



## How ValueXPA reduced Board Report preparation efforts by about 90% for a Leading Middle East Business Hub

---

Client is a Middle-East based Government-backed business hub offering a wide range of business licensing and company formation solutions for startups, SMEs, and industries, providing services like UAE business licenses, residence visas, and customizable facilities, aiming to streamline business setup processes while adhering to local regulations.

### The Problem We Solved

The finance division of the client was experiencing difficulties on account of significant manual efforts for preparing of their periodical management and board reports. Business transactions ran into high volumes each month and was also diverse in nature. This was due to the nature of upfront cash collection for single year or multi-year subscriptions, revenue booking was also complex leading to several manual adjustments and errors.

Therefore, for accurate revenue reporting to management, the process necessitated tagging each transaction record with different labels which was used for reporting. The manual process of copying and pasting data into PowerPoint presentations consumed non-value added efforts each week.

## What We Did

ValueXPA developed a sophisticated solution that uses Visual Basic for Applications (VBA) to automate the data tagging and report generation processes in order to address the client's challenges and improve efficiency in the recurring report preparation process. We started by carefully examining the client's current workflow to pinpoint any major problems and inefficiencies. We began by thoroughly analysing the client's existing workflow and identifying key pain points and inefficiencies. Our team then designed a custom VBA script tailored to the client's specific needs. This script automated the tagging process, categorizing each record based on rule-based criteria such as due dates and transaction record dates.

The automation was robust, ensuring that all records were accurately labelled without manual intervention.

Next, we integrated this automated tagging system with Excel to generate comprehensive data tables and visualizations. These tables and charts provided clear, actionable insights and were dynamically updated based on the tagged data. The final step involved using VBA to automate the placement of these tables and visual elements into PowerPoint presentations. Our solution streamlined the entire report generation process by ensuring that every visual was precisely positioned in the appropriate slide.

### Automation of Data Tagging and Report Generation

Created a custom VBA script to automate data tagging based on due dates and transaction record dates, ensuring accurate labeling without manual intervention.

### Integration with Excel for Dynamic Data Tables and Visualizations

Created dynamic Excel tables and charts for clear, actionable insights based on tagged data.

### Automated Placement into PowerPoint Presentations

Automated data tables and visual elements in PowerPoint using VBA, ensuring accurate placement and streamlining report generation.



We kept in close contact with the client's finance team during the implementation process to make sure the solution satisfied their needs and to quickly address any issues. Additionally, we gave the client's employees thorough training so they would be prepared to operate the new system effectively.

## How We Created an Impact

The client's finance division was significantly impacted by the deployment of our VBA-powered automation. Almost ninety percent of the time was saved when the report generation time was cut down from more than twenty hours to just two hours per month. This significant time saving allowed the finance team to redirect their efforts towards more strategic and value-added activities, enhancing overall productivity.

Furthermore, the elimination of manual data entry greatly improved the accuracy of the reports. The automated process reduced the risk of human error, ensuring that the financial data presented to the Board, and CEO was both reliable and precise. This increased accuracy bolstered the confidence of the executive team in their financial reports, facilitating more informed decision-making.

The automation also provided the client with a scalable solution. As the business continues to grow, the system can handle increased data volumes without additional manual effort, ensuring sustained efficiency gains over time.

ValueXPA's solution not only resolved the immediate inefficiencies faced by the client's finance division but also laid the groundwork for long-term improvements in operational efficiency and strategic focus. By leveraging advanced automation technologies, we enabled the client to navigate complex reporting requirements with ease, positioning them for continued success in their business endeavours.

For more information on business partnering please connect with us!

Write to us at [info@valuexpa.com](mailto:info@valuexpa.com)