Reporting & Measurement

eBook

Administrate

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Administrate Reporting - Simply the Best

We're extremely proud of our reporting engine if you haven't guessed already by the amount we brag about it. After being personally frustrated with reporting, we decided to create what we believe is the industry's best reporting engine.

It's easy to use, all the data is automatically pulled from Administrate and updated in real-time, and you can easily create, download, and send reports in just a few clicks. What more could you ask for?

We've collected our favorite blog posts, which deal with reporting and data measurement into one convenient eBook. Read about the benefits Administrate's reporting engine can offer you – they're all here!

Reporting

Data & Measurement

Getting Rid of Boring Reports

If you break out in a cold sweat at the thought of reporting, have no fear! Reporting doesn't have to be boring, and you can use all your important data to produce reports that you're excited to read and use!

Reporting is an essential, but perhaps sometimes boring, part of any business. The thought of sifting through data and doing complex calculations can make even the best of us break out in a cold sweat, but nevertheless, it needs to be done.

Reporting is vital to so many different parts of the business, so you can't simply put it on the back burner just because it's not the most exciting task. Instead, why not make reporting as easy as possible and something you actually look forward to!

You may not believe me, but a little forethought and research can help make your reporting process painless and not something you dread.

Get the Right Data

The first point to making your reports more interesting is to focus on the information you need. Think about what you actually need to report on and get really granular on those aspects. You don't need to report on anything and everything because you can.

There is no more significant time-waster when it comes to reporting than doing reports just for the sake of it. Who wants to read mountains of reports that don't really tell them anything important? That's where boredom can creep in, and pretty soon people will stop reading the reports you send them because they are unable to separate the vital information from everything else.

You need to think about what business question you are trying to

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answer every time you make a report, which will ensure that every report you create is an essential one. If you're trying to answer more than one question with a report, you may want to take a step back and decide how you're going to split the questions up. Then you can create a report focused on each business question so that you won't muddle up your data. If reports are too confusing to read, people will quickly lose interest.

You want to create useful reports that focus on specific data every time, so it's worth putting in the extra effort to get the answers you need.

If you want to make your reports interesting, you need to focus on the data that people are interested in and need to make quality business decisions.

Know Your Audience

The data you'll want to include in a report may be different depending on who you are producing the report for. Is it for an entire team, your board, or an individual? All these different audiences will need different overviews of different parts of the business and will only be interested in specific selections of data.

If you're producing a report for a specific audience, ask them what they want to be included before you create the report, so everyone gets a report that's relevant to them and their interests. When it comes to sales, your Accounting team will be interested in how much profit you're making and the costs, whereas your instructors may be interested in how many trainees are in their classes. It's basically the same sections of data both audiences are looking at, but they're focusing on different aspects. Make it easy for your audiences and filter the data for them, so they immediately see the data they need and care about.

Use the Data

Reporting is all well and good, but what's the point if you're not going to do anything with the data? If people think they're supposed to be spending a lot of time creating and reading reports just to get an overview of the numbers and nothing else, they may stop reading them after a little while.

It's important to make sure people are using the data presented in their work going forward. Providing people with data that is relevant to their day-to-day work will help them improve in the future.

For example, you may want to produce a report on how many employees are taking a particular training course. If your training department offers offsite training, this may highlight the fact that only 20 employees have been attending this training, but it is booked into a venue that can seat 40 people. By relocating this training to a smaller venue, this could save the business a lot of money. If a report highlights an important issue like this once, it's more likely that the audience for that report will start looking for things like this to focus on in the future.

If this small detail had been buried in a huge report that takes hours to read, it could have gone unnoticed for a prolonged period, effectively wasting the company money for no reason!

When looking at reports and effectively using the data becomes a regular task everyone within your business gets used to doing, it encourages reports to become part of your company culture, as opposed to dull emails that people dread receiving.

Automate It

Reading boring reports is one thing, but what about the person who has to create those reports? Trudging through data every month doesn't sound like the most fun in the world, and if you're not excited to create those reports, how can you expect anyone to be excited about reading them?

The best way to make creating reports enjoyable is to make it easy! The data itself isn't boring - it's vital, but the whole reporting process can be a bit dull. Here at Administrate, we're all about making reporting as easy as possible, and that's why our reporting engine lets you create automated and customized reports to get exactly the data you need when you need it. Use our reporting engine to cut through all the facts and figures and get straight to the information you really need.

Timing

If you have to create a lot of different reports, chances are they all need to be done at different times. Whether they need to be done weekly, monthly, quarterly, or annually, it can be hard to keep track of what reports need created and when. Administrate gives you the ability to have reports automatically generated precisely when you need them, repeated when they need to be, and automatically sent to everyone who needs to see them.

Data

Our reporting engine also gives you the ability to construct, create, and save reports quickly and easily from any of the data you have saved within the Administrate platform. It's as easy as dragging and dropping the data you want to include, and then we do all the hard work for you! Having all the data you need right at your fingertips within the Administrate system also means you don't have to waste time collating data from different sources from all over the company.

The University of York recognizes how important this is because it can be challenging to merge lots of data from different sources in a useful way. Amanda Selvaratnam, Head of Corporate Training, commented:

> *"It's been very hard to accurately bring together all the various bits of information from across the university on an annual basis. The wonderful thing about Administrate is it brings together the client information, the course information, and the financial information into one reporting system, which means we now know what's going on across the institution."*

Store

All the reports you create within Administrate will also be saved for future use, so you don't have to worry about trawling through loads of previous reports to find the one you need. You can even export them to Excel or CSV files.

Conclusion

Reporting may never be your favorite thing in the world to do, but hopefully, we've shown you there are ways to stop it being thought of as a tedious task! As with a lot of things, it's all about planning and making sure you're putting the effort in where it's needed.

Then you can get to the exciting part: studying and using the data produced to highlight things that need to be worked on to improve your business!

5 Mistakes to Avoid When Writing Reports

Whether you have to write reports regularly as part of your job, or it's something you only delve into every so often, it's important to make sure you are producing the best reports possible.

Reports show how different areas of your business are performing and give staff members the critical data they need to complete their work. It's vital the reports you produce convey the correct message and contain helpful information for the people reading them.

We've highlighted five common mistakes when creating reports so that you can avoid them!

1. Ask Your Audience

If you're creating different reports for different audiences, the last thing you want to do is just reproduce the same style of report for everyone. Perhaps your CEO likes to see all the facts and figures in their report so they can get a real idea of the big picture, but maybe your Team Leaders are more interested in seeing the data displayed in graphs so they can get a quick overview of the business without having to read pages and pages of numbers.

The best way to see how your audience would like their reports displayed is simply to ask them. You'll most likely know exactly what data your different audiences need to see to make the reports usable, so take a bit of extra time to find out how they like their reports structured and presented.

2. Waiting Too Long

While items like your annual reports only need to be done once per year, many business decisions benefit from more regular reports.

For example, if you only report on trainee performance every six months instead of monthly, there may be problems with your training that you've not given yourself the opportunity to fix. With monthly reports, you may notice a pattern after a couple of months and can take action to strengthen your program.

Thinking about how often you need to be analyzing your data allows your business the chance to improve whenever possible.

3. Don't Complicate It

Often, your report may be data collected into tables and graphs for people to view, but sometimes you may need to include some written explanations to provide a clear picture of what the data is showing. This allows you to highlight and detail the particular points of data.

When it comes to written reports, the most important thing is to make sure you don't overcomplicate the report and make it confusing.

Don't write more than you need to. The numbers should be able to speak for themselves, so just include enough text to clarify your point. If you write pages of copy to go with one graph, chances are you'll confuse people, and they will miss the vital information.

Also, make sure you write using clear language and avoid jargon!

You may want to show off your writing skills, but this isn't the best platform for that. Just give simple explanations, so all the data makes sense.

4. Padding

It can be tempting to make reports long and full of impressive-looking data, but it's vital you only include the data people actually need to see and will read.

If a manager wants to see every single number for their department, be happy to provide them with it; however, don't make everyone else trawl through data that isn't relevant to them.

You may think a twenty-page report is going to look more impressive than a one-page report, but the truth is, essential data should be the only focus of any report. If there's only one page worth displaying, then that's all there is! Bigger isn't always better!

5. Proofread

Numbers should speak for themselves, but that doesn't mean they will always make sense. Make sure you proofread any report before you send it out. Proofreading your report is imperative, and it applies not only to the written text but to the data as well.

Maybe someone misentered a decimal point in their figures, or perhaps you took some data from a spreadsheet where the formula was mistyped. This could lead to your numbers being all over the place and data being misrepresented in the report, giving you an inaccurate picture of how the business is performing.

Take a little time to check over your report before you send it to anyone – maybe even ask someone else to take a quick glance over it to make sure everything makes sense. Another pair of eyes will always be able to help you ensure all your report content makes sense and is accurate.

The Importance of Training Measurement

Periodically measuring your training programs helps ensure you are providing the best service possible to your trainees. We think a big part of training measurement is surveying your trainees and creating reports to analyze the data. This allows you to see what is working well and what positive changes you can make.

For any business, it's essential to make sure you are offering the best service possible, not only to your actual customers but to anyone you deal with on a day-to-day basis.

Training departments are no different. It's important to consider how your training department is working on several different levels. You want to ensure your employees are receiving excellent training, that your instructors are providing the best possible information, and that you have a great relationship with your vendors.

So how do you give yourself a better idea of how well your business is doing? It's important to measure yourself to see how well you're performing compared to how well you think you should be. Let's take a look at some ways you can approach this!

Observation

Sometimes the easiest way to see how something is working is to simply observe it! This may not work for measuring all aspects of your business, but if you want to see how your training courses are being run, or observe what your training staff are like "in the field," then why not attend or take a few training sessions so you can experience it first hand?

This can quickly give you an overview of the content being taught, how your trainers interact with their learners, or even how suitable a venue is for a particular class. Sometimes it can be hard to see problems until you're immersed in a situation, and a little observation can give you a different view of your training.

Observation can also be straightforward to slot into your workday since you'll already have a clear view of when your training sessions are scheduled and will be able to attend at a time that suits you.

Measuring your training department based on what you observe is a great way to pick up on obvious problems, as they will be things that jump out at you right away, such as venue locations or upgrading equipment. However, to measure how your training is running on a larger scale, you're going to need to dig a little deeper.

Follow Up

One effective way to measure your training department is to follow up with your employees. This will mainly be employees who have been through one of your recent training sessions, but you may also want to consider talking to department staff and vendors or other people your trainees are interacting with.

All these different groups of people can give you an insight into different parts of your business, so it's essential to incorporate as many different groups of people as possible into your measurement.

A great way to measure the success of your training is to look at the average assessment scores for the training you run. Whether it's a pass/fail or one where trainees receive a grade or score at the end, you will want to consider this in your measurement.

Do you have a high number of trainees all failing one question? Is there one section of the training people seem to be struggling with consistently? This gives you great insight into parts of your materials that may require some tweaking. Maybe the materials don't provide a good enough explanation to give trainees the knowledge they need to be successful. Or perhaps the instructor is having trouble explaining a particular concept adequately.

If you have certain results jumping out at you, it's worth going over your content with your instructors to make sure you're giving your trainees the best chance possible to learn and understand the information being taught to them.

It may be that you assess an area that trainees are struggling with and find that you're pleased with how that section of the training is being taught, and that's fine as well! You may want to do something simple like suggest extra reading for that particular section that will help strengthen difficult concepts.

The Importance of Surveys

The easiest way to get a good idea of how well your training department is doing, from across several different departments within the company, is to use surveys. Surveys allow you to ask precisely the questions you want answers to so you can get a clear idea of how effective your training is.

Design

The first stage is designing your survey. This will depend greatly on the audience you are planning on sending it to, and you'll want to create several different surveys to make sure you get the answers specifically relevant to each group surveyed.

You also want to make sure that you're only getting information that will be useful to you in measuring your training, so take some time to think about the questions you want to include.

Finally, think about how you want people to answer. You may want to use tick boxes or a 1–10 rating system, but for more complex questions you may wish to include a text box so that participants can write detailed answers.

Repetition

Running a survey once may give you the answers you need right at that moment, but what about a few months down the line? Employees may have responded one way after initially completing a training course, but your employees may be encountering a whole new set of problems now that they are on the job that weren't apparent the last time you surveyed them. This means the results won't be of any use now!

You want to make sure you regularly survey the relevant people involved in your business, whether that's department managers, trainers, or employees, to make sure you are constantly producing results that you can use.

Repeating surveys is important because you don't want to measure your training efforts once and then move on. You will always want to make sure you are at the top of your game and providing the best information possible, so ensure you are continually reflecting on the data you've collected.

Timing

When is the best time to send out a survey? It depends on what you're trying to find out. If you want to ask your employees to review a training session, its content, or their instructor, you may wish to send this survey out during the training. This allows you to address any problems before the training is completed or, at least, before that training course is rerun. If you want a full review of a training course, you could send the survey a week or so after it has finished, as this will give trainees the chance to provide you with an accurate review of their whole experience.

The key to timing is to give yourself the best opportunity to fix problems as quickly as possible before anyone has to face that problem again. If something isn't working, you don't want to continue repeating that mistake again and again because you will be wasting valuable time and money.

Analyze!

You've sent out your survey and received your results. Great! Now what? Your job is far from done! It's important to keep comparing the results over time and take them into account as you make decisions in the future.

Constantly comparing past and present results allows you to look for patterns in the data, which enables you to always be looking for things to update to make sure you are continually improving as a training department and business.

To get the results that will be useful to your business in the future, it's important to make sure you ask precisely the questions you need answers to, so think about the analysis stage at the beginning when you're designing your survey. You want to give yourself the best data to compare in the future, so plan your questions around that.

Analysis can be daunting if you have a lot of data to compare, so make sure you store all the results smartly. The best way to make sure your data is easy to find and compare is by using an online survey database. Keeping hard copies of results could mean storing years' worth of data in your office or having to trawl through it manually any time you need to analyze it. Even emailing surveys to people as things like Word documents involves storing a lot of data on your computer, which doesn't allow for easy comparisons.

Online Surveys

Using an online survey tool like SurveyMonkey will make the analysis of your survey data more manageable and less time-consuming. Here at Administrate, we have a SurveyMonkey integration, meaning Administrate users can easily send customized surveys directly from Administrate, which will save you even more time and help keep things organized.

Whatever online survey tool you use, here are some of the benefits that tool could offer you:

- **Real-Time Results.** Having the ability to see your results in real-time means you will always have the freshest data available to you, and you won't have to wait for all responses to input your data for comparison.
- **Keep Everything in One Place.** Keeping everything online means you'll never have to worry about losing those essential responses. It also makes it easy to search for past results, and you won't have to worry about surveys being stuck somewhere that you don't have access to, such as a filing cabinet or someone else's personal computer.
- **Easy to Distribute.** Distributing paper copies of surveys is not only time-consuming, but it is also expensive if you mail them to respondents. Online surveys can be sent directly to the people you need to reach quickly and easily. It also means you can easily keep track of how many you've sent and how many have been completed!
- **Create Custom Reports.** Using an online survey database means you will be able to create custom reports based on the data you want to see. Maybe you want to see the answer to a particular question from everyone you've ever surveyed, or you can filter

your results to certain people such as employees or trainers. Only specific data will be related to certain problems you are addressing, so it's helpful to be able to filter the information so you can look at the pieces you specifically need.

All these features are available through SurveyMonkey, and don't forget Administrate's SurveyMonkey integration will make the job even easier!

Conclusion

While there are different ways to help you measure how successful your training department is performing, we believe the most important tool at your disposal is surveys.

Not only can you design them to analyze precisely the data you want to focus on, but you can then reuse that data for as long as it's relevant, giving you an invaluable catalog of information to help you make critical business decisions.

Using an online survey database will only make the process simpler. Not only will it save you a considerable amount of time in the long run, but it will also allow you to have all the data you've ever collected to create a comparison of how your business is doing at different points in time, which will give you a more realistic picture of how effective your training department is.

Measuring your training department is an on-going task that you should consider whenever you make important decisions, so never forget how vital it can be to your success as a business.

The Questions You Should Be Asking to Effectively Measure Your Training

When you're compiling a survey to measure how effective your employees found a particular training session, there are hundreds of questions you could ask, which can make the whole process seem overwhelming.

We've provided some of the main questions you may want to ask, and covered the main topics you'll want to focus on to get a clear idea of how trainees rate your training – focusing on the main questions that will give you the best picture of how effective your training is overall.

Evaluating Your Trainers

One area you may want to focus on is how your trainees feel their trainers are performing. You may have amazing material, but if your trainers aren't performing to the best of their ability, it's going to hurt your trainees' learning experience.

To get the full picture of how your trainers are performing, make sure to target any trainer-related questions specifically on their teaching, and not the content or assessments they issue your trainees. This means if your training is engaging, but a trainer is not, you won't miss this detail by only asking questions about content.

You can use a Yes/No option, or a Strongly Agree/Agree/Disagree/Strongly Disagree scale so that the trainees can answer with their gut reactions. Using options like these allows your data to be easily compared across your entire training offering, giving you a clear picture of how your trainees felt about a particular trainer. You may have noticed that we've left out the Neutral response you might typically expect on this type of scale because it's not helpful when you're analyzing data. Your trainees will have an opinion on each of these questions, so it's easier to gauge how they felt by not offering them the easy Neutral option.

You may want to provide a text box at the end of all the questions, so students can further expand on any specific areas. While this won't be as easy to compare as other data, it will give you further insight into your staff performance and allow you to raise any particularly worrying issues with your trainers before they harm your business. It also offers you the opportunity to share positive feedback with your trainers.

Below are examples of the types of questions you could ask relating to your trainers, and you can allow your learners to answer with whatever method works best for your training analysis.

1. I feel my trainer:

- Was always well prepared?
- Was always willing to give feedback?
- Was always willing to answer my questions?
- Was effective in leading the class?
- Was friendly and approachable?
- Was interested in the subject they were teaching?
- Had a thorough knowledge of the subject they were teaching?

Evaluating Your Content

The main reason for doing a survey to evaluate your training will be to see what trainees thought of the training they received.

For this section of the survey, it's important to get as much detail from your trainees as possible, as feedback like this will allow you to make changes to your content if you need to, ensuring you're always providing the best experience possible.

We've laid out the most important questions you'll want to ask below, as well as what we think is the best way to structure the questions in your survey.

2. What are the most important things you will take away from this training?

This will allow you to see if your trainees' experience ties in with the teaching aims of the course. If they don't align across the board, you may want to rethink your training goals.

3. How do you rate the training content?

- Interesting
- Relevant
- Will be able to use in the future (at work or in general)
- Easy to understand
- Enjoyable to learn
- A good amount of homework

4. How prepared did you feel to perform your job duties before you completed the training?

- Not prepared at all
- Prepared
- Greatly prepared

5. How prepared do you feel to perform your job duties now that you have completed the training?

- Not prepared at all
- Prepared
- Greatly prepared

6. How do you rate the assessments for this training?

- Good level of difficulty
- Tested the knowledge I was taught
- Revision prepared me well
- The thought of them was stressful
- I felt supported in the lead up to assessments

Breaking down these last two questions into as many points as possible will give you the level of detail you need and will provide you with an accurate picture of how your training is performing. Splitting it into different sections, such as actual course content and assessments, will also be extremely useful for your analysis.

Segmenting questions like this lets you see exactly which parts of your training are working and which aren't, instead of getting the impression the whole training course was a failure when a trainee gives it a low score because they found the assessments too difficult.

Segmented data like this also allows you to make changes to the problem areas of your training, instead of trying to adjust things that don't actually need fixed and missing the main problems.

Make sure for these questions you allow your trainees to select as many answers as they like so that you can get a full picture of their opinions.

Operations

The last area of your training that you'll want to focus on is the operational side. Even if students enjoyed the training, if they had issues using the training systems, chances are they didn't learn what you need them to. Make sure your trainees have the best experience from start to finish.

7. What method of delivery did your training use?

- eLearning
- Phone/video conferencing
- In-person
- Other

8. How was the experience for you?

9. How would you rate the level of communication you received before the training started?

- Excellent
- Good
- Poor
- Terrible

10. How easy to use was the training system?

- Excellent
- Good
- Poor
- Terrible

Questions like these are more general for all the training you offer and will allow you to see how effective trainees find them. It will also let you see if there are any issues as far as ease-of-use in your training systems. Systems that are difficult to use can take the focus away from your content and be unnecessarily time-consuming for your trainee.

What's Next?

As we mentioned above, these aren't examples of all the questions you may choose to ask on a student survey, but these are the main ones we believe you'll want to cover and analyze the answers from.

Interested in Administrate?

We'd love to show you how Administrate can work for training providers and make your life so much easier!

Our reporting engine is like no other, and we love nothing more than making sure training providers are super organized and have all the data they need right in front of them!

If you're interested in seeing how Administrate could work specifically for you, why not get in touch with us?

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