



Case Study

Benefits of Excel Advanced

Background

Our client was a marketing assistant in the UK national sales office of a world-leading manufacturer of consumer and business electronics products. His role required the monthly processing of large amounts of numerical data. The data arrived in Excel in a standardised manner every month, arranged in the same format. The new month's data was added to previous data in a master database and general trends were gleaned over time.

Unfortunately the data needed cleaning before it was added to the master database. Some rows and columns needed to be deleted before the data was manually copied and pasted into the master. The data was then used to generate new trend graphs and these were presented in PowerPoint.

Problems

Due to the fact that there were many standardised reports, the preparation of the monthly marketing reports was slow and repetitive.

The manual processing of the data encouraged the onset of boredom and increased the chances of making mistakes and inaccurately representing data

Because of the volume of data to be manually processed, the marketing manager would receive market data more than a week after it was received

All graphs were copied and pasted into PowerPoint every month for a presentation to the marketing manager

The data processing was so slow that, despite the time taken in collating reports, they could not provide a comprehensive description of the market. Reports were therefore highly aggregated, without the nuances that the marketing manager wanted to exploit.

Report volume: 35 pages, Time to collate – 1 working week

Solution

The marketing department were convinced that MS Excel and MS PowerPoint (the main engines for driving the report) were not being used to their full potential. The marketing assistant was sent on an MS Excel Advanced training course to improve the system.

The course taught the marketing assistant how to automatically process data through using macros. This was to dramatically speed up the processing of raw data.

Next the marketing assistant was taught how to link data in Excel to PowerPoint so that reports would update automatically.



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Result

The marketing assistant took the knowledge gained from the course and applied it to the department's problem.

First a duplicate "dummy" system was created where the new macro and linking skills were tested and proven, before affecting the precious master database.

Once proven, the skills were rolled out and applied to the master database

Benefits

Benefits to the company were far in excess of expectations.

- Drastically reduced file size for archived reports – linked data uses less disk space than embedded data
- Improved data quality – automated processing eliminated manual mistakes
- Enormous increase in data processing speed
- Elimination of laborious copy and paste
- Vastly improved detail – the speed of data processing allowed more data to be analysed more quickly. 35 pages doubled to 70 pages, with additional supplementary reports
- New analysis tools developed – comprehensive market segment analysis and price development tools created
- Old report generation time (35 pages) – 5 days
- New report generation time (70 pages+) – 4 hours
- Knowledge spread and applied to other departments in the company
- 1 week ahead in terms of current market knowledge



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The Figures

Of course, this client gained huge efficiencies, and benefitted from the fact that the assistant could focus on other activities when he would have been generating reports, but what were the financial benefits?

The bottom line...

Total saving	£2803.80/year
Cost of MS Excel Advanced course	£225.00

The breakdown...

The new data represented 2 weeks of work, all processed in 4 hours

Marketing assistant salary	=£13,500
	=£259.61/week
Cost of generating new report (1/10 week's salary)	=£25.96
Saving over 1 month period	=£233.65
Saving over 1 year	=£2803.80

- . The data in the new reports were DOUBLE what the company had before - speed of data processing was increased by as much as 20x
- . The cost of the course was recovered in the same month in which it was paid for
- . The marketing assistant was freed from report generation to engage in pro-active, rather than reactive, marketing activities