

Modernised project reporting tools that streamlined data entry, improved data quality, delivered real-time insights, and accelerated board-level readiness.

Health Services - Streamlining monthly project status reporting processes using the Power Platform

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CASE STUDY

Modernised project reporting tools that streamlined data entry, improved data quality, delivered real-time insights, and accelerated board-level readiness.

PROBLEM

This hospital and health service organisation manages a number of projects that are funded by their overarching governing body, and these projects have internal and external reporting requirements to track their progress.

Project Managers previously used a suite of data capture tools and reporting visualisations which were primarily made up of SharePoint lists, PowerApps and QlikView reporting representations; however, they had a number of issues with poor user experience, formatting inconsistencies, data refresh delays, visualisation and functionality limitations and data quality issues.

These issues all culminated in low adoption rates and a reluctance to use the reports in their current form, driving stakeholders to create their own version of the reports with inconsistent look and feel or governance.

Reporting was being done manually each month using a variety of tools, which was very time-consuming, and stakeholders were reluctant to share the reports at the board level.

SOLUTION

Our Chamonix & exposé teams combined forces to review and overhaul the organisation's project reporting and data capture tools used.

The timeline for this engagement was short, so we looked to re-purpose any elements that still provided value, such as the existing SharePoint Lists and Power App solution (with a bit of tweaking, of course).

Our Power Apps specialist reviewed the stakeholders' list of pain points from the data capture perspective. Our specialist significantly enhanced the existing Power App to alleviate the current issues and created a one-stop shop for entering all the project reporting data elements required.

In parallel, our Visualisation specialist reviewed the existing reports and list of reporting-related pain points and requirements and built a brand-new data model and reporting solution in Power BI, which connected directly to the improved SharePoint Lists, eliminating the need to access the outdated on-premise data warehouse.

A number of Power Automate Flows were created to schedule data refreshes every 15 minutes during business hours, create audit change history logs and monthly snapshots of the data for better historical reporting.

BUSINESS BENEFITS

The new data capture tool included additional functionality to help streamline the data entry process for Project Managers including auto-copying status updates from the previous month for current month editing, automated RAG status population based on the corporate Risk/Issue Matrix and dynamic text rendering to name a few.

Power Automate was used to trigger email notifications to the Program Director, alerting him to changes in risk/issues status or when project status reports were ready for review and approval. This helped streamline the monthly reporting process and reduce the time taken to produce board packs and report extracts for regulatory reporting purposes.

The new look reporting suite provided enhanced project reporting with visual representations of the project data captured, which were more visually appealing and easier to comprehend for stakeholders. Near real-time data refreshes allowed project managers to review their updates almost immediately before submitting them for approval, thereby speeding up the end-to-end monthly reporting and approval process.