

## CUSTOMER SUCCESS STORY

# AUTOMATING PROCESSES WITH QLIK ENTERPRISE REPORTING



## READ HOW WE HELPED A NOT-FOR-PROFIT MENTAL HEALTH AND WELLBEING ORGANISATION PROVIDE BETTER REPORTING TO THEIR CUSTOMERS

### THE CHALLENGE

Our client provides mental health services and they wanted to regularly update their customers on their usage. This would demonstrate value and the better health outcomes their services contributed to.

The organisation was manually sending reports to their customers upon request. They involved pulling data from a third-party tool and copying and pasting it into a Word template, which was time consuming and very reactive.

The client wanted to proactively send reports to keep their services front of mind and strengthen relationships with their customers. However, they were struggling to find a solution that would enable them to share dashboards and PDF reports, without having to purchase individual customer licenses.

### THE APPROACH

The organisation challenged Clumber to find a solution that would enable PDF reporting, but keep licence costs to a minimum, while also introducing a level of automation to minimise manual intervention. They also wanted to create reports for internal use that would provide better understanding of the customer service usage across the organisation.

We recommended Qlik Sense and Qlik Enterprise Reporting, because, as a cloud-based solution, the reporting element does not require individual customer licences. Our BI developer worked with the organisation to cleanse their source data and build their reports in Qlik. These reports provided the insights they required, both for their customers and their internal teams.

# CUSTOMER SUCCESS STORY

During the project we uncovered complexities in the source data, so we recommended setting up an API to the client's Salesforce system to help improve data quality.

*"To get the enterprise level of reporting, you do need a developer, and Climber helped us to set the rules and tasks for sending out the email reports.*

*"They also helped us join the dots between the customer usage data and the data we had internally, by joining our systems with our third-party provider systems. This proved to be quite complicated in the end, but it was the right solution."*

Digital Project Manager

*"From the customer point of view, they will be able to understand how their teams have used our services. It gives them better insight and regular content from us, and it gives us an opportunity to touch base with them to tell them about the webinars we are running, for example."*

Digital Project Manager

On the internal reporting side, they are encouraging more teams to use Qlik and undertake training so they can better understand how they can improve their use of data and reporting within their own teams. This will help to spark ideas and inform decision-making across the organisation.

*"The Climber team has always been very nice and accommodating. They have been very helpful, and we've all understood where we stand. When they say they are going to deliver something they do deliver."*

Digital Project Manager

## THE RESULT

The client has now sent their first mass mailing to customers and is continuing to test and learn.

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## WE CAN HELP YOU

Get in touch to learn more about how we can help you transform your reporting.  
Let's start 'Creating Intelligent Business' today!

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Creating Intelligent Business

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