

A Power Automate Case Study

Enforcing Excellence Through Automation



Operational Excellence at Every Stage

Automating executive accountability and client service checklists to maintain quality in a growing digital agency.

Client Overview

Company: Industry Leading Digital Marketing Agency

Industry: Marketing & Creative Services

Size: Rapid growth over 5 years

Challenge Area: Operational consistency, executive accountability, client experience

Solution Stack: Microsoft Power Apps, Power Automate, SharePoint Online, Outlook

Operational Excellence at Every Stage

The Challenge

As the agency experienced significant growth, the founder grew increasingly concerned that the operational checks, standards, and processes he had instilled would be watered down or overlooked by newly appointed executives.

The agency's client relationships depended on proactive service, timely updates, and high-touch account management — but without a scalable system, there was a risk that quality would erode over time.

Objectives

- Enforce operational discipline at scale without micromanagement.
- Provide automated accountability for executives and client-facing teams.
- Maintain a consistent and repeatable client experience.
- Ensure real-time visibility of checklist compliance across clients and team members.
- Use compliance as a differentiator in the sales process.

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The Solution

Power Automate for Scheduled Workflow

Multiple Power Automate flows were built to run on defined cycles:

- Weekly, Bi-weekly, Monthly, and Quarterly
- Each flow:
 - Generated client- and executive-specific checklists via SharePoint.
 - Assigned due dates and expiry times, marking items as “Failed” if not completed.
 - Triggered reminder notifications and status updates to stakeholders.

Power Apps for Execution

A custom Power App allowed team members to:

- Access their live checklists across cycles.
- Tick off tasks, add comments, and flag exceptions.
- View expired or missed tasks to encourage personal accountability.

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The Solution

Power BI for Compliance & Oversight

A real-time dashboard measured:

- Checklist completion rates by executive and by client.
- Missed or late completions over time.
- Trends in client service consistency.
- The dashboard was embedded into a rolling PowerPoint slideshow in reception and internal meetings via a live Power BI connection, always showing up-to-date compliance metrics.

Key Components

- Power Automate - Scheduled flow-based checklist creation and status alerts
- Power Apps - Custom checklist interface with input logging and expiry handling
- SharePoint Online - Data structure and storage for checklists and task metadata
- Power BI - Real-time analytics and compliance reporting
- PowerPoint (Office 365) - Embedded live dashboards for internal visibility and sales use

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The Solution

Deployment

- Reports were published to Power BI Service.
- Scheduled refreshes via gateway every 2 hours.
- Role-level security (RLS) ensured:
 - Managers only saw the information that is for meant for them
 - Finance saw portfolio-wide insights
 - Board had visibility to executive level kpi's and financial information.

Results

- Compliance - Reporting time reduced from 'days' to under 30 minutes
- Oversight - H&S team gained real-time visibility across all 130+ stores
- Efficiency - Manual collation of documents eliminated – now one-click export
- Accuracy - More complete reports with photos, signatures, and witness input
- Responsiveness - Investigation decisions made within hours, not days
- Insurance Processing - Documentation to insurers is now instant and standardised

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The Solution

Results

- Checklist Compliance - Achieved 100% checklist completion within 3 months
- Operational Consistency - Standardised delivery of client services across all teams
- Client Retention - Strengthened retention through proactive, visible processes
- Team Accountability - Executives now fully own their responsibilities
- Sales Enablement - Live compliance dashboard used as a proof point for prospective clients

Next Steps

- Added CRM functionality to the application

Operational Excellence at Every Stage

Testimonial

"Latitude 53 are an absolute pleasure to work with. The knowledge and flexibility that they bring to our clients is second to none.

We've been able to deliver some amazing concepts on data management and analysis for our clients, and we really look forward to future working with Latitude 53.

Can't recommend highly enough.

Thank you for all your support and work."

Founder and CEO - Digital Marketing Agency

What **makes** Latitude 53 Solutions **different**

Our Mission

We exist to help organisations turn complexity into clarity, empowering people to do meaningful work, not manual tasks.

By combining deep technical expertise with empathy and creativity, we deliver scalable Power Platform solutions that drive performance, unlock insight, and create lasting value.

Our Vision

To be the strategic partner for organisations seeking clarity, confidence, and growth — empowering people through intelligent, scalable solutions that turn complexity into opportunity.

Our Values

1. Curiosity

We ask better questions to find better answers — and we never stop learning.

2. Integrity

We communicate honestly, deliver on promises, and build trust through transparency.

3. Collaboration

We work closely with clients and each other — sharing ideas, responsibility, and success.

4. Clarity

We simplify the complex — in our thinking, our communication, and our solutions.

5. Impact

We focus on outcomes, not just outputs — building scalable, valuable tools that make a difference.

6. Accountability

We own our work, stick to the agreement, and stand behind every solution we deliver.

think • build • improve