

Executive Intelligence is a niche management consultancy. We create concise, insightful monthly reporting for our clients. Then we ensure it continues.

Our challenge is to produce a clear, accurate picture of a complex organisation from a large volume of data. This regular **insight** is central to informed decision-making. To be **trusted** it must be consistently excellent.

*“it is impossible to make good decisions without
... an honest confrontation of the brutal facts”*

Jim Collins in “Good to Great”

Executive Intelligence – our approach

The objective: we want our clients to have the tools, techniques and training to produce regular, high quality, insightful executive, management and operational reports. Typically we start at the top, with an executive report, and cascade this into the organisation.

We excel in defining the content of the report, designing its format for optimal communication and putting in place an effective process for producing it.

The **diagnostic study** is the starting point. We look at current reporting and make propose improvements in the three areas of reporting process, report content and report format.

The reporting process is be driven by how, when and by whom reports are prepared and used. The rhythm of management meetings forms a backbone for this process.

An insightful report cannot be produced automatically – it will always rely on input from the reporting team – but a degree of automation allows a report *outline* to be produced quickly and efficiently. The report can then be completed by analysing performance, investigating problem areas and adding commentary on the results.

Report content is informed by business priorities and by a comprehensive model of the organisation that provides both 'lag' measures of past performance and 'lead' measures that indicate future results; measures are presented as snapshots against target or as longer-term trends.

The result is more than simply a suite of operational and financial measures. It emphasises exceptional performance (adverse or positive) and often includes project, customer and market information, with one-off pieces of analysis to shed light on emerging issues. The content is not complete without insightful commentary on the key messages and the areas for action.

The optimal report is structured as a pyramid, beginning with a short summary of performance and the decisions required; the format may be largely graphical and is typically designed for use in paper form.

The report is a living document, designed for the monthly meeting, to be annotated and waved around. To bring it to life, the next stage is to prepare a **mock-up**. This mock-up elicits feedback from readers and gains commitment to the new reporting style and content.

Once the mock-up has been presented and changes agreed, it is often possible to prepare manually a report with current performance data in time for the next monthly meeting. This **manual report** draws together a wide range of data, typically including:

- Financial, operational, non-financial, metrics
- Progress on major projects
- Competitor and customer developments
- Economic and market growth.

The collection of data and graphical presentation of much of this information can in due course be automated, but at this stage the content and the way it is used has not been settled, so all elements are produced manually, an intense and time-consuming activity.

Data is not enough, and the reporting team at this point develops methods and styles for the commentary and analysis. This is the first stage in our handover of this capability to the client team.

Once the report design is settled – often after just one cycle – its production can be made quicker and more efficient by 'light' **automation**. The benefits – speed, accuracy and consistency – must be achieved in order to allow the reporting team time for the analysis and for deciding how to present the key messages.

So the next stage is to implement this automation. This collects data to produce skeleton report pages - measures, charts and graphs - which together form the outline report. Automation typically uses the client's desktop software and is independent of the brand of corporate databases in place - taking data from any ERP, Finance or Business Intelligence system.

This dramatically reduces the time required for data preparation and review - from five days to one, in one recent case - and reduces the risk of errors by removing ad-hoc spreadsheets.

Both the organisation and the reporting team will change over time so the system is fully documented and is designed for the client to maintain and refine over time.

Once automation is in place - typically after four weeks - and the client team can deliver an insightful report each month, we **hand over**, only providing further support if required - some clients prefer a short period of support for reporting to 'bed in'.

Success for us is an excellent report - an essential tool for executives and managers - regularly produced by the client team.