



Pancreatic
Cancer
UK

Transforming service data with
powerful reporting and
visualisations

wood
for trees

A Wood for Trees case study

Key benefits

- Improved service delivery – time and resource saving
- Benchmarked KPIs and more informed, strategic planning and decision making
- Fully interactive, real-time reporting dashboard with data visualisations and bookmarked filters
- More accessible data and insight at a granular level



Overview

The services team at Pancreatic Cancer UK collected and stored data coinciding with their core deliverables in a CRM system but accessing the data and meaningful analysis proved difficult.

The data was reviewed monthly in manual and limiting Excel spreadsheets, which were time consuming to put together, with static month-on-month or financial year views. Requesting variations in data and timescales significantly impacted resource in the data team.

The solution was to transform the data in the Raiser's Edge CRM system to create a bespoke data warehouse using Microsoft Azure Synapse and SQL Server. Then, an interactive, visual reporting dashboard was created in Microsoft Power BI. Four main reports were initially set up, with the opportunity to add more with relative ease in future.

Instead of monthly, manual reporting with a clunky, time-consuming process, the charity can now access their on-brand, real-time visual reports efficiently at the touch of a button. This enables the services team to benchmark their data to allow more informed, strategic planning and decision making.

Challenge

Pancreatic Cancer UK is a charity working hard to transform the future of those affected by pancreatic cancer. The charity's services team liaise directly with people that have pancreatic cancer, with seven nurses providing support over the phone and by email daily.

The services team also produce information materials covering all aspects of pancreatic cancer for people affected by the disease and health professionals. In addition, they offer online support in the form of group sessions and webinars and hold events and online learning for health professionals.

Data coinciding with these deliverables was collected and stored in a CRM system, and still is. However, accessing the data and performing meaningful analysis proved difficult.

The data was reviewed monthly – reviewing each month a fortnight into the following month. The reports were set up manually in an Excel spreadsheet, which was time consuming to put together and update, limited and static on options, with month-on-month or financial year views.

To see the data in different timescales required requests sent to the data team which, depending on workloads and priorities, could take a couple of weeks to process. This significantly impacted resource in the data team and provided time constraints for the services team in being able to analyse their services.

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Solution

Firstly, the data stored in Pancreatic Cancer UK's existing Raiser's Edge CRM system was transformed to create a bespoke data warehouse using Microsoft Azure Synapse and SQL Server. This allows the datasets to be refreshed daily.

Then, a reporting dashboard was created using Microsoft Power BI, integrating the data warehouse with interactive visualisations.

Four main reports were initially set up (see below) and there's opportunity to add more with relative ease in future.

1. Support line – data collected by nurses from phone calls and emails with those needing support
2. Publications – data collected about information materials for people affected by pancreatic cancer and health professionals
3. Online support – data collected from group support sessions and webinars
4. Events – data collected about events held for health professionals

Results

Instead of monthly, manual reporting with a clunky, time-consuming process, Pancreatic Cancer UK can now access their on-brand, real-time visual reports at the touch of a button.

With more in-depth and targeted datasets, bookmarked filters allow important KPIs to be reviewed at organisational level – providing access to multiple users. This negates sending requests to the data team for drilled down reports of differing timescales.

There's also a regional breakdown filter – a useful function to differentiate the charity's performance around the UK.

Not only are the reports more comparative, they're also now fully interactive, so comments can be added by numerous people in the organisation, keeping information where it's needed in a central hub rather than getting lost in emails.

With the ability to review the charity's regularly refreshed data at any time, any errors or gaps in tracking KPIs and trends can be more quickly identified. The team can ensure the most appropriate data is being captured and make more informed decisions as a result.

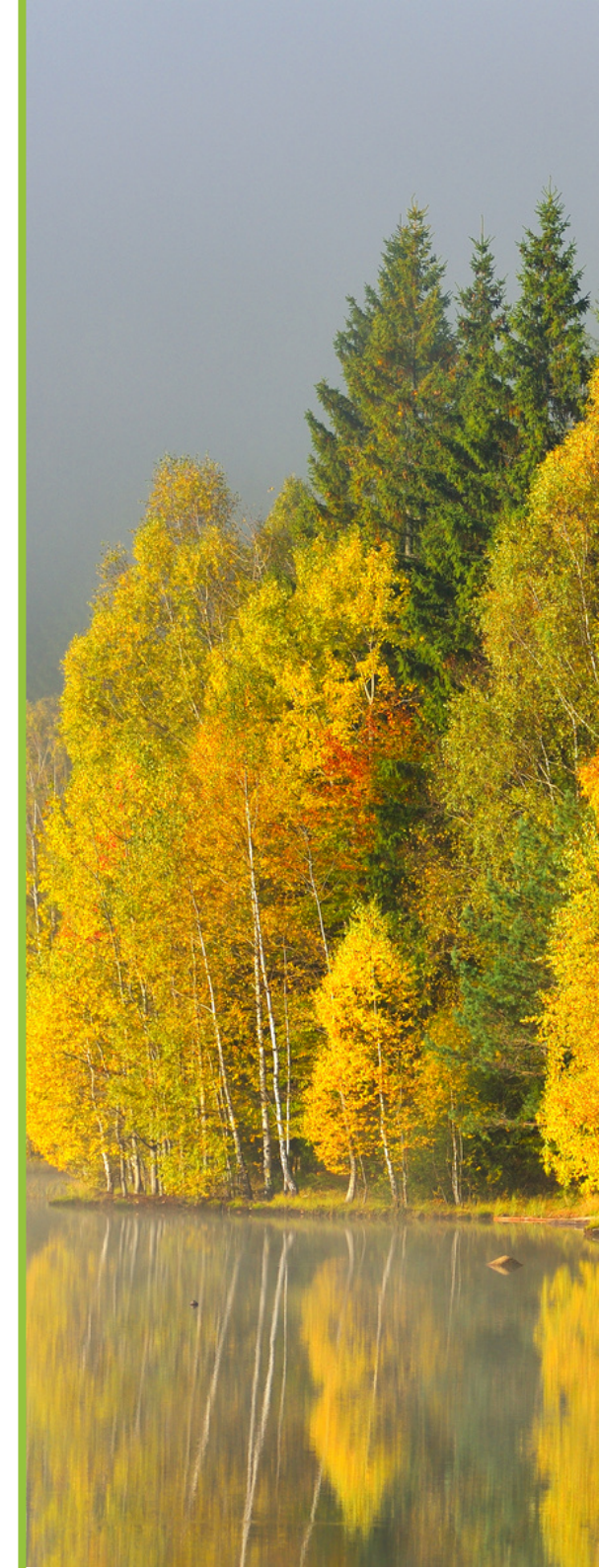


Results cont'd...

The charity intends to ramp up its marketing strategy, including the implementation of social media advertising. This new way of reporting data allows for more efficient and reactive analysis in using digital marketing channels and campaigns like this that can rapidly change.

The services team are also now able to benchmark their data to allow strategic planning and decision making for the future. For example, a core objective is to track how soon pancreatic cancer patients get in touch with the charity following diagnosis. This metric wasn't included in the monthly reports before. So, to access this, it required going into the backend of the CRM system, exporting the data to Excel and analysing when needed. Now, it's a fundamental KPI being tracked within the new reporting dashboard.

Having this new way of reporting data at a more granular level in the services team not only has enabled more useful visualisations to be shared organisation-wide, improved time efficiency and allowed more informed benchmarking and strategy, but it's also changed operational processes for the better, alleviating pressure on the data team and providing the services team with more focused resources.

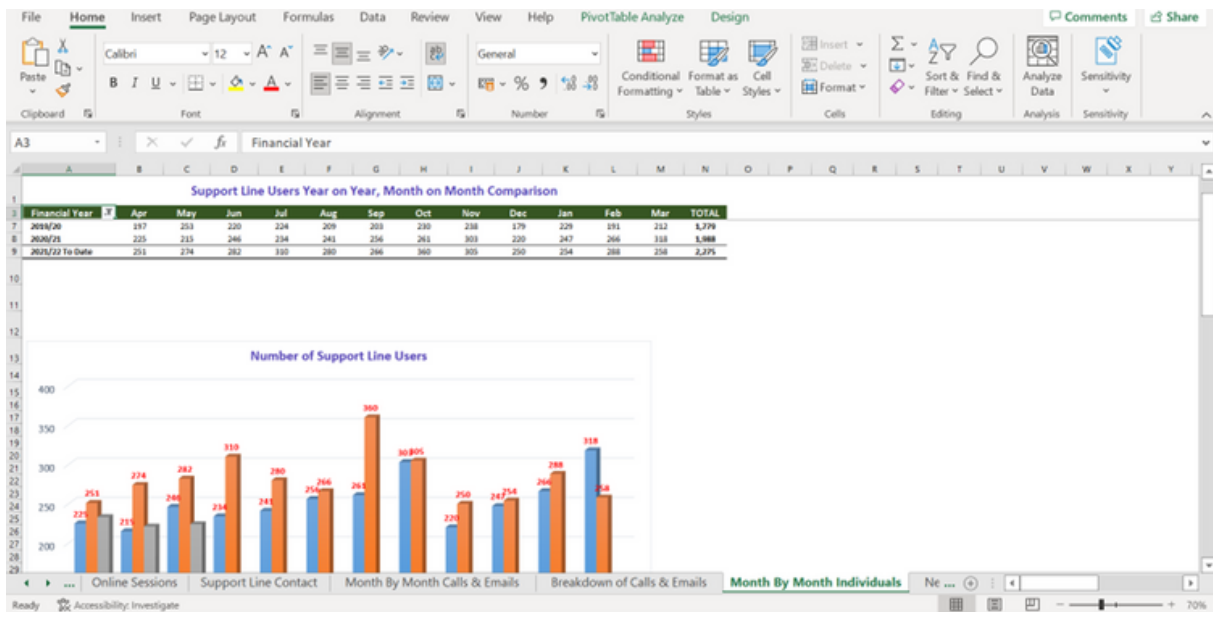




Results cont'd...

Before - Excel tables and charts

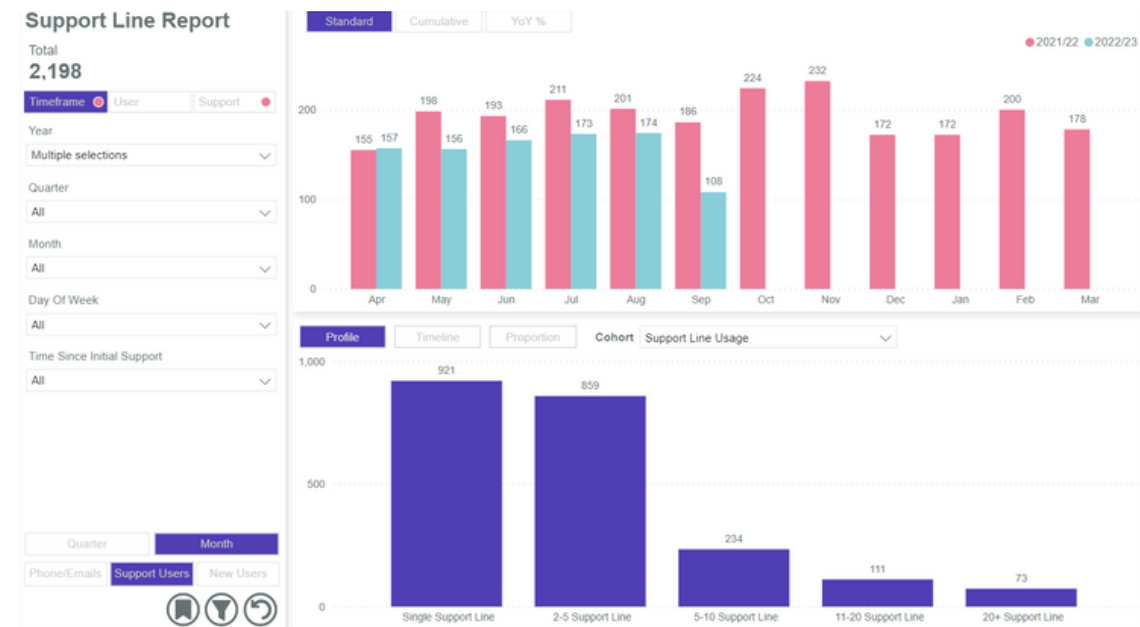
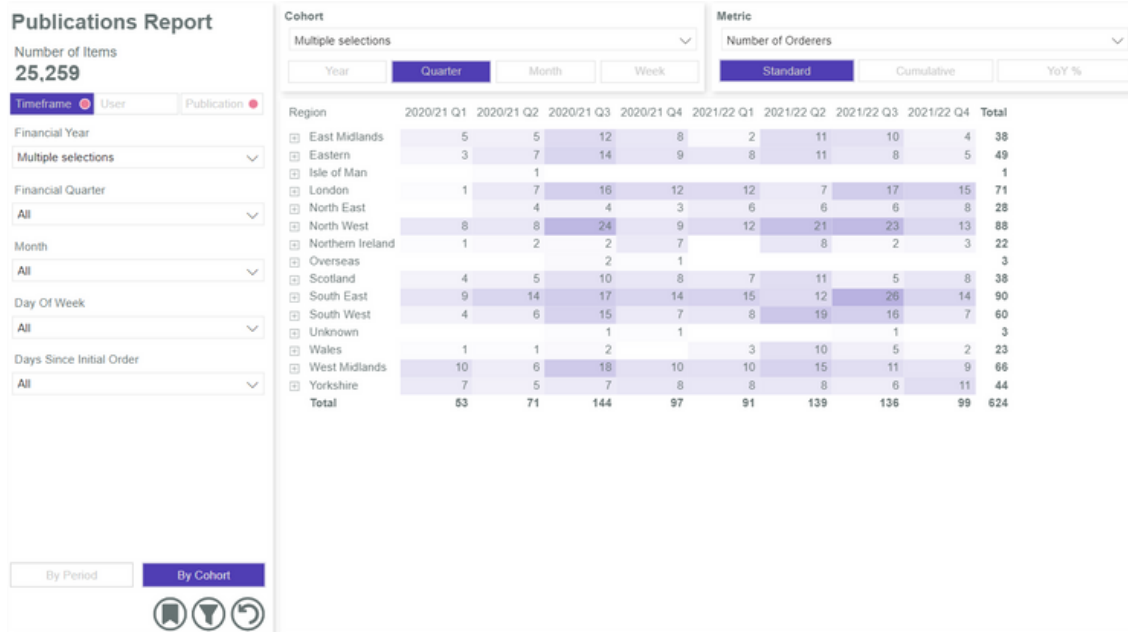
	Qtr 1			Qtr 1 Total	Qtr 2			Qtr 2 Total	Qtr 3			Qtr 3 Total	Qtr 4			Qtr 4 Total
	Apr	May	Jun		Jul	Aug	Sep		Oct	Nov	Dec		Jan	Feb	Mar	
HP Publications Ordered	1,025	1,940	1,895	4,860	0	0	0	0	0	0	0	0	0	0	0	
Info. User Publications Ordered	167	187	129	483	0	0	0	0	0	0	0	0	0	0	0	
Total No. Publications Ordered	1,192	2,127	2,024	5,343	0	0	0	0	0	0	0	0	0	0	0	
No. People Supported via Support Line	233	221	224	561	0	0	0	0	0	0	0	0	0	0	0	
No. of People Supported via Online Sessions	17	19	51	87	0	0	0	0	0	0	0	0	0	0	0	
HP Attendee Count	147	0	0	147	0	0	0	0	0	0	0	0	0	0	0	





Results cont'd...

After - Power BI interactive, visual reports



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