

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

01

What do you need?

Needs Analysis

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?



04

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

7. Cashflow



8. Many Budgets



9. Many Years



10. KPIs & Metrics



11. Customisation



12. Help & Support



What to Evaluate

- Calxa Premier
- Fathom
- BudgetLink
- Cerebiz
- Spotlight Reports
- Futrli

Do your research

Good requirements give good results

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