

Extensive research brings THE pert GROUP back to E-Tabs



Case Study: THE pert GROUP

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From THE pert GROUP's first acquaintance with E-Tabs using the Professional Reader to convert files to Excel, and improve the process of 'posting' numbers, to automating our PowerPoint presentations and Excel reports with AutoGraph, to finally implementing complete report automation with E-Tabs Enterprise, the expectations we've placed on the E-Tabs solutions and the demands we've made of them have increased along with our experience.

This case study outlines how E-Tabs have managed to meet our changing report automation requirements, how our knowledge and understanding of report automation has increased with experience, the benefits we experienced in each stage of our development and why, despite having thoroughly considered other report automation providers we returned to E-Tabs.

E-Tabs Professional Reader: Our first introduction to E-Tabs

THE pert GROUP first implemented the E-Tabs Professional Reader in 2003 because it could convert ASCII files to Excel. Up until one of our largest clients requested that their reports were delivered to them in an Excel format, we had been delivering all of our reports to clients as ASCII files.

Before utilizing E-Tabs Professional Reader to convert files it took us 2-3 days to hand enter 100-150 tabs into Excel. Using The E-Tabs Professional Reader in conjunction with a macro that gave the reports a set corporate format, we were able to convert the files to Excel and produce the same reports in 2-3 hours.

To accommodate clients who requested PowerPoint deliverables we copied and pasted the relevant data from Excel files into our presentations. This ensured the data in presentations was accurate, but was inefficient and an incredibly manual task.

E-Tabs AutoGraph: Initial Automation

Recognizing this process could be made more efficient, E-Tabs introduced us to AutoGraph, our first experience with a report automation solution. AutoGraph was simple to use and enabled us to create custom reports and presentations in a few easy steps.

Using E-Tabs AutoGraph:

- ▶ Turnaround time on our PowerPoint and Excel deliverables was dramatically improved

- ▶ Our reports were accurate because hand entry and its potential for errors had been eliminated
- ▶ The accuracy of the reports contributed to faster checking processes
- ▶ The time savings on checking and turnaround contributed to increased productivity

AutoGraph took us a step closer to *complete* automation, but still required a small element of manual intervention. As we became more proficient in report automation we saw room to improve the process further and began researching other report automation solutions.

We left E-Tabs to use an alternative product in 2007. At first glance the alternative product had seemed keener priced, but with our upgrade to Microsoft Office 2007 unforeseen circumstances left us having to account for additional software. The alternative product was not compatible with Office 2007 and we were forced to install virtual machines onto our existing computers so that we could run the alternative program on the older version of Microsoft Office, causing inconvenience and adding to the initial cost of automation.

E-Tabs Enterprise: Complete Automation

E-Tabs are the only report automation providers fully compatible with Microsoft Office 2007. Whilst it was THE pert GROUP's upgrade to Microsoft Office 2007 that initiated our return to E-Tabs, our final decision was based on a number of factors.

Assessing E-Tabs Enterprise for a second time we felt confident, we understood it and we knew the support we needed to return to E-Tabs would be available.

- ▶ Using E-Tabs Enterprise we cut presentation creation time by roughly 70% of what it used to be
- ▶ Our reports were on time, accurate and consistent because automation eliminates manual tasks like hand data entry

In hindsight we realize the most important thing to look at when assessing a report automation solution is what the product can actually do for you? How much time it will save you and whether or not the time saving is worth the cost?

- ▶ Report Automation with E-Tabs Enterprise will save you time and money
- ▶ There are no hidden requirements for additional software or specific hardware with Enterprise. You can use almost any computer and we have found all of the E-Tabs products to be very low maintenance
- ▶ Enterprise is a flexible and intelligent report automation solution, you can do almost anything because you are tagging and grabbing the data. You can use multiple source files. You could have a set of tables and a spending table and both can be used in a chart

Automating our reports and charting with E-Tabs has ensured our reports are accurate, reduced project turnaround times and increased productivity.

The support we have needed has always been available and E-Tabs have continued to meet and exceeded our automation requirements.

About THE pert GROUP

THE pert GROUP is a research based consulting group that brings clarity to business, brand and marketing decision-making in the areas of Innovation, Positioning and Performance. For more information, visit www.thepertgroup.com