UNITO'S

Report on Reporting

unito

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What is Unito's Report on Reporting?

Unito surveyed a 150 people from all kinds of industries, at all seniority levels. We asked them to share their biggest difficulties with reporting, the tools they use, and more. Here are our findings.

What is reporting?

In a sentence, reporting encompasses the workflows necessary to keep people in the loop. Some reporting work can be performed wholly within your organization's favorite work management tool with purpose-built features. More often than not, reporting involves many tools, multiple data sources, and several teams.

Individual reports come in all shapes, sizes, and page counts. Two reports that seem similar on the surface can communicate completely different things. Some reports stick to high-level information and are meant to be reviewed quickly between meetings. Others are more in-depth, inviting dedicated analysis from experts.

Reports can communicate project health, resource spending, workload, project scope, and more. Typically, the purpose of a report is to enable someone to communicate important data to another person in a tangible and archivable way.

By surveying 150 people on reporting, we were looking to find the biggest obstacles people face when building reports. We also wanted to get a better idea of who these reports were for, whether they were perceived as useful, and how people went about gathering data.

Let's dive in.

Executive summary

The spreadsheet might be clear and crisp, but the workflow sure isn't.

Unito's Report on Reporting surveyed 150 respondents from a variety of industries, departments, organization sizes, and seniority levels. They were asked questions about their reporting workflows and the problems they encounter. After reviewing their answers, a few things became clear.

1: Reporting is an incredibly complex process

Reports are impactful and necessary, but building them can feel like an uphill battle. Data isn't static, updates come in waves, and everything's spread out over dozens of tools. Building a report — and keeping it accurate — is like keeping many plates spinning at once. The complexity of the report itself is another big issue. These things and more make the average reporting workflow complex, draining, and resource-intensive.

2: Reporting is a solo workflow

A great report can benefit teams and leaders alike. It can spark creativity, lead to new initiatives, and empower stakeholders to make better decisions. But no matter how many people benefit from a strong report, building it is usually a solitary affair. And, most of the time, it involves more than a little manual work.

3: Reporting is high-volume

Everyone wants to make better decisions, meaning everyone wants data. The individuals responsible for reporting workflows are frequently working on multiple reports at once, and they need to keep them all updated as new information comes in. It's no wonder, then, that reporting can be a huge time sink.

Reporting is a complex, high-volume process lacking in collaboration. It comes with several difficult challenges, including:

Consolidating data from multiple sources: The average company uses 137 individual SaaS tools. Even if only a few of these tools have the data your report needs, that's a lot of work.

Staying ahead of constant updates: A report that isn't updated becomes irrelevant before long. A single person can be responsible for building and updating multiple reports, so they're watching multiple data streams.

Doing hours of manual work with no support: The person responsible for a reporting workflow is rarely in a dedicated data role; they're building reports around all their other tasks.

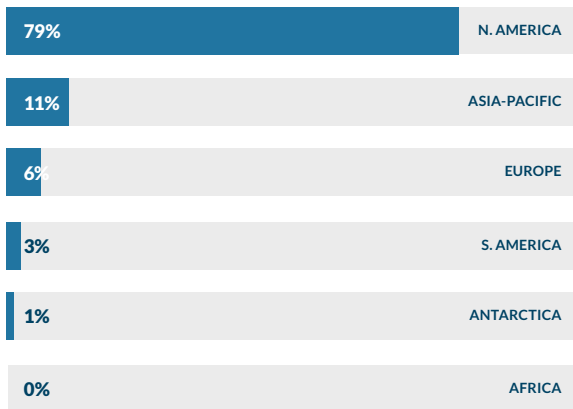Now let's dive into the survey results in more detail.

Reporting is a complex, high-volume process, and the responsibility for it falls on individuals.

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Demographics

We interviewed 150 respondents, who answered a short survey on the main difficulties they faced when creating reports, who their reports were created for, and more. Here's a breakdown of our sample.

What geographic region do you live in?

79%	N. AMERICA
11%	ASIA-PACIFIC
6%	EUROPE
3%	S. AMERICA
1%	ANTARCTICA
0%	AFRICA

What industry do you work in?

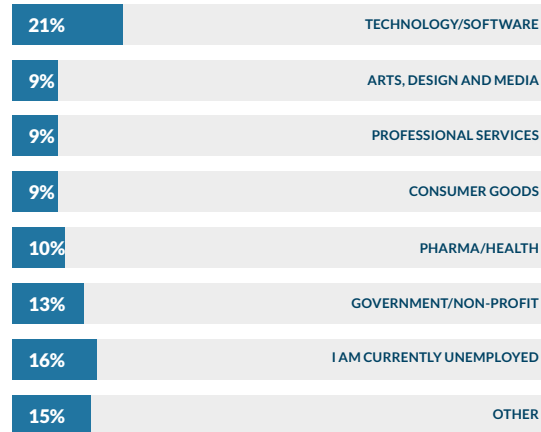|	
21%	TECHNOLOGY/SOFTWARE
9%	ARTS, DESIGN AND MEDIA
9%	PROFESSIONAL SERVICES
9%	CONSUMER GOODS
10%	PHARMA/HEALTH
13%	GOVERNMENT/NON-PROFIT
16%	I AM CURRENTLY UNEMPLOYED
15%	OTHER

Geography

The vast majority of our respondents (79%) were from North America. A few other respondents were from the Asia-Pacific region (11%), Europe (6%), and South America (2%).

One person claimed to be answering our survey from Antarctica. Honestly, we're not sure what to do with that one.

Industry

About 20% of our respondents worked in technology or software companies. The rest were spread out rather evenly over a variety of fields, from media to professional services and non-profit organizations.

12%
in organizations of
501-1000 employees

17%
in organizations of
101-500 employees

9%
in organizations of
26-100 employees

12%
in organizations of
11-25 employees

5%
in organizations of
2-10 employees

25%
worked independently
freelancing or consulting

20%
in organizations of
1001+ employees

Organization size

A notable portion of our sample (25%) worked independently, whether that be in freelancing or consulting. 20% of our sample worked in companies of 1001 employees or more. The rest of the sample is split as follows:
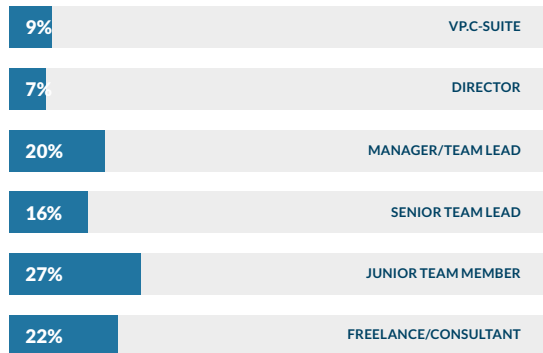
What department do you work in at your company

5%	MARKETING
6%	SALES
4%	PRODUCT DEVELOPMENT
12%	INFORMATION TECHNOLOGY
2%	HUMAN RESOURCES
10%	FINANCE
20%	CUSTOMER SERVICE
13%	OPERATIONS
28%	OTHER
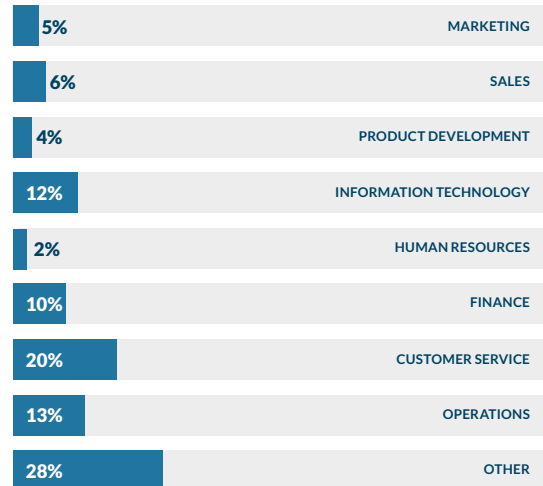
Department

The single most significant department in our sample was customer service at 20%, followed by operations at 13% and IT services at 12%. The rest of our sample was spread out over a variety of departments, including marketing, sales, engineering, finance, data, and administration.

Which seniority level best describes your current position?

9%	VP.C-SUITE
7%	DIRECTOR
20%	MANAGER/TEAM LEAD
16%	SENIOR TEAM LEAD
27%	JUNIOR TEAM MEMBER
22%	FREELANCE/CONSULTANT

Seniority

More than a quarter (27%) of respondents identified as junior team members, followed by 20% of respondents who reported being managers or team leads. About 16% of respondents were senior team members, 9% were VPs or other C-Suite personnel, and 7% were directors.

More than a fifth (22%) of respondents were either freelancers or consultants.

Unito

The three big problems with reporting

Problem #1: Complexity

There's no questioning that data is the lifeblood of many organizations. Decisions big and small depend on having the right information at the right time. That information usually comes in the form of reports: more than 75% of our survey's respondents said their reports provided actionable insights at least most of the time — if not every time.

How often do your reports provide actionable insights?

0% Never

4% Rarely

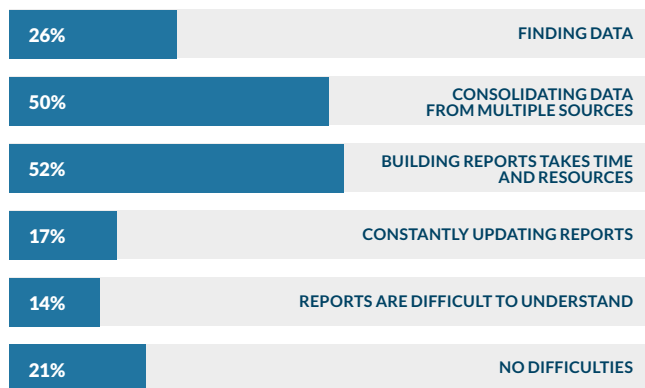13% Sometimes

26% Everytime

55% Most of the time
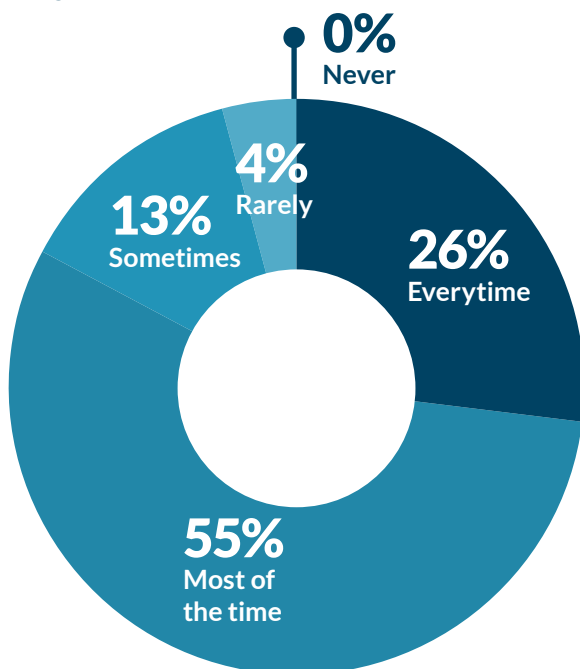
Leaders love reports because they give them an eye on what their teams are doing. Depending on the report, that can be a brief, visual summary — like a dashboard — or a deep dive into all the numbers. With that information, they know how current initiatives are going, whether they need to change their strategy, and where they can best apply their influence. Stakeholders love reports because they give them answers. They're the best way a stakeholder can know what's going on with the project they care about the most.

It might be the case that the only people who don't like reports are the ones responsible for them. Reports are hard to make, but they're not going anywhere.

So if we've still got to write reports, let's go over why they can feel so damn difficult.

Which of the following issues do you face while building reports?

26%	FINDING DATA
50%	CONSOLIDATING DATA FROM MULTIPLE SOURCES
52%	BUILDING REPORTS TAKES TIME AND RESOURCES
17%	CONSTANTLY UPDATING REPORTS
14%	REPORTS ARE DIFFICULT TO UNDERSTAND
21%	NO DIFFICULTIES

1. **Building the report itself is difficult:** So you've gone through all the data and found the bits you need for your report. That hard part should be over now, right? Well, not really. See, turning that data into something that brings value to leaders and stakeholders can be a long, difficult process, fraught with headaches. Even when you have a tool specifically for the job, it takes time and effort. And when you don't? Well, you have to process all that data manually and find some way to represent it. No wonder, then, that almost 53% of our respondents identified this as the main issue when creating reports.

2. **Consolidating data is a nightmare:** Parsing out the data from the noise is one thing, but it's made that much more difficult when you need to check multiple sources. Exactly half (50%) of respondents reported having to go through multiple tools, platforms, and other sources before they had all the data they need.

3. **Finding data is tough:** What counts as data? How do you find the right information when there's so much noise? Too many tools in your stack aren't designed to make important information visible, which means finding the things you want to surface for your leaders can be an uphill battle. More than a quarter (26%) of respondents named just finding data as an issue they dealt with.

4. **Reports are outdated quickly:** Many reports are built manually — at least to some degree. That means that, by the time you're done building a report, the information you've spent hours gathering might have changed. So your report might get to a stakeholder and already be out of date when they get their hands on it. It's tough to get insights you can work with when your information's outdated. About 17% of respondents named this as one of their main issues with reports.

5. **Reports can be difficult to understand:** If you're not used to working with numbers and dashboards, a report can seem like it's written in a completely different language. For 14% of respondents that was the biggest issue they faced with reports.

There's no doubt that reports are crucial. Leaders get the insights they need to direct their teams towards better initiatives, and everyone gets a better understanding of how things are going.
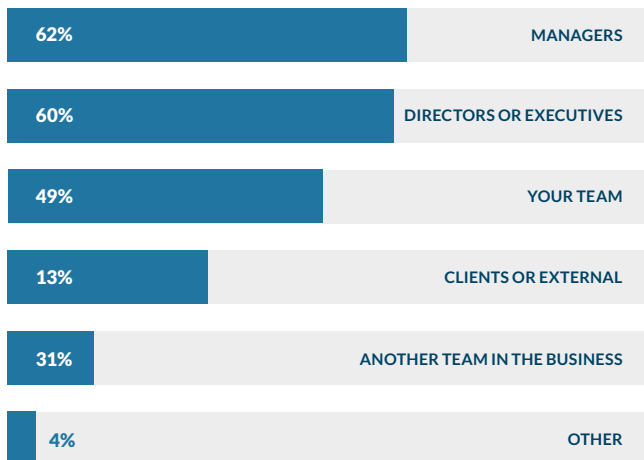
But the people responsible for these reports have to deal with a whole bunch of hurdles before they can even get to those insights. Reports are important, but they're unnecessarily difficult.

Problem #2: Responsibility

Reports are tough to build, take time, and require checking multiple data sources. It sounds like the kind of job that requires a whole team to get done with custom-made tools. Unfortunately, that isn't always the case in practice.

Who is your report's recipient?

|	
62%	MANAGERS
60%	DIRECTORS OR EXECUTIVES
49%	YOUR TEAM
13%	CLIENTS OR EXTERNAL
31%	ANOTHER TEAM IN THE BUSINESS
4%	OTHER

People who benefit most from reports are too busy to contribute: The majority of respondents said that managers (62%) and their organization's C-Suite (60%) were the target audience for their reports. C-Suite personnel don't really have time to build reports, especially when they spend most of their day in and out of meetings. Managers find themselves in a tight spot. They're both responsible for reports themselves — remember that 20% of our respondents were managers or team leads — and rely on reports from their team.

Is your report creation workflow an individual or collaborative effort?

62% COLLABORATIVE EFFORT	38% INDIVIDUAL EFFORT

Reporting means flying solo: Nearly a third of respondents (62%) said they worked on their reports alone. Even though nearly half (49%) of people working on reports do so for the rest of their team, they rarely get support from them.

Is your report creation workflow mostly manual or automated?

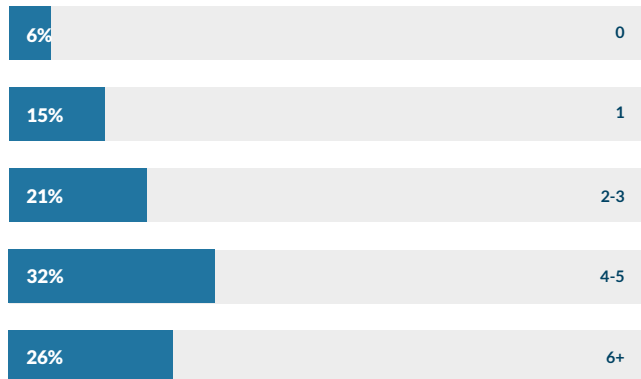| 33% MANUAL	18% AUTOMATED	49% A MIXTURE OF BOTH
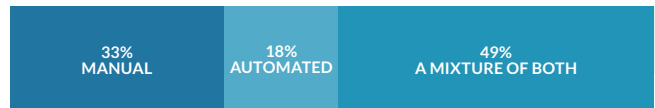
It's like driving stick: Not only are the people working on reports doing it alone, they have to do at least some manual work. Nearly half of respondents (49%) built workflows using a mix of automatic and manual work. A full third had to do everything manually, and only 18% of people could say their reporting workflow was completely automatedThe importance of reports can't be overstated. You would think that something so important would be a collective effort, but unfortunately the responsibility to create reports — and keep them updated — falls on individuals. That means that many people benefit from something a single person is responsible for creating.
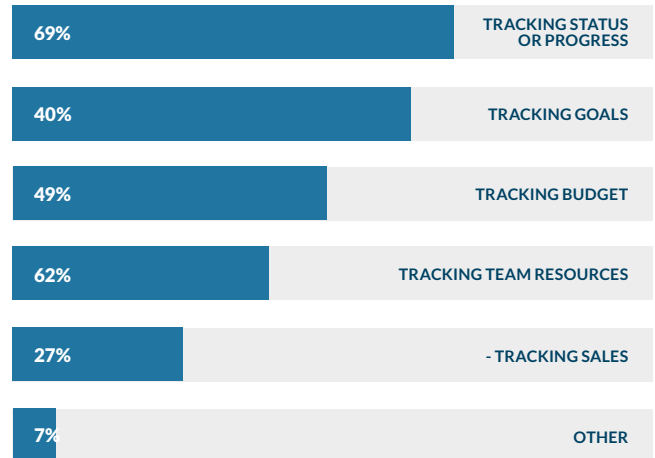
Problem #3: Volume

Too often, a report has only one owner, no matter how many people benefit. This means the monumental task of building reports — with all its problems — and keeping them up to date falls on a single person's shoulders. But as we poured through the data from our respondents, it quickly became apparent that reporting, as it stands, can hardly be a single person's responsibility. Here's why:

How many individual reports do you own or contribute to?

6%	0
15%	1
21%	2-3
32%	4-5
26%	6+

What best describes the purpose of your reporting?

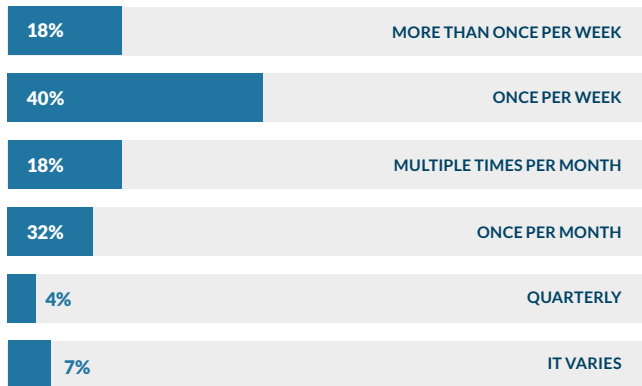|	
69%	TRACKING STATUS OR PROGRESS
40%	TRACKING GOALS
49%	TRACKING BUDGET
62%	TRACKING TEAM RESOURCES
27%	- TRACKING SALES
7%	OTHER

Multiple reports for one person: More than half of our respondents (57%) were responsible for at least four reports. That's tough, especially when you're manually consolidating data from multiple sources and dealing with the headaches of building the actual reports.

A report for every need: When we asked our respondents to describe the purpose of their reports, we expected one to stand head and shoulders above the rest. And while reports on project status and progress were most common (69%), they weren't that far ahead of reports on goals/targets/OKRs (62%). Close enough behind to be significant were budget reports (49%) and reports for team resources (40%). This suggests that a single reporter could find themselves building multiple types of reports and need to familiarize themselves with each one.

How often do you need to update your reports on average?

18%	MORE THAN ONCE PER WEEK
40%	ONCE PER WEEK
18%	MULTIPLE TIMES PER MONTH
32%	ONCE PER MONTH
4%	QUARTERLY
7%	IT VARIES

Outdated reports: Building a single report is a difficult process that can take hours of your time. Being responsible for multiple reports means syncing even more time into that task. But what about keeping everything up to date? After all, leaders and stakeholders alike need information they can act on, and outdated info is anything but that. That's why more than half of our respondents (57%) find themselves updating their reports at least once a week.

How much time do you spend on reporting each week?

>30 MIN	30 TO 1 MIN HR	1-2 HRS	3-4 HRS	<5 HRS

Time sink: How much time are you spending on reports? How much time do you wish you were spending on reports? If you're receiving a report, you might need just enough time to read through and click to something else. But the people building them? More than a third (37%) of our respondents spend at least three hours a week on reporting, whether that's building reports, keeping them updated, or just making them more accessible.
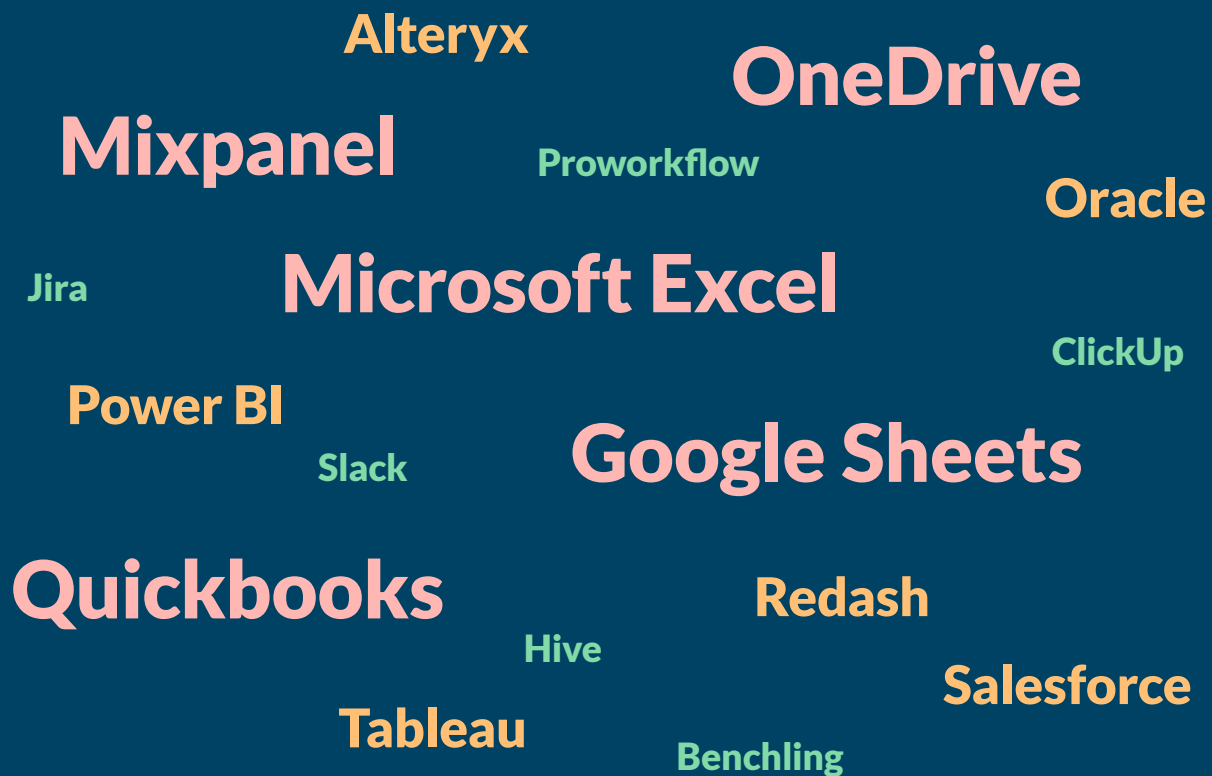
One of the biggest challenges with reporting is one of volume. When a single person can be responsible for so many reports, it's natural that they'll quickly become outdated. Modern organizations depend on data to make better decisions and stay agile. But when these decisions bottleneck at a single person's reporting efforts, good data can be harder to come by.
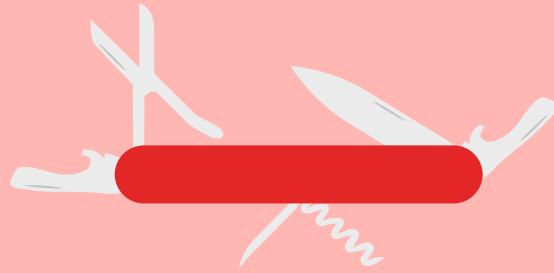
Everyone wants a report because they're a valuable way to track project status and resource spend. But with the number of reports needed, it's too much to put on a single person's shoulders, and reporting sucks up too much of their time.

The reporting toolbox

Reporting is a complicated process. The work is complex, taxing, and often left to a single person. But it goes beyond the workflow itself. One in four respondents said they didn't have all the tools they needed for their reporting workflow. We asked people which tools they used as part of their workflow, and we got a sizeable list back:

Alteryx

OneDrive

Mixpanel

Proworkflow

Oracle

Jira

Microsoft Excel

ClickUp

Power BI

Slack

Google Sheets

Quickbooks

Redash

Hive

Salesforce

Tableau

Benchling

With so many tools in use — and dozens more that went unnamed — you'd think anyone should be able to build all the reports they need. But the problem isn't with any specific tool. Remember one of the main issues people were facing when building reports: finding and consolidating data. The average company uses 137 individual SaaS tools, and few of these are designed to work smoothly together.

That means anyone working on an individual report could be collecting bits of information from dozens of tools.

Every major problem in reporting is made more difficult by the number — and type — of tools a company uses:

Complexity

Imagine trying to build a budget report for a single project. You might have to go through several spreadsheets, an accounting application, Slack threads, and more just to get the information you need.

Responsibility

When you're building a report alone, you're working on borrowed time. After all, the majority of people engaged in reporting aren't often in data roles; they're

sourced from all over a company. So you're likely to go to a mainstay, like Google Sheets. But while Sheets is fantastic for building detailed reports, it's not where your data originates, and that puts more work on your shoulders.

Volume

The huge number of tools someone needs to check when working on a report makes the volume issue into an exponential problem. Constantly needing to check for updates is much tougher when it needs to be done across multiple apps.

There's no one-size-fits-all solution for reporting. Many of our respondents made it clear that they need to check multiple sources and use more than one tool before they had a report that suited their purpose. Some respondents even said there were too many tools to count. So the solution isn't to reduce the number of tools, but it's clear something's missing from the reporting toolbox.

Enter Unito

There is no shortage of tools available for reporting workflows, and each one has its place. But the missing piece doesn't provide better dashboards, formulas, or graphs.

It builds bridges.

The status quo for reporting involves manually checking multiple data sources, funneling that information into a state where it can be analyzed, and manually building a report. That takes hours that could be spent doing something with higher impact.

But with a tool like Unito, you can build deep, two-way integrations between the tools in your reporting workflow, automating a huge chunk of that reporting work. Plus, you get dynamic, real-time updates without any extra work so your reports aren't outdated by the time they reach their recipient.

Reporting is essential, and it isn't going anywhere. But we don't have to accept it in its current state.

Here's how Unito addresses each of the big three challenges that come with reporting workflows:

1. **Complexity:** Building reports is difficult, it involves checking multiple data sources, and consolidating that data is a headache. With Unito, you just need to set up integrations between those data sources and your reporting tool. Spend your time working with insights, not building the report itself.

2. **Responsibility:** Unito empowers a single person to own their organization's reporting workflow without getting crushed under the responsibility. Build just a few Unito flows, and it's like you have extra collaborators collecting data for you without needing a new hire.

3. **Volume:** Want to keep manually entering data every time there's an update? Or would you rather someone do it for you automatically? Unito checks your work tools in real time and makes updates in your reporting tool without your input. With Unito, you can give stakeholders the dynamic, real-time updates they're craving.

Reports aren't going anywhere, but the headaches can. Unito is the one-stop solution for better reporting, and it can be set up in minutes.

Try Unito for 14 days, free, and transform your reporting workflows

Start free trial

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