REPORTING TOOLS

How to evaluate them

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Agenda

• What do you need?
• How good is your current system?
• The good and bad of spreadsheets
• What to look for in Reporting Tools
What do you need?
1. **Essentials**

2. **Nice to have**

3. **Ask everyone**

4. **Consider the Future**
02 Evaluate your Current System
Current System

1. What works?
2. What's broken?
03 Understand Spreadsheets
Understand Spreadsheets

1. Ultimate Flexibility
2. Prone to error
3. Can you automate?
4. Can you link?
What can Reporting Apps do?
Reporting Apps

1. Connections
2. Exporting Data
3. User access
4. Features
Features to Check

1. Programs
2. Grants
3. Board Reports
4. Dashboards
5. Automation
6. Flexibility
Features to Check

- Cashflow
- Many Budgets
- Many Years
- KPIs & Metrics
- Customisation
- Help & Support
What to Evaluate

• Calxa Premier
• Fathom
• BudgetLink
• Cerebiz
• Spotlight Reports
• Futrli
Do your research

Good requirements give good results