



# WORKBOOK

## Identifying Reporting Bottlenecks

***“Manual reporting isn’t a data problem.  
It is a momentum problem.”***

The bottleneck that’s holding back your growth -  
A practical workbook by 29FORWARD to  
help you uncover and eliminate time-wasting  
reporting processes.


**For more information contact [HelloUK@29FORWARD.com](mailto:HelloUK@29FORWARD.com)**

## 1. Identify Your Reporting Bottlenecks

Use this quick self-assessment to find where your team's time is disappearing.  
Rate each statement from **1 (Never)** to **5 (Always)**.

Statement	1	2	3	4	5
We spend more than a day each week preparing reports.					
Different teams use different versions of the same report.					
We rely heavily on Excel for key management reporting.					
Reports often arrive too late to influence decisions.					
We manually combine data from multiple systems.					
No one is sure which version of a report is correct.					
We spend a lot of time copying and pasting between Excel workbooks.					
We have to present our KPIs as PowerPoint Slides.					
We have to make changes every week to our reports.					
We rely on one person or machine to process data.					


*Any score over 20 suggests you're losing significant time to manual processes.*

 *Tip: Get your team involved – Regardless of whether there are 2 Reporting Engineers or a team of 50, everyone will offer key insights into the problems you are having. Stay open-minded and listen to the problems people are facing.*

## 2. Understand the Root Causes (Symptoms to Recognise)

Most reporting bottlenecks fall into one or more of these categories. Use the checklist to tick the behaviours or symptoms you see in your business:

Symptom / Behaviour	Yes	No	Notes / Department
We often spend hours copying/pasting data between systems.	<input type="checkbox"/>	<input type="checkbox"/>	
Different teams are using conflicting versions of the same report.	<input type="checkbox"/>	<input type="checkbox"/>	
Reports rely on one person's Excel skills to update correctly.	<input type="checkbox"/>	<input type="checkbox"/>	
It's unclear who owns each report or KPI.	<input type="checkbox"/>	<input type="checkbox"/>	
Reports are only created after an event happens, not proactively monitored.	<input type="checkbox"/>	<input type="checkbox"/>	
We frequently find errors in our reports and have to fix them manually.	<input type="checkbox"/>	<input type="checkbox"/>	
Managers wait for reports instead of having live access to key metrics.	<input type="checkbox"/>	<input type="checkbox"/>	

 **Action Step:** Tick the boxes for symptoms that match your business and note which departments or teams are most affected. This gives you a clear map of where reporting bottlenecks exist.

## 3. Your Quick Wins Roadmap

You don't need a complete BI overhaul to make meaningful progress. Here's where most SMBs start:

Action	Outcome
Automate recurring Excel exports into a shared dashboard.	Save hours per week and eliminate manual file versioning.
Standardise KPI definitions across teams.	Ensure all departments speak the same "data language."
Connect key systems (CRM, finance, operations) via a simple BI connector.	Achieve a single source of truth.
Create daily automated reports for leadership.	Shift from reactive reporting to proactive insight.

#### **4. Next Steps — From Workbook to Action**

Now that you've mapped your bottlenecks, the next step is imagining what your reporting could look like *without them*. Even small changes can make a big difference.

##### **Here's a straightforward step you can try right away:**

- Pick one report that takes the most time each week.
- Identify just one repetitive task you spend hours doing manually (e.g., copying data from different systems, reconciling numbers).
- Ask yourself: *Could this step be automated or centralised in a dashboard?*

**Even doing this once can save hours and reduce frustration.**

**At 29FORWARD, we help small and medium businesses turn slow, manual reporting into fast, reliable insight — using the systems you already have:**

We helped the BNSSG NHS save over 40% of their manual BI building time; they now have a slick, fast process that their Stakeholders love. It has led to more effective board meetings and better decisions. They went from 130 slides a month, to a single Dynamic Dashboard built on a custom data platform. It took us less than 3 months!

##### **👉 Book a free 60-minute “Reporting Review” session and we'll show you:**

- Where your biggest time-wasters are
- How small automation or dashboard changes can free up your team
- Which quick wins will have the most significant impact on decision-making

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