

Information Essentials for a Successful Training Team





Agenda

- Why is reporting important?
- What are the reporting tools available to you?
- Using: accessplanit's Report Writer
- Using: accessplanit's Dashboards
- Using: accessplanit's DataGrids



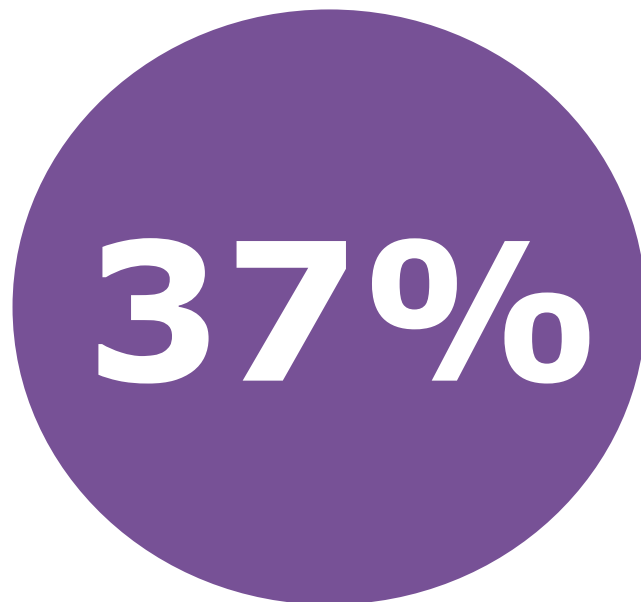
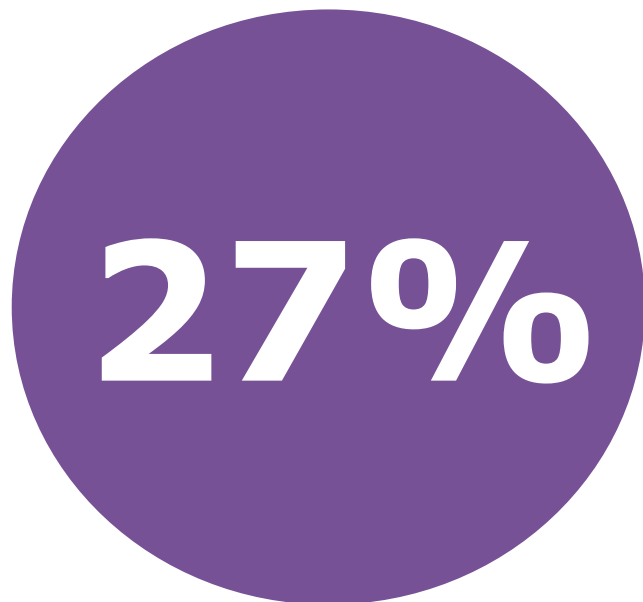
Why is data important?

- Deeper Insights
- Aligns with KPIs
- Business Performance
- Improves Strategy
- Decision Making

Whether you are consciously using data or not, data should be used to influence nearly every part of your training and business



Why is data important?



Why is data important?



How do you know:

- what courses are popular?
- where your customers are coming from (location & industry)?
- which customers are booking onto which courses and when they attend?
- which departments are not meeting their quotas?

Does the above:

- drive your business strategy?
- justify resource use & calculate resource spend



What tools are available?

- Report Writer
- Dashboards
- DataGrids



accessplanit's Report Writer



The Report Writer is our advanced tool for pulling complex reports, summaries and charts.



accessplanit's Report Writer



- Use database style tools to link together various data sources to create one all-inclusive report
- Use advanced settings to heavily customise your report including data grouping options, functions, formats, and calculations
- Once built, schedule your RW reports to send to you every week to save you the hassle of re-running them



accessplanit's Report Writer

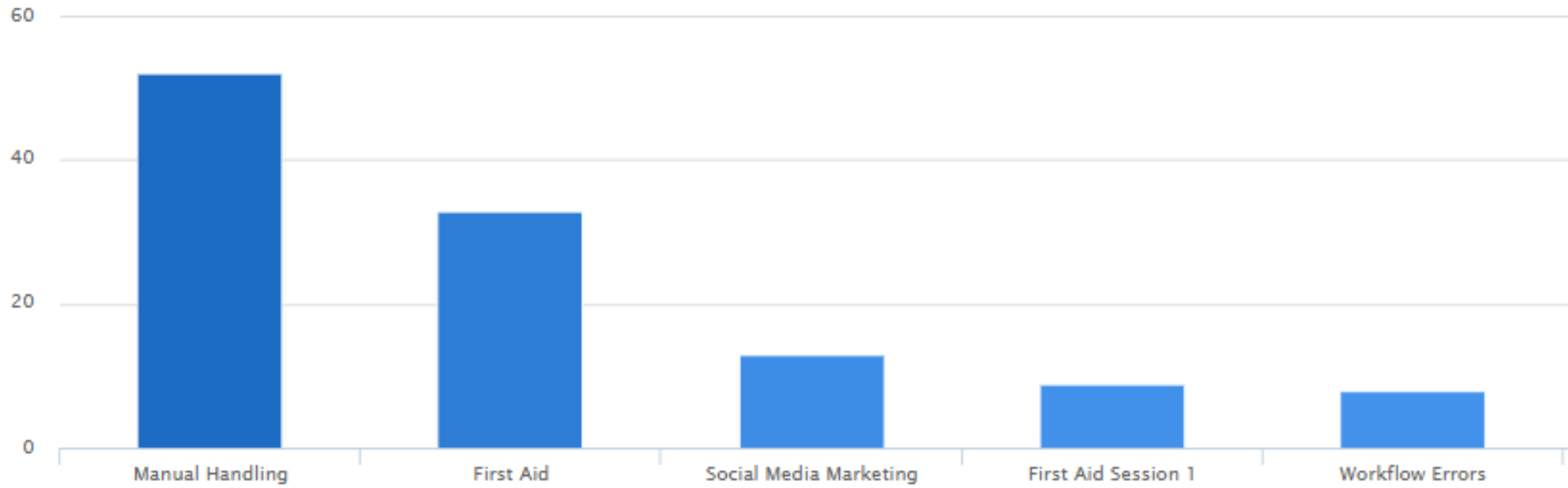


How can I use the Report Writer for reporting?

- Income Reports
- Course Date Statistics
- Resource Viability & Utilisation
- Delegate Stats & Requirements

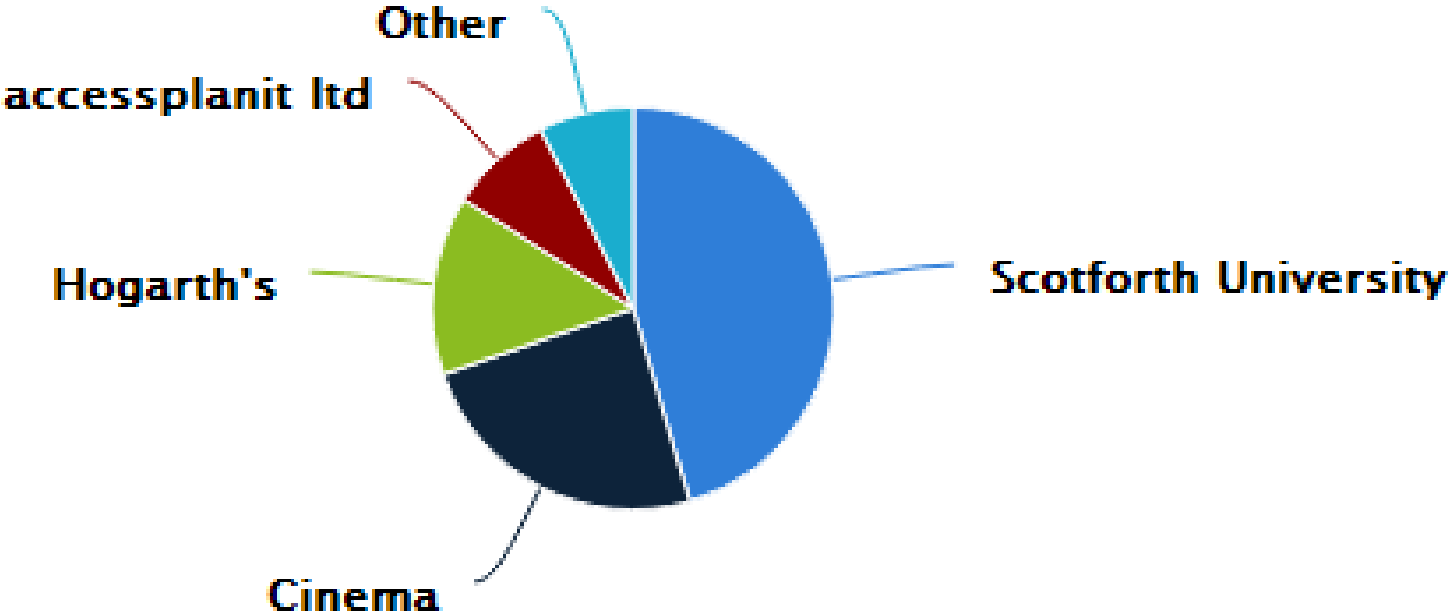


Popular Courses





Customer Breakdown





35% feel lack of employee resource is an issue



accessplanit's Dashboards



- Everything you need at a glance
- Real time live information
- Key KPIs and objectives as soon as you log in
- Fully customisable



accessplanit's Dashboards



Dashboard

Course Coordinator

OUTSTANDING TASKS 4

EXPIRING AWARDS (TRAINER) 0

ACTIVE CUSTOMER ACCOUNTS 10

DELEGATES TRAINED THIS YEAR 0

UPCOMING COURSES 6

EXPIRING AWARDS (DELEGATES) 0

TASKS DUE THIS MONTH

Date Created	Due Date	Mappe	Type	Mapped To Label	Status	Subject	User Name
16/05/2018 08:22	23/05/2018	Account		Cinema	Not Started	Chase Cinema PO Number	Matthew Smalley
16/05/2018 08:22	23/05/2018	Course		First Aid Session 1	Not Started	Arrange Accommodation	Matthew Smalley

UPCOMING COURSES

Label	Start Date	End Date	Venue	Status	Spaces Left	Profitability Forecast
Manual Handling	02/06/2018 09:00	02/07/2018 17:00		Available	2	10350
First Aid	29/06/2018 09:00	29/06/2018 17:00	The Hub	Cancelled	25	500
Workflow Errors	20/06/2018 11:00	21/06/2018 11:00	The Hub	Available	14	0
First Aid Session 2	21/05/2018 13:00	21/05/2018 17:00		Available	17	0
First Aid	21/05/2018 09:00	21/05/2018 17:00		Available	15	750
First Aid Session 1	21/05/2018 09:00	21/05/2018 12:30		Available	17	0

Records 1 to 6 of 6.

DELEGATE STATUS THIS YEAR

Status	Status (Count)
Cancelled	5
Completed	85
Waiting List	2
Transferred	1

MEETINGS THIS MONTH

Subject	Start Date	End Date	Organiser Fullname	Account Attendee Names	User Attendee Names
Meeting with Customer	21/05/2018 09:30	21/05/2018 10:30		Scotforth University	Abbey McVie
Internal Meeting	29/05/2018 14:00	29/05/2018 15:30		accessplanit ltd	Jamie Butterworth
Webinar Meeting	31/05/2018 10:15	31/05/2018 12:20		Cinema	Calv Mackison

Records 1 to 3 of 3.



accessplanit's Dashboards



Dashboard

Managing Director

REVENUE (YTD)

38472

NUMBER OF DELEGATES THIS YEAR

109

EXPECTED THIS MONTH

1250

INVOICE SUMMARY

Status	Status (Count)
Outstanding	34
Part Completed	4
Completed	7
Temporary	4

Records: 49. [Open DataGrid](#)

REVENUE BREAKDOWN

Start Date	Income (Sum)
April 18	12000
May 18	8280

Records: 10. [Open DataGrid](#)

PROFITABILITY

Start Date	Profitability Forecast
April 18	0
May 18	0
June 18	0
September 18	0
September 18	500

Records: 17. [Open DataGrid](#)





accessplanit's DataGrids

DataGrids are one of the most commonly used sources of information within the system, yet one of the most overlooked in terms of reporting!

View Courses

Filters Views Bulk Edit Export Search

Course Template Name	Training Provider	Start Date	End Date	Course Template Type	Status	
Everest Day 2: Customer Conference	accessplanit ltd	07/06/2018 08:00	07/06/2018 17:00	Class	Available	

1 - 1 of 1 items 10 Per Page Page 1 of 1



accessplanit's DataGrids

- So simple!
- Fully customisable
- Design & save your own filters
- Export your data for further manipulation



accessplanit's DataGrids



How can I use DataGrids for reporting?

1. Outstanding invoices per account
2. Active shopping baskets
3. Future courses with a low fill rate
4. Outstanding tasks
5. Waiting list delegates





Q&A





Up Next:

A Case Study: Distance Learning Centre

Learn about how Fat Media delivers SEO and PPC for Distance Learning Centre including current trends, quick wins and free tools for a winning marketing strategy.

