CASE STUDY 03 / PROFESSIONAL ENGAGEMENT / IMPLEMENTED AUTOMATION

60 Hours of Monthly Reporting Reduced to Less Than One

Commercial recycling and waste handling

THE BUSINESS CHALLENGE

A small company with limited technology and staff was spending about 60 hours a month producing complex client waste-compliance reports.

THE WORK PERFORMED

01 Process and controls assessment. Mapped the reporting workflow, client compliance obligations, approval points and approximately 60 hours of monthly manual work.

02 Inputs and outputs analysis. Identified source records, data fields, required calculations, report outputs and reporting formats.

03 Product and architecture selection. Evaluated automation options and selected a practical approach using existing accounting software and available APIs.

04 Data transformation and reporting design. Specified data extraction, transformation, validation, report generation and output formatting.

05 Environment and systems integration. Coordinated environment setup, configuration and integration with offshore programming resources.

06 Implementation and automation. Implemented the end-to-end workflow, including processing logic and automated report production.

07 Testing and validation. Tested data accuracy, workflow behaviour, controls and report formatting against the required outputs.

THE RESULT

The automated workflow reduced monthly reporting from approximately 60 hours to less than one, a reduction of more than 98%. The business could support growth without proportional reporting headcount.

< 1 hour
monthly reporting after automation

WHAT THIS EXPERIENCE PROVES

Demonstrates end-to-end transformation capability: diagnose a process, specify data and controls, select products, integrate systems, implement and validate measurable improvement.

BEFORE / TRANSFORMATION / AFTER

BEFORE
Manual client reporting consumed about 60 hours every month.

TRANSFORMATION
Mapped inputs and outputs, selected automation tools and connected existing systems through APIs.

AFTER
The reporting workflow required less than one hour a month.

SELECTED CAPABILITIES

Readiness assessment | Workflow and controls review | Solution design | Software selection | API integration | Process automation | Implementation

Experience: Tracey DeLeeuw | Historical performance figures should be corroborated before external publication.

Could your organization benefit from similar work? team@greenteaming.ca | LinkedIn: Green Teaming