

Microsoft Excel Consultancy

Automation, integration, and reporting with custom workbooks and add-ins.

We are experts in building software assets that empower your team to deliver more.

Our unique “**no new apps**” approach simplifies adoption and avoids risky migrations.

Implementing **connectivity, automation, and governance** is simpler when existing workflows are not disrupted.

We know that **low cost of ownership** (cost of iteration) pays dividends and is critically important for enterprise solutions. That’s why we focus on:

- proven design patterns (like the factory or reactive strategy methods), and
- highly configurable architectures.

Knowledge tasks like information gathering and decision-making are **de-risked** with system integrations and **artificial intelligence**.

“A real game-changer. Now, our Geochemists can do actual interpretation. They didn’t earn PhDs to manipulate and format data all day.

And it’s nice to know that iterating the build is simple.”

Team

Consultants with MBAs and executive experience at Accenture or KPMG, our team has decades of experience.

We know that intelligent solutions must be nimble and simple. That’s why our intuitive, no-friction designs overdeliver by extending Microsoft apps to connect with others.

Results



Shell: 92% reduced effort preparing geochemistry reports.



Regional Bank: 100% governance via intelligent risk assessment.



Univ. of California: 3+ million medical samples inventoried in custom LIMS.



Harley-Davidson: 100+ users connected thru custom ERP.



Dell: 8+ years relying on data solution.



Nathan Drapela

Specialist Geosciences,
Data Consultant

Shell – Houston, TX



Case Studies, Highlight

Shell: Geochemistry data report automation.

Solution Size: 

Increased capacity for critical interpretation by PhDs. Bulk geochemistry (regulatory BSEE) reports are 92% automated and produced. 100% compliance.

Standardized and dynamic SQL queries (for customer Oracle database) are staged and conditionally executed based on user selections. Form accepts constraints like units of measure, datasets to exclude, and list of samples.

Results are merged, cleaned, and reconciled using engineering and regulatory constraints. Units of measurement are converted.

The BSEE regulatory report is produced as a Power BI dashboard, and an Excel workbook containing between ~5 and ~15 worksheets. Usability features like a snapshot of data inventory present, dataset navigation, and predefined filters are included in the interactive reports.

Middle Market Lender: Interconnected Excel apps.

Solution Size: 

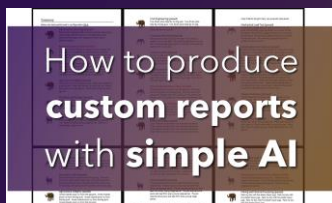
Portfolio of Excel products servicing billions of dollars transformed with: guaranteed process validation, interconnectivity, data accuracy, and workflow efficiency while arming teams with a highly configurable and familiar environment.

Workflows within each product are assisted with input validation, calculation checks, and countless alerts on business logic requirements. Conditional visibility of modules, sheets, and input forms further simplify the complex processes (of underwriting or validating eligibility, for example).

All data is warehoused outside the Excel products themselves, enabling benefits of a cloud app (or more accurately, intranet app) experience. That is, all data is queried into each Excel product. All changes are synced back with the data source.

A dedicated database (designed and maintained by Docmo) stores most information. Other information is stored in peripheral business applications including Salesforce, WSO, and a customer-built database.

Business-critical products built for the Corporate Finance and Operations groups: Underwriting Model, Closing Model, Hypothetical Pipeline Eligibility, Cash Forecast, Cash Management, Audit Confirmation Letter automation, Funding Settlement Letter automation.



See a simple example of our AI-powered **intelligent report automation solution.**
(Deployable as web or desktop.)

Case Studies, More

Harley-Davidson: Sales platform.

Solution Size: 

Complete system for deal activity, sales performance, commissions, and payroll delivers 100% guaranteed deal compliance, clear insight to deal status and profitability. Real-time intelligence on deal, store, and salesperson performance.

Performance and profitability analyses are presented in real-time via master dashboard and dozens of detailed reports. By deal, by day, MTD, YTD, and leaderboard views are all featured.

All deals produced by hundreds of salespeople across several states are connected through this product. Every deal's profit, from front end to back end, as well as implications to the cash account and payroll are tracked.

By deal, real-time communication between accounting and sales (including flags, conversation logging, status tracking and more) enables salespeople to act intelligently at all stages.

Encrypted cloud database warehouses all information and authenticates users with role-based permissions using a traditional username and password credentialing system.

All departments (sales, service, finance, accounting, and payroll) have dedicated input forms, workflows, reports, performance leaderboards. An executive dashboard (Power BI) yields MTD performance for all departments across all stores.

Commissions rates are calculated uniquely for each salesperson and results are integrated directly with ADP.

\$600MM Mortgage Fund: Loan servicing solution.

Solution Size: 

A custom software asset servicing mortgage loans yields low cost of ownership, and full control over functionality. On-prem database avoids security costs and concerns.

A complete Loan Servicing Software (LSS) product, calculates exact mortgage payments down to the penny, compiles monthly bills, and prepares payoff orders upon request. Loan performance and risk metrics are presented via dashboard.

SES Group: Bid estimation for construction.

Solution Size: 

Increased nimblity and reliability on bid-day. Data-driven confidence. Custom cloud-backed bid/quote estimating system supporting packages of cost codes.

Projects are estimated by CSI cost codes either individually or grouped into infinitely customizable bid packages and work packages.



Simplified worksheets provide a familiar experience, and complex workflows are intuitive and fully validated as assisted by modern sidepanels reacting to real-time data and business requirements.

New project bid estimates are mocked up in minutes by browsing packages used in past projects. Package comparison feature highlights discrepancies between packages as they are iterated between project.

A very unique Excel product, this solution stores all bid data in the cloud while the user experience and all interaction remain in a simple Excel workbook. It is fully functional in offline mode (work done offline is queued and synced when reconnecting to the internet).

Regional Bank: Company-wide risk platform.

Solution Size: 

Complete risk assessment and approval system delivers 100% industry code compliance, a completely unique experience for each user, and a permanent audit trail for every initiative time-calibrated against system changes.

New initiatives are registered, profiled, assessed, and approved thru this unified, cloud-backed system. An encrypted cloud database serves information to authenticated users (with no logins) with appropriate role-based permissions.

300+ users are presented a fully guided workflow experience through a dynamic questionnaire serving up to 100+ questions which are contextually included or excluded.

A custom visualization of the risk profile matrix simply displays risk information.

All configuration changes (such as risk weightage, or question responses available) are version controlled and preserved forever. Past risk assessments can be reproduced exactly as the environment was upon initial approval (potentially several years ago).

Approval process usher users and leaders through a collaborative experience. Notifications are sent in-product and externally via email.

University of California: Laboratory inventory.

Solution Size: 

Visual LIMS managing inventory of 3MM+ medical samples yields a simplified workflow, increased productivity, and avoids training burden of bulky software.

Complete inventory for the lab is stored on-prem with a redundant nightly backup up system.

Visual display of the laboratory's unique trays (10x10, 9x9, and wedge) provides drag-and-drop inventory relocation experience.

Barcode scanner integration supports the sample identification workflow. Shipping module supports reporting, tracking, and checking samples in and out.

Dell: Engineering test result management.

Solution Size: ■■

Electrical test results management and reporting system delivers increased workflow efficiency, data integrity, and compliance thru intelligently designed data system.

Dozens of distinct electrical engineering tests are performed by the lab. Their complexities wildly vary. All results are warehoused and managed in this system.

A standardized format designed to accommodate the results of each test delivers a consistent experience for reliable work (despite varying datatypes and dataset formats), and simple onboarding.

A logarithmic regression machine learning (ML) model and standardized simple Boolean conditions is proposed to assist the engineers in their analysis by helping to detect noise and anomalies in the result datasets.

The results are catalogued and summarized in a pdf report output.

Tarsco: Engineering quote proposals.

Solution Size: ■■

Quote and proposal generation for industrial fuel tank construction yields faster proposals, 100% governance of SoW verbiage, and 100% compliance.

Customer-built vba form accepts scope requirements and feeds a quoting schedule (collaboratively-built) throughout several Excel sheets.

A library of ~100 Word docs maintains all scope and proposal verbiage. Docmo intelligently in/excludes content from this library to compose the final proposal in seconds.

Proposals are revision controlled, automatically organized in the customer filesystem, and logged.

Nemko: Engineering report packages.

Solution Size: ■■

Document package production using 300+ templates and a database of products yields 4x increased output of existing team, better insights, and quality guarantee.

Docmo intelligently reconciles scope constraints against a vast database of products and certifications.

A package of ~3-12 documents is produced (Word, text, and pdf files); files are organized into a preset folder structure with subdirectories named according to internal customer processes. The package is compressed (zipped) and archived.

Alerts on expiring certifications (and upcoming document packages to produce) are granted.

Updates to templates, country requirements, and products are all made by our customer within the Microsoft environment.



Local Attorney: Excel models to pdf.

Solution Size: ■

Grant applications 86% automated with complex business logic and dozens of custom charts yields faster grant applications, confidence in complete content, and a more reliable workflow experience.

Docmo (licensed product) curates content from an expansive customer-made Excel file. Unique business logic is considered to determine what content, verbiage, charts, addendums, etc. to include. A pdf with ~10-80+ pages is dynamically produced.

Importantly, users can edit longform text directly in the produced document and *reproduce* it (as content in the Excel file iterates) without losing one-time modifications inside the already-produced document.