

Kidney Health selects QlikView for mobility, improved insights and management reporting



For forty two years Kidney Health Australia has been promoting kidney and urinary tract health to consumers and the medical profession. During that time it has funded more than \$23 million for research into kidney disease. The organisation continually funds and implements awareness and education programs to help reduce the incidence and impact of kidney disease in the community, plus it provides a national network of education, care and support for patients, their families and carers.

As a not for profit organisation, Kidney Health has long understood the cost saving and efficiency benefits that come from investing in the right tools. They teamed with Professional Advantage to deploy Microsoft Dynamics GP, a professional financial management solution. In addition, to help manage call centre and fund raising activities, the two organisations also designed and deployed a solution based on the world-class customer relationship management solution, Microsoft Dynamics CRM. Both software investments have provided management with far more insight into the organisation's operations and continue to inform decision making to this day.

The limitations of spreadsheets

Kidney Health CFO, Rosanna Care realised that management reporting was failing to keep up with the company's growing information needs. Data for senior management and board reports was being compiled using Microsoft FRx before being exported to Microsoft Excel for review and dissemination. Frequently however, the accounting team would find that changes were required to the base data. New line items may be required or there would be edits to existing information. With each change, finance staff would have to amend the source data before generating a new spreadsheet.

The problem was all the to-ing and fro-ing took time, and what's worse, the manual methods meant occasionally, errors would creep in. "We realised we would need an automated system at some point to eliminate problems, speed the process and improve accuracy." In addition, the charity wanted to be able to conduct more complex analysis on its financial data.

Seeing is believing

It was around this time that Manish attended a Professional Advantage seminar and demonstration of the business intelligence tool, QlikView. Used by organisations across the globe, the software enables users to assemble data from multiple sources, view and analyse the information and to solve business problems in new ways.



At a glance

Company

Kidney Health Australia

Problem

With management reporting becoming ever more complex, it was apparent that spreadsheets could no longer meet Kidney Health's needs for accuracy and speed of reporting, and that a more professional analytic tool was required.

Solution

- QlikView

Benefits

- Faster, more accurate reporting
- Reduction in staff time, photocopying and distribution costs
- For the first time the board will have mobile access to critical reports anytime



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Manish immediately realised that he'd found the solution to Kidney Health's financial reporting problems. "When I saw QlikView I recognised that it would make reporting easier and, in addition, could be a live reporting tool for our board members," he says. Manish referred a business case to CFO Rosanna Care, highlighting the benefits of speedier information. It was quickly accepted by Rosanna and, with the help of Professional Advantage staff, deployment began.

"One of the key things about QlikView is that it is fast to set up and once it is in place, it provides accurate information. All you have to do is set up the conditions and reporting is automated. It's even more user-friendly than Excel."

An evolving journey

Deployment was carried out within a matter of weeks in May, 2012. Before the end of month the software had been installed, initial reports built and QlikView was being tested by a small group of users. Manish anticipates that even at this early stage, QlikView will deliver significant time savings for the finance team.

"To begin with we're looking at doing month-by-month reporting in exactly the same format as we used in the past. We'll be closing at end of month and expect that by the second or third working day of the following month, reports will be ready for board and management to view," he explains.

"The difference is in the past it would have taken us seven to eight days to prepare reports for the board, so we are looking forward to at least a one week reduction under the new process."



In addition to board reports, QlikView will be used to prepare statutory accounts, thus speeding end of financial year processes.

The first users of QlikView will include the company's finance team, senior management and board members. Users will be able to simply log on to QlikView using Kidney Health supplied tablets for anytime, anywhere access to the charity's reports. The browser based access is an important capability given board membership is drawn from right across Australia.

"Board members will still be able to access the data regardless of whether they attend the meeting or not."

The new technologies also bring the potential for greater collaboration. Board members will be able to conduct video conferences with each other to discuss any issues while still referring to their QlikView reports.

Other benefits are anticipated due to the introduction of electronic distribution. This will help to reduce staff workloads, and remove the copying and distribution costs previously incurred under the hard copy reporting system.

Over time, Manish believes QlikView access will be expanded to include other members of the organisation.

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"The reporting may well be used as a marketing and call centre tool in the future, giving access to team leaders so they can analyse how campaigns are performing and to conduct "what if" analysis to see how they can change conditions, to improve profitability or response."

"This is an important difference. In Excel reporting, you don't have "what if" conditions. That kind of analysis has to be set up separately. But with QlikView it's easy. So for example, if we are planning a lottery campaign and the lottery manager wants to see the impact of an increase in ticket price or other variables, the analysis can easily be done."

Manish believes that with so much additional valuable information about to be made available within the organisation, decision making will become faster and even more informed. "We have another two or three projects in the pipeline that the board wants to link with QlikView. It's too early to discuss these now but they will be launched into the Australian market shortly and QlikView will provide the analysis," Manish concludes.

About Professional Advantage

Professional Advantage focuses on providing technology and services that enable high-performance workplaces and organisations. Professional Advantage was established in 1989 and today employs more than 230 people in Sydney, Melbourne, Brisbane, Perth, London and Fargo, USA. The company is the largest provider of leading brand global business management systems such as financial management, ERP, CRM, retail, business intelligence, business process management and portal solutions to mid-sized organisations in Australia, supporting over 800 clients nationally. Its multi-product offering is complemented by its development, systems integration, consulting, training, and support services. Professional Advantage is the winner of many business and vendor awards including the Microsoft President's Club 2011 and the 2012 Asia Pacific Partner of the Year Award for Infor.

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