



CASE STUDY

Excel Dashboard Automation

Illustrative Sample Case Study

This case study illustrates how STRIVE helped a growing business transform scattered spreadsheet reporting into a clear, automated Excel dashboard system for faster decision-making, better visibility, and more reliable performance tracking.



INDUSTRY
Business Operations



SERVICE
Excel Dashboard Automation



TIMELINE
4 Weeks



TOOLS
Microsoft Excel,
Power Query, Pivot Tables,
Formulas



CASE STUDY

Client Overview

Business context at a glance

An established consulting business led by a solo founder, experiencing steady growth and increasing operational demands across multiple areas.



BUSINESS TYPE

Management & Strategy
Consulting Services



TEAM STRUCTURE

Founder-led business
with contract and
project-based support



DAILY OPERATIONS

Multiple client meetings,
project coordination,
scheduling, and
administrative tasks



MAIN SUPPORT AREA

Executive support,
calendar & email
management, task
coordination, reporting



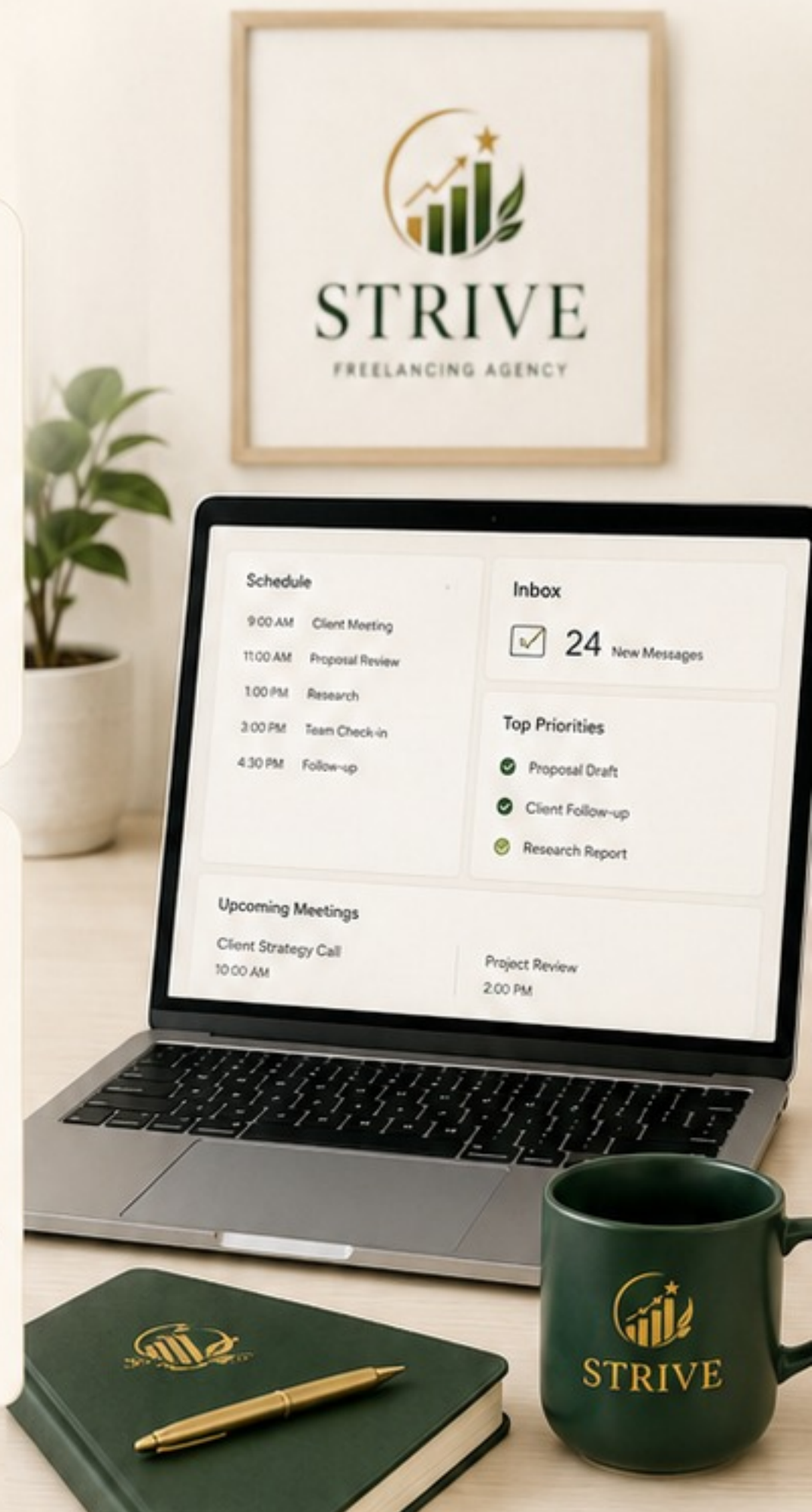
COMMUNICATION VOLUME

High volume of daily
emails, messages, and
client touchpoints



REPORTING NEED

Regular updates, project
reports, and performance
summaries for clients
and stakeholders



As the business grew, the founder faced challenges in maintaining structure, managing communications, and keeping projects on track. They needed dependable **executive virtual assistant support** to bring order to daily operations, improve visibility, and create consistent systems that support long-term growth.



CASE STUDY

Client Challenge

What needed to improve

Before partnering with STRIVE, the client's customer support process was inconsistent, hard to review, and too dependent on manual follow-up. Important requests were not always tracked in a clear and timely way.

1



TICKETS WERE SCATTERED

Messages were spread across email, chat, and WhatsApp.



Email

27



Live Chat

15



WhatsApp

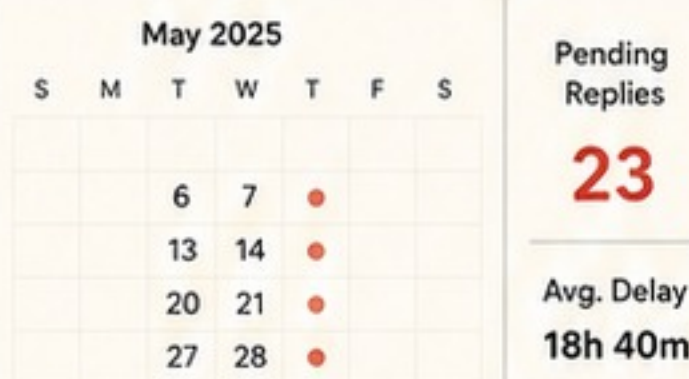
18

2



RESPONSES TOOK TOO LONG

Manual checking delayed replies and follow-ups.



3



STATUS TRACKING WAS INCONSISTENT

Different formats caused confusion.

Ticket ID	Status	Owner
#1042	Open	John
#1043	In Progress	Sara
1044	working on it	Mike
Ticket-1045	Pending	—
001046	Resolved	John

4



PRIORITIES WERE UNCLEAR

Urgent issues were not flagged consistently.

#1012	Website down
#1013	Refund request
#1014	Payment issue
#1015	Login not working
#1016	Feature request

5

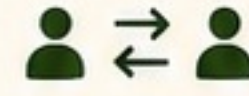


REPORTING WAS LIMITED

Management lacked a clear daily overview.



6



SALES & SUPPORT HANDOFF WAS WEAK

Customer context was sometimes missed.



THE IMPACT:

These workflow gaps reduced response efficiency, slowed resolution, and made support operations harder to manage confidently.



CASE STUDY

Goals & Priorities

What needed to improve

The goal was not only to complete tasks, but to build a dependable operating rhythm for the client—one that brings clarity, consistency, and more time to focus on high-impact work and growth.



CREATE A STRUCTURED WORKFLOW

Establish clear systems and processes to ensure tasks move smoothly from start to finish.



IMPROVE CALENDAR VISIBILITY

Optimize scheduling and prioritization to reduce conflicts and protect focus time.



ORGANIZE INBOX & FOLLOW-UPS

Streamline email management and ensure important messages and follow-ups never fall through.



MAKE REPORTING EASIER TO REVIEW

Create clear, organized reports and summaries that provide quick insights.



CENTRALIZE INFORMATION

Build a single source of truth for documents, resources, and project updates.



SUPPORT SMOOTHER DAILY OPERATIONS

Anticipate needs, reduce bottlenecks, and keep daily operations running seamlessly.

PRIORITY MATRIX



PRIORITY FOCUS

		HIGH	MEDIUM	LOW
	Create a structured workflow	☒	☐	☐
	Improve calendar visibility	☒	☐	☐
	Organize inbox & follow-ups	☒	☐	☐
	Make reporting easier to review	☒	☐	☐
	Centralize information	☒	☐	☐
	Support smoother daily operations	☒	☐	☐



CASE STUDY

STRIVE Solution

How the workflow was improved

STRIVE designed a practical Excel dashboard automation system focused on structure, KPI visibility, reporting consistency, and faster analysis—ensuring every business metric is easier to review and act on.

- 1



DATA CLEANUP & STANDARDIZATION
Removed inconsistencies and standardized data for accuracy.
- 2



SOURCE SHEET ORGANIZATION
Structured sheets and named ranges for better flow.
- 3



KPI LOGIC & FORMULA BUILDING
Built dynamic formulas to calculate key metrics.
- 4



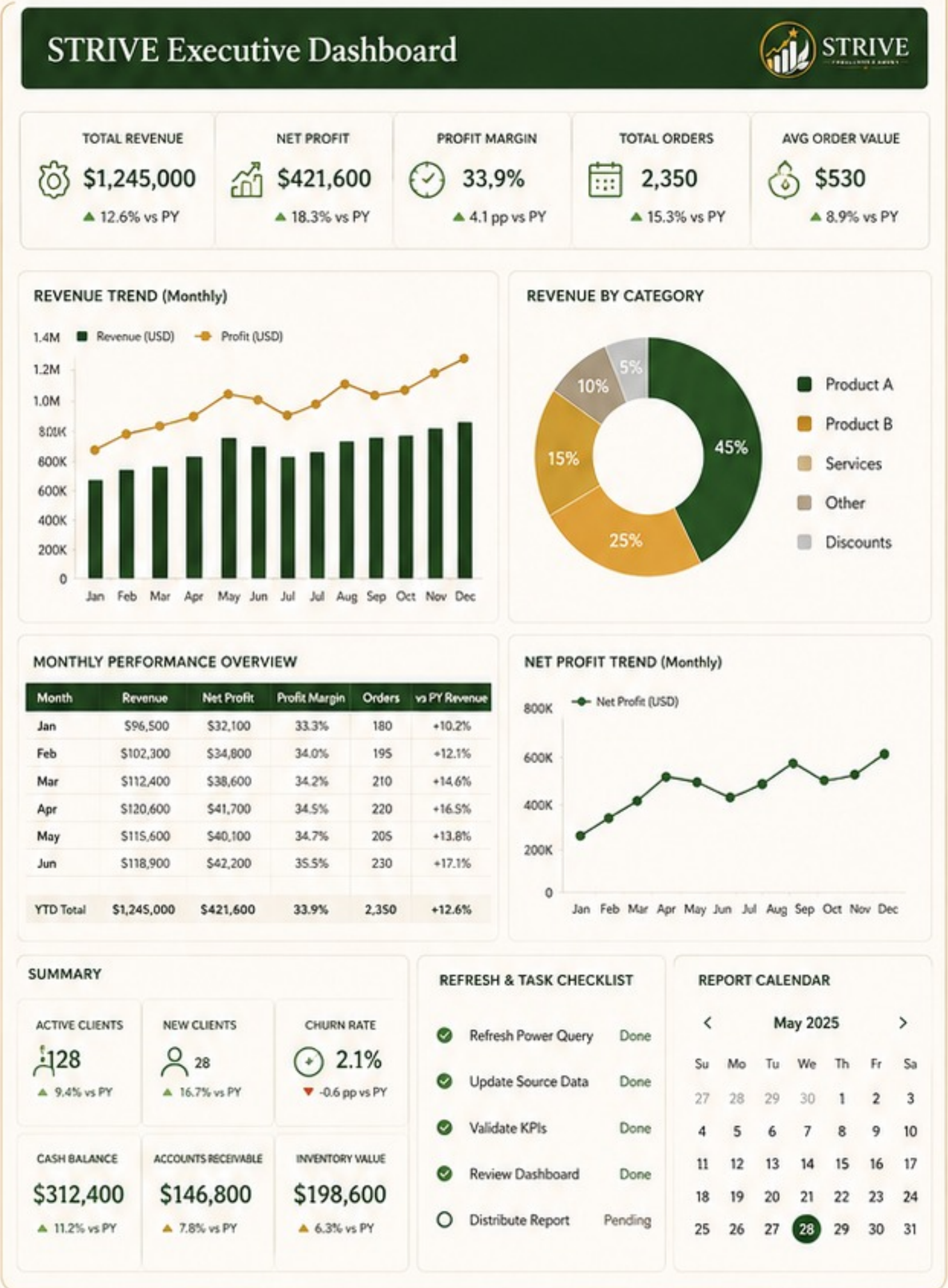
DASHBOARD DESIGN & VISUALIZATION
Designed clean, intuitive visuals for quick insights.
- 5



AUTOMATION SUPPORT WITH PIVOT TABLES / POWER QUERY
Automated data flow and refresh for efficiency.
- 6



WEEKLY REPORTING & HANDOVER
Delivered automated reports and provided team walkthrough.



CASE STUDY

Work Process

From requirement to final delivery

At STRIVE, we follow a structured and transparent process to ensure every customer support workflow we design is organized, practical, and ready for day-to-day operations.



STRIVE ensures a seamless support workflow process—
from scattered communication to organized service operations.



STAY INFORMED

clear visibility into queue status and follow-ups.



IMPROVE CONSISTENCY

repeatable support actions reduce missed tasks.



ENSURE USABLE OUTPUTS

trackers and dashboards are simple, practical, and ready to use.

CASE STUDY

Deliverables

Project outputs

All outputs were delivered in a clear, organized, and client-ready format—making customer support easier to review, manage, and improve.

01 SUPPORT TRACKER

ticket ID, channel, customer, issue type, status, owner.

Support Tracker					
Ticket ID	Channel	Customer	Issue Type	Status	Owner
#1042	Email	Sarah Johnson	Order Issue	Open	Mia R.
#1043	WhatsApp	James Lee	Refund Request	In Progress	Alex T.
#1044	Helpdesk	Priya Patel	Account Access	Pending	Nina K.
#1045	Gmail	Michael Brown	Product Question	Resolved	Leo S.
#1046	Website	Emily Davis	Shipping Delay	Closed	Mia R.

02 DAILY QUEUE DASHBOARD

open tickets, pending follow-ups, urgent cases, response time.



03 RESPONSE TEMPLATE LIBRARY

common reply templates for order issues, refunds, account help, and product questions.

Template Library	
Order Issues	12 templates
Refunds & Returns	10 templates
Account Help	9 templates
Product Questions	11 templates

Order Delay - Apology

Hi (Customer Name),

We're sorry to hear that your order is delayed. We're working on it and will keep you updated shortly.

Thank you for your patience!

Best regards,
(Company Name)

[Use Template](#)

04 ESCALATION MATRIX

when and how issues should be escalated.

Escalation Matrix			
Issue Type	Trigger / Condition	Escalate To	SLA
Billing Dispute	Refund amount > \$100	Finance Team	24h
Refund > \$100	or customer dispute		
Technical Issue	System error or bug affecting users	Tech Support Lead	12h
VIP Customer Complaint	VIP customer unhappy or repeated issues	Account Manager	12h
Legal / Compliance	Terms violation or legal concern	Compliance Team	4h

05 WEEKLY SUPPORT REPORT

ticket volume, resolution count, satisfaction trend, top issue categories.



06 HANDOVER NOTES

workflow guidance, update instructions, and checklist.

Handover Notes	
Workflow Guidance ✓ Review tickets in the Daily Queue. ✓ Respond using templates from the Template Library. ✓ Update ticket status after each action. ✓ Escalate based on the Escalation Matrix. ✓ Follow up pending tickets daily.	Update Instructions 1. Log in to the support system. 2. Check and update ticket status. 3. Add internal notes if needed. 4. Attach relevant files. 5. Save and move to next ticket.
Handover Checklist ☐ All data files updated ☐ Templates reviewed ☐ Escalation rules confirmed ☐ Access handed over	



Handed Over with Care. Ready for Better Support.
Every file is structured, verified, and ready for business use.

CASE STUDY

Before & After

How the process changed

Before partnering with STRIVE, daily operations were reactive and scattered. With a structured virtual support system in place, workflows became organized, follow-ups improved, and leadership gained the clarity needed to focus on growth.

BEFORE How it used to be		AFTER How it is now
 Scattered Information Data and updates were spread across multiple tools and inboxes.	→	 Organized Workflows Information is structured, categorized, and easy to access.
 Inconsistent Follow-ups Messages and tasks were often missed or followed up late.	→	 Clearer Follow-up Structure Reliable follow-ups ensure no task, client, or deadline is overlooked.
 Manual Tracking Tasks, deadlines, and updates were tracked manually, leading to gaps.	→	 Centralized Information All updates, files, and records are stored in one secure place.
 Unclear Priorities It was hard to know what needed immediate attention versus what could wait.	→	 Cleaner Reporting Regular reports bring clarity to performance, progress, and priorities.
 Difficult Review Process Reviewing progress took too much time and lacked structure.	→	 Easier Daily Review A streamlined system makes daily check-ins simple and actionable.



The transformation from scattered and reactive to organized and proactive has created more than just efficiency—it has built a reliable foundation for sustainable growth. With clearer workflows and consistent support, the business now operates with confidence, focus, and forward momentum.



CASE STUDY

Business Outcomes

Results demonstrated by this illustrative project

Through reliable virtual assistance and consistent administrative support, this project delivered meaningful improvements that strengthened the client's ability to operate with clarity, confidence, and control.



BETTER ORGANIZATION

Files, documents, and information are structured and easy to access, improving daily efficiency.



CLEANER WORKFLOW

Tasks and processes are streamlined, reducing clutter and improving productivity.



PROFESSIONAL PRESENTATION

Reports, documents, and updates are polished, accurate, and ready to share with confidence.



EASIER REVIEW

Organized updates and clear summaries make reviews faster and decision-making easier.



STRONGER TASK VISIBILITY

Priorities, deadlines, and project progress are clearly tracked and communicated.



IMPROVED OPERATIONAL CONSISTENCY

Standardized processes and dependable support create a stable foundation for long-term success.



This support model empowers the client to stay focused on strategic priorities while knowing daily operations are managed with care and consistency. The result is a smoother workflow, stronger organization, and a business environment that supports sustainable growth.





STRIVE

— FREELANCING AGENCY —

Precision Planning, Measurable Growth



CASE STUDY

Need a Similar Solution?

Let's Build a Support System That Works for You

Every business has unique goals, challenges, and processes. STRIVE delivers tailored virtual assistance solutions that streamline operations, save time, and drive measurable results.



CLIENT FEEDBACK

Verified client feedback will be added after publication approval.
No placeholder testimonial is used.



READY TO TRANSFORM YOUR WORKFLOW?

Tell us what you need — we'll design the right support for your success.



Share your current problem and expected output.



We'll assess, recommend the best solution, and build your support plan.



Focus on growth — we'll handle the rest with excellence.



START YOUR PROJECT
Let's bring your goals to life.

— OR —



REQUEST CUSTOM QUOTE
Get a tailored plan for your needs.

PREFER TO CONNECT DIRECTLY?



hello@striveagency.com



www.striveagency.com



Let's Schedule a Call



AT STRIVE, YOUR SUCCESS IS OUR MISSION.

We help businesses streamline operations, delegate with confidence, and achieve more with reliable support systems built for growth.

Your Goals. Our Support. Great Results.



Thank you for reviewing this case study.
We look forward to supporting your success.



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