

TRANSFORMING BOARD REPORTING WITH ACCESS COMMUNITY HEALTH



AT A GLANCE

Access Community Health supports communities across New Zealand with home-based care.

By moving from spreadsheets to Join, the finance team has streamlined multi entity reporting and now produces clear, polished board packs in minutes.

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For us, Join’s Excel Add-in bridges the gap between automation and flexibility. It gives us the live data of an FP&A tool, but in Excel where we already work.

– Warrick Jackson, Executive Director – Strategy and Finance



CHALLENGE

Access Community Health relied on manual Excel reporting that was slow to update, hard to keep consistent across entities and time consuming to share with senior leaders. As reporting needs grew, spreadsheets became too difficult to maintain and too slow for the organisation.

SOLUTION

With Join, Access Community Health rebuilt its board reporting process, moving to consolidated multi entity reporting and automated pack creation, with polished board packs produced in minutes. The **Microsoft Certified Excel Add-In** brings live Join data straight into their spreadsheets, removing manual updates and speeding up the workflow. Dashboards surface key trends, collaboration with senior leaders is smoother, and the team now delivers clear, consistent reporting without the heavy spreadsheet work.



MICROSOFT EXCEL ADD-IN



LIVE DASHBOARDS



JOIN INTELLIGENCE AI

BENEFITS

- 01** **Faster, polished report packs**
 Board packs produced in minutes rather than hours, with clean layouts and automated updates that keep everything consistent.
- 02** **Clearer insights for leadership**
 Dashboards and consolidated reports give the executive team a clearer view of performance across entities.
- 03** **Less manual work**
 The finance team now spends time interpreting results, improving processes and supporting decision-making.