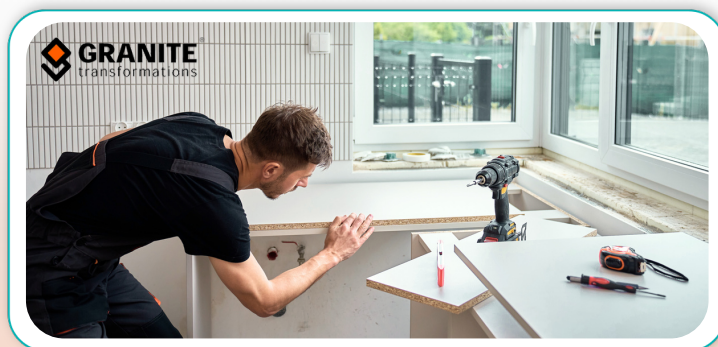


CASE STUDIES

Granite Transformations Eliminating Manual Bottlenecks and a Single Point of Failure in Franchise Reporting



At a Glance



Industry

Home Improvement /
Kitchen & Bath Remodeling
(Franchise Network)



Location

United Kingdom



Solution

Intelligent Automation



Challenge

Manual monthly consolidation
across 15 franchisees, 6-7 files
each; single point of failure



Outcome

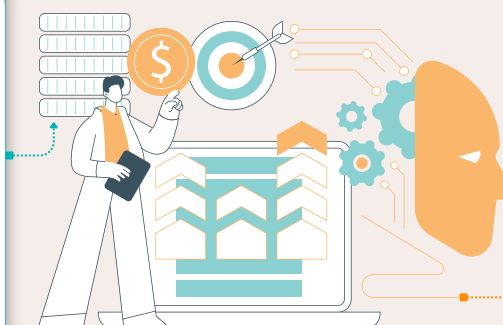
91% reduction in processing
time, from 56 to <5 minutes

Technology



What We Delivered

- Automated data intake and KPI calculation (13 financial variables) via Microsoft Forms and Power Automate
- Staged franchisee reminder system with automated status reporting
- Automated Sage 50 invoicing for RSG and NML fees via RPA
- Execution and status reporting for Finance and franchise leadership



Data Scope

Monthly data from 15 active franchisees, spanning 5 sub-processes (sales, invoicing, enquiries/appointments, marketing spend, stock), consolidated across Excel/OneDrive, Sage 50, and Outlook into a single automated workflow.

About Granite Transformations

EGranite & TREND Transformations is a home renovation franchise specializing in kitchen and bathroom makeovers, using granite, quartz, recycled glass, and porcelain surfaces along with replacement doors and flooring. Founded in 1996, the brand now operates in 7 countries with 200+ showrooms worldwide and has served over a million customers.

In the UK, Granite Transformations operates a network of over 60 showrooms and displays nationwide.

The Challenge

Granite Transformations ran a monthly Benchmarking Returns process to consolidate data from its 15 active franchisees. As the network grew, the process couldn't keep pace, and it depended heavily on manual effort and one person's institutional knowledge.

The same figures were manually re-entered across 6-7 files per franchisee every month. The year-on-year tracking file relied on hand-edited cell references with no automated validation, the highest-severity risk identified during the review. The entire monthly cycle was gated until all 15 franchisee reports were received, and three of the five sub-processes depended on a single person, creating a critical point of failure.

Our Approach

Granite Transformations' original request was limited to automating invoicing. During discovery, Valenta's delivery team identified two additional opportunities and expanded the scope to include them, delivering the full engagement in three weeks.

Key steps included

Mapping all 5 sub-processes across Excel, Sage 50, and Outlook to identify manual hand-offs and validation gaps

Building the KPI intake and calculation layer with Microsoft Forms and Power Automate

Automating Sage 50 invoicing logic with RPA, including DD/non-DD template routing and ledger updates

Our Solution

Valenta delivered three connected automations that replaced a manual, single-person-dependent process with a validated, hands-off monthly cycle.

Key capabilities delivered

Data Intake & KPI Calculation

Captures monthly data via Microsoft Forms and automatically calculates 13 KPIs/financial variables (including MSF 2%, MSF Doors, NML 2%, conversion ratios, marketing spend), writing results directly to the master Excel database on SharePoint.

Automated Franchisee Reminders

Scans franchisee submission status daily and sends up to three staged reminders (days 9, 12, and 14) to franchisees who haven't submitted, plus a consolidated status report to franchise leadership. Built with Power Automate, Outlook, and Excel.

Automated Sage Invoicing

The Digital Assistant runs daily, reading Outlook emails containing monthly franchisee data. It creates RSG invoices (2% Management Service Fee + Door Management Fee) and NML invoices (National Marketing Levy) in Sage 50, updates the ledger, selects the correct DD/non-DD template, emails the invoice, and generates an execution report for Finance. Supports up to 20 franchisees per daily cycle (60-minute run).

Also Added, Beyond The Original Scope

- Automated execution report for Finance
- Consolidated status report to franchise leadership

Business Impact

✓ Manual cycle time eliminated

A full processing round across all three processes combined dropped from approximately 56 minutes to about 5 minutes, or roughly a 91% reduction.

✓ Errors eliminated

The automation removed the conditions that caused multi-file transcription errors, unvalidated manual cell references, KPI calculation mistakes, Sage invoicing errors, MSF/NML confusion, and omissions tied to the 15-of-15 gating requirement.

✓ Single point of failure reduced

Process knowledge once concentrated in one team member is now distributed into the automation itself, reducing key-person risk, an unexpected benefit identified during implementation.



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