
Are Your Reporting Tools Getting the Job Done?



To better understand your business and make meaningful improvements, it's essential to create insightful, accurate reports. But reports are only as good as the capabilities and limitations of your reporting solutions. Are your reporting tools helping you make business decisions or are they holding you back?

These 16 questions—broken into five crucial categories—will help you determine if your reporting tools are helping or hurting your efforts to better understand your business. For each category, check off the questions that you can answer with a yes. Categories with few or no check marks indicate a weakness in your current reporting solution.

Customisation: One-size-fits-all or modify as needed? *Default report settings weren't built with your unique data needs in mind. How much freedom do you have to make your reports your own?*

- Can you build ad-hoc reports?** Are you limited to a set of pre-built reports or can you create custom reports as the need arises?
- Can you compare multiple data sets in the same report?** How many fields can you select in the reports you build? Can you simultaneously compare multiple types of metrics or does each type require its own report?
- Can you set up your own parameters?** Are you choosing the appropriate dimensions for your reports or is your solution doing it for you?
- Can you customise the labels and fields you use in your reports?** Can you rename labels and fields to make them specific to your team or are you stuck with default settings?

TOTAL: ____ / 4

Access: Closed-circuit or open-book? *Maximise the persuasive power of your reports by ensuring the right people can access the data they need to make meaningful improvements.*

- Are your reports shareable?** How easy is it to send reports to the people who will benefit from them?
- Can others use this tool?** Is your solution limited to one user or can teammates and employees run reports?

TOTAL: ____ / 2

Presentation: Eyesore or a sight for sore eyes? *Presentation matters. Ugly or confusing reports increase the likelihood that decision-makers won't read them.*

- Does the quality of your reports' presentation match the quality of the data within?** Does your reporting solution's interface look professional? Would you be able to confidently present your data to someone outside of your organisation?
- Are your reports aesthetically pleasing?** Are your reports an assault on the eyes? Don't let bad presentation undercut the meaning and impact of your data.
- Can you illustrate your data visually?** Can you present your data with charts and graphs? Illustrated representations of data are more persuasive than raw numbers alone.

TOTAL: ____ / 3

Versatility: Toaster or all-purpose oven? *Can your reporting solution accomplish everything you need it to do? Seek out a reporting tool that's equipped to handle whatever reporting demand that may arise.*

- Can you break down data?** How deep can you dig into your data? Surface results can raise more questions than they answer.
- Is your reporting solution comprehensive?** Can your reporting solution do everything you need it to do with all the data you need it to access?
- Do your reports utilise real-time data?** Are you using the most recent data available in your reports or are you stuck measuring data after the fact?

TOTAL: ____ / 3

Ease of Use: Road to nowhere or road to success? *Your reporting solution must be reliable and easy to use. Any obstacles that prevent you from running reports increase the likelihood they'll get pushed aside for other pressing tasks instead.*

- How long does it take you to run a report?** Do you get results instantly or do you have to wait to download the report and view it later? The more steps you're required to complete, the less likely you'll run your reports consistently.
- Can you schedule your reports in advance?** When you're busy, out of the office, or on holiday, can you rely on your solution to produce the necessary reports?
- Does your reporting solution provider offer customer support?** If you have a question or technical problem, can you reach a human being to help you?
- Are your data sources integrated with your reporting solution?** Does your reporting tool have access to all of the data you need it to analyse? Does it require manual entry or is the process automatic?

TOTAL: ____ / 4

TOTAL SCORE:

Customisation: One-size-fits-all or modify as needed?	_____ / 4
Access: Closed-circuit or open-book?	_____ / 2
Presentation: Eyesore or a sight for sore eyes?	_____ / 3
Versatility: Toaster or all-purpose oven?	_____ / 3
Ease of Use: Road to nowhere or road to success?	_____ / 4

TOTAL: _____ / 16

Your reporting needs are unique to you. Where does your reporting solution succeed? What are its shortcomings? Which functions are most crucial to your reporting needs? If your reporting solution falls short where it matters, consider adopting a new reporting suite to better deliver, faster, clearer, deeper, more persuasive reports and make more informed decisions about your business.

