



sage

SWK  
TECHNOLOGIES

**UNLOCKING THE DOOR**  
TO COMPLETE  
**BUSINESS VISIBILITY**

*Are you tired of standing on the  
outside of your business?*



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A photograph of two men in business attire. The man in the foreground is smiling and looking towards the other man. The background is a blurred office environment with glass partitions and plants.


## INTRODUCTION

**43 %** of Small & Medium Business owners believe that getting better, timely reports and more information to drive down costs is one of the top three challenges they face in optimising their business visibility.\*

Every business owner wants more visibility into their business so that they can make better informed decisions and take immediate, game-changing action. However, most are simply standing on the outside of their own businesses, not quite sure how to get inside to the information they need. This can be challenging, and it's sometimes difficult to identify where to begin.

A good reporting solution can help you gain more insight into your business and improve the visibility you have with your current business management solution. This eBook will highlight the issues your business may be facing in terms of visibility, and will explain how equipping yourself with a worthwhile reporting solution can solve them.





## ***CHAPTER ONE: STOP PEEPING, IT'S TIME TO OPEN THE DOOR***

Keyhole visibility is a concept that is familiar to many Small & Medium Businesses (SMBs). This type of visibility is equivalent to trying to see what's happening in a room by looking through the keyhole of a door. Likewise, with a narrow view of your business, you are forced to make critical decisions with only a small portion of information.





It's largely due to keyhole visibility that SMBs are constantly challenged with responding quickly and efficiently to the customers' needs in order to stay profitable and competitive.

### **The top three of these challenges are as follows:**

#### **1. Disconnected processes**

This makes it difficult for you to understand how customers engage with you across different channels, or how profitable they are to your business. For example, this may happen when sales have one view of a customer, customer services another view, and marketing yet another view. Information is gathered and stored in silos, and processes around these are not connected.

#### **2. Spreadsheet chaos**

Most companies, regardless of size, tend to have data tied up in spreadsheets that have been dumped out of business management solution that help run their company. This means that there's no way to get the real-time, accurate insights that you need in order to respond to critical issues in your company that happen at any given moment.

#### **3. Costly, laborious processes**

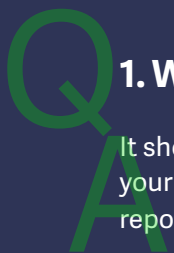
Complete visibility requires a certain level of automation of data, and analysis that can be available to all that need it in order to make decisions. This means doing away with long, drawn out processes and equipping your business with an intuitive Business Intelligence solution that pulls information from your business management solution, and places it into interactive reports to help your people share and collaborate information. This will give real-time insights on key performance indicators that matter to your business at little cost.

## **CHAPTER TWO:** *INTERROGATING YOUR REPORTING SOLUTION*

Here are a few non-negotiable questions you should be asking your current (or next) reporting solution:







## **1. What difference does it make to me?**

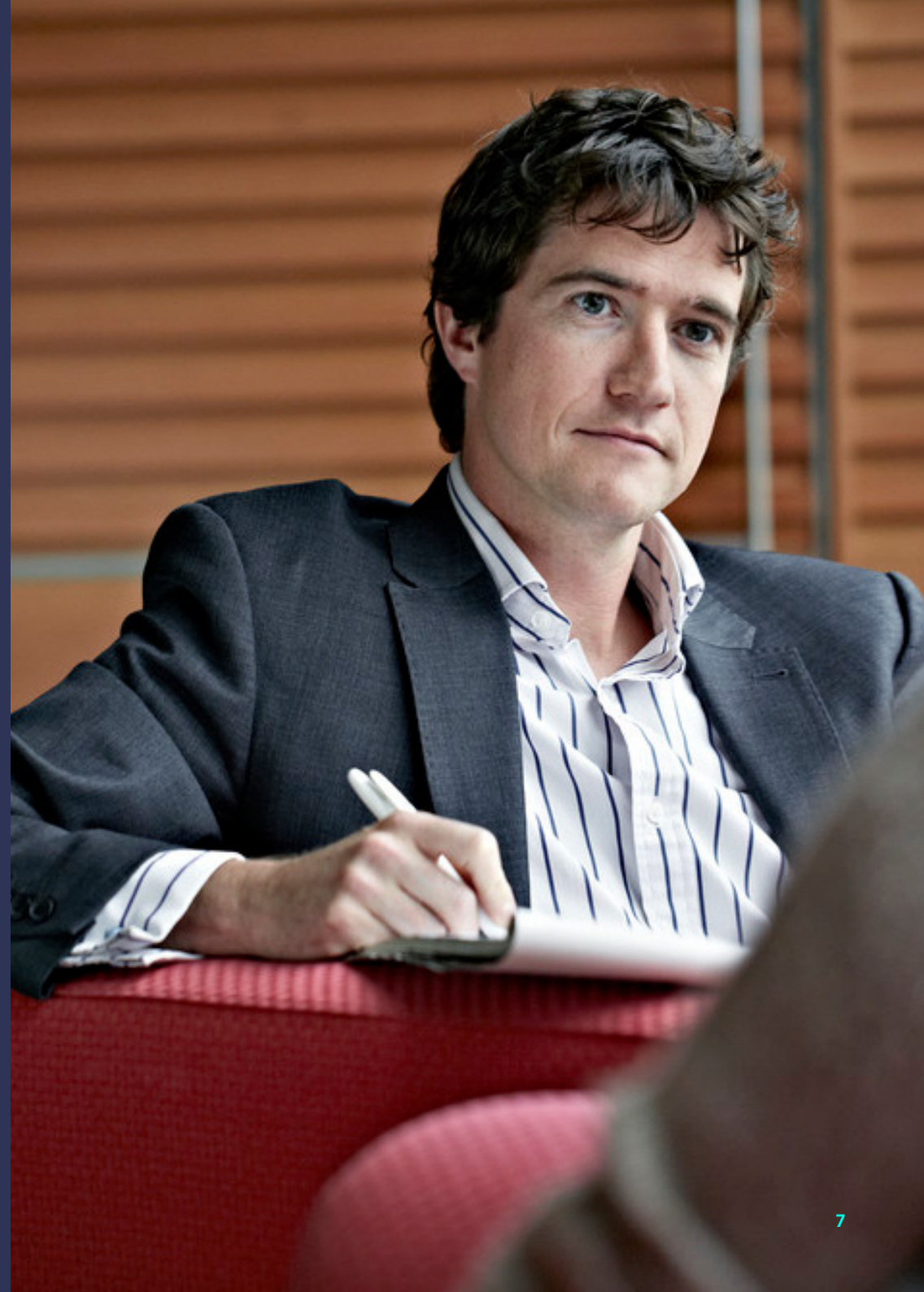
It should offer you a better, simpler reporting experience by automating your manual reporting process and providing you with fully customizable reports that allow you to get started right away.

## **2. What difference does it make to my business?**

The solution should help to increase company performance and revenue by automatically distributing timely and accurate reports to the relevant departments. This will both drive down business costs with your finance team being able to analyse your data rather than spend hours creating manual reports, as well as provide other teams with the insights they need. For example; by providing the sales team with up-to-date information that they can use to analyze buying behaviours, identify up- and cross-selling opportunities, and spend more time chasing prospects.

## **3. How does it manage my data?**

With a good reporting solution, you and your team should feel empowered to operate your business with the confidence to make better business decisions through timely, and accurate insights into your data. You will have a central repository of reports and user-based security to manage who can access which reports.





#### **Q 4. Does the solution give me the detail I need?**

A You should expect immediate visibility into insightful information when you need it. This information should be available to view any way you choose, be it looking at the bigger picture of what's going on in your business, or drilling down into the detail.

#### **5. Does it allow me to consolidate my information and view it all in one place?**

A good reporting solution will enable you pull information from different databases into one report, giving you a holistic view of your business. This will allow you to view information from two or more different sources, for example; create a consolidated report with information from your BMS and CRM system, or create a multi-company or multi-currency report.

#### **6. Does it allow me to get a handle on my financials?**

Let's face it, your business is the sum of the numbers behind it. Therefore, your reporting solution should empower you to gain complete control over your financial reports in an intuitive and easy manner. This is regardless of whether it means looking at departments/regions/products side by side, viewing your income in different currencies, or simply viewing an income statement with actual vs budget month on month, your reporting solution should have you covered.

If you don't have a reporting solution but want complete visibility into your business, it's time you found the key instead of peering through the keyhole.





## **CHAPTER THREE:** FINDING THE RIGHT KEY

So you're tired of knocking on the front door of your business and want to find your own way in? Here's a compelling example of a reporting solution you can use to finally get the information you need, when you need it:





## Sage Intelligence Reporting gets you in

Sage Intelligence Reporting empowers you to quickly and easily obtain the information required for improved operations and reporting across your entire business. Using the familiar look and feel of Microsoft® Excel®, you can quickly and effectively analyze data from your Sage accounting or business management solution. Effortlessly create real-time, automated, and preformatted reports with up-to-date, accurate, and meaningful information.

Intelligence Reporting allows you to spend more time focusing on analysis and interpretation, and less time pulling the data together. With Intelligence Reporting, you're able to:

- **Get immediate insights from day one** – Sage Intelligence Reporting integrates seamlessly with your Sage solution with ready-to-use reports allowing you get immediate insights into your business information.
- **View and customize reports in Excel** – Using Microsoft Excel as the front end of the solution, Intelligence Reporting allows you to customize reports to suit your business's unique reporting requirements. This means that you will receive trusted data, every time.
- **Access information from multiple sources** – See information from across your business, in real time. You have access to your information no matter where your business is located.
- **Collaborate information at the right time** – Through self-service reporting and the ability to auto-schedule your reports to distribute when you want them to, your colleagues will have access to the right information when they need it.



A woman with dark, curly hair is smiling and looking off-camera to the right. She is wearing a bright orange short-sleeved shirt and a black headset with a microphone. She is sitting at a wooden desk, and her hand is visible near a white computer mouse. In the background, another person is working at a desk in a bright, modern office environment with large windows and industrial-style lighting.

## CONCLUSION

The starting point in discovering a reporting solution that suits your business's visibility needs is identifying what information you need visibility into, in what format, and what your internal skills are in the business. Are you looking to upskill yourself on a reporting solution that you will operate internally? Or are you looking for a business partner's assistance in providing you with the relevant solution, and then customize the reports to suit your company's reporting requirements?

No matter what your requirements are, becoming aware that it's time to unlock and open the door to complete business visibility is the first step on a journey to running a smoother, more successful business.

For more information, check out **[sageintelligence.com](https://sageintelligence.com)** and discover how easy it is to get impactful insights into your business that help you make better decisions, faster.





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