Rollstack x relevatehealth®

HCP & EHR Reporting at Scale with AI and Automation

How Relevate Health Automates HCP & EHR Reporting Using Rollstack

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Executive summary

Relevate Health, a leader in omnichannel marketing for the healthcare and pharmaceutical sectors, faced challenges in managing complex reporting requirements for healthcare professionals (HCPs) and electronic health records (EHRs). These challenges included producing monthly client reporting in PowerPoint, manual data integration from Tableau, and customization demands that consumed valuable time and resources.

To address these inefficiencies, Relevate Health implemented Rollstack, an AI data platform that automates reporting by integrating Tableau and Power BI data directly into pre-designed PowerPoint templates. This solution significantly reduced manual workload, cutting report preparation time by 75% and enabling the team to produce 60 client decks in under 4 hours—a task that previously took 4-5 days. Rollstack also streamlined customization processes, allowing for standardized yet client-specific deliverables at scale.

Relevate Health's customer success team has shifted focus from repetitive tasks to crafting strategic insights and impactful storytelling, enhancing client satisfaction and operational efficiency. This case exemplifies how AI and automation enable faster, data-driven decision-making in healthcare and pharmaceutical industries.

Introduction

Healthcare stands as one of the sectors with the highest data reporting needs, with data informing every step of the healthcare journey. Reporting needs span across all departments: research, global development, IOPS, commercial, and G&A. Business units report at various cadences: weekly, monthly, quarterly, and yearly.

Despite significant investments in data infrastructure, a notable disconnect persists between the tools used to analyze data (the Business Intelligence and Infrastructure layer) and where insights are ultimately consumed and utilized by decision-makers (the "consumption" layer): PowerPoint presentations and documents.

As a result, **highly-paid data analysts often spend 20-30% of their time on manual tasks like copy-pasting charts from Excel, screenshotting business intelligence tools, or manually plugging data** to create the decks and documents needed for informed decision-making across the organization.

Thousands of decks are created and shared inside organizations every year, spanning all functions from data and analytics, customer success, finance, business operations, to marketing. The time spent on data and document preparation comes at the cost of deriving meaningful insights, driving client relationships, and making timely strategic and operational decisions. **Today, a staggering 85% of the preparation time is spent on data wrangling, leaving only 15% for analysis and insight generation.**

AI is now turning that around!

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About Relevate Health

Relevate Health is an omnichannel marketing agency specializing in the healthcare and pharmaceutical sectors. They focus on creating data-driven, customer-centric brand experiences across multiple channels to enhance engagement with healthcare professionals (HCPs) and maximize return on investment (ROI).

Services and solutions

+ **Omnichannel Strategy:** Relevate Health develops unified brand experiences that deliver personalized content to target audiences at the right time and place.
+ **Data-Driven Personalization:** Utilizing artificial intelligence and machine learning, they tailor content and campaigns to individual HCPs, optimizing engagement and outcomes.
+ **Peer-to-Peer Engagement:** Their solutions include national broadcasts and on-demand platforms that facilitate peer-to-peer interactions among HCPs, enhancing the dissemination of information and best practices.
+ **EHR Integration:** They provide solutions that incorporate financial information and patient communications directly into electronic health records (EHRs), improving the patient and provider experience at the point of care.

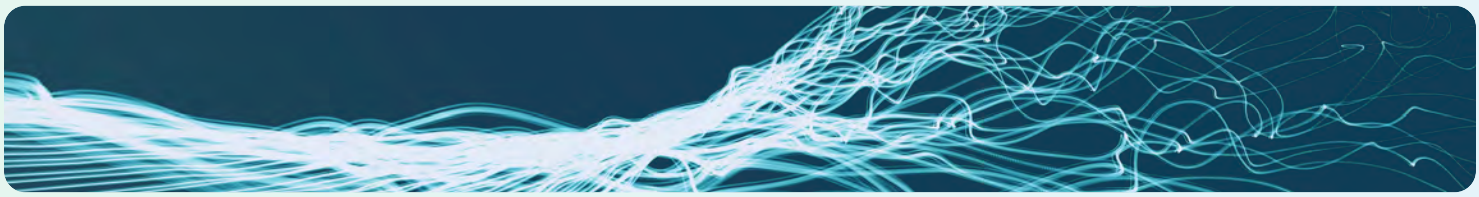
Relevate's Data Reporting Challenges

The challenges

Relevate Health's reporting needs were extensive and complex, encompassing EHR and HCP reporting for clients. This required managing a high volume of reports while balancing the need for both standardization and personalized customization.

+ **High Volume of Client Reports:** The team was tasked with creating more than 50 PowerPoint decks each month for client presentations.
+ **Manual Processes:** Generating these decks required manually copying and pasting data and visualizations from Tableau into PowerPoint. This repetitive process consumed valuable time and introduced the potential for errors.
+ **Customization Requirements:** Clients often had specific needs, requiring certain visualizations to be removed or modified in their reports. Handling these variations manually added an extra layer of complexity and increased the time burden.

These challenges created a bottleneck, preventing the team from dedicating time to more strategic activities, such as storytelling and deriving actionable insights from the data.



The desired situation

Scott Clair, PhD who leads Decision Science and Analytics at Relevate Health and his team identified key objectives to improve their reporting process:

+ **Automating Deck Creation:** The team sought a solution that could automate the generation of PowerPoint decks directly from Tableau data, eliminating the need for manual intervention.
+ **Refocusing Efforts on Insights:** By reducing time spent on repetitive tasks, the team wanted to prioritize crafting impactful narratives and strategic insights for clients.
+ **Streamlining Customization:** They aimed to simplify the process of tailoring reports for different clients, ensuring that decks were polished and customized while minimizing the associated workload.

Data stack

Data transformation	BI tool	Presentation tool		Reports generation
dbt	Tableau	PowerPoint	Word	Rollstack

Key results

- Using Rollstack, Relevate Health's team was able to cut down the time needed to prepare client reporting by **75%.**
- The team now generates **60 client decks** in less than **4 hours**—something that would have previously taken them **4-5 days of work per month.**
- They created standardized templates while still being able to personalize reporting for each client's needs.
- Scaled client reporting across **21 CS team members**, enabling consistent, high-quality deliverables.

-75%

the time needed to prepare client reporting

60

client decks in less than 4 hours

Standardized Templates

for each client's needs

21

CS team members

> Rollstack has been the perfect solution for us to exponentially improve our report efficiency. As our reporting needs have grown, the need for quicker turn arounds was critical to letting our team focus on providing actionable insights to our clients instead of being PowerPoint jockeys.

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Scott Clair
VP Decision Science and Analytics

Scott Clair is a data and decision science leader with extensive experience in data strategy, governance, and business intelligence. He has worked with Fortune 500 companies in the Pharmaceutical, Medical Device, and Healthcare industries, focusing on helping organizations optimize their data and analytics processes.

Prior to his role as a VP Decision Science and Analytics at Relevate Health, Scott has held leadership roles, including VP of Data Science at Measurement Mojo and Director of Market Insights and Analytics at Relationship Marketing, Inc. (RMi). His work includes developing data-driven strategies for improving marketing outcomes, campaign performance, and operational efficiency.

The solution

Relevate Health implemented Rollstack to automate their client reporting process end-to-end. Rollstack integrates with Tableau, enabling the team to pull visualizations and data directly into pre-designed PowerPoint templates. Using Rollstack's AI, customization became effortless, allowing team members to tailor content for specific client needs without disrupting workflows.

By automating repetitive tasks, Rollstack allowed Relevate Health to refocus their efforts on delivering value to clients through storytelling and strategic insights. The solution empowered their CS teams to scale reporting capabilities without sacrificing quality or precision.

Conclusion

The healthcare and pharmaceutical industries are evolving rapidly, with increasing demand for actionable insights, personalized experiences, and data-driven decisions. Automation and AI are revolutionizing reporting, enabling teams to move beyond manual tasks to focus on storytelling, strategy, and patient outcomes.

These technologies empower faster, more informed decision-making, enhance client satisfaction through tailored insights, and enable scalable, efficient operations. By breaking down silos and democratizing data access, they pave the way for innovation in EHR integration, HCP engagement, and beyond.

As the industry embraces automation, the potential to drive meaningful change in healthcare delivery and strategy has never been greater, shaping a future that is smarter, faster, and more impactful.

Gain a competitive advantage by becoming data-informed

Founded and led by an experienced team of enterprise data leaders, Rollstack is on a mission to transform the world of analytics, reporting, and data-first decision making. By creating an intelligent automation layer between data sources and presentation platforms, Rollstack empowers organizations to automate their reporting processes, eliminate inefficiencies, and drive data-driven decision-making.

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What customers say about Rollstack

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Rollstack has transformed our client reporting process. We've gone from spending weeks on manual data compilation to generating personalized, high-quality reports in just hours. This efficiency gain allows our team to focus more on strategic client interactions and less on data wrangling.

Clayton Maike
Vice President, Strategy & Growth Enablement, Glytec

SoFi

Rollstack has been a great addition to our toolkit, significantly reducing time spent on slide creation and allowing greater focus on strategic work. Even after just a few months, the time savings are undeniable.

Michael McElvaney
Strategic Finance Director, SoFi

PROMACH

Rollstack is playing a key role in our journey to becoming a truly data-driven company, making the process smooth and easy with its user-friendly interface and automation features.

Joe Rodriguez
Senior Director, Marketing Technology, ProMach

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Automate healthcare storytelling with data and AI

www.Rollstack.com

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Schedule a discovery call →

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