

Case Study:

How An Automated Excel Solution Saved One Company \$500,000 *and* Increased Sales by 25%

Customer Profile

This company became the first in its industry to combine search engine optimization with website analytics to provide a solution that improves online marketing campaigns and results. Their goal is to help customers execute successful search engine strategies while formulating accurate results so customers can make critical decisions about web campaigns in a timely fashion.

Through proprietary search marketing strategies, analytics and technology innovation, the company delivers a solution that amplifies market share and profitability for each client.

Manual Reporting Becomes Unmanageable

To continue providing the cutting edge web solutions they are known for, this company must overcome several costly obstacles.

They include:

- Collecting information from several remote sources
- Transforming this information and dumping it into a local database
- Manually create reports from the database
- Sharing the end result with customers and colleagues

To complete these tasks, a policy was adopted requiring fifteen employees to perform the daily ritual of collecting and preparing reports for customers. In some cases, they have to repeat this process and generate client reports twice a day. In other words, they are squandering valuable resources in terms of both time *and* human capital.

Situation Analysis

These manual procedures are draining the company's ability to maintain existing client's needs, not to mention the needs of any future customers.

Currently, the company obtains client information from remote 3rd party databases (i.e. Google Analytics, Yahoo, MSN etc...) via custom written applications (API calls), or they have the 3rd parties send daily client results in an email format or FTP. These files are then collected and the information is dumped into a local database. This database hosts the compiled information in a central location so it can be used by their proprietary applications. It also serves as a single source to generate reports for clients, sales teams and management.

To gather the information and generate reports for clients, the company must go in manually, login to each client's account, grab the data they need and enter it into a set of complex Excel spreadsheets containing macro's running in the background for formatting and formulas. This complex process is repeated for every client's account every day.

To share this information, the company then converts these complex Excel reports into a web format to be uploaded to a secure website so they can be viewed by customers.

As a result of these daily tasks, the company is now confronted with several management and accountability issues, including: account management, quality assurance, maintaining version controls, etc.

Customers have come to expect a high level of service from this company. However, with the massive number of clients requesting daily reports, the stress on the company's core competencies is becoming too great. And, because of the high potential for human error, the quality and usability of these reports is also in question. *"Is the information adding the value we promised to our customers?"* In other words, is the information and functionality in the web-based reports too much for their clients to digest and use? Is it what they truly want?

A viable, user friendly solution is fundamental to helping them manage and improve the existing customer experience and growth opportunities. This solution should have the added benefit of allowing employees to get back to their jobs.

The Customer Gets What They Want and Need

With an understanding of the headaches this company was experiencing, SoftWidgets suggested a simple solution: implement Spread Server 3.0 to tackle the problem.

By automating their reporting process, Spread Server would produce consistent, professional reports tailored to the individual customer's need in a fraction of the time it used to take. Spread Server enabled this company to easily perform the type of powerful Excel automation they wanted to achieve.

They were impressed by how Spread Server could create customized client reporting based on a database server. Instead of sifting through the vast and difficult to navigate dashboards of a web solution, clients are provided with a *customized* report using Excel.

By utilizing the power of Spread Server and its reporting capabilities with Excel as the backbone, this company can now give their clients the information they want and need, in a format they are comfortable working with.

This alternative reporting solution was well received. The usability and broad knowledge of Excel is simpler and infinitely more useful than trying to recreate the form and feel on a website. Not to mention that customers are able to easily navigate the Excel environment and share reports within their own organizations.

Everyone Gets Back to Business of Doing Business

By automating its client reporting workflow process with SoftWidgets Spread Server solution, this company now has a greater competitive edge in the marketplace. Greater organizational efficiency has given way to a high level of client satisfaction and loyalty. Translation: sales opportunities to existing clients *and* potential customers have dramatically increased.

Spread Server 3.0 allows the workforce to focus on sales and promotes operational efficiency by virtually eliminating labor costs associated with manually updating their spreadsheets.

Currently, this company requires half of its employees to spend up to three hours a day preparing routine reports for customers. In some cases, this process is repeated twice daily. The annual cost of all this manual reporting and updating of spreadsheets is approximately \$500,000.00! Moreover, when you figure that nearly a quarter of each person's day was spent away from their revenue generating activities, it's easy to see the potential to recapture a 25% (or more) increase in sales. SoftWidgets Spread Server dramatically reduced costs and helped drive sales.

Proper reporting leads to greater customer satisfaction, retention and sales opportunities. SoftWidgets Spread Server eliminated the error prone reporting which had plagued previous efforts to generate and distribute data. No more headaches or time lost resolving inevitable customer disputes arising from faulty reporting.

Finally, by embracing the individual needs of their clients and providing the exact information they need in the form they rely on (Excel), this company added tremendous value. With the help of Spread Server, they enhanced their customer experience and in turn created greater loyalty and growth opportunities for both themselves and their clients.