



# AUTOMATING AWAY THE REPORTING BLUES

## Abstract

Reporting and Service Manager at a US-based oil and gas corporation, Ryan Keller was saddled with the lack of efficiency of a manually intensive reporting system. Due to this, the accuracy and on-time delivery metrics of his team suffered, especially during peak seasons when 75% of the months' reporting activities were to be accomplished within just 10-12 days. This case details how Ryan brought in Infosys BPM to automate his reporting activities and delivering a live dashboard for performance tracking and insight generation – enabling him to reduce data extraction efforts by 65%, and also save \$355k annually.



## When reporting becomes a chore

Ryan Keller is the Reporting and Automation Service Manager at a US-based multinational oil and gas corporation. He handles the complete reporting setup for the corporation, and is responsible for achieving 99% service level agreement (SLA) targets in terms of accuracy and timelines.

90% of the reporting activities handled by Ryan's teams were in Excel spreadsheets that demanded high levels of manual intervention. This was aggravated especially during the company's peak seasons, when 75% of the total month's reports were required in just 10-12 days of activities. There were also several instances when the reports were demanded on the

very day the data became available. The high-volume data flow, same-day reporting demands, and overall inconsistencies made it extremely challenging for Ryan to meet his SLAs.

The organization's reporting system was split across multiple geographies, so the team worked in multiple shifts spread over different time zones. The fragmented, manually intensive nature of the reporting structures made Ryan's role difficult, in addition to which his team lacked the technical expertise to meet the optimal accuracy and timeliness standards. Yet, on considering the situation, Ryan had noted that over 30% of the standard reporting work was related just to data upload and

extraction. This left a significant scope for automation, and so Ryan sent out a global RFP, searching for a digital solutions partner who could effectively carry out large-scale automation in his reporting system.

With Infosys BPM eventually winning the bid based on its rich heritage of solving complex business challenges for an enviable list of global enterprises, Ryan was soon in touch with Jim Millers, the Infosys BPM point of contact, to discuss his challenges. After a series of telephonic and in person meetings, Jim was brought up to speed and ready to hit the ground running.

## Stepping up in stages to optimal automation

To find the best way to maximize the speed and accuracy in the reporting system with productive automation, Jim first set his team to analyze the shortcomings in the current system, and derive optimal solutions to overcome them so as to meet Ryan's SLAs. He directed the team to put a special focus on quality maintenance and on-time delivery, while ideating on

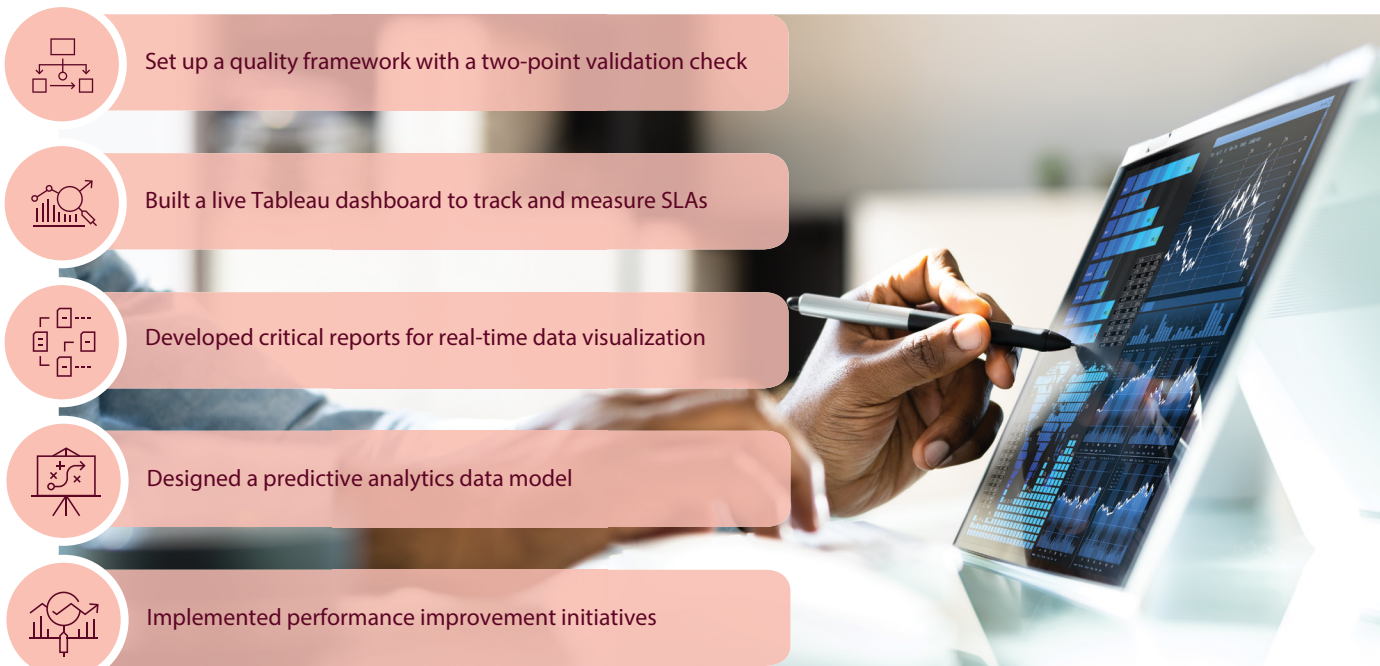
potential solutions.

After the intensive planning stage, Jim and his team began the reporting transition with 8 personnel dedicated to handling 450 unique, multi-frequency reports. The team set up report tracking macros to increase the real-time process visibility, and also designed a quality framework

to validate every report through a two-point check mechanism. Furthering the system's capabilities to meet the SLAs, Jim implemented a live Tableau dashboard to track the accuracy, timelines, and other relevant metrics. This dashboard also measured critical business insights and visualized the reports through a user-friendly interface.



## Approach summary



Later, when Ryan agreed that the project was ready to be moved to the next stage, Jim expanded his efforts to cater to 900 additional reports, increasing the reporting team headcount. Then, within the span of one year, Jim induced automation across 40% of the scope, especially for data extraction. During the automation, any new code or solution implemented had to be sent through the company's strict

controls approval process, which increased the stipulated time of the project. However, Ryan and Jim worked around the challenge and successfully deployed the solutions in time.

Additionally, the team also set up a predictive analytics model to offer greater insights into the reporting system. Jim consistently extended the solutions

in phases to include over 2000 unique reports in total, in addition to ~200 on an ad-hoc basis, with the team eventually growing to 40 members. Throughout these expansions, the team made several performance improvement initiatives to speed up and optimize the overall report generation process.



## Reporting live: clear insights ahead

Jim and his team's efforts to automate the reporting system proved successful in minimizing manual inputs and optimizing

the overall infrastructure. The improved system enhanced the overall reporting quality and strengthened the company's

business analytics operations.

## Key benefits



More than 60% of the tasks were automated, which led to 65% savings in data extraction efforts. This further resulted in manual effort savings of 6 FTEs, to the tune of \$355k annually. What was more, with the team going the extra mile, Ryan also gained additional task-based insights and productive visualizations through the live dashboard. Further, its new data

historization facility allowed Ryan to generate new insights wherever applicable. With a 99.8% accuracy and 100% schedule adherence in report generation, the automated reporting system successfully met the defined SLAs enabling Ryan to save in-house manual effort equivalent to 100, and thereby enjoy 65% bottom-line savings.

All in all, it had been a great journey and one that Ryan wanted to continue taking forward. That's why he scheduled a meeting with Jim to inform him that he wanted another set of over 1000 reports to be transitioned to the Infosys BPM team over the next two quarters – further paving he way for a long-standing partnership.

*\*Names have been altered to preserve the identities of the people involved.*

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