WHAT FEATURES DO YOU NEED IN A REPORTING TOOL?

CHECKLIST

ClearPoint Strategy

DIRECTIONS: Check off each reporting feature that your organization needs. After that, you'll have a list of features and descriptions to share with your executive team, or copy and paste it into an RFP for reporting software.

STRATEGIC PLANNING

☐ **Strategy Mapping**

Paint a picture of your strategy by dragging and dropping objectives, measures and initiatives onto a report template.

☐ **Objective, Measure and Initiative Alignment**

Track all elements of your strategy in one place. Link them together to easily see how they align and roll-up.

☐ **Strategic Objectives & Themes**

Organize your strategy and goals into the four perspectives of the balanced scorecard—financial, customer, internal, and learning and growth.

☐ **Strategy Measures**

Create specific metrics you want to track, like "customer satisfaction rating," in order to see how well you're doing against your objectives. Set targets for these measures.

☐ **Strategy Framework Templates**

Unite your organization's people, goals, and numbers in one place with ready-to-go templates you can customer for any strategy framework including the Balanced Scorecard, GAP planning, SWOT analysis and OKRs.

☐ **Action Items and Risks**

Easily record to-do lists from a meeting (or on the fly) so people are accountable for moving the strategy in the right direction.

REPORTS & DASHBOARDS

Charts and Visualizations

Display your data in custom charts like bar, line, pie and area charts. Include an unlimited amount of data and create an unlimited number of charts.

Qualitative Analysis

Track analysis and recommendations alongside your quantitative data. Include it in reports and dashboards

Customized Layouts

Create reports for every audience, customizing the layout and style of each report to include only the information that your stakeholders need.

Complex Calculations

Build complex calculations that can source data from anywhere in the application. Create roll-ups, sums, and averages to analyze your data.

Parent/Child Relationships

Group various elements together by showing relationships between elements, allowing drill-down analysis.

Summarized and Detailed Data

Track detailed data for each of your strategic elements. Use complex calculations to roll it up into a high-level view, with the ability to drill down from summary reports to detail pages from anywhere in the application.

PROJECT MANAGEMENT

☐ **Gantt Charting**

Quickly visualize your project management process with Gantt charts and see how your due dates are progressing over time.

☐ **Strategic Initiatives**

Give visibility to your initiatives by entering objectives and tracking start and end dates, milestones, and any necessary resources in one view.

☐ **Cascading Milestones**

Arrange your milestones and due dates in sequential order, and automatically adjust the entire project by moving one milestone.

☐ **Milestone Date Calculations**

View automatically calculated numbers, like days until completion, percent complete, and due dates, based on the length of the project.

☐ **Project Data Tracking**

Track any type of data for your project including budget, percent complete and milestone data.

☐ **Project Evaluations**

Evaluate your projects with RAG (red/amber/green) status icons. Set manually or automatically based on project data and performance compared to your targets.

☐ **Portfolio Management**

Track an unlimited number of projects, segmenting into programs and portfolios and rolling up results to show overall status and progress.

AUTOMATION & WORKFLOWS

☐ **Automatic Evaluations**

Automatically apply your RAG (red/yellow/green) status icons to your objectives, measures and initiatives based on their performance compared to your targets.

☐ **Data Uploads**

Upload data from other data sources including Excel, CSV and SQL databases. Schedule uploads or watch a directory for real time data.

☐ **Update Reminders and Notifications**

Schedule emails to remind users to update data and set up notifications so they know when one of their strategic elements changes or they are assigned something new.

☐ **Reporting Process Workflow**

Manage your automation in one place, ensuring your workflow runs seamlessly. Check in on the progress of your team's updates on a dashboard.

☐ **Easy Exporting**

Export pages and reports to PDF, Excel, and PowerPoint. Export as needed or schedule to send at a pre-defined date.

CUSTOMIZATION

☐ **Custom Number Formats**

Create any type of number format you'd like so you aren't constrained by the one the system serves up.

☐ **Custom Fields**

Create any type of form field in order to track information that fits your needs. Use these custom fields in detail and summary layouts.

☐ **Custom Menus & Language**

Customize the language of the application to meet the language you currently use in reports (i.e., Metric, Measure, or KPI).

☐ **Custom CSS**

Customize page colors, fonts, spacing, margins and background of your application and reports so that you have full control over the look and feel of your interface.

☐ **Custom Table Views**

Switch rows and columns, expand rows to full width, and color your rows and columns so that your reports are just right for your stakeholders

☐ **Custom Page Layouts**

Drag and drop elements to quickly lay out pages while having full control over the way you view each page layout.

SHARING & COLLABORATION

☐ **Global Access**

Securely log into your account from anywhere in the world, not just the computers in your office.

☐ **Public-Facing Dashboards**

Share results externally on a custom branded website that is automatically updated with data from your reporting tool.

☐ **Threaded Discussions**

Run discussions around certain topics in your reporting system so everything is in one place, rather than in notepads and emails.

☐ **Publishing**

Ability to publish static reports from the system that can be used to communicate reports externally.

☐ **Email Notifications**

Sign up for notifications when things change or whenever you want them. Mark elements as "favorite" and get notified whenever these elements are updated.

☐ **Measure and Data Sharing**

Collaborate with other organizations by sharing measures in custom groups you create, or share specific measure data with individual peer organizations for easy benchmarking.

EASE OF USE

☐ **Mobile Use**

Access your reporting software on the go from the browser on any mobile device with mobile responsiveness designed for phones and tablets.

☐ **Cloud-Based System**

Access the software from anywhere through an internet browser and keep the strain off of your servers.

☐ **Easy Update Process**

One location for all strategy updates. Users can make updates from an update workflow or from grid-style reports.

DATA INTEGRATION

☐ **API**

Allow for data to flow from your system to your reporting software seamlessly through an API. Or use the API to pull data from your reporting software into other applications.

☐ **Data Loader**

Upload data to the reporting application via a standalone application that installs on your desktop and securely pushes data to the application on demand or on a schedule.

☐ **Custom Integrations**

Leverage webhooks to easily communicate with other applications, integrating your reporting tool into your existing processes.

SECURITY

☐ **Audit Logging**

Automatically track, view, and search which user changed what and when. Search and print the audit log.

☐ **Role-Based Security**

Assign different roles to users so some can change the entire system and others can simply view data.

☐ **Single Sign-On**

Log in to your reporting software with the same credentials you use for other systems. Leverage your existing security and password policies to stay in compliance.

PRICING

☐ **Scaling Packages**

Pricing packages should include the ability to add users and functionality based on the needs of your organization. Grow and expand at any time.

☐ **Support Options**

Understand the level and quality of support. Make sure that it's included in your package so you can get the help you need, when you need it.

With ClearPoint, you get all these features (and more!).

Schedule time to talk with our team today to learn more about automating and improving your process with ClearPoint.

Our customers reduce the time it takes them to create reports each month by 75% when they leverage our reporting software.