

# Better Budgets with Power Platform

Streamlining Marketing Funds from Manual to Measured

A global IT distributor partnered with us to address inefficiencies in their marketing fund management. By leveraging Microsoft Power Platform, we helped the client reduce administrative overhead by 40%, improve compliance, and gain real-time financial insights, driving better decision-making and operational efficiency.

## CLIENT BACKGROUND

A Fortune 500 IT distributor operating in over 100 countries, the client collaborates with leading technology vendors and resellers to deliver comprehensive solutions. Managing co-funded marketing campaigns at scale had become increasingly complex due to fragmented systems and manual processes, necessitating a more unified and efficient approach.

## BUSINESS VALUE

- **40% Time Savings:** Administrative overhead was significantly reduced, allowing teams to focus on strategic initiatives.
- **20% Cost Reduction:** Operational efficiency and automation minimized manual errors and delays.
- **Enhanced Financial Governance:** Real-time dashboards ensured budget accuracy and improved regulatory compliance.
- **Scalable for Expansion:** The platform is designed to extend automation capabilities to other departments such as HR and Procurement.

## PROBLEMS

- **Disjointed Fund Tracking:** Manual spreadsheets and siloed systems led to inconsistencies and budget overruns.
- **Slow Approvals:** Campaign and payment workflows required multiple manual checkpoints, delaying execution.
- **Limited Spend Visibility:** Teams lacked real-time insights into fund utilization, hindering proactive optimization.

## SOLUTIONS

- **Custom Power App:** Developed a tailored application to manage end-to-end fund allocation and investment plan approvals.
- **Automated Workflows:** Utilized Power Automate to streamline campaign approval cycles and payment processing.
- **Financial Dashboards:** Implemented Power BI dashboards to provide real-time reporting on fund spend, ROI, and vendor engagement metrics.

## TECHNOLOGIES



## NEXT STEPS

By automating fund management processes with Microsoft Power Platform, the distributor transformed a previously manual and error-prone system into a streamlined, data-driven operation. The enhanced visibility, expedited execution, and improved control have positioned the business for smarter scalability and sustained growth.