# ConvergeHub

## Case Study:

# Automating Reporting and Email Delivery for a Healthcare Organization with **ConvergeHub**

## Industry

Healthcare

## Engagement

Since 2nd December 2016

## Services Delivered to Client

Custom reporting configuration and automated report scheduling with email delivery using ConvergeHub CRM.

## Key Business Problems and Operational Gaps

A healthcare organization needed clearer performance visibility but lacked automated reporting, with critical data scattered and manually compiled. The organization faced the following challenges:

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### ◇◇ Manual reporting inefficiencies:

Teams pulled data from multiple modules, wasting time and increasing reporting errors.

### ◇◇ Limited insights and delayed decisions:

Without unified metrics, leadership relied on outdated information for critical choices.

The organization needed an automated reporting solution that would provide consistent, real-time insights without adding administrative overhead.

## How ConvergeHub Addressed the Challenge

ConvergeHub addressed these challenges by implementing custom reports tailored specifically to the client's business requirements.

The solution included:

**01** Develop customized reports covering products, sales, invoices, revenue.

**02** Consolidate key metrics into clear, easy-to-read reports.

**03** Automate scheduling to deliver reports daily via email.

With automated report delivery in place, the team gained consistent access to up-to-date insights without manual intervention.
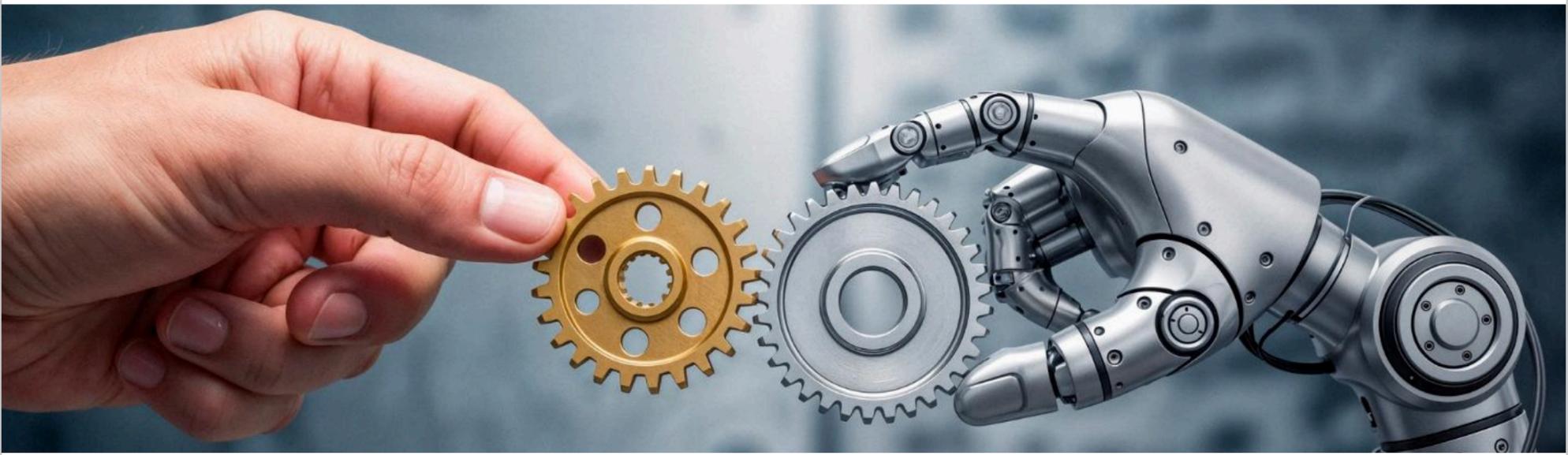
# Impact of the Implemented Solution

The reporting automation delivered measurable improvements across efficiency, visibility, and operational focus.

## 01

### Centralized Business Visibility

Custom reports delivered a unified source of truth for key performance indicators, ensuring accuracy, consistency, and reliable decision-making across teams.

- Leadership gained real-time visibility into sales, invoicing, product performance, and revenue metrics.

- Teams no longer needed to reconcile data from multiple sources to understand business performance.

- Daily email delivery ensured stakeholders always worked with the latest available data.

## 02

### Reduced Manual Effort

Automation eliminated repetitive administrative tasks tied to reporting, streamlining processes, reducing manual effort, and improving overall efficiency.

- Manual report preparation time was reduced significantly.

- Team members no longer spent hours exporting, compiling, and formatting data.

- Reporting accuracy improved significantly due to the removal of manual data handling.

### 3

**Faster, More Informed Decision-Making**

Access to timely, reliable data enabled quicker, more confident decisions, strengthening performance and supporting informed strategic business outcomes.

1. Leadership received daily performance updates without requesting ad-hoc reports.

2. Sales teams could track progress against targets more effectively.

3. Finance teams benefited from consistent visibility into invoice and revenue trends.

1. Overall operational efficiency improved considerably.

2. Administrative workload related to reporting dropped substantially.

3. The organization estimates saving 100+ hours annually through automated report generation and email delivery.

### 4

**Improved Operational Efficiency**

By automating reporting and delivery processes, the organization streamlined workflows, reduced manual effort, and improved overall operational efficiency.
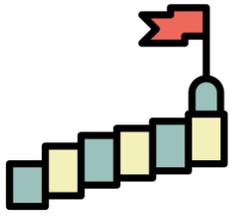
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## Results Achieved and Business Impact

The implementation of ConvergeHub's reporting and automated email capabilities transformed how the healthcare organization accessed and used business data. Manual reporting processes were replaced with a reliable, automated system that delivered timely insights directly to stakeholders.

Teams no longer spent time assembling reports and instead focused on higher-value activities such as sales execution and strategic planning. Leadership gained consistent, real-time visibility into business performance, enabling faster responses to trends and opportunities.

## This operational uplift translated into measurable business impact:

**1** Reporting turnaround time improved **by over 60%**, driven by automation and scheduled delivery.

**2** Team productivity increased **by approximately 30%**, as manual reporting tasks were eliminated.

**3** Overall operational efficiency **rose by 35%**, supported by consolidated insights and reduced administrative effort.





At length, ConvergeHub helped the healthcare organization replace manual reporting with automated intelligence. By delivering the right data at the right time, ConvergeHub enabled the client to operate more efficiently, make better decisions, and focus resources on growth-driving activities rather than administrative reporting.