# Report Review

#### Change Management committee

#### Xoserve

Author: Charlie Haley Meeting Date: 11/09/19

### Purpose of this Paper

1. Provide a summary of findings to CHMC
2. Provide a set of options, including a recommendation for how we move forward
3. Seek approval of recommended option

### Report Review Summary

KPMG have carried out the formal review of all reporting, outputs and extracts which are provided to customers as a current state of play; considering the purpose; frequency and distribution. The review has allowed Xoserve to identify areas for improvement, where we can make the reporting services to customers more efficient.

What are the key recommendations provided by KPMG?

* **Utilisation of Data Visualisation tools**
	+ Utilising data visualisation tools such as DDP will make data much more consumable for customers
	+ Data will be made available to customers much faster than the current manual methods of reporting, such as data extracts sent via email
	+ The requirement for email reporting will be reduced, and therefore manual effort saved
	+ Enhances the self service capability which Xoserve are currently developing i.e. Shipper MI Dashboards
* **Automation of Reporting and API Usage**
	+ Utilising APIs will allow customers to have almost instant access to their data
	+ The APIs will talk directly to customers systems, reducing manual effort on the customer side
	+ The requirement for email reporting will be reduced, and therefore some reporting could potentially be decommissioned
	+ Leverages and enhances Xoserve’s API capability, which is currently being used by a number of services i.e. Quantities API, Enquiry API, FindMySupplier
* **Consolidation of Business Objects (Business Objects) Reporting**
	+ Combining existing BO reports will reduce the number of reports issued to customers, which will drive and improve the efficiency of our reporting processes
	+ Data will be more consumable for customers because there will be a single source of truth, rather than a number of reports delivering a similar message
* **Enhanced Security/Password Protection**
	+ Automating Xoserve’s reporting will reduce risk of data breach. However where manual reporting is used, password protecting the files will ensure that customer data is delivered more securely

### Option 1 (Recommended)

What is the recommended option and why?

* Expedite DDP by adding additional resource to the DDP product development team
	+ The product team will build, test and implement new data products utilising the DDP, as well as work with customers to educate them in using the new data products
* Mobilise an analysis team
	+ KPMG have initially identified circa. 70 reports which are currently emailed to customers, which potentially provision data which is available via the DDP. The team will perform detailed analysis on all of our reports, targeting the above in particular, and educate customers in using DDP, to reduce the number of reports delivered to customers via email
	+ The analysis team will work with customers to understand why certain reports are required, and what they’re being used for. This will help us improve the reporting services we provide by adding value, and ensuring the reports are always aligned to the purpose

What are the benefits?

* An additional 2 AGILE Sprints
	+ 2 additional sprints will result in more product backlog items being delivered via DDP, faster.
* Reduced risk and improved data protection
	+ If manual email reports are decommissioned as a result of the analysis, the reduction in number of outputs will mean there will be less risk in our reporting
* Avoids duplication/Single source of truth
	+ A reduction in number of data outputs will result in less data discrepancies between reports
* Maximise usage of DDP
	+ Utilising data visualisation tools such as DDP will make data much more consumable for customers
* Resource/Efficiency Savings
	+ Utilising the self service capabilities of DDP will result in a reduction in resource used for reporting. Therefore, more resource will be available to utilise for other things



What is the cost?

* CHMC is asked to approve a value of **£192,000k**
	+ The above value includes 4 FTE for a period of 4 months

### Option 2

What is the option and why?

* Mobilise an analysis team
	+ KPMG have initially identified circa. 70 reports which are currently emailed to customers, which potentially provision data which is available via the DDP. The team will perform detailed analysis on all of our reports, targeting the above in particular, and educate customers in using DDP, to reduce the number of reports delivered to customers via email
	+ The analysis team will work with customers to understand why the reports are required, and what they’re being used for. This will help us improve the reporting services we provide by adding value, ensuring future solutions (i.e. DDP) are always aligned to the purpose

What are the benefits?

* Reduced risk and improved data protection
	+ If manual email reports are decommissioned as a result of the analysis, the reduction in number of outputs will mean there will be less risk in our reporting
* Avoids duplication/Single source of truth
	+ A reduction in number of data outputs will result in less data discrepancies between reports
* Maximise usage of DDP
	+ Utilising data visualisation tools such as DDP will make data much more consumable for customers
* Resource/Efficiency Savings
	+ Utilising the self service capabilities of DDP will result in a reduction in resource used for reporting. Therefore, more resource will be available to utilise for other things

What is the cost?

* CHMC is asked to approve a value of **£96,000k**
	+ The above value includes 2 FTE for a period of 4 months

### Option 3

What is the option and why?

* Do nothing option

What are the benefits?

* No additional benefits

What is the cost?

* Zero cost