VividCharts

ADVANCING DATA SERVICES FOR MSPS

MSP Automates Customer Reporting for 90% Reduction in Time to Create Quarterly Reports

RESULTS

Quarterly reporting for each customer reduced from 4 weeks to **2 days**

3 full time employees **freed up** for other projects

Eliminated data integrity errors from reporting

Company Background

A leading IT solutions provider assists clients in harnessing technology innovation and simplifying IT complexity to digitally transform their businesses and drive return on IT investment. One of the offerings they provide is Managed Services and the primary solution they utilize is ServiceNow.

As part of their service, they performed Quarterly Business Reviews (QBRs) with clients. A team of three individuals was tasked with generating the reports needed for QBRs. The process for reporting was manual so this was a full time job for the team as QBRs were distributed and took place weekly.

> *It's so powerful to have slides ready to accept the data.* **What used to be a full time job is now 2 to 3 days.**
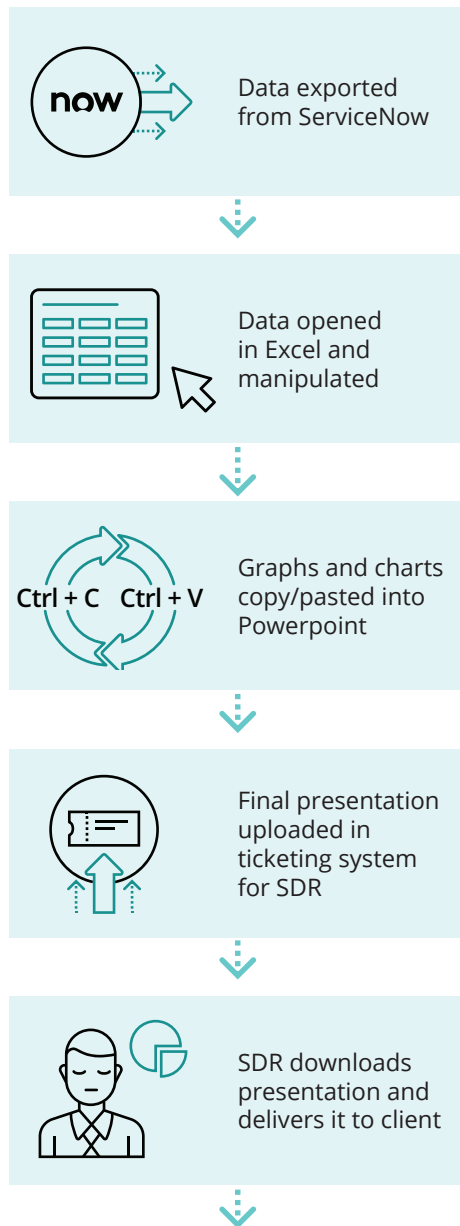>
> —Business Operations Analyst

servicenow. **Partner**

Elite

vividcharts.com

VividCharts

MANUAL PROCESS FOR CREATING REPORTS FOR QBRS

now → Data exported from ServiceNow

↓

Data opened in Excel and manipulated

↓

Ctrl + C Ctrl + V — Graphs and charts copy/pasted into Powerpoint

↓

Final presentation uploaded in ticketing system for SDR

↓

SDR downloads presentation and delivers it to client

↓

The process takes
4 to 5 weeks
per client

Challenge

In order to create QBRs, the reporting team was exporting data from ServiceNow and combining it with other data in Excel. The team would then manipulate the data in Excel creating graphs and charts, then copy/pasting them into PowerPoint. The presentation was tweaked to fit the new data then uploaded into their internal ticketing system tagging the appropriate Service Delivery Manager (SDR). The SDR then downloads the presentation and delivers it to the client. The entire process takes four to five weeks per client.

Creating reports manually was inefficient and human error often led to mistakes. Additionally, clients often had data requests that the MSP could not fulfill using this process. This was costly both from man hours as well as negative interactions with clients who were often paying a premium for this service. They knew they had to find a way to automate reporting to improve efficiency, accuracy and the ability to respond to client requests for specific data.

Without VividCharts, I would refuse to work on this project. **We can't move forward without it.** *And we can't move back to where we were—it was unsustainable.*

—Business Operations Analyst

Solution

The MSP looked for a way to automate ServiceNow reporting for 3 years before they found VividCharts in the ServiceNow app store. They immediately asked for a demo and were thrilled that VividCharts met and exceeded their requirements for reporting automation. Internally they started an optimization project for bringing in VividCharts with a Business Operations Analyst taking the lead.

The analyst commented, "It's embarrassing to be an IT company and have stuff done manually with copy/paste. We knew we could do better." They wanted VividCharts to be tied to each person's job and have it run automatically. Using VividCharts starter templates and extensive chart library they were able to easily create automated templates that mimicked their current reporting with a plan to upgrade to slicker visuals over time.

"The rollout of VividCharts was smooth as it is very intuitive to use," stated the analyst. "That said, there are still folks who want to work in PowerPoint or have a client that demands it. Being able to export the VividCharts presentations as PowerPoint presentations is so important to meet that need and get naysayers on board."
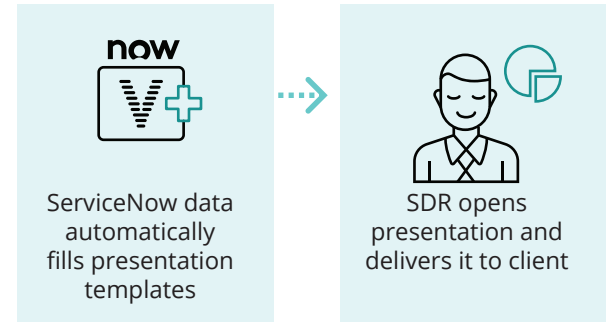
Outcome

The MSP is thrilled with the immediate time savings that VividCharts provided. "It's so powerful to have slides ready to accept the data," said the analyst. "What used to be a full time job is now 2 to 3 days. And that number will continue to decrease as we get more of our data inside ServiceNow."

With VividCharts, the MSP can now handle more data requests from clients—both to deliver deeper levels of data as well as to meet delivery requirements. The analyst provided an example, "We had a large client that for some reason needed to have their QBR on the third of the month. Normally we'd have to say no, but with VividCharts we were able to say yes with no additional work needed."

The MSP is still optimizing their process and data handling, but they soon plan to measure man hours saved, data integrity issues solved and quantify their ability to be scalable for an internal ROI factor. They are confident this is going to be a great return on investment.

Beyond cost savings from automation, the analyst said that the next project is to look at ways to utilize VividCharts to bring in additional revenue with clients. The team will explore the value of creating live dashboards for clients so they can view their data any time. They'll also look at the value of more in-depth reporting. The analyst added, "We now have scalability and maneuverability to really advance our reporting and give our clients what they really want."

AUTOMATED PROCESS FOR CREATING QBR REPORTS WITH VIVIDCHARTS

ServiceNow data automatically fills presentation templates

SDR opens presentation and delivers it to client

A 90% reduction allowing reallocation of 3 full-time resources

*We now have scalability and maneuverability to really advance our reporting and **give our clients what they really want.***

—Business Operations Analyst

Learn How Companies Advance with VividCharts

To learn about how other companies utilize VividCharts visit: **vividcharts.com/customers**