

CASE STUDY

Sanborn Head and Associates Adds Dynamic Reports

CHALLENGES



- Outdated accounting type reports for stakeholders, no management style reports
- Unable to understand drivers or show comparative data
- Could not add metrics or produce statistical trends

SOLUTION

Struggling with creating reports that all stakeholders could understand, Sanborn Head and Associates was in search of a way to produce more than standard reports. While their team was able to pull the data efficiently, they were unable to present the data to the board of directors in a format that was easier to read and more informative. Not only was the finance team limited on the types of reports they could create and present, they were unable to show rolling data or illustrate trends for analysis. In order to present and distribute data more effectively Sanborn Head and Associates added BizInsight for Deltek Vision in 2016.

Stakeholders now have access to view the numbers displayed in a more meaningful way which includes related metrics and corresponding charts. “With BizInsight it feels like we are light years ahead of where we were” said, Mary Beth Dopfer, Vice President of Finance. Sanborn Head and Associates is now producing boardroom executive level management reports including actual versus budget, trend analysis and more.

“BizInsight made me look like a hero!”

- **Mary Beth Dopfer**, Vice President of Finance, Sanborn Head & Associates, Inc.

RESULTS



- Significant reduction in the amount of time to produce and distribute reports
- Reports provide more data than before with very little effort (balance sheet and income data on same worksheet / report)
- Able to view and analyze trends for quicker real-time business decisions