

Transforming Executive Reporting Through Automation and Modern Analytics

At a glance

A healthcare organization relied on a manual, Excel-based process to compile a weekly "Flash" report that executives used to monitor operational metrics. This process had significant challenges.

Key metrics



100% Reduction in Manual Compilation Time:

Freed up 6+ hours of FTE time weekly.



Daily Insight Availability:

Metrics now updated and accessible every morning, compared to weekly cycles before.



Zero Data Discrepancies:

Resolved accuracy issues, improving executive confidence in the data.



Stop Bottlenecks. Build BI that Scales.

syntrixconsulting.com

info@syntrixconsulting.com

CHALLENGES



Wasted Resources: A highly skilled FTE dedicated time to a repetitive, low-value task.



Delayed Insights: Executives had to wait until the end of each cycle to receive critical metrics.



Data Trust Issues: Inaccurate groupings and outdated calculations undermined confidence in the report.

SOLUTIONS



We modernized the reporting process by:

- **Building SQL Views** to centralize and standardize data for accuracy.
- **Creating a Tableau Data Source** to automate and streamline data visualization.
- **Designing a Real-Time Dashboard** for executives to access up-to-date insights anytime.
- **Implementing Automated Email Delivery** to ensure executives receive daily Flash report updates directly in their inbox.

OUTCOMES



Time Savings

Eliminated the need for manual report generation, freeing up the FTE for higher-value tasks.



Increased Accuracy

Updated groupings and calculations to match the organization's current structure.



Real-Time Access

Provided executives with 24/7 access to key metrics via an interactive dashboard.



Enhanced Confidence

Restored trust in the report's insights, leading to more data-driven decision-making.