

## CASE STUDY: SYNDICATED RESEARCH

Major information provider uses OfficeReports to automate an industrial-scale reporting operation

### CHALLENGE

A major information and customer measurement company produces reports in PowerPoint for over 100 sector-specific studies every year. As the scale of the task grew, so too had the complexities of producing a diverse set of reporting deliverables to a common standard. The firm needed to find a new reporting platform it could use internally to speed up and standardize its regular report production.

### OUTCOME

Within a few months, report production times had been cut by between 60 and 70 percent, with reports provided a few days after data collection rather than in three weeks. Reports could be released into the market sooner, bringing competitive advantage. Seventy percent of the anticipated cost savings for the year were achieved within the first six months by reducing manual effort.

## SOLUTION PROVIDED

Dan Green, head of client deliverables, highlights an example which demonstrates the scale of the task his operation undertakes: a quarterly report requiring several hundred two-page summaries presented as a “scorecard”—each of which must be created with complete accuracy. These scorecards form part of quarterly study that profiles 20 to 30 of the top players in each of a dozen regions across North America.

“We needed to have a way to build a template and automatically populate that information,” explains Dan Green. “Trying to do that by hand is not only error prone because fatigue sets in, but is also extremely time consuming. We’ve had various homegrown tools, but for us, OfficeReports is the answer. There isn’t another solution to do what we need and—believe me—I don’t say this anecdotally, because we looked.”

To get the best from the software, Dan reports there were many challenges, one being the sheer scale of the functionality within OfficeReports. In the first year, Dan regularly turned to the team at OfficeReports for advice on implementation, working closely with the OfficeReports Product Manager, Fred Balkenende. Most of the existing reporting was converted using standard functionality, but OfficeReports also responded with some custom enhancements to its platform.

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"OfficeReports have been very supportive of our work and a partner from the get-go. Fred has done a fantastic job whenever we have needed help and is always partner-focused." Whenever development work is discussed, Dan feels he is always given a choice: "OfficeReports can charge you for this functionality for a reasonable price or you can change your set-up. They do not try to squeeze you for every penny."



The work Dan's division undertakes has now shifted away from repetitively filling files with data into focusing on quality and accuracy of reports. Of all the time spent using OfficeReports, 80 to 90% of it is spent building the reports in readiness to receive the data. Once set-up is complete, it takes a matter of minutes to populate the reports with data, which then flows through automatically into PowerPoint. "This is where the labor saving comes through the repetitive nature of these reports," says Dan.

OfficeReports has also acted as an enabler for a wider corporate goal to apply consistent standards across all the organization's different activities. Linking OfficeReports into the company's standard chart library has ensured that charts follow corporate charting and presentational standards. Furthermore, corporate business rules—such as how significance testing and rounding are handled—are now defined within OfficeReports, improving accuracy and eliminating the need to spend time checking that they have been applied.

Dan concludes: "OfficeReports is very, very robust. With any other software, I don't think we would be in the situation we are in now with faster turnaround times and meeting our year-end objectives."



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## THE RESULTS

- Reduction in turnaround times by 60 to 70%, compared to using homegrown tools. Deliverables that previously required up to 15 days to process now are produced within 3 to 5 days.
- Achievement of about 70% of the annual cost-saving target within 6 months, improving the profitability of a high-cost activity.
- Production of deliverables that would have otherwise been too labour intensive—such as individualized scorecard reports for hundreds of different entities.
- Fast turnaround for one study, as client presentations are now ready the same day the data becomes available, instead of two to three weeks later.
- Improved quality and consistency of presentation, and adoption of company-wide standards.
- Incorporation of corporate business rules into reports removed a source of human error and eliminated many hours in report-checking time.

## ABOUT THE CLIENT

The client is a large US-based business information provider that provides a range of benchmarking and syndicated industry-specific reports based on customer insights. This case study was written from an interview conducted with our client by technology writers Tim Macer and Sheila Wilson of meaning ltd and subsequently verified by the client. Names have been changed and the company's name withheld at the request of the client company.

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