

4 Steps to a Report Rationalization Process



1

Data Collection Strategy

- Determine the legacy report name and description. Is this report used frequently?
- Understand the pattern and usage of the report.
- Identify the business owner and process groups that run the report.
- Identify the source database, table, and column name for each metric and dimension.
- Understand the metrics of the organization and map it to the report.

2

Understanding the Overall Report

- Business Area – For which part of the organization is the report intended?
- Report Frequency - Is the report run on-demand, daily, weekly, or monthly? Does it generate huge volumes of data to be requested in real-time or is it run as a scheduled job?
- Distribution details of the report.

3

Understanding the Data in the Report

- Identify the name and definition of each dimension on the legacy report.
- Determine the calculation for each metric. Often business logic is embedded into a report, so it is critical to capture this logic to be replicated in the future state.

4

Analysis of Data and Recommendations

- Develop a dimensional matrix with report information and domain/subdomain information (domain driven design).
- Combine similar reports based on data entities, report functionality, KPIs/metrics, and ad-hoc queries.
- Map the matrix with the future data architecture of data domains, data dimensions and hierarchies.
- Understand the out-of-the-box (OOTB) reports available in the future state system and extend them to reduce development time.
- Additional rationalization can be performed by combining reports that fall under similar grain of data entities.
- Use the best tool to implement the new reports with the skill set that is available to deliver them.

Key Reporting Issues Within Business Functions

- Extensive manual processing and manual report production
- Users download a version of the report from the ERP system then create additional reports using Microsoft Excel VLOOKUPs, create additional charts. **These workarounds lead to multiple versions of the truth and result in data quality and integrity issues.**
- Varying levels and quality of commentary, metrics, KPIs, and insights between teams
- Multiple copies of the same report exist within the system, generating a high volume of redundant operational reports in the legacy system
- Lack of Change management and governance process enforcement around existing and new reports
- Self-service reporting capabilities are not being utilized for ad-hoc queries or one-time reports
- Large numbers of IT SOX queries are created because of legacy system limitations, or having disparate ERP systems generating additional reports for validating data consistency between multiple systems
- Lack of report design standards including branding, logos, fonts, column names, etc.