



43 Tips

To Tame Reporting
Monsters



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Having a clear, fully-integrated reporting process at your organization is extremely important, regardless of whether you use report generation software or a spreadsheet application like Excel.

However, as you may know (far too well), having a stellar reporting process can be difficult because of certain people in your organization. These individuals, who are often well-meaning, make the reporting process frustrating and painful for those they work with.

You may be nodding your head furiously at this point, recalling someone you work with now (or have in the past). There are *plenty* of individuals that make this process difficult for various reasons, but we've identified and named the primary culprits.

Meet The “Reporting Monsters”





Within the pages of this ebook, you'll be introduced to these monsters, all of whom make reporting a nightmare—but for different reasons.

Don't worry—we're not just going to introduce you to these reporting fiends and leave you to fend for yourself. Instead, we've asked the reporting superheroes here at ClearPoint (plus a few from other companies we've named below) to swoop in and save the day! Our superheroes, who have mastered the art of reporting, have provided 43 tips and ideas about how to fix the reporting issues caused by each of these monsters.

What are you waiting for? Dive in! If you take note of these pointers, we're confident you'll improve the value of your reports and the efficiency of your processes.

(While you're at it, you may want to send your headache-inducing co-worker this ebook. He or she may learn a thing or two!)





meet Complex Chris

HIDES OUT IN: BROKEN PROCESSES.

THRIVES ON: COMPLEX EXCEL FORMULAS,
BROKEN POWERPOINT LINKS.

PRIMARY WEAKNESS: TRANSPARENCY.

Complex Chris revels in convolution and confusion. He has always used his “trusty” Excel and PowerPoint for reporting, and is set on using these programs. To Chris, complications are just part of the job! He figures that there isn’t another way to handle these reporting issues, and that complex processes are to be expected. Chris doesn’t see a way to boil his processes down any further. In his eyes, there are many steps that must be taken to achieve a particular outcome, and he doesn’t understand how to make that process any shorter.

Chris believes the complexity makes him look smarter. He feels needed because the process is so complex that only he can manage it. Chris’ co-workers depend on him, because they don’t understand what he does (and he loves being the only one who can explain it).

Have you dealt with someone like Complex Chris? Our reporting superheroes have, and they agree that Chris is a big problem-causer in reporting. Here is a list of suggestions that can help you deal with people in your department who are like him.

Tip #1:

First and foremost, define your reporting process.

Everyone in your organization should be on the same page before the reporting process begins. You should have a policy document (which can be simple or complex, depending on your organization). The document should define roles, responsibilities, the reporting calendar, and rules for evaluation and analysis. Having a defined reporting structure fights complexity because it simplifies the process for everyone.



Tip #2:

Simplify, simplify, simplify.

Your reporting process doesn't need to be overly complex. At Rent Like A Champion, we now have two numbers we look at each and every week—that's it. There are tons of metrics we could try to keep tabs on, but we've found that boiling it down to the two most simple and meaningful numbers is best. Measuring those things forces us to concentrate on them, and has been incredibly helpful for us as a company. *Mike Doyle, CEO of [Rent Like A Champion](#)*

See Also: [How To Lead Effective Strategy Review Meetings](#)

Tip #3:

Automate your reporting process.

The more time you spend collating and bringing together reports, the less time you can spend properly analyzing them and defining actions. Invest in customized reporting and report-building automation that does the job for you, so you can spend more time doing what will make a difference. *Joel Lumsden, Head of SEO at Attacat*

Hint:

You should be spending 5 times more time on your strategic decisions than on managing your scorecard process. Time yourself and see how you are doing.



Tip #4:

Perform regular quality checks.

This is especially important if you're using Excel or Google Sheets instead of a dedicated business intelligence system. Many companies find that existing spreadsheet reporting sheets accrue errors introduced to them over time, often by well-meaning employees who make changes to some areas of the sheet. The longer the sheet has been around, the more likely it is that errors have been introduced, so take the time to ensure that all the numbers are true. *Shawn Veltman, Strategic Lead of Peritas Solutions*



Tip #5:

Send out report pre-reads.

As we learn in this article, surprises are great for birthdays—but not for reporting. Distributing your slides or data early will help prepare your team for what they will be seeing. Trust me—upper management isn't going to want to hear about a significant drop in leads or a missed earnings reports in front of other executives (without being prepared for how to handle the situation).

Tip #6:

Define what matters before you define measurements.

When it comes to reporting, if you want to be terrific, you've got to be specific. Be specific about what your customers care about and how you can measure it. Do not provide reporting or measurement on something just because it's easy to measure. *Tom Cooper, Principal Geek at BrightHill Group*

Tip #7:

Maintain consistency in your reporting.

The more consistent, the better. With consistency, you can assess changes and fluctuations over time. When reporting is consistent and predictable, it is easier to rely on for business decisions. *Deborah Sweeney, CEO of MyCorporation*



Tip #8:

Have a defined reporting timeline.

You should always set a “data deadline,” and enforce it across all departments. If you allow reports to be turned in late, you are ensuring a frenzied process where everyone is scrambling to gather data. To avoid this recipe for disaster, set simple and strict deadlines, and stick to your guns. Similarly, when you are in the review meetings, be sure that everyone, including Complex Chris, is given the same amount of time to share. Hold him accountable to this—it will make him simplify his complexities to meet the time constraints.



Tip #9:

Take full advantage of exception reporting.

It's often beneficial to have reports that are only designed to draw your attention to significant differences (either positive or negative). Retail store owners, for example, may want to see only stores who generated profits 30% above average for the weekly period, or 20% below. By focusing on these outliers, you can quickly determine where your time is most wisely spent (like trying to figure out what was responsible for the increase in the best stores). *Shawn Veltman, Strategic Lead of Peritas Solutions*

Tip #10:

Only report on things you can impact (or contribute to).

This is the key to the reporting and action cycle: if you can't propose an action to address a metric change, then you have no interest in observing it. (Bear in mind that some organizations will report on things in their overall environment, even if they don't impact the measures directly. For example, the American Diabetes Association needs to measure diabetes rates.)

*Joel Lumsden, Head of SEO
at Attacat*

Tip #11:

Create strategy maps.

A simple description of your strategy will help get Complex Chris on the same page as the rest of his department. Provide Chris with your organization's strategy map, and ask him to describe his department's strategy in the same terms. This will help him fully understand what his department's goals are, and how they link to the enterprise strategy.



Tip #12:

Have a set number of measures.

Determine a total number of measures (like monthly revenue and advertising ROI) that Complex Chris is allowed to use to tell the story of the company strategy. Do not allow more. Chris needs to have a simple way of explaining things to the entire organization. Ensure the measures are approved by the leadership team, so that Chris doesn't create measures no one understands.

Tip #13:

Generate reports directly from one database.

When you keep everything centralized, you don't have to worry about having the wrong numbers (or null formulas). This is nearly impossible to do when you use Excel.

Berrin Sun, Product Marketing at Ragic, Inc.



Tip #14:

Focus on and present key decisions and outcomes.

Have these decisions presented in advance with clear options. That way, the rest of the team can contribute to the decision, but not get bogged down in the details of the operation. These processes can, indeed, be very complex, but it's important to simplify them for reporting's sake. For example, there are a number of steps that go into repaving a road. But in the end, we only care about number of miles repaved in the last three months (outcome) and how we overcame challenges like weather, staffing, and budget (decisions).



Summary

In order to to help Complex Chris mend his broken processes and begin being more transparent, you'll need to:

- Define and simplify your reporting processes.
- Add quality control measures.
- Create common templates for each department.
- Pre-present complex information.
- Focus on the implication of initiatives, not project details.
- Maintain consistency.



meet Doubting Deb

EXCELS IN: MAKING SURE NO DECISIONS EVER GET MADE.

THRIVES ON: QUESTIONING (AND MAKING SURE OTHERS QUESTION) THE NUMBERS, FORMULAS, AND CHARTS.

BIGGEST WEAKNESS: SHE HAS YET TO SEE A NUMBER IN A PRESENTATION SHE AGREES WITH.

Doubting Deb lives in a state of frustration and denial. She thinks that most, if not all, of the numbers presented to her are wrong. Deb often voices her concern that formulas are incorrect, or that the information source shouldn't be trusted. She is particularly tricky to deal with, because her doubts and worries make it difficult for everyone to complete their jobs in a timely fashion. Her

performance often gets off-track, and she drags others down with her.

We're willing to bet that you've dealt with someone like Doubting Deb in your professional career. Our reporting superheroes have, too. Here are some suggestions on how to handle Deb and help her become more confident.

Tip #15:

Be consistent with your reporting structure.

Intricate, difficult-to-read charts are not impressive—they're annoying. No manager wants to spend an inordinate amount of time interpreting a chart. Do your best to present the same fields for all measures to ensure consistency.

Tip #16:

Be open to what the data means—and what it doesn't.

Confusing counting creates confused customers. For example, if your company has successfully installed antivirus software for a customer on 90% of the "targeted machines," they may think that sounds pretty great. That is, until they find out that only 10 of the machines were targeted—leaving 9,991 out of 10,000 of them without antivirus protection. Not only should you focus on gathering data, but you should be able to correctly interpret what it means and fully understand what might be misleading about it. *Tom Cooper, Principal Geek at BrightHill Group*



Tip #17:

Designate an unbiased facilitator.

Assigning someone who is not vested in outcomes—for example, someone from the marketing department might be a good facilitator for a finance or operations discussion. Assign them as a “coach.” The coach will be able to help Doubting Deb (and others) present their information simply and to the point. Be sure to avoid posturing in meetings, because that will ensure that you never move past specific topics with Deb in the room.



Tip #18:

Create consistent and understandable RAG rules.

“Red, Amber, Green” rules can help your team assess and manage high, medium, and low performance, which allow you to focus first on your objectives and goals. These definitions should be clear to everyone for evaluation purposes. For example: Green is on or above plan, amber is below plan (but indicates that we should be back on track by the end of the year with no additional resources), and red is below plan (and indicates that we need to apply additional resources or change the way we are operating in order to fix this). These should be made clear to everyone. Also, you should ensure that the status indicators are not manipulated. 90% can be “green” for some measures and “red” for others, but be sure everyone knows the rules and how they apply. By creating these rules, you should be able to answer, “What are we trying to accomplish and how are we doing?”

Tip #19:

Have the right people attend the meeting.

This is a simple concept, but it is overlooked frequently. If you think you will have questions about a project that you'd like to cover during a meeting, a project manager should be in attendance. Similarly, if you'll be making a decision during a meeting (or need to discuss an important decision for the future), make sure the key people are there. This will help Doubting Deb feel more confident about the numbers and measures discussed.

Tip #20:

Do not allow for changes in measures mid-stream.

Doubting Deb must report on the measures that were agreed upon by the team. In a separate meeting or process, Deb can suggest new measures to replace current ones, but there needs to be a full discussion of why it is better with approval before using it. Stick with the original measures, and allow Deb to create an appendix of additional measures. Then discuss if these additional measures provided value or not (give Deb a chance, but then show if this additional information was helpful).



Tip #21:

Be certain the report holds decision-making value.

If your report just *looks* impressive, but isn't really functionable, understand that it's a "vanity analytic"—and it's useless. When your team looks at a report, they should know within 10 seconds whether everything is performing up to expectations. If it is, then Deb will have a hard time doubting this information. It's often necessary to restructure your reports (especially if they're long-standing) to match the information you really need.

Shawn Veltman, Strategic Lead of Peritas Solutions

Tip #22:

Limit the discussion time for each objective.

If you don't have time for Doubting Deb, then stick to your guns and don't allow extra time. Reward great discussions by praising the teams and individuals that add to the discussion. These measures will help show Deb what efficient teamwork looks like, and encourage her to cooperate with the team next time around.



Tip #23:

Avoid offline manipulation of data.

If you pull data from a system that is not accurate and then have an individual make it accurate, it will cost you in the long-term. Take the time to get your source data accurate. This will help Deb doubt the numbers and measures far less.

Tip #24:

Have one version of the report.

Having one version of the report will ensure that everyone is working off the same page. Lock the information at the time it is sent out for a pre-read, so no new information is introduced.



Tip #25:

Have a single scorecard for your organization.

If every department is working on the same scorecard, you'll be able to limit confusion and questioning. Deb thrives in finding conflicting numbers like the marketing team reporting on total revenue and the sales team reporting on revenue from new accounts. Make sure to align your organization on one scorecard so conflicting data is removed.

Tip #26:

Link to Excel, CSV, or SQL to leverage what you have.

Instead of copying and pasting data from spreadsheets, link directly to the source systems. The less data is manipulated, the fewer chances there are to introduce errors. If you come across an error, correct it in the source system—not in the final report. That way, you'll be prepared when Doubting Deb questions the numbers. This also allows you to have clear formulas for your data; in other words, the data can be changed by the leadership team, but not by Deb alone.



Tip #27:

Keep past information as a reference for old decisions.

Deb also likes to question previous decisions made if she knows there isn't solid documentation. That's why it's critical to keep previous decisions and results in an accessible place. You'll get much more out of your meetings if Deb can question if the decision was the right one, rather than which decision was made.

Summary

To help Doubting Deb feel confident in the reports and allow for decisions to be made, try to:

- Determine what your data and reports are telling you.
- Get Deb away from *her* version of the truth, and create "one version of the truth."
- Have one scorecard that multiple owners can edit simultaneously.
- Leverage what data you have and keep past information as reference.





meet Forgetful Fred

EXCELS IN: MAKING COMMITMENTS AND NEVER FOLLOWING THROUGH WITH THEM.

THRIVES ON: LOOKING GOOD IN FRONT OF MANAGEMENT.

BIGGEST WEAKNESS: TRACKING AND ACCOUNTABILITY—HE SIGNS UP FOR ANYTHING, KNOWING THAT HE WON'T BE HELD ACCOUNTABLE.

Forgetful Fred has a really great idea... but he can't recall what it is. He'll suggest an idea in one meeting—and everyone will agree that it's a good thought—but by the next meeting, he is on to something else. Sure, this happens to the best of us, but Fred makes it a pattern. He seems to always volunteer to help out (particularly when the boss is around), but the tasks assigned to him are never completed. Fred's co-workers

can't decide if he's sucking up to upper-management and purposefully ignoring his tasks, or whether he just honestly forgets... every single time.

Do you deal with a Forgetful Fred in your organization? It can be tiresome. Our reporting superheroes have handled these types of individuals, and have figured out a few great ways to hold them accountable.

Tip #28:

Have clear accountability.

This goes for goals, measures, initiatives, and other action items. One person should ultimately be responsible for what is missing. If Forgetful Fred doesn't show up to the meeting with the correct version of the report, Fred should be held accountable—not the last person he sent it to for revisions.

Tip #29:

Begin each meeting with the action items from the previous meeting.

Start out every meeting, without fail, by reviewing each person's action items. Praise the individuals who have completed their tasks in a timely fashion, and hold those accountable who are late. If someone *is* late, be sure he or she clarifies their reasoning for this.



Tip #30:

Review all accountability at the end of every meeting.

Be sure everyone in attendance understands and can repeat what was decided during the meeting, when these action items will be accomplished and delivered, and who is ultimately responsible for seeing the items through. A good way to accomplish this is by sending out notes reiterating these points at the conclusion of the meeting. It's important to capture a running history of these decisions and actions so you can look back at the end of the year and see what was decided and accomplished.

Tip #31:

Avoid “analysis paralysis.”

Too many stats will just perplex you and your team, leading to a lack of direction. Focus is vital in reporting, as while you may be able to act on all your data, many of these actions might not lead to a change in revenue or your key business metrics. Focus on what will make a difference to your bottom line. This is a tactic that can be used with Forgetful Fred, but it also applies to Complex Chris. [Joel Lumsden](#), Head of SEO at Attacat



Tip #32:

Let the system keep track of changes.

Most management reporting solutions (and even some online spreadsheets like Google Sheets) have an “audit log” that shows all the changes made to the system. It will help ensure that Fred can’t simply delete tasks that have been assigned to him before the meeting—he’ll actually have to complete his tasks (or get in trouble for not doing them).

Tip #33:

Put everyone on a team.

This is the best way to ensure that Forgetful Fred’s tasks actually get accomplished. Make sure all members of his team have tasks that are interrelated; forcing teamwork on Fred may be tough for him to swallow in the short-term, but will have great long-term benefits.



Tip #34:

Don't let Forgetful Fred "hide."

Store actions, accountability, and due dates centrally. Having one common place for these items, similar to your reporting, will keep everyone on the same page. Show each goal, what the actions are, who has completed their items, and what is left open. Fred can't hide from this!

Tip #35:

Present your findings—don't just send them.

Even if you can only schedule a five-minute phone conversation, presenting your data or reports will solicit solid discussion and feedback. As a result, your reports will become more relevant. This is particularly relevant if your organization only meets for a more lengthy discussion only a few times each year. *Chris Grant, Director of Analytics at Enlighten*



Tip #36:

Define a purpose for your meeting.

If you are just meeting to go through the motion of reviewing reports, it's time to make a change. Every meeting should have a clearly-defined (and understood) purpose. When your meeting comes to a close, schedule a "check-in" to be sure you've accomplished what you wanted.

Summary

To help Forgetful Fred hold himself accountable for the commitments he makes, you can:

- Hold strategy review meetings.
- Track action items and start new meetings with those actions.
- Put a name on goals, KPIs, and projects, and maintain accountability for them.
- Use an audit log if necessary.





meet Siloed Sarah

AFRAID OF: KNOWLEDGE, AND SHARING KNOWLEDGE OUTSIDE HER DEPARTMENT.

THRIVES ON: GOING OUT OF HER WAY TO MAKE SURE THAT THERE'S NO ALIGNMENT, AND THAT NO ONE OUTSIDE HER TEAM KNOWS WHAT SHE'S DOING.

BIGGEST WEAKNESS: ORGANIZATIONAL ALIGNMENT.

Siloed Sarah doesn't see how her department can possibly align with any other department in the organization. *"We're just so different,"* she thinks. You can regularly find Sarah mentioning that a particular KPI or measure doesn't work for her department, because of any number of reasons. She's afraid of the unknown, and is positive that sharing ideas and processes with other departments is a waste of time and effort.

Sarah doesn't realize how difficult she makes teamwork, but her co-workers do. But the reporting superheroes are here to save the day! Find out how you can help Sarah become less "siloed" and instead get excited about organizational alignment.

Tip #37:

Be specific about the reports that are useful.

Spending time on reports that are not valuable can be a waste and can lead to feelings of wasted time. No leader wants team members to waste time, and team members do not like to do reports that are not needed for the betterment of the business.

Deborah Sweeney, CEO of MyCorporation

Tip #38:

Get teams aligned with organizational processes.

Disorganization and miscommunication often play into Siloed Sarah's weaknesses. Having a common reporting software and common reporting template will help her understand her role in the company, and reassure her that she is working toward common goals with her peers. This will encourage Sarah to step outside her comfort zone and offer suggestions both departmentally and organizationally.



Tip #39: Create cross-functional teams.

Ensuring that Sarah is on teams across the organization ensures that she will be communicating and working directly with other departments. Opening up these lines of communication can help her overcome her fear of knowledge.

Tip #40: Show value by providing information.

Get Siloed Sarah to create a simple description of her department's strategy (via your strategy map), and have it relate back to the overarching organizational strategy. Then, review what is aligned to the enterprise strategy; stress that things unrelated to the overall strategy are less important, and question the items that do not link to the goals. This exercise may help her better understand how vital her department (and individual position) is to the health of the organization as a whole. Additionally, find a way to demonstrate to Sarah that providing more information across the organization can get her more resources as she is able to demonstrate her value better.



Tip #41:

Reward the sharing of knowledge with recognition.

Once Siloed Sarah is able to share knowledge across the organization, it is important to reward her. Sharing her work and figuring out how it can apply to others is a big step! Lunches and meetings are great opportunities to make someone like Sarah feel special. During these encounters, encourage Sarah to show others how to adopt her best practices.

Tip #42:

Centralize reporting to avoid duplication (and stay on the same page).

Make sure multiple people are not working on similar analyses. This can be particularly tricky if you're working on reporting through Excel, because there isn't a good way to handle version control. To remedy this issue, you may want to consider moving from Excel to reporting software. (This will help Siloed Sarah see that everyone is working toward similar goals, and that knowledge isn't that scary, after all). *Deborah Sweeney, CEO of MyCorporation*



Tip #43:

Create alignment reports.

Siloed Sarah will sometimes say her numbers don't connect with the overall goals of the organization. For example, it's hard to see how landing page conversion rate (one of her KPIs) directly ties to profitability (an enterprise-level KPI). This is where the need for alignment comes in. Look at how Sarah's goals contribute to the enterprise goals. Stay at the goal or objective level, and don't get "caught in the weeds" of the measures. Sometimes things mathematically add up from the department to the division level, and sometimes they just contribute in other ways. Help Sarah see how her work contributes to the overall goals of the organization, whether that comes in a direct tie to numbers or through discussion.

Summary

In order to help Siloed Sarah strengthen her weakness with alignment and stop being afraid of knowledge:

- Reward Sarah and other business units for demonstrating alignment to objectives and measures.
- Question strategies that don't align to the enterprise goals.
- Share measures across departments.
- Involve Sarah and her department staff on cross-functional teams.



43 Tips To Tame Reporting Monsters



As demonstrated in these 43 tips, it is indeed possible to have an excellent reporting process.

It is *also* possible to get your company's "monsters" on the same page as the rest of the employees, all while encouraging continued positive performance (and to continually work toward breaking their bad habits.)

As you may have realized, quite a few of the suggestions listed here require an organized way to execute strategy, manage projects, and build management reports,

dashboards, and scorecards. If you don't have the tools necessary to do those things, we would love to give you a hand.

Are you ready to get rid of your company's monsters and become a reporting superhero? ClearPoint is a reporting software built by managers, for managers. It's made for the value-conscious organization that needs a single place to organize and analyze all its data.



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