

Pery Consulting

CASE STUDY: Operational Toil Reduction & Data Automation

Transforming manual document processing into a Zero-Admin M365 automated workflow - peryconsulting.co.uk

Executive Summary

A highly mobile Occupational Health Consultant was managing thousands of medical records for enterprise clients (including multi-national corporations on multiple sites) and regional SMEs. Administrative friction had reached a breaking point.

The operational bottleneck was severe: manually filing complex medical reports into deeply nested OneDrive folders, typing out metadata, and desperately searching for specific historical data (like a past blood test reading) while on the road. The client needed an enterprise-grade retrieval system but completely lacked the internal bandwidth to perform manual data entry.

The Challenge

1. **Human Behavior vs. Compliance:** The client admitted they were poor at admin. Relying on them to consistently create complex folder structures, standardize file names, and tag metadata was a guaranteed point of failure.
2. **Data Retrieval Bottlenecks:** When an enterprise client called urgently requesting a historical clinical metric for a specific employee, finding the answer meant drilling through five levels of folders and manually reading through dozens of PDFs.
3. **Scalability Limits:** Standard flat OneDrive folders lag and freeze when filled with 5,000+ files, making mobile access impossible for large enterprise contracts.

The Approach

Rather than enforcing rigid administrative rules on a busy professional, the strategy shifted to Human-Centric Automation.

The goal was to build a system that adapted to how the client actually worked. We implemented a "Zero-Admin Hopper" architecture utilizing Microsoft 365 tools the client already owned and were already paying for: SharePoint for enterprise scale, M365 AI Builder for intelligent data extraction, and Power Automate to act as the invisible administrative engine.

The Solution: The Zero-Admin Hopper Architecture

The traditional approach of manually organizing files was completely eliminated. Instead, the workflow was condensed into a single, two-second action for the end-user.

The End-User Experience

The client drops a scanned PDF or forwards an email attachment into a single "*Unprocessed Inbox*" folder on their phone and walks away. The system handles 100% of the downstream processing, filing, naming, and data extraction automatically:

- **Step 1: The Single Intake Hopper**
User drops a raw, unformatted PDF into a single folder.
- **Step 2: AI Document Processing (M365 AI Builder)**
Power Automate intercepts the file. AI scans the document and extracts key structured data: Patient Name, Employee ID (or DOB), Company, Test Date, and Key Clinical Metrics.
- **Step 3: Dynamic Logic & Routing**
The system checks SharePoint. If a dedicated patient folder does not exist, it automatically creates it.
- **Step 4: Auto-Filing & Metadata Tagging**
The file is moved, renamed to an ISO-standard format, and the extracted metrics are saved to the SharePoint index for instant mobile search.

The Impact & Results

By restructuring the architecture around Microsoft SharePoint Document Libraries and layering intelligent automation on top, the client achieved enterprise-grade compliance with zero ongoing administrative effort.

- **Data Entry & Filing Time:** Reduced from ~5 minutes per record to <5 seconds (98% reduction in manual administrative toil).
- **Mobile Data Retrieval:** Reduced from minutes/hours to instant (via SharePoint metadata search and M365 Copilot queries).
- **Folder Navigation:** Reduced from 5+ clicks deep to zero clicks (Universal ID-based indexing replaced brittle folder trees).

Capturing Lost Billable Time (Quickfile Integration)

When the specialist spent 15–45 minutes reviewing lab results, this clinical time didn't always make it to the Quickfile invoice due to manual oversight. By tying the clinical sign-off directly to the accounting software, the system now automatically pings Quickfile when a lab result is approved, adding the specialist review fee to that client's open invoice.

- **The Outcome:** 100% revenue capture for specialist time with zero extra clicks, turning an administrative function into a self-funding revenue driver.