



# **Business Reporting** Workbook

How to accelerate results by surfacing  
key business insights in real-time

For use as a stand-alone workbook or in conjunction with this 15-minute self-paced [webinar](#).

# 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 But by the time qualitative insights from people filter up, they're out of date.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.

You're about to change that. By surfacing key business insights and executing on them in real-time, you will eliminate the inefficiencies and empower your entire organization to act swiftly.



**Want some guidance  
as you work?**

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





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## 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.



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## 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
	

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## 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:





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## 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:



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## 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](mailto:hello@groopit.co) to schedule an introductory meeting and demo or visit our website [groopit.co](http://groopit.co) to learn more.

We'll look forward to meeting you!

Date and time for demo:



# 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*.

Want to learn more? Email [hello@groopit.co](mailto:hello@groopit.co) to schedule an introductory meeting now.



**Want to see the real-time technology in action?**

*Schedule a demo [here](#)*

The logo for Groopit features the word "groopit" in a white, lowercase, sans-serif font. The letter "o" is replaced by a circular icon composed of three segments: a teal segment on the left, a yellow segment on the right, and an orange segment at the top. The background is a dark teal color with a large, faint, stylized gear or cogwheel graphic on the left side.

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