

Fort Lauderdale Strategy and Performance Management Summit

Training Agenda | February 27th, 2018

The ClearPoint Strategy team is thrilled to present to you three topics that will take your organization's strategy and performance management to a new level. With these lessons on coordinating organization wide data management, creating increasingly meaningful summary reports, and more efficient yet concise reporting, you will become a reporting superhero in no time! Each session will include instruction from a ClearPoint expert and discussion with other performance management and reporting peers.

1:00-2:00 PM | Organization-wide Data Management

It's a challenge to organize data throughout an organization, so ClearPoint has many features in place that make the process easier. We'll cover how to get the data you need, including aggregating data from multiple departments and creating complex calculations, to creating data visualizations to enable decision making. As a bonus, we'll even dive into some custom charts using JSON!

2:30-3:30 PM | Reporting your Data Effectively

ClearPoint provides numerous options for reporting and sharing data. Learn about a few effective, yet simple, methods such as automatically evaluated series statuses, HTML exports and some creative briefing book ideas.

4:00-5:00 PM | Increasing your Reporting Efficiency

There is a difference between reporting and efficient reporting. Learn how to leverage alerts, reminders, and notifications to ensure that your reporting is as efficient as possible. Also, learn about our spring cleaning best practices to keep your account tidy and make sure your reporting runs smoothly.

5:00-5:30 PM | Wrap up and Questions

