

PROFITEDGE PLANNING SHEET · FOUNDATIONS

Decision–First Report Request

Before asking for a new report, a new dashboard or a new system, write down the decision it is meant to support. Most of the time the information already exists. What is missing is the question, the owner and the habit.

START WITH THE DECISION

Not “what reports do we have?” but
“what are we trying to decide?”

WORK BACKWARD

What would answer it, whether it
already exists, who needs it, how often,
and what happens next.

EXCEPTIONS, NOT ACTIVITY

A useful review shows the 25 lines that
need attention, not the 500 that do
not.

Requested by _____ Date _____

1 The decision

QUESTION

ANSWER

What are we trying to decide?

Who makes the decision?

What would we do differently depending on the
answer?

2 Working backward

STEP

ANSWER

What information would help answer it?

Does it already exist in the system? Where?

Who needs to look at it?

What happens after they see it, and who acts?

HOW OFTEN

Daily

Weekly

Monthly

Before the close

3 What counts as an exception

The line that decides whether the review is 25 lines or 500.

Show a line only when _____

Leave it off when _____

4 Can we trust it?

Nobody has perfect data. Consistency improves everything downstream of it.

ITEM	YES	NO
The fields it depends on are entered the same way by everyone	☐	☐
Statuses mean the same thing from one employee to the next	☐	☐
Customer and vendor records are not duplicated	☐	☐
Costs and categories are kept up to date	☐	☐

One habit to clean up first _____

5 What the people know

The context the system does not hold. Good management combines both.

WHO KNOWS IT	WHAT THEY KNOW THAT THE REPORT WILL NOT SHOW
_____	_____
_____	_____
_____	_____

6 Is it really a software problem?

Tick any that apply before asking for new technology.

☐ A useful field is not entered the same way twice

☐ The report exists, but nobody owns the review

☐ It runs 500 lines when 25 need attention

☐ One department does not see how its entries affect another

☐ A monthly review should really be weekly

☐ We measure activity instead of looking for exceptions

7 A useful test

Will the result answer at least one of these?

What is working?

What needs attention?

What do we know that helps us decide what to do next?

Your system probably knows a great deal more about your business than you are asking it to tell you.

WANT A SECOND SET OF EYES?

Start a conversation at profitedgesystems.com about getting more from the system you already have.