

Defendify – no more manual reports, please.

3 – slide taster (redacted) • automation + service design

THE PAIN

Monthly customer reporting was a manual scramble:

- copy/paste across sources, tables, and charts
- formatting + brand polish done by hand
- QA cycles to catch inconsistencies and mistakes
- high effort → high stress → easy to ship errors

Design problem:

Not “make a prettier report.” Make the reporting system calmer, repeatable, and trustworthy.

The fix

Turn structured exports into a consistent deliverable (with fewer humans in the loop)

THE MACHINE

1) Export

Structured data export
(CSV/JSON) from product +
internal sources.

2) Compose

Populate a Word template via
content controls and tables.

3) Refresh

Update embedded charts and
validate key sections.

4) Publish

Export a clean PDF deliverable
for customer-facing use.

My role (design):

- verified the data → document mapping and guardrails
- designed the template strategy for repeatable output (automation)
- added checks that reduce rework and surprises

The result

Less toil. Fewer errors. A report system that scales.

OUTCOME

- dramatically reduced manual assembly and formatting work
- improved consistency across reports (tables, charts, narrative)
- reduced error risk through repeatable steps + validation
- enabled faster turnaround without heroics

Why it matters:

Reporting is part of the product. When it's reliable, teams move faster and customers trust what they see.

Walkthrough: Available on request (full automation is internal / contains customer data).