



Business Reporting for Executives

How winning executives accelerate results by surfacing 5 key business insights in real-time

A STEP-BY-STEP WORKBOOK

Introduction

Most companies have an enormous amount of data to run the business. But by the time qualitative insights from people filter up, they're out of date. Ground truth has been forgotten or watered down. Precious productivity has been lost through the preparation process. And opportunities to act have slipped away.

In essence, companies are trying to identify today's signals using yesterday's news. They're making decisions based on lagging indicators.

Why? Because the processes surrounding human intelligence are imprecise, antiquated, and slow.

But great executives know that their leaders have insights that can move the business forward today, not a month from now. They harness technology to surface - and act on - that intel without adding administrative burden. And they do it by asking their leaders to weigh in on **5 key questions** every week.



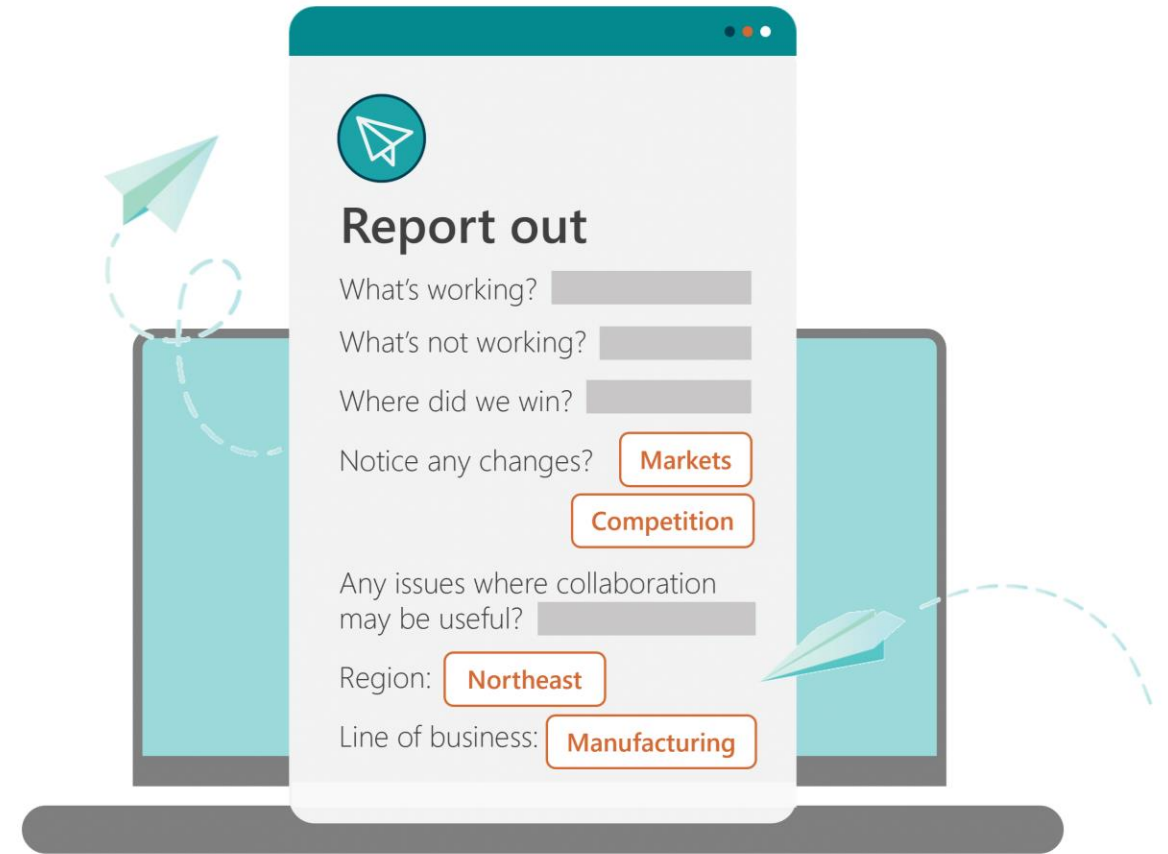
Example

One fortune 100 customer asks L3 leaders and above to spend less than 15 minutes reflecting on what occurred at the end of every week. Leaders *Report Out* by answering these five questions:

1. *What's working*
2. *What's not working?*
3. *Where did we win?*
4. *Notice any changes in markets, competition, supply or regulations?*
5. *Any issues where collaboration may be useful?*

Answers are due by 4:45 PM and a summary of actionable intelligence is published by 5:00 PM. Specific insights are delivered to key stakeholders for immediate action.

And every leader on the team ends every week with clarity on what occurred and what's important for the week ahead.



Report out

What's working?

What's not working?

Where did we win?

Notice any changes? **Markets**

Competition

Any issues where collaboration may be useful?

Region: **Northeast**

Line of business: **Manufacturing**

Know exactly what's working, what's not, and where intervention is needed

Now You Do It

This step-by-step workbook is designed to help you define, extract and use the real-time data you need to act in the moments of opportunity.

By the end of this workbook, you will know how to:

- 1) Define the key business insights to surface, and
- 2) Enable real-time analysis, action and execution.

You can use this workbook on its own or click to the right to start the 15-minute, self-paced companion workshop.



Want some guidance as you work?

Click [here](#) to start the 15-minute self-paced companion workshop

1

Define the key business insights

The first step is to define the key business insights to surface. Companies typically want people to report on five topics: overall performance, progress, highlights, lowlights, and changes in the market. Think of the questions you want to ask and list them to the right.

Here is an example of typical questions companies ask to elicit this information:

- Summarize overall performance
- What progress did we make? – or - Where did we win?
- What's working?
- What's not working?
- Did we discover any competitive activity?

Key Business Insights

2

Plan for analysis

The second step is to think about how you will want to analyze this information. Companies typically want to analyze the information by time frame, location, product or solution.

Think of the two or three data points that you'll want to use to slice, synthesize and analyze the data. List them to the right.

Here are examples:

- By date
- By region, country or area
- By product line
- By solution or end market

Analysis data points

3

Prioritize the information

The third step is to prioritize the insights. Don't eliminate anything on your ideal definition, because you might be able to get all of it depending on how you execute - we'll tackle that in a moment.

Simply circle or add a check mark to designate the most important pieces of information listed on 1: Define the key business insights page.



4


Establish a cadence

The fourth step is to outline an ideal cadence. The frequency of sharing insights—whether monthly, weekly, daily, or continuously—is critical.

Many companies start by aligning insight sharing to existing review cadences and set deadlines that reinforce immediacy, such as weekly insights due every Friday at 4 PM. Complete this step to your right.

Here are examples:

<i>Frequency</i>	<i>Due By</i>
Weekly	Fridays at 4:45 PM
Monthly	Last day of the month at 6PM
Daily	By 4:45 PM
Continuously	As events occur

Frequency	Due Date
	

5

Real-time execution: Sharing

Allowing employees to share in-the-moment and from wherever they already work is critical. This is how you get high-quality information shared, before it's forgotten or muted, and without a drain on productivity.

List the tools used in your organization and add them to your right. Here are examples:

- Slack
- Salesforce
- Microsoft Teams
- Microsoft Outlook
- Microsoft Excel and Word
- Chrome browser

Insights shared from:

6

Real-time execution: visibility

Delivering specific insights to specific people, immediately and proactivity is critical. Don't allow insights to be lost in a proverbial black hole: instead, give key stakeholders real-time visibility that equip them to learn continually and act in the moments of opportunity.

Think of three types of insights that are essential to business results and the key stakeholders who will value them. List those on your right. Here are examples:

- Pricing insights should be immediately available to people in pricing, licensing, and solutions
- Competitive activity should be immediately available to people in marketing, sales, and corporate strategy
- What's not working insights should be immediately available to people in sales enablement

Insights delivered to:

7

Real-time execution: reporting

The right technology will automatically synthesize, analyze and summarize actionable intelligence, for anyone who needs it, at any time. What once took 20 hours can now be done in minutes. Everyone should have immediate, actionable views of their specific business.

In addition, you're going to want to periodically and proactively publish reports. If employees are sharing on a weekly cadence and insights are due by Friday at 4:45, you may want to publish a Summary Insight at 5PM.

As a result, everyone will have a shared, actionable view of the business in addition to their real-time visibility.

Think of your ideal reporting timeline then capture it to your right. Here's an example:

- Full analysis published on Fridays at 5PM

Summary insight published on:



8

Real-time execution: partner

The real-time technology partner you choose is an important decision. Groopit would love to be that partner – the partner you rely on.

Groopit is the only AI engine designed specifically for real-time human intelligence. It's our specialty. It's our expertise. It's what we do better than any other technology partner you'll find.

Would you like to see how real-time technology works? Just email hello@groopit.co to schedule an introductory meeting and demo or visit our website groopit.co to learn more.

We'll look forward to meeting you!

Date and time for demo:

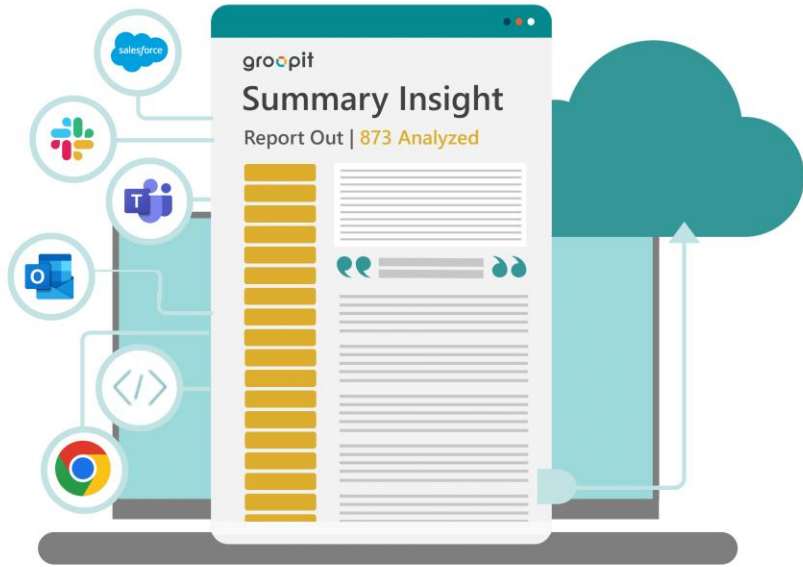


"We tried to solve this problem for months using Microsoft Copilot and simply couldn't. Groopit had exactly what we needed from Day 1."

F500 Customer

Congratulations!

You have a blueprint for real-time business reporting. By defining the key business insights people surface, developing a real-time execution plan, and choosing a real-time technology partner, you'll not only transform the business reporting process – you'll transform your business *results*.



groopit



Want to see the real-time technology in action?

Schedule a demo [here](#)



The AI engine for **Human
Intelligence** in the enterprise