

# TURBOCHARGE YOUR REPORTING WITH CUTTING EDGE AUTOMATION



Mary Curry, KS&R



Benjamin Rietti, E-Tabs



# WHAT WE'LL LOOK AT TODAY



## 01 THE KS&R STORY

A case study

## 02 AUTOMATION IN ACTION

Demonstrating the technology

## 03 LEVERAGING MORE

Innovative ways of using automation further

## 04 THE STRATEGIC BENEFITS

What Automation can do for your business

# Dynamic Wisdom Empowering Better Decisions

- **Top 50 U.S. Market Research & Data Analytics Firm**  
Recognized by AMA for our excellence and consistency.
- **Global Reach: 179+ Countries**  
We scale insights to meet the needs of global enterprises.
- **5,000+ Impactful Projects | 5M+ Surveys Administered**  
Broad experience with depth and precision.
- **Expertise Across Core Industries**  
Technology, Healthcare, Retail, Transportation & more.
- **Trusted by 150+ Fortune 1000 Clients**  
Longstanding partnerships rooted in measurable value.
- **Founded in 1983 | 100+ Employees Nationwide**  
Delivering research with continuity, trust, and innovation.



# Healthcare

Our Healthcare Industry Team has **decades of experience in the healthcare space**; developing and sharing insights with clients, partnering with them to elevate and activate insights throughout their organizations.

Our expertise and best-in-class methods **enables us to serve as partners to our clients**, seamlessly integrating our team throughout the healthcare ecosystem, in addition to various markets and product lifecycles.

With a focus in select key treatment territories, medical devices, pharmaceuticals, hospital administration, and pharmacy insights; our goal is to help bring the best value propositions to market for patients and providers by **giving our clients the insights needed to feel confident in their decisions**.



We are often conducting research with **multiple stakeholders** for a **more comprehensive market view** whether it be hospital administrators and physicians or patients and pharmacists or everybody involved in the care / treatment of a patient.



## The Need

Clients needed **faster, richer insights from monthly KPI trackers**, without burning out the team.



## The Solution

Automating **repetitive reporting tasks** using scalable tools like E-Tabs.





## Realized Outcomes

Quicker turnaround, deeper insights,  
**reduced manual hours**, and a re-energized team.



## Key Learnings

Practical takeaways to **scale automation** smarter in future reports.

# Our Clients Needed Faster, Deeper, Smarter Reporting

We were tasked with **solving time and insight depth challenges** on high-pressure KPI trackers.

The Challenges	What Clients Expected
Tight Timelines	Faster read-outs—especially for executive meetings tied to KPI shifts
Shallow Insights	Go beyond monthly metrics to uncover meaningful trends
Repetitive Processes	Eliminate rework and inefficiencies to keep the team focused on value-add



# Data Collection Complications

- Targeting healthcare specialists **extended the timelines**
- Additional time in the field was to meet quality and quota standards
- KS&R was **unable to shorten data collection period**





# Excessive Overtime and Team Burn Out


- Complex surveys and tight post-collection deadlines **led to overtime**
- KS&R staff consistently **worked beyond working hours**
- Several team members **experienced near burn-out**



# Monthly reporting adaptations

- Monthly ad hoc questions added **complexity to the reporting**
- Teams **increasingly focused on driving insights**, not just KPI's
- **Chart structures evolved regularly** to adapt to shifting client needs





*We couldn't  
shorten data  
collection, so we  
had to transform  
what came after.*



# The Solution...



# E-Tabs Enterprise

We are able to build automation **inside of PowerPoint** that will populate charts, tables, titles, footnotes, callouts with data from our banner books.

- ✓ **No limit** on the number of items that can be automated on the slide
- ✓ Uses our KS&R standard banner book output, **no extra manipulation required**
- ✓ Allows for **calculations and cross-competitor stat testing** that does not exist in the banner book
- ✓ Updated/refreshed inside of PowerPoint. Charts are **native PowerPoint charts**, so they are easy to manipulate if needed.



# Our Recipe for Success

**Step 1:** Use E-Tabs experts to establish the automation set-up

**Step 2:** Utilize our license to maintain and run reports

**Result:** This combination ensures that we do not need to be experts, just proficient at the basics



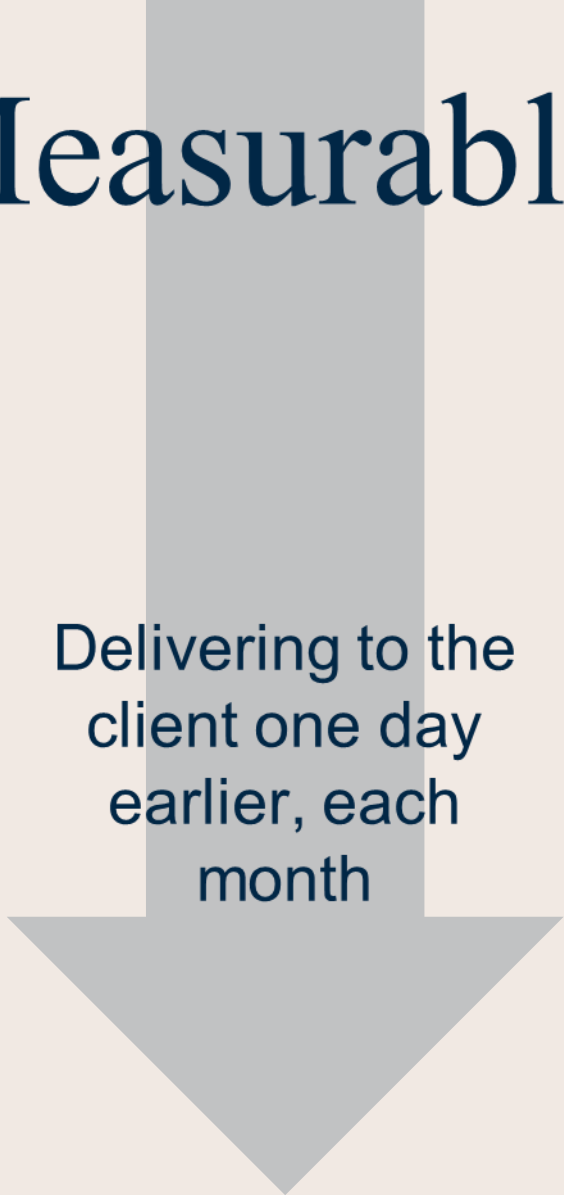


# Our Recipe for Success


- Appoint a platform owner
- Prioritize repeatable work
- Don't over-automate
- Train for automation opportunities




# Measurable Results



Delivering to the  
client one day  
earlier, each  
month



Reduced KS&R  
resources needed  
to populate from 16  
working days to just  
3 working days  
**That's an 80% time  
saving**



Drove additional  
revenue for KS&R

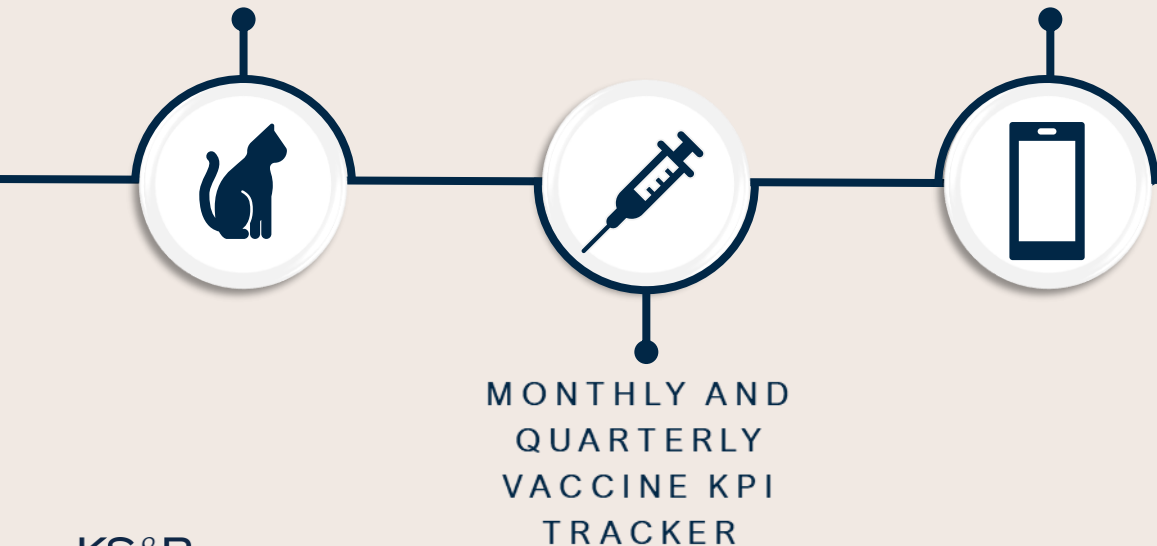


# Broader Adoption at KS&R

In addition to the original project, we have **integrated E-Tabs** in as part of the process, **several teams at KS&R have turned to E-Tabs.**

VETERINARIAN /  
PET OWNER  
QUARTERLY  
TRACKER

MONTHLY  
TELECOMMUNICATIONS  
TRACKER



# Results that mattered the most

**Uncovered deeper insights** every month, insights that drive business.

**Improved teamwork-life balance**, reducing burn-out risk during reporting.

The team is making a **more strategic impact** for all our clients.





A dark, moody photograph of chess pieces on a board, with the text overlaid in the center. The pieces are arranged in a way that suggests a strategic game in progress. The lighting is low, creating a sense of mystery and focus on the text.

*Automation allows us to  
gain capacity to deliver  
strategic value.*

# ABOUT US



- **Acknowledged MR industry leader** in Data Visualization, Online Dashboards and **Automated Reporting solutions**
- Winner of **numerous MRS/ASC awards** and HM The Queen's Award for Enterprise
- **24-hour** Global **support**

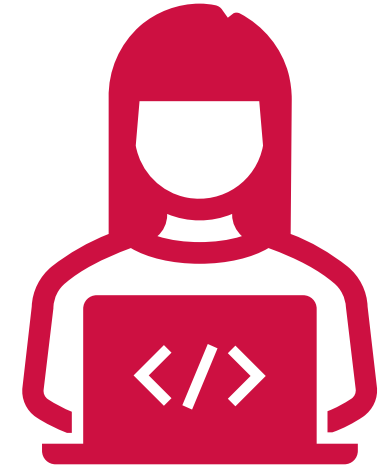


# AUTO CHARTING OR AUTOMATED REPORTING ?



## AUTO CHARTING - INFLEXIBLE!

- **Macros**
- **Images** of charts instead of editable objects
- Online analysis exporting **too simplistic**
- **Limited** on chart types, number of charts per slide
- Very **few options** for handling changing conditions



# AUTO CHARTING OR AUTOMATED REPORTING ?



- Can read in **MR banner tables**, SPSS files
- Can handle **variance** across time or markets
- **Changing Brand** lists, numbers of bands
- Can read in **testing**, or **calculate significance**
- Handle **low-base** conditions
- Automatically **align** brand **logos**, indicators
- **Calculate** differences, trends, **generate** standard analyses



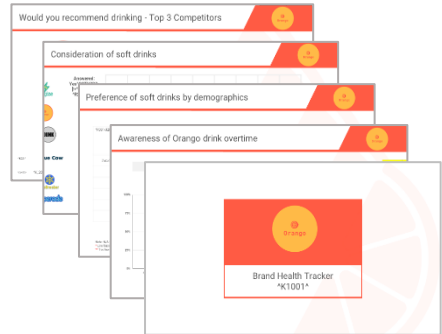
# AUTOMATION DESIGNED FOR MARKET RESEARCH!



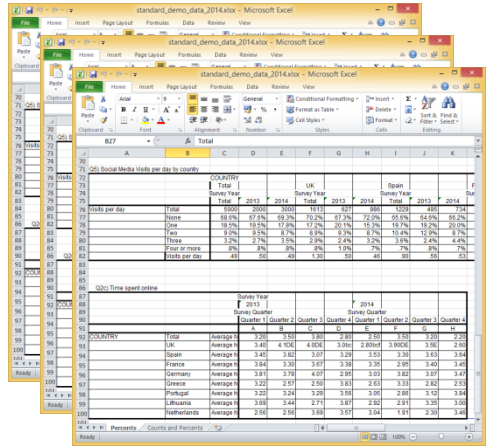
**“NOW YOU’RE TALKING!”**  
**“SO MUCH MORE DETAIL IS POSSIBLE**  
**THAN JUST SETTling FOR**  
**AUTO-CHARTED REPORTS.”**



# FLEXIBLE PARADIGM FOR OPTIMAL AUTOMATION

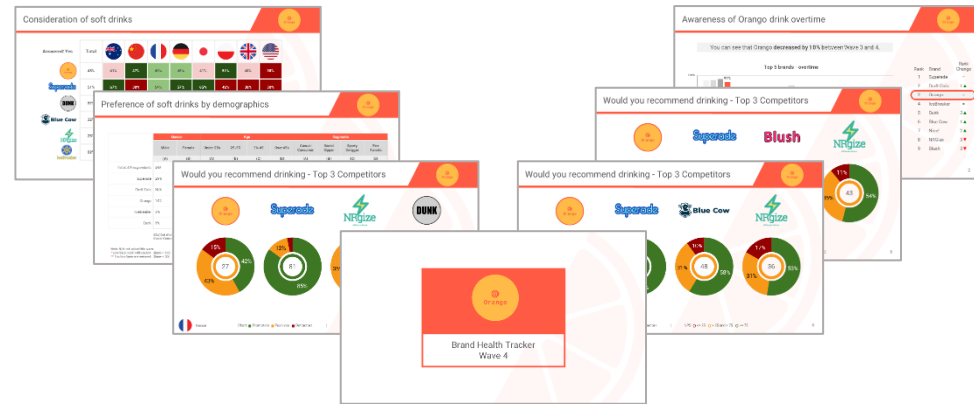


» Data pulled into your own existing template «



Google Slides

Google Sheets



Google Sheets



Power BI

Tableau

SQL

Project Files

Project Info

Project Folder

C:\E-Tabs Enterprise projects\Orango demo\

Data Files

Drinks.xlsx

Sample Data.xlsx

Template File

Orango BHT - PowerPoint - Template.pptx

Translation File

Output File

Orango BHT - Wave 4.pptx

Other Files

Recent Projects

Powerpoint - Orango Demo (C:\E-Tabs Enterprise projects\Orango demo\Powerpoint - Orango Demo.epg)

Latest News

Release Notes

Click to Display Table of Contents

News Feed

E-Tabs

FOLLOW US

in

Generate reports on our E-Cloud!

With Enterprise Cloud, you can generate automated, editable PowerPoint/Google Slides outputs from your online dashboards (including PowerBI and Tableau). See the video below:

2:26

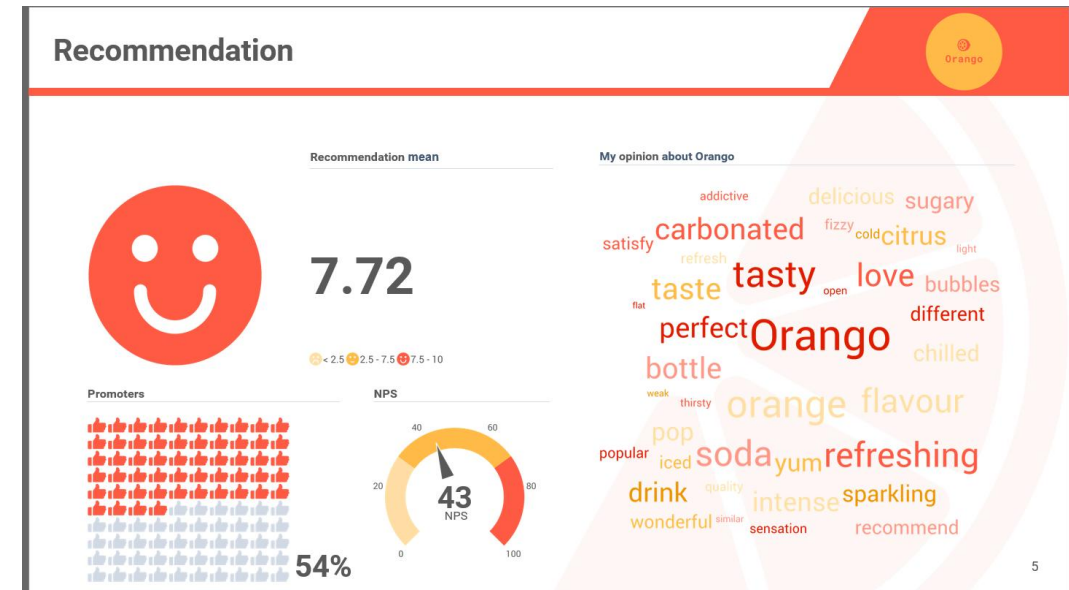
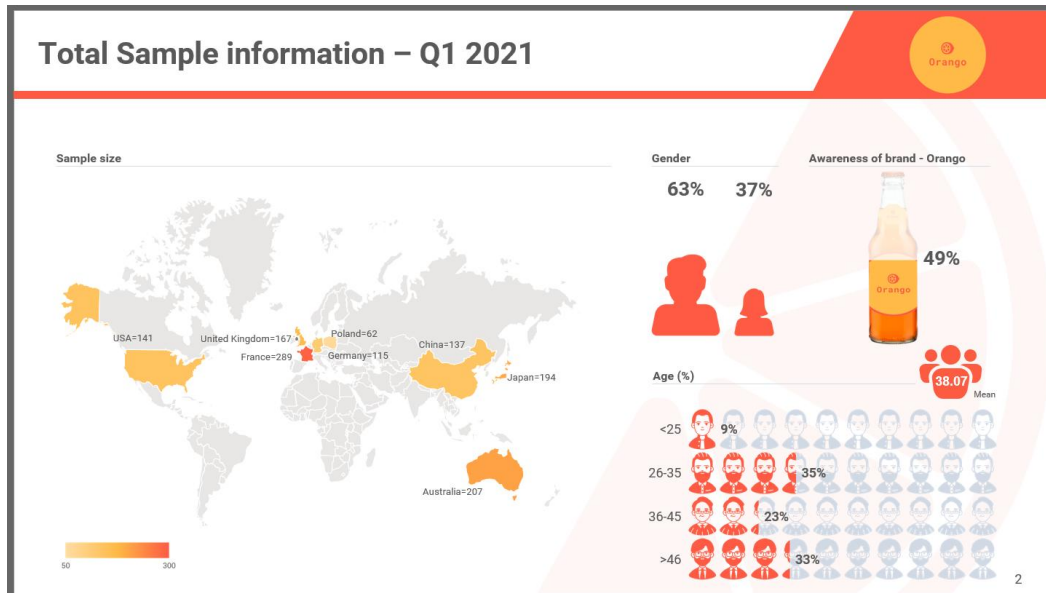
Book a demo [HERE](#)

You can keep up to date with new features by clicking the icons below:

# NOT JUST YOUR STANDARD CHARTS....



## DATA-DRIVEN INFOGRAPHICS TOO



# TYPES OF PROJECTS



## TRACKERS



## MULTI COUNTRY



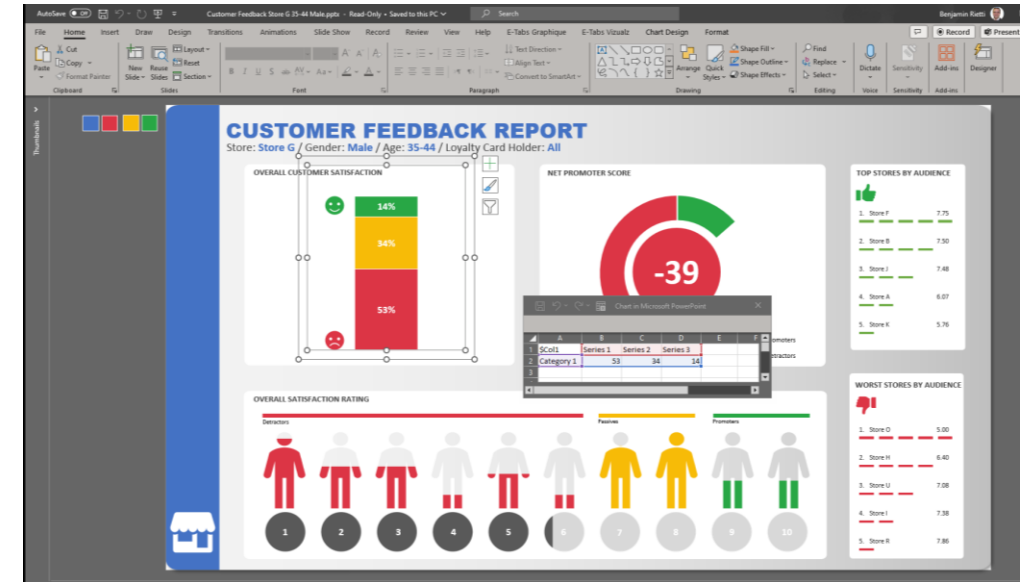
## SEGMENTATION



## CX SAT



# LEVERAGING MORE FROM AUTOMATION

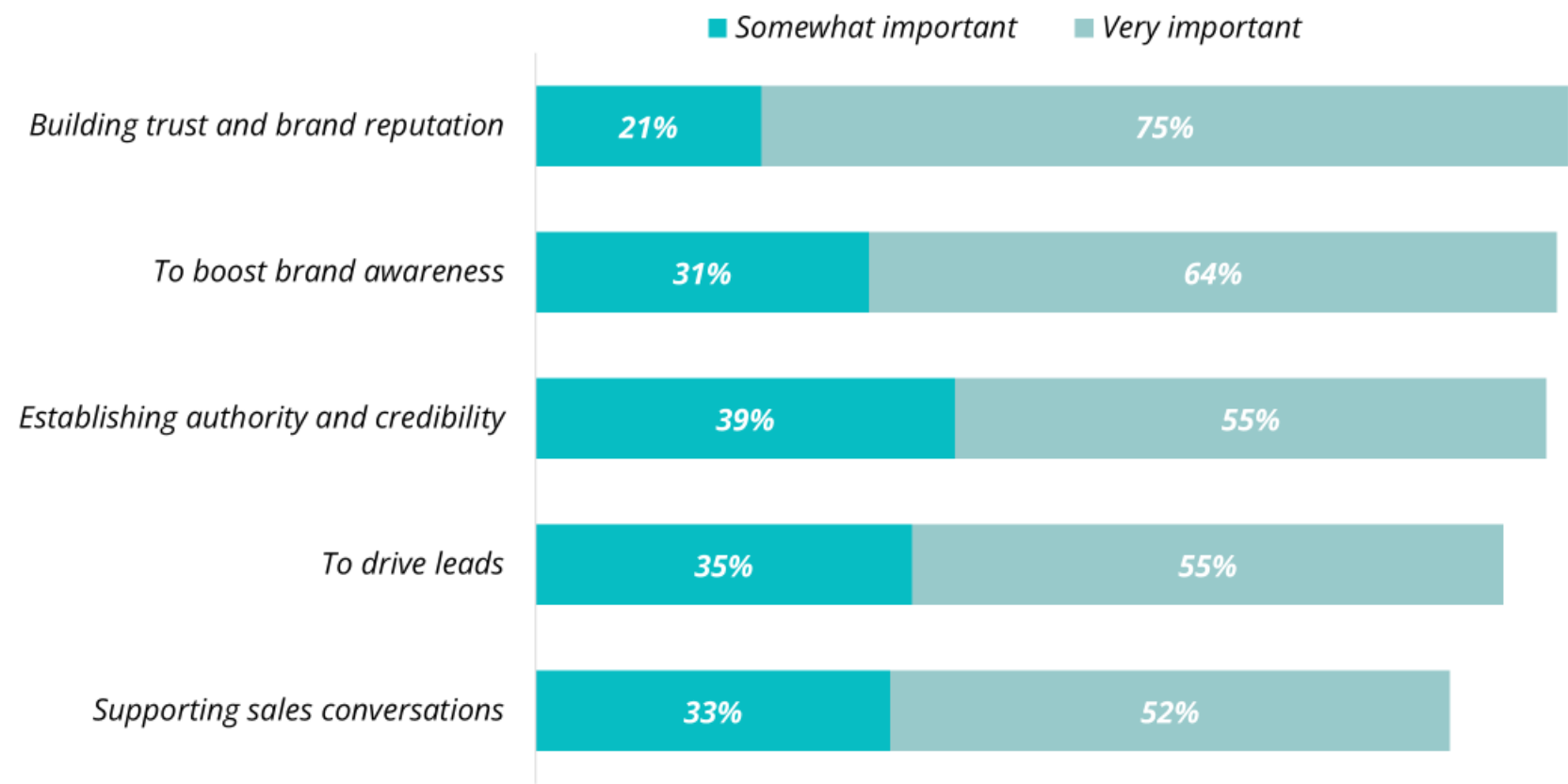




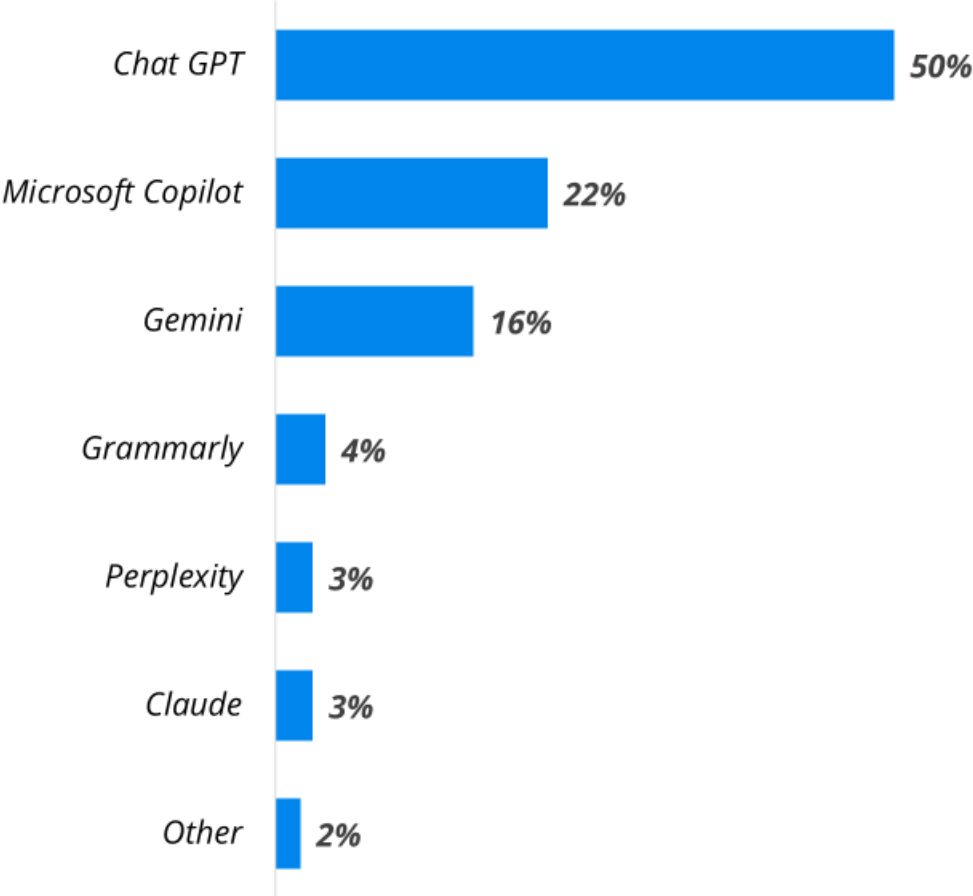
# AI ANALYSIS - AUTOMATED



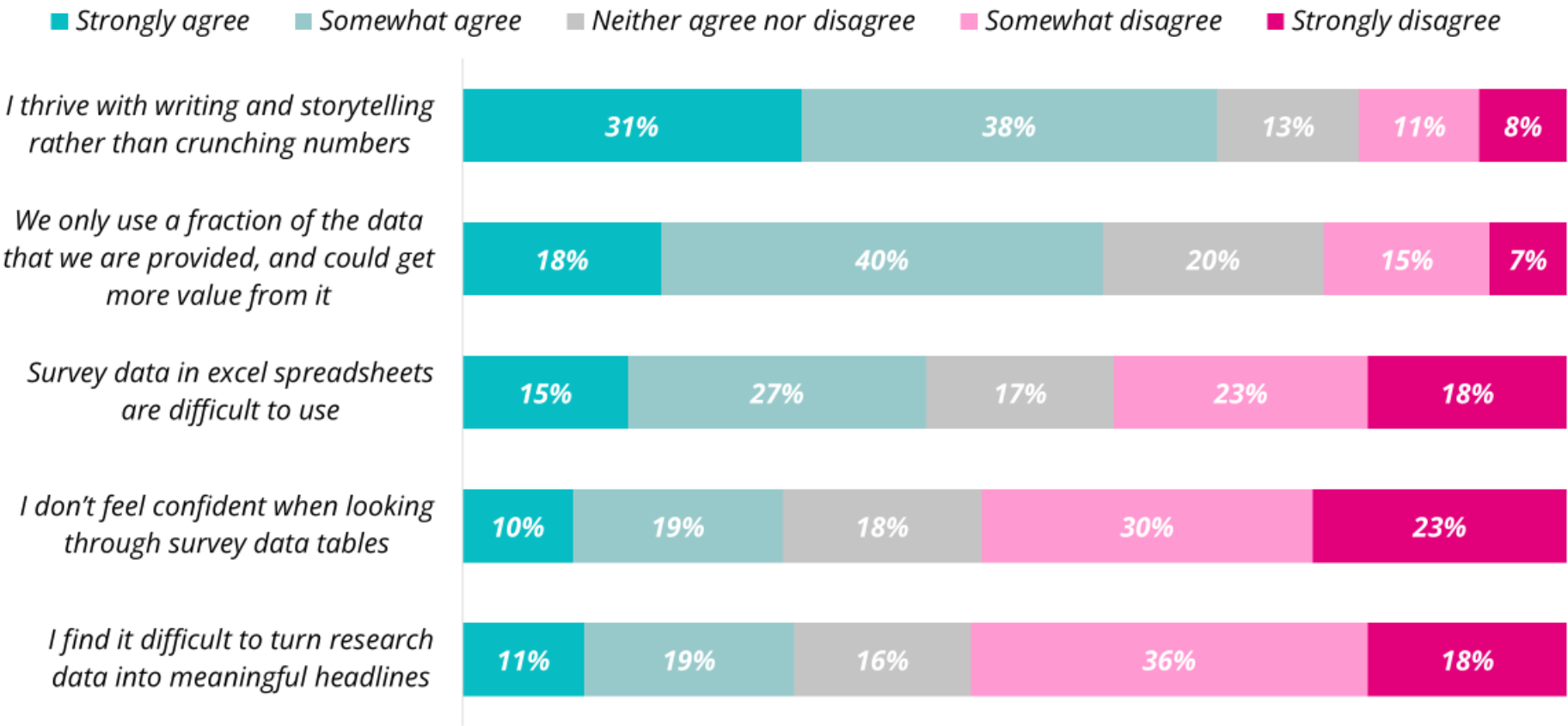
Nearly all marketers see research-led thought leadership as vital for boosting brand awareness (96%), building trust and brand reputation (96%) alongside authority and credibility (94%).



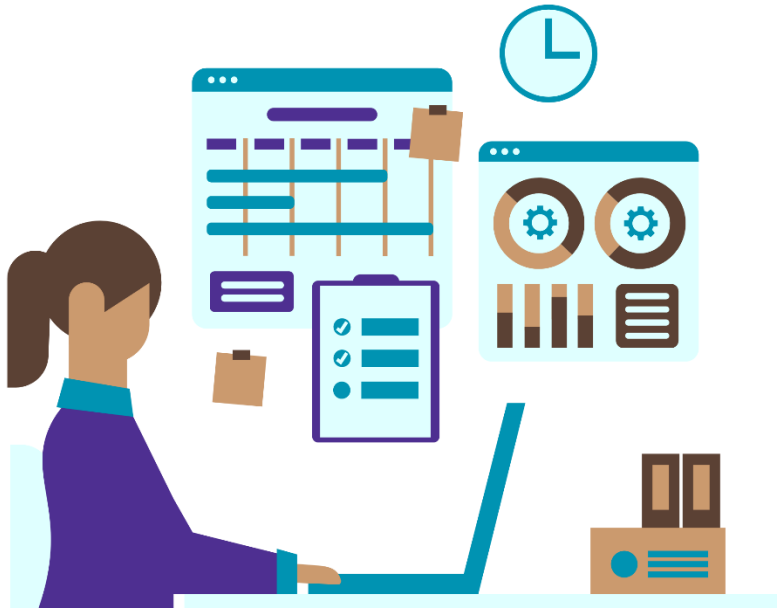
Chat GPT is the most used AI tool for data analysis, with 50% of respondents using it, followed by 22% using Microsoft Copilot.



68% of respondents agree they thrive with writing and storytelling, while 58% feel they only use a fraction of the data provided.



# HOW TO ENGAGE WITH E-TABS FOR AUTOMATION



## E-TABS ENTERPRISE SOFTWARE SUBSCRIPTION

- We provide the software, training and support
- Automate everything – Google, PowerPoint, Excel +



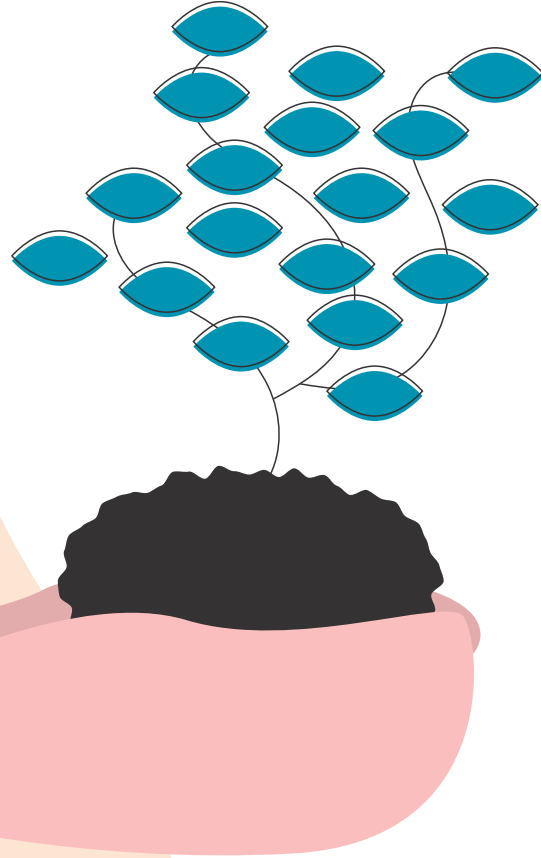
# HOW TO ENGAGE WITH E-TABS FOR AUTOMATION



## E-TABS BUREAU SERVICE CAN AUTOMATE FOR YOU



- Give us your template, tables and instructions
- Any project –PowerPoint, Google Slides, Excel +
- We set-up and then update each wave/market



## STRATEGY FOR GROWTH



- Creates opportunity for **added value**
- Creates time for more **insights**
- Creates options for **more revenue**
- Builds stronger client **relationship**
- Increased employee **satisfaction**

# ANY QUESTIONS?



Mary Curry, KS&R  
mcurry@ksrinc.com



Benjamin Rietti, E-Tabs  
b.rietti@e-tabs.com