BUSINESS ANALYSIS CASE STUDY

From Inbox to Menu

Turning a one-person spreadsheet into a self-service request process for client business reviews

Snapshot	
Role	Reporting Coordinator — idea owner, requirements and workflow design, rollout and training
Organization	Global relocation management company (corporate relocation services)
Timeline	Designed and launched for a business review season, around 2018–2019
Tools	Microsoft SharePoint (already licensed), Excel, SmartQ workflow platform
Users	Grew to about 28 across five teams: 6 analysts, 8 Client Service Managers, 8 Operations Managers, 4 Accounting, 2 household-goods (van line) suppliers

40%	60%	100+	2019
improvement in reporting efficiency	less manual reporting time	business reviews produced in the season	Employee of the Year

EXECUTIVE SUMMARY

Client business reviews — the reporting packages we presented to corporate clients and our executives — were tracked in one analyst's Excel spreadsheet. Requests came through meetings and email, data cleanup across four teams was chased by hand, and nobody but the analyst could see where a review stood. Executives had no view of how many reviews were planned, scheduled or completed.

I proposed and designed a **self-service request menu on SharePoint**, built on tools the company already owned. Client Service Managers ordered a review the way you'd order at a counter — a standard base, plus options matched to each client's services — and every team involved could see each review's status. The result: **40% better reporting efficiency, 60% less manual reporting time**, full visibility for every team involved, and a weekly executive status report that hadn't existed before.

1 THE PROBLEM

Every business review depended on clean data from several teams. Relocation files had to be closed and reconciled by Accounting, and files with a home sale, a tax gross-up or an outsourced van line move needed those teams to finish their part too. If a report didn't run clean, the analyst went back to the team, waited, and ran it again — sometimes more than once.

All of it lived in one place: a single analyst's spreadsheet, and that analyst's memory.

What was broken

- **One person, one spreadsheet.** No one else could see status, and coverage during an absence meant starting over.
- **Status by email.** Client Service Managers and Directors had to ask the analyst, creating long email chains and lost information.
- **A hidden rework loop.** There was no measure of how long each cleanup team took or how often reports had to be rerun.
- **No history.** No record of which reports each client received or why.
- **No executive view.** No count of planned, scheduled or completed reviews.

- **No self-service.** Client Service Managers needed a meeting just to request a review.

2 SCOPE, GOALS AND CONSTRAINTS

Problem statement: Client Service Managers, analysts and cleanup teams had no shared, self-service way to request, track and report on client business reviews, so every review depended on one person's spreadsheet and inbox.

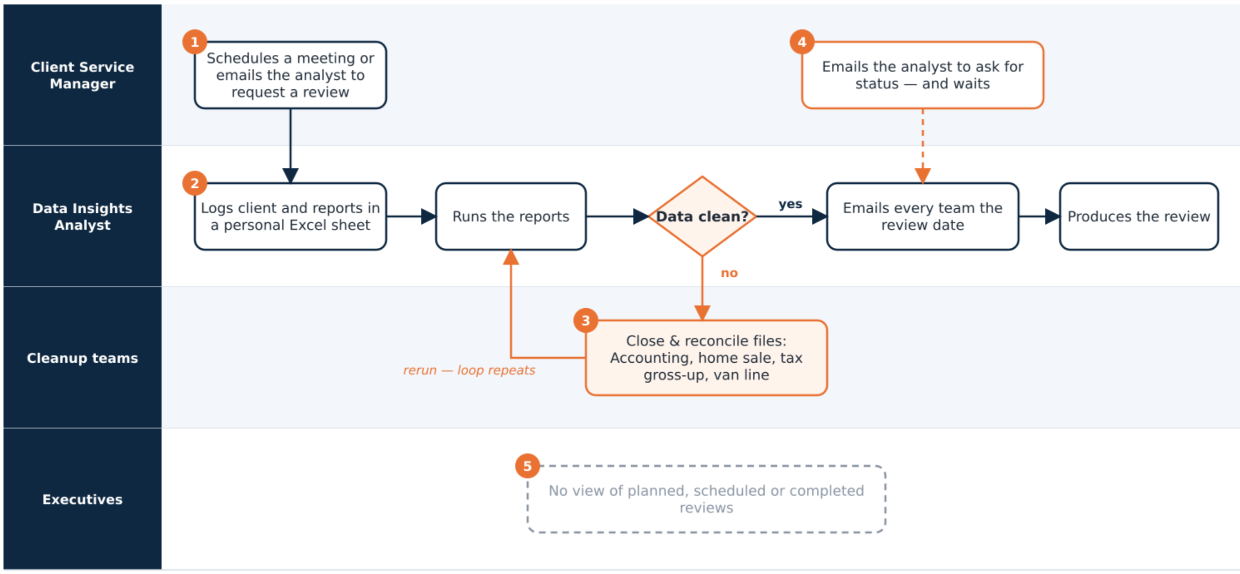
Area	Definition
Goals	Self-service requests with a set production date; status visible to every team involved; a lasting history by client; executive reporting on planned, scheduled and completed reviews.
In scope	Request intake, report selection, cleanup-team tagging and status, history, status export.
Out of scope	Changing the reports themselves or the underlying data systems.
Constraints	No budget for new software — use the company's existing SharePoint; build and maintenance by the internal SharePoint team; launch at the start of a review season.
Success measures	Less manual reporting time; fewer status emails and meetings; reviews prepared ahead of the production window; adoption across teams.

3 STAKEHOLDERS

Stakeholder	What they needed	What frustrated them
Client Service Managers & Directors	Order the right reports for each client on a known date	Scheduling meetings to request reviews; chasing status by email
Data Insights Analysts	Clean data on time; fewer interruptions	Being the only source of status; rerunning reports
Accounting, home sale, tax gross-up teams	Know which files to finish, and by when	Last-minute requests with no visibility of the schedule
Van line (household goods) suppliers	Complete move data before the production run	Learning about deadlines by email
Operations Managers	See reviews affecting their clients	No access to the plan
Executives	See the season at a glance	No reporting on planned, scheduled or completed reviews

4 THE CURRENT STATE (AS-IS)

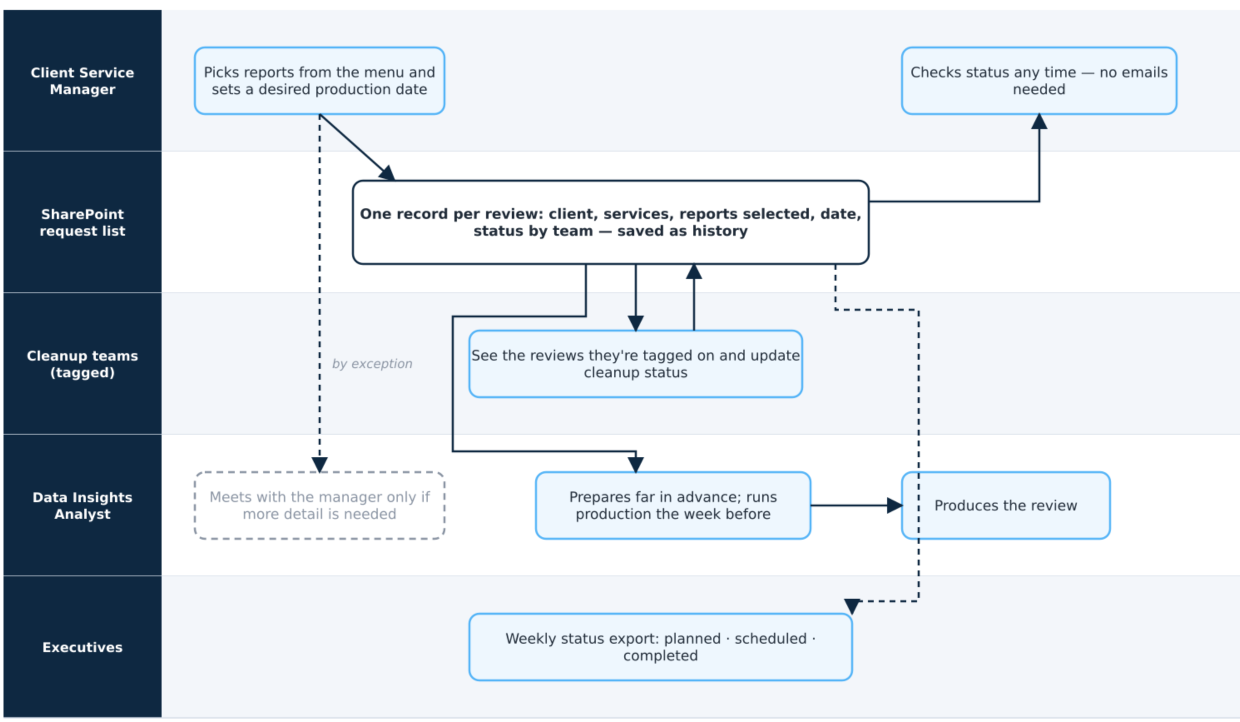
AS-IS: the manual business review process



Numbered points: (1) requests by meeting or email, (2) a personal spreadsheet, (3) the rework loop, (4) status by email, (5) no executive view.

5 THE FUTURE STATE (TO-BE)

TO-BE: the self-service SharePoint request process



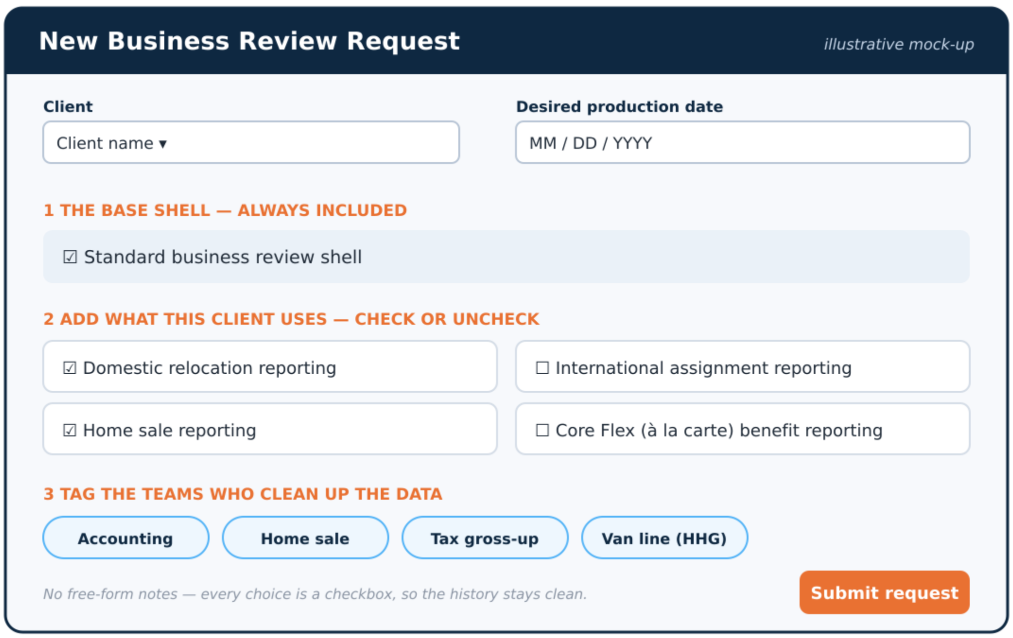
Gap analysis

Need	Before	After
Request intake	Meeting or email with the analyst	Self-service menu with a desired production date
Status	Ask the analyst	Everyone tagged sees it any time

Need	Before	After
Cleanup tracking	Notes in one spreadsheet	Status by team on every review
History	In people's heads	Every request saved, by client
Executive reporting	None	Weekly planned / scheduled / completed status
Coverage	Depends on one person	Any analyst can pick up from the history

6 THE SOLUTION: A MENU, NOT A NOTES FIELD

The design idea was simple: **order a business review the way you'd order at a fast-food counter.** Every review starts from a standard base, and the Client Service Manager adds only what that client uses — domestic, international, home sale, or Core Flex, the à la carte benefit plan. Choices are checkboxes, not free-form notes, so the history stays clean, consistent and reportable.



Illustrative mock-up recreated for this case study — not the original screen.

Sample requirements (reconstructed)

User story	Acceptance criteria
As a Client Service Manager, I want to pick my client's reports from a menu and set a production date, so I don't need a meeting to request a review.	Options match the client's services; production date is required; the request is saved with a status.
As an Accounting team member, I want to see the reviews I'm tagged on and their dates, so I can close and reconcile files before the production run.	A filtered view shows only tagged reviews; I can update cleanup status.
As an analyst covering for a colleague, I want each client's past requests on record, so I can prepare the review without starting over.	Past requests are searchable by client, with the reports selected each time.
As an executive, I want a weekly count of planned, scheduled and completed reviews, so I can see the season at a glance.	An export groups reviews by status and date and feeds a weekly status email.

7 TRADE-OFFS AND RISKS

Option	Pros	Cons	Decision
Keep Excel and email	No change needed	Same bottleneck and blind spots	Rejected
Buy a workflow tool	Powerful features	Cost, procurement, long lead time	Not needed
SharePoint request menu	Already licensed; supported by the internal team; familiar	Needed adoption; some users trusted Excel more	Chosen

Risks and how they were handled

- **Adoption.** Two analysts kept a parallel Excel file at first. Rather than forcing the switch, we let the tool prove itself during the season — and both came around.
- **Opening access too early.** Visibility was phased: Client Service and Operations Managers first, then Accounting and van line suppliers once the process was proven.
- **A menu that misses a need.** Tech-savvy Client Services leaders tested it during development, and the launch message asked every user for feedback.
- **Messy history.** Checkboxes instead of free-form notes kept every record consistent and reportable.

8 ROLLOUT AND RESULTS

My Director backed the idea from day one and brought in the SharePoint development lead, whose team held working sessions with us and built and maintained the site. We launched at the start of a business review season with a simple message: *this replaces scheduling appointments with your analyst — use it this season and tell us what you think.*

- **40%** improvement in reporting efficiency and **60%** less manual reporting time.
- **100+ business reviews** produced in the season, with the tool used year-round for monthly and on-demand reviews.
- **From zero visibility to full transparency** for everyone involved in each review — no more hunting down one person for an answer.
- **Reviews prepared far in advance,** with production runs the week before.
- **A weekly executive status report** on planned, scheduled and completed reviews — which hadn't existed before.
- **Recognition:** nominated by a peer and voted Employee of the Year by the executive team in 2019.

9 WHAT I LEARNED

Work that lives in someone's head or spreadsheet can't be measured or balanced. Once the process was documented as a flow, we could see it, report on it and improve it.

I also learned how to take an idea from the edge of a team — it wasn't my process to own — and position it as a business case: find a sponsor, bring in the people who can build it, let early users shape it, and let results win over the skeptics.

Figures are from memory and the author's resume; artifacts and screens were recreated for this case study and contain no confidential company data.