

An aerial, top-down view of a landscaped area with several workers in orange safety gear and hard hats. They are positioned around a central green lawn area, which is bordered by a light-colored path. The workers appear to be using tools, possibly trimmers or mowers, on the grass. The overall scene is dimly lit, with a dark, moody atmosphere. The text is overlaid on the left side of the image.

Client Case Study: Franchise Grounds Maintenance Business

Phase one

JO by Joanna Oakley



Client Overview

Franchise business in the corporate grounds maintenance sector, with 3 internal admin staff and 25 field-based operatives. Operates under a franchised model with franchisor-controlled systems and franchisee-owned IT infrastructure.

The Challenge

Manual processes and fragmented systems led to inefficiencies, duplicated effort, bottlenecks, and over-reliance on the business owner. Admin staff lacked confidence to engage with 'master' documents, and almost all communication occurred via email. Client data was stored in Excel, and task tracking was non-existent.



Manual Processes

Inefficient workflows causing bottlenecks



Email Dependency

Over-reliance on email communication



Fragmented Data

Client information stored in basic spreadsheets



Owner Bottleneck

Business owner required for most decisions



Approach



Operational Review

Job shadows, site visits, and workflow analysis to understand current processes



IT Infrastructure






New IT provider onboarded, two laptops purchased, and systems upgraded from Windows 10 to 11



Software Implementation

Office 365 Business implemented with full support services

Improvements Delivered

-  Digital holiday request process with automated approval flow and calendar scheduling via MS Forms & Power Automate
-  Built a new centralised client database using MS Lists
-  Digital client service request form, into a newly created client ticketing system followed by an automated task generation To Do list for operations manager
-  Electronic stock order form with automated email order creation
-  Shared MS To Do lists and a new 'Customer Service Planner' list for the admin team

Testing & Training

User Acceptance Testing

Each new tool underwent 1–2 weeks of user acceptance testing, support by the franchise Operations Manager. This ensured all automations worked as intended and were accessible by all users.



Training & Support

I also delivered mini workshops and created professionally branded how-to guides to support confident adoption of MS Teams, To Do, and Power Automate flows.

- Mini workshops for staff
- Branded how-to guides
- Hands-on training sessions

SharePoint Development



Operations Team Landing Page

Created a new landing page which provides access to key documents including the newly created Customer Ticketing System; Customer New Quote Tracker and Customer Database

Training Hub

A new training hub page was created on the client's internal SharePoint site, centralising all bespoke presentations, how-to guides, and training videos.

Forms Centre

A second SharePoint page was built to house all key forms. Both pages were fully branded to align with the business identity and enhanced with practical features, including localised regional weather widgets and useful day-to-day information.



Marketing & Engagement

Customer Satisfaction Survey

Designed and issued the client's first customer satisfaction survey via MS Forms, receiving a 22% response rate and 97% positive feedback.

Social Media Content

Developed social media visuals from the results and temporarily took over LinkedIn content, highlighting client work, community engagement projects, and customer testimonials.

Impact Summary



Reduced email dependency and improved information traceability



Enabled effective delegation and freed up owner's time



Increased team confidence and collaboration



Created marketing assets and enhanced client engagement



Built centralised SharePoint resources to support onboarding, training and operational consistency



Reduced the need for paper printouts for daily schedules and holiday forms



By automating the stock ordering process, we created an audit trail to track volume usage to control costs



Improved visibility created greater accountability across the admin team that reduced pressure on business owner

Tools & Technology Summary

All digital workflows and system improvements were created using Microsoft Office 365 applications, including:

Microsoft Forms

- For clients: New quote requests, customer service request forms, and quarterly client satisfaction survey
- For internal use: Holiday requests and stock ordering

Microsoft Lists

For centralised client databases, client service request ticketing system and new quote request trackers.

Task Management

- Microsoft To Do: for individual and shared task management
- Microsoft Planner: for collaborative planning and tracking

Automation

Power Automate: to automate approval processes, notifications, tracker data entry and task generation

All automations and workflows were custom-built by me, based on mapped and documented processes. This ensured a tailored approach that aligned with the business's day to day operations.

Marketing and visual content for LinkedIn and client communications was designed using Canva, helping to showcase the business's brand, corporate work, community engagement, and customer testimonials.