

## ANALYTICS



NHS Wales empowers budget holders with meaningful, accurate, and actionable data insights



## About NWSSP

NHS Wales Shared Services Partnership (NWSSP) is an independent mutual organization, owned and directed by NHS Wales, the Welsh healthcare provider. It was set up in April 2011 to provide a range of high-quality, customer-focused professional, technical, and administrative services on behalf of all health boards and trusts in NHS Wales.

NHS Wales turned to Qlik to replace static and time-consuming reporting with dynamic, insightful, and meaningful information for finance, procurement, and warehouse management reporting. As well as saving time and resources, the new solution quickly gained adoption and support, providing targeted information to budget holders across the organization.

**“We’re really talking about empowerment. Qlik gives users their data and lets them slice it however they need to, so they can make their own decisions and take their own actions. That’s a major step forward.”**

Stuart Fraser, Service Manager, NWSSP



### Customer Name

NHS Wales Shared Services Partnership (NWSSP)

### Industry

Healthcare

### Geography

Wales, UK

### Function

Finance, Supply Chain Management

### Challenges

- Improve reporting accuracy and timeliness across the organization
- Reduce manual processes and report generation times
- Make data easier to interpret and action by stakeholders

### Solution

NWSSP replaced cumbersome report processes with Qlik Cloud Analytics™ and developed a dedicated Budget Holders App to place data in the hands of end users.

### Results

- Reports are now generated in less than an hour, instead of days
- Budget holders now access meaningful, targeted insights
- Reporting uptake has nearly doubled since implementation



## A critical shared resource to support healthcare delivery

The responsibilities of NWSSP's Management Accounts team are broad and varied. From providing advice on finances to managers across NWSSP to producing accurate monthly and annual reporting to budget holders, the team combines expertise in systems, finance, and management.

"We manage all the financial information that goes out to our budget holders within NWSSP," explains Claire Watkins, Head of Financial Resources at NWSSP. "All the monthly, annual, and ad hoc reporting for that area comes through us."

The team's breadth of services has grown significantly since the Covid-19 pandemic, and it became clear that systems that had worked well for a smaller operation were becoming strained.

"The team went very quickly from circa 10 people to 30," Watkins recalls.

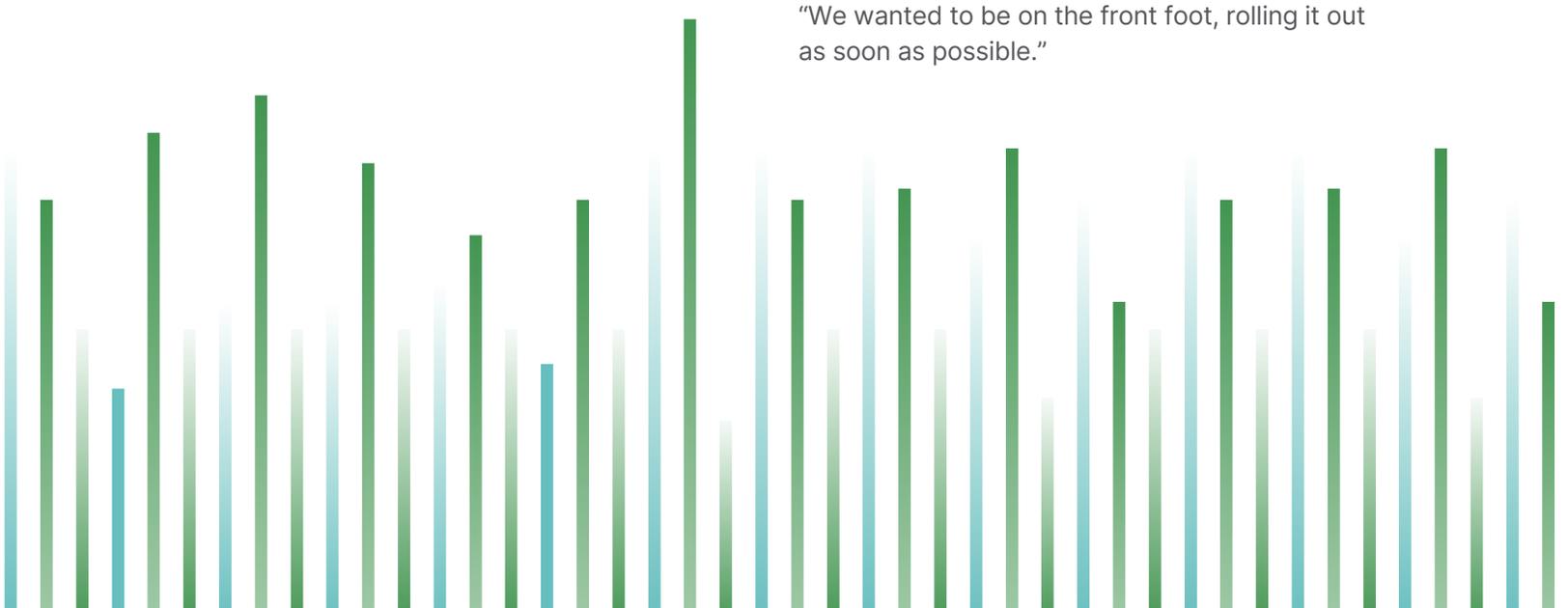
"The number of budget holders we were looking after was also rising at a similar rate, but our financial reporting wasn't really evolving."

"Monthly budget reports would take around two days to prepare and send out," adds Dana Purnell, Finance Manager at NWSSP. "As a result, the information the reports contained could be old and difficult for budget holders to interpret."

## Building engagement and buy-in

NWSSP saw that by switching from cumbersome, static, and time-consuming reporting tools to a dedicated business intelligence (BI) platform, it could add significant value to the information its teams were supplying. Having previously used Qlik in other parts of the operation, Qlik Cloud Analytics was selected as the solution to take forward.

"When we knew that Qlik Cloud Analytics was on the horizon and the Budget Holders App was in development, we were very keen," says Watkins. "We wanted to be on the front foot, rolling it out as soon as possible."





Implementation and roll-out were achieved through a combination of Qlik's resources, its Signature program, and NWSSP's own initiatives.

"We created supporting documentation and made it available to everyone who needed it, but probably the most effective technique was demonstrating Qlik to our people using their own figures," Purnell adds. "They could see their own information and it was relevant, which really improved buy-in."

"By feeding Qlik with the budget holders' data, queries, and focus areas, that was when the penny really dropped," adds Stuart Fraser, Service Manager at NWSSP. "People became engaged because it was a living, breathing tool that spoke to them directly."

He continues: "The right strategy, training, and technical support from Qlik through its Signature program also underpinned this success and ensured a smooth launch."

### **Empowering users with accessible, targeted information**

The most significant outcomes became clear when Qlik and the Budget Holders App went live. Standardized reporting that users struggled to comprehend was replaced by useful, accessible, and targeted information that enabled easy interaction and meaningful action.

"With the old system we sent reports to 60 budget holders and it was difficult to respond to requests in a timely manner," Purnell says. "Since Qlik has been rolled out, the number of recipients has risen to 110. They've seen the information we can provide and it's generating real buy-in and more requests to receive it."

Also significant are the time savings for the finance team. Reports that could previously take days to generate can now be completed in less than an hour, and the information delivered is quick and reliable.

"We can complete monthly reports within five days of the month-end instead of 10," Watkins says. "We can also run a macro that notifies budget holders of their financial positions and gives them links to their individual reports. Qlik is much more efficient; you can get information on aged debts, for example, the following day instead of waiting for reports to be circulated."

Having increasing amounts of valuable information available 24/7 in one place is saving time and resources across NWSSP, as well as improving the user experience for the Budget Holders App's rising user base. It also means that key decisions on finance, procurement, and warehouse management are based on current and reliable data and are more effective as a result.

"I am able to take early action while reviewing my position in the app. I can view my staff leavers, check if there are overpayments, and respond promptly to resolve in the same period," says Fraser. Importantly, it also means NWSSP is well-positioned to move forward with confidence and improved accountability, and is ready to continue to deliver key services effectively.

"We're excited about what we can do because Qlik gives budget holders the data at their fingertips," says Watkins. "We can promote better housekeeping and better responsibility."

"We're really talking about empowerment," Fraser adds. "Qlik gives users their data and lets them slice it however they need to, so they can make their own decisions and take their own actions. That's a major step forward."

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## About Qlik

Qlik transforms complex data landscapes into actionable insights, driving strategic business outcomes. Serving over 40,000 global customers, our portfolio leverages advanced, enterprise-grade AI/ML and pervasive data quality. We excel in data integration and governance, offering comprehensive solutions that work with diverse data sources. Intuitive and real-time analytics from Qlik uncover hidden patterns, empowering teams to address complex challenges and seize new opportunities. Our AI/ML tools, both practical and scalable, lead to better decisions, faster. As strategic partners, our platform-agnostic technology and expertise make our customers more competitive.

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