

Case Study

Automating Spreadsheet Consolidation and Review for a Mid-Sized Business

Client Challenge

Each month, the client faced a tedious and time-consuming process:

- Download ~90 spreadsheets for one dataset and ~40 for another.
- Combine each set into two “master” spreadsheets.
- Review each for inconsistencies.
- Transform and reformat the data to prepare it for import into another system:
 - Remove and reorder columns
 - Add calculated columns
 - Rename several headers

This process spanned up to four days and consumed roughly 20 hours per month, placing a heavy manual burden on a single employee and increasing the risk of inconsistency and error.

Our Solution

We implemented a low-code automation pipeline using OneDrive, Power Automate, and Power BI, resulting in:

- Two dedicated OneDrive folders for monthly spreadsheet uploads (one for each dataset).

- Automated ingestion via Power Automate that:
 - Validates and imports spreadsheet data into Microsoft Dataverse Tables.
- Dynamic review dashboards in Power BI that:
 - Highlight inconsistencies
 - Allow on-demand review of historical and current data
- Automated output transformation:
 - Final output exactly matches the required upload format — no manual cleanup required.

Now, users can upload files individually or in bulk and see near-instant results in a centralized dashboard.

Impact & Value Delivered

Metric	Before	After	Improvement
Time Spent Monthly	~20 hours	~3 hours	17 hours saved
Estimated Time Value	\$1,000	\$150	\$850/month saved
Error Risk	High	Low	More consistent output
Employee Stress	High	Low	More time for higher-value work

Project Snapshot

- Duration: Less than 1 week
- Total Cost: \$8,000
- ROI Realization: ~10 months (based on time savings alone)

Key Technologies Used

- Microsoft OneDrive
- Power Automate
- Power BI
- Dataverse

Quick Recap

This project shows how IMIT Solutions turns repetitive, high-effort manual workflows into efficient, scalable systems. By automating spreadsheet processing and validation, we helped the client reclaim time, reduce stress, and produce cleaner, audit-ready data with minimal human effort.