- 2 Cleanup teams see every review they're tagged on.
- 3 Analysts prepare far in advance and run production the week before.
- 4 Executives get a weekly count: planned, scheduled, completed.

Getting people on board

The part that separates a good idea from a working process.

-  **A sponsor from day one**
My Director backed it and brought in the SharePoint development lead.
-  **Early users shaped it**
Tech-savvy Client Services leaders tested it while it was built.
-  **Skeptics, handled patiently**
Two analysts kept their Excel files at first. The results won them over.
-  **Phased visibility**
Access widened team by team once it was proven.

The results

40%

better reporting efficiency

60%

less manual reporting time

100+

reviews in the first season

2019

Employee of the Year

From zero visibility to a self-service process every team could see into.

WHAT I LEARNED

Work that lives in someone's head can't be measured.

Once the process was documented as a flow, we could see it, report on it and improve it.

The full case study — diagrams, requirements, trade-offs — is in my Featured section.

Case study 1 of 3