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Using Innovative Technology to Automate Reporting for Employee Engagement at a Financial Services Company

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The Study

In 2006, PeopleMetrics conducted an employee engagement study with a global financial services company. The total sample for the study was nearly 50,000 employees. The study reported on engagement levels and key drivers and included a trending component from 2005 data.

- Approximately 1,800 reports were run using Enterprise over the course of several months.
- All reports were created in Microsoft Word.
- While the report size varied, the majority were 10-15 pages long.

The Reporting Challenges

There were two main reporting challenges for this study.

1. Resources required to produce the 1,800 reports
2. Accounting for the variations in the reports

The primary issue was resourcing. Producing 1,800 reports by hand, even over a few months, would require a large, fully-utilized team. The existing team was staffed with two analysts plus intern support. Expanding the team would mean hiring temporary employees. Bringing in untrained temps would have increased the risk of errors, and the cost to hire them could have jeopardized the profitability of the project.

The secondary issue was automating the variations in the reports. While the reports were generally consistent in format, the number of columns included in each report, and the questions inserted into specific rows, could vary from report to report. These reports required thinking beyond copy-and-paste.

Reporting with E-Tabs Enterprise

PeopleMetrics estimated that a trained analyst could create a single report in about ten minutes on average. In total, manual report production would require about 300 analyst hours. We knew we needed an automated reporting solution.

Of the various options available to us, we chose to use E-Tabs Enterprise. The main concern with using E-Tabs Enterprise was that it occupied an analyst's workstation while running reports. However, the benefits of using E-Tabs Enterprise included:

- On-time report delivery
- Reporting within budget
- Consistency in formatting
- Accuracy

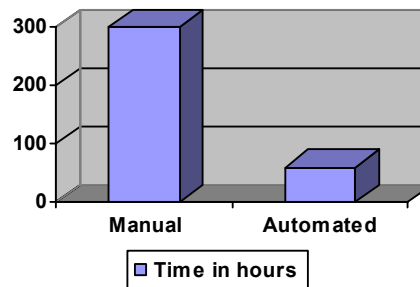
The benefit above all others was that E-Tabs Enterprise would allow us to deliver the reports on time and within budget. The other significant benefits were reporting consistency and accuracy. Since each report was created from a centralized template, we knew that formatting would be consistent. Because numbers were not being hand-posted, we had greater confidence in the accuracy of each individual report.

We solved the workstation problem by installing Enterprise on multiple network servers. Since these servers have more available memory than the typical workstation laptop, they can run larger batches of reports in less time, and without occupying a workstation.

We broke down the 1,800 reports into about 50 more-manageable groups. Each group had its own Enterprise template, dataset, and looping file. However, through consistent formatting, we were able to run most of the groups using the same templates and scripts with only slight modifications.

We estimate that it took approximately one hour of setup time to program each group of reports. Adding on an additional 10 hours for the initial programming and testing of the Enterprise code, that's a total investment of 60 hours. Since reports were run on servers and not workstations, the actual report production did not monopolize any analyst time.

- Compared to the manual production estimate of 300 hours, we cut production time by 80%.
- One analyst with Enterprise was able to accomplish the same work as five analysts creating reports manually.



E-Tabs certainly delivered on their promise of helping produce reports on time and within budget. A side benefit that exceeded expectations was that we were able to shorten the quality control cycle for each report, since Enterprise populated the data more accurately than hand-posting. The reports created by Enterprise were highly accurate; in fact, our client found no errors in any of the reports. That sort of flawless delivery is part of our core values at PeopleMetrics.

Summary

E-Tabs Enterprise is a powerful and elegant solution for mass-producing reports. Those companies using Enterprise will be able to bid on large-scale projects with shorter timelines, greater margins, and lower total costs than competitors relying on manual reporting techniques. Even the most skilled research companies will have a hard time competing without an automated reporting solution like the E-Tabs suite.

About PeopleMetrics

PeopleMetrics is a leading research firm specializing in Employee Engagement, Customer Engagement and Strategic Market Research. Our research helps clients act on feedback from employees and customers to improve business outcomes such as employee productivity, return on marketing spend and revenue growth. PeopleMetrics serves some of the most trusted brands and respected companies in the world, including AstraZeneca, CocaCola, Comcast, Genzyme, HSBC, McDonald's, Morgan Stanley, Microsoft, Novartis and Wyeth.

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