

Report Templates and Analysis models

25 White]

Last updated on July 16, 2024

This guide provides an overview of the report templates and analysis models available in the InfoDesk platform's reporting module.

Introduction

The report module should primarily be used when you have a defined analysis goal and want to use one of the analysis models available in reporting to perform your analysis. If you do not want to do any analysis, you should stick to the newsletter function.

We recommend that you first prepare the report's content with edited and summarized articles in a Workspace. The content should be summarized at a high level, highlighting the topic/trend/event/insight/change. Then, you can deepen the analysis of your material using the analysis models in reporting.

Matrix

The matrix in the report templates is directly linked to the analysis model you choose when you create your report template. It is created automatically when you select an analysis model, and you can modify it according to your needs.

When you do your analysis, you use the matrix and its columns to sort your material based on the analysis model. The result will be an overall and educational picture of your analysis at the beginning of the report.

Columns

If you are not using one of the predefined analysis models or want to customize a predefined matrix, you can adjust its columns.

Specify the number of columns your matrix should display. Keeping the number of columns even is more visually appealing, with two and four columns being the most common numbers. Note that changing the number of columns in the matrix changes the conditions for the analysis.

The X and Y axes

The X and Y axes of a matrix usually represent different dimensions of the analysis. When you select one of the predefined analysis models, the X and Y axes will be named automatically. You can modify the names of the axes according to your needs but note that this may affect the analysis model. If you chose an empty report template, you choose names for the X and Y axes on the Settings page in the report.

Fields

You can deepen your analysis of the posts in the matrix or comment on your analysis by adding fields to the report. Examples of fields that can be added are consequences, driving forces, strategic advice, and suggested actions. Note that some templates already include fields that you can change to suit your needs. You can also add additional fields beyond those in the templates. Open the Setting page in your report to add fields.

Steps to create a report

Follow these steps to produce a report.

1. Define the purpose of the report and the type of analysis you want to use. Then, choose an analysis template that suits your purpose and needs.
2. Create a Workspace to prepare the content for your report. Move the posts you want to process to the workspace.
3. Before adding the posts to the report, you should use the Summary function to combine similar topics into trends and insights and limit the number of posts in the report.

Our recommendation is that you refine your material so that each section of the report matrix contains a maximum of 3-5 high-level posts. The more posts the report contains, the less reading value it has for the recipients/readers.

The workspace preparation for reports involves some manual work. This is on purpose so you can put your own professional, organization-specific analyst touch on the articles for your report. However, you can always speed up the analysis using the Summary and AI tools available in workspaces.

4. When you have combined and edited the posts in the workspace, you can link the workspace to the report so that your material becomes available in the report. You can easily connect to the workspace from the Refine step in the report.
5. Do your first analysis of the material by dragging and dropping your summarized posts into the boxes of the matrix based on your analysis. You can move the posts by dragging and dropping them between the boxes in the matrix. Remove posts from the matrix by clicking the cross next to the post heading.

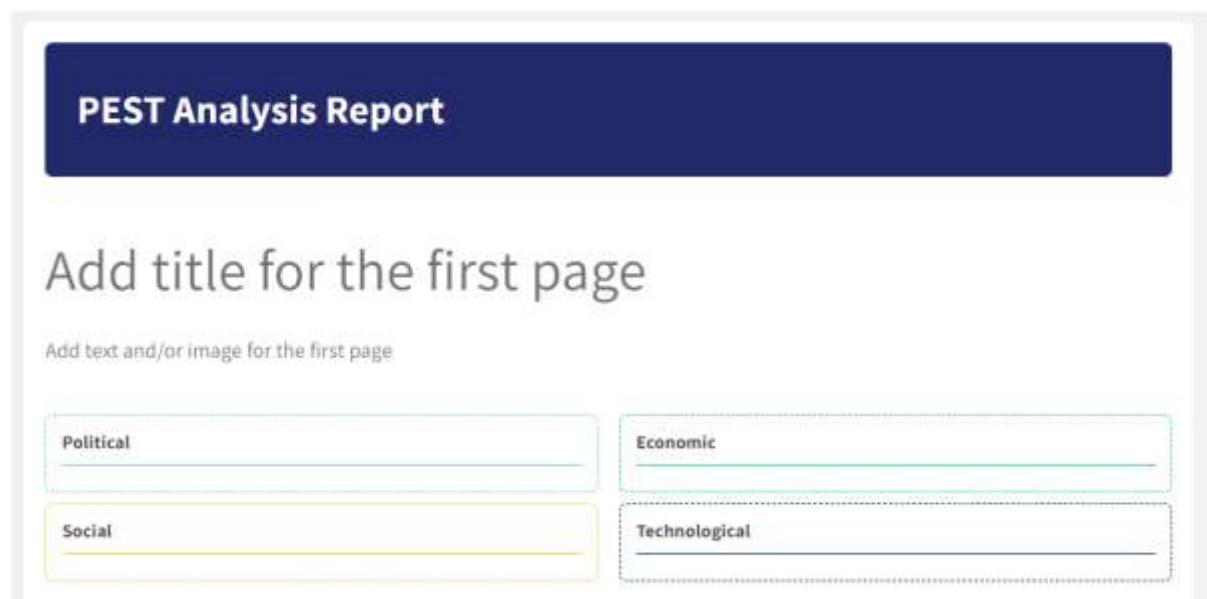
6. You can deepen your analysis of the posts in the matrix or comment on your analysis by adding fields to the report. Examples of fields that can be added are consequences, driving forces, strategic advice, and suggested actions. Note that some templates already include fields that you can change to suit your needs. You can also add additional fields beyond those in the templates.
7. To do your analysis in the added fields, open the posts in edit mode and enter your analysis and other comments in the added analysis fields.
8. You can also connect your posts to your organization's strategies and use the icon library to show the direction of trends you have described in your report.
9. When you have finished your analysis and edited your content, write an introduction and summary on the first page of your report. Use the AI Copilot to create a draft summary of your report content. You can enter custom instructions to the AI Copilot to control the length or what you want to emphasize in the report summary.
10. In the final step, click Preview to preview and make the final edits to your report. Use the page break tools in the posts to ensure the end result looks nice.
11. Publish the report to make it available in your portal and on embedded dashboards and export it to pdf to share the report by email or uploaded on other applications.

Report templates and analysis models

There are 12 default templates that come with your InfoDesk Portal, which are described below:

Pest Analysis

PEST (Political, Economic, Social, Technological) analysis is a strategic tool used to understand the macro-environmental factors and trends that can impact an organization, helping organizations making well-informed strategic decisions.



The screenshot shows a template for a 'PEST Analysis Report'. At the top, a dark blue header bar contains the title 'PEST Analysis Report' in white. Below this, a large text area is labeled 'Add title for the first page' and 'Add text and/or image for the first page'. This area is followed by four input fields arranged in a 2x2 grid. The top-left field is labeled 'Political', the top-right 'Economic', the bottom-left 'Social', and the bottom-right 'Technological'. Each field has a horizontal line for input.

Using the PEST analysis report template:

When using this template, we recommend that you prepare the content by summarizing posts into political, economic, social and technological trends.

Position the trends (summarized posts) in the matrix using the analysis model.

Add a Consequences or Impact field to the template to deepen your analysis with consequences these external factors may have on your organization.

Template Specifications:

Columns = 2

Activated settings: Show matrix label on posts

Matrix Sections = 4

1. Political 2. Economics 3. Social 4. Technological

X-axis: External Factors

Y-axis: External Factors

SWOT Analysis

A SWOT Analysis report is a strategic tool used to assess the Strengths, Weaknesses, Opportunities, and Threats facing an organization. Strengths and weaknesses are internal factors such as employees, products, brand, and capacity. Opportunities and threats emanate from external factors such as market development, competitors' capabilities, and technology development.

This report leverages data and insights to provide a comprehensive evaluation of internal capabilities and external factors impacting the organization's strategic position.

The SWOT analysis is commonly utilized as a tool to analyse the current situation of a business. It is beneficial when developing a business plan or strategy to achieve the organization's goals. Conducting a SWOT analysis should be a part of strategic planning and ideally should be done at least once a year.

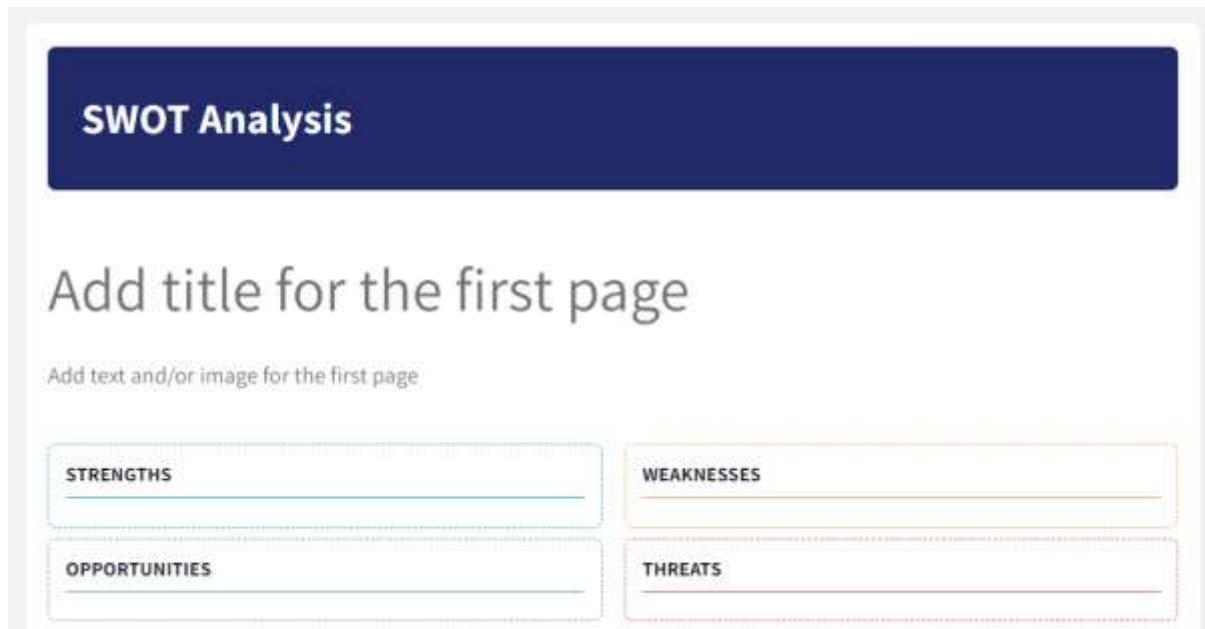
Using the SWOT Analysis report template:

Prepare the SWOT analysis by creating a Workspace where you prepare posts and summaries that constitute strengths, weaknesses, opportunities, and threats. Invite experts from your organization to the workspace so they can contribute with their insights on internal strengths and weaknesses. Add posts from Search that represent external opportunities and threats and process them in the workspace.

You can also gather a selection of experts from different parts of the organisation and together brainstorm a number of strengths, weaknesses, opportunities, and threats, which you can then edit after the brainstorming.

Evaluate strengths, weaknesses, opportunities, and threats and position the summarized posts in the matrix using the analysis model. Add fields to deepen the analysis or to add your comments and reflections. Suggest actions where you find the biggest strengths, weaknesses, opportunities, and threats.

Summarize the result and suggest actions needed to achieve the organization's goals.



Template Specifications:

Columns = 2

Activated settings:

1. Show matrix label on posts
2. Enable report strategies on posts
3. Show trend icon on posts

Matrix Sections = 4

1. High Strategic Impact/Low Urgency
2. High Strategic Impact/High Urgency

3. Low Strategic Impact/Low Urgency
4. Low Strategic Impact/High Urgency

X-axis: Urgency

Y-axis: Strategic Impact

Fields: Strategic Advice, Consequences

Risk/Urgency

Risk/Urgency analysis helps organizations prioritize actions based on the degree of risk (risk) and the immediacy with which they must be addressed (urgency).

The risk/urgency report template utilizes data and insights to efficiently identify, evaluate, and manage risks, ensuring timely interventions to mitigate potential adverse impacts on the business.

Risk / Urgency Report

Add title for the first page

Add text and/or image for the first page

High Risk / Low Urgency	High Risk / High Urgency
Low Risk / Low Urgency	Low Risk / High Urgency

Using the Risk/Urgency analysis report template:

Prepare the content by summarizing posts (external and internal factors, events, and trends) that pose a potential risk. Then, use the report template to analyse each risk factor's degree of risk and urgency. Evaluate the degree of risk and

urgency and position the summarized posts in the matrix using the analysis model. Add an "action" field to suggest actions based on the factors with the highest risk and urgency.

Template Specifications:

Columns = 2

Activated settings:

1. Show matrix label on posts
2. Enable report strategies on posts
3. Show trend icon on posts

Matrix Sections = 4

1. High Impact/Low Readiness
2. High Impact/High Readiness
3. Low Impact/Low Readiness
4. Low Impact/High Readiness

X-axis: Readiness

Y-axis: Impact

Risk/Probability - Consequences/Actions

A Risk/Probability report is a strategic document that assesses potential risks and their likelihood of occurrence. This report identifies and prioritizes risks and their consequences, providing actionable insights for risk management and decision-making. The report template is equipped with two additional free-text fields, where you are to manually input the consequences of these risks, and what actions should be taken to avoid them.

Using the Risk/Probability - Consequences/Actions analysis report template:

Prepare the content by summarizing posts (external and internal factors, events, and trends) that pose a potential risk. Then, use the report template to analyse each risk factor's degree of risk and probability that it will happen. Evaluate the degree of risk and probability and position the posts in the matrix using the analysis model. Add your consequence analysis on each post in the consequence field and use the

action field to suggest actions based on the factors with the highest risk and probability.

Risk Probability - Consequences Actions

Add title for the first page

Add text and/or image for the first page

High Risk / Low Probability

High Risk / High Probability

Low Risk / Low Probability

Low Risk / High Probability

Template Specifications:

Columns = 2

Activated settings:

1. Show matrix label on posts
2. Enable report strategies on posts
3. Show trend icon on posts

Matrix Sections = 4

1. High Risk/Low Probability
2. High Risk/High Probability
3. Low Risk/Low Probability
4. Low Risk/High Probability

X-axis: Probability

Y-axis: Risk

Fields: Consequences, Actions

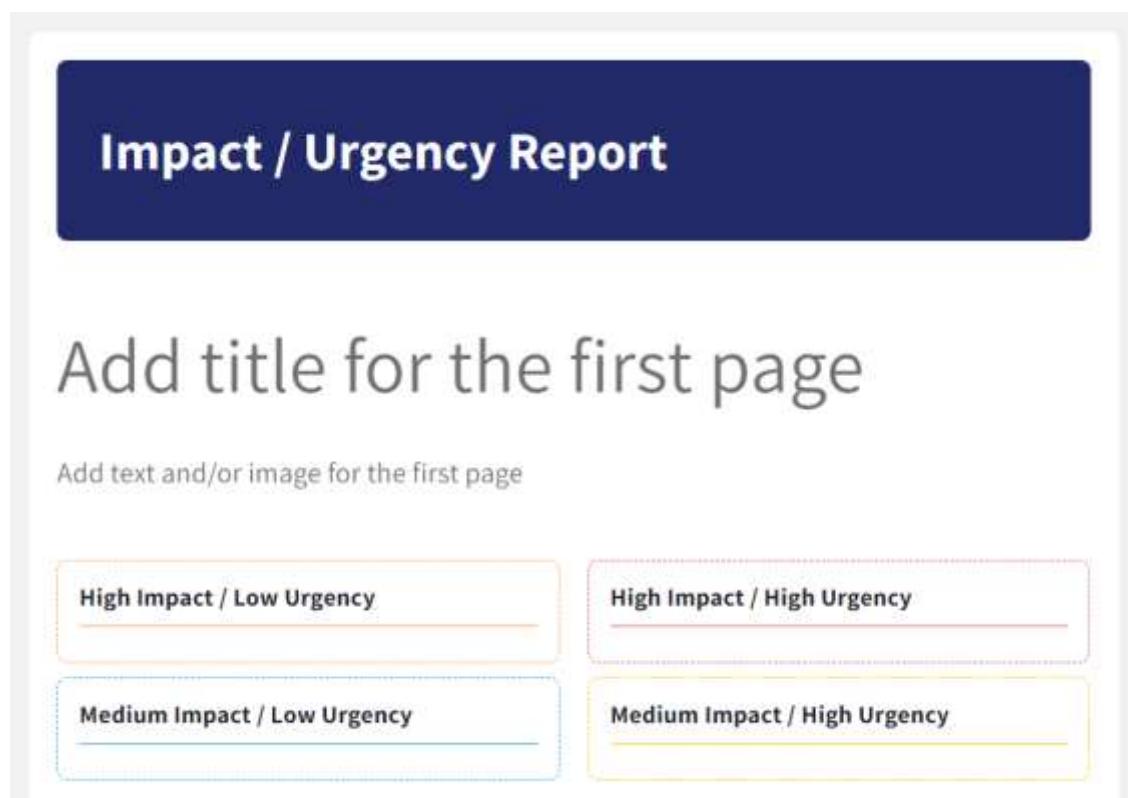
Impact/Urgency

Impact/Urgency analysis helps organizations prioritize actions based on the degree of impact a trend or event have on the organization and the immediacy with which the trends and events must be addressed (urgency). This report leverages data analysis and insights to guide decision-making processes, ensuring that critical issues are addressed promptly and effectively.

The risk/urgency report template utilizes data and insights to efficiently identify, evaluate, and manage the impact of trends and events, ensuring timely interventions to mitigate potential adverse impacts on the business.

Using the Impact/Urgency analysis report template:

Prepare and summarize posts (trends, events) related to the area of analysis. Evaluate the degree of impact and urgency and position the posts in the matrix using the analysis model. Add "consequences" and "action" fields to further analyze the consequences and suggest actions based on trends and events with the highest impact and urgency.



The image shows a digital template for an 'Impact / Urgency Report'. At the top, a dark blue header bar contains the text 'Impact / Urgency Report' in white. Below this, the main title 'Add title for the first page' is displayed in a large, light gray font. Underneath the title, there is a placeholder text 'Add text and/or image for the first page'. The main content area is organized into four colored boxes arranged in a 2x2 grid. The top-left box is orange and labeled 'High Impact / Low Urgency'. The top-right box is red and labeled 'High Impact / High Urgency'. The bottom-left box is light blue and labeled 'Medium Impact / Low Urgency'. The bottom-right box is yellow and labeled 'Medium Impact / High Urgency'. Each box has a thin horizontal line inside it for notes.

Template Specifications:

Columns = 4

Activated settings: Show matrix label on posts

Matrix Sections = 4

1. High Impact/Low Urgency
2. High Impact/High Urgency
3. Low Impact/Low Urgency
4. Low Impact/High Urgency

X-axis: Urgency

Y-axis: Impact

Strategic Impact/Urgency

This report template and analysis model is similar to the **Impact / Urgency** analysis report model and could be used for analysis on a higher strategic level and a more long-term perspective.

Strategic Impact/Urgency analysis helps organizations prioritize actions based on the long-term degree of impact major trends and events have on the organization and the immediacy with which the trends and events must be addressed (urgency). This report leverages insights to prioritize long-term strategic actions, allocate resources effectively, and guide decision-making at a senior management level.

Using the Strategic Impact/Urgency analysis report template:

Prepare and summarize posts (major trends and events) related to the area of analysis. Evaluate the degree of impact and urgency these trends and events have on your business and position the posts in the matrix using the analysis model. Summarize your analysis on the first page focusing on the trends and events that have the highest impact and urgency.

Strategic Impact Urgency

Add title for the first page

Add text and/or image for the first page

High Strategic Impact / Low Urgency

Medium Strategic Impact / Low Urgency

High Strategic Impact / High Urgency

Medium Strategic Impact / High Urgency

Template Specifications:

Columns = 2

Activated settings:

1. Show matrix label on posts
2. Show trend icon on posts

Matrix Sections = 4

1. High Strategic Impact/Low Urgency
2. High Strategic Impact/High Urgency
3. Low Strategic Impact/Low Urgency
4. Low Strategic Impact/High Urgency

X-axis: Urgency

Y-axis: Strategic Impact

Strategic Impact/urgency + Consequences/Strategic Advice

This report template and analysis model is similar to the **Strategic Impact / Urgency** analysis report model and could be used for analysis on a higher strategic level and a more long-term perspective. The template is equipped with two additional free-text fields, where you are to manually input the potential consequences and strategic advice on the highlighted information.

Strategic Impact/Urgency analysis helps organizations prioritize actions based on the long-term degree of impact that major trends and events have on the organization and the immediacy with which the trends and events must be addressed (urgency). This report leverages insights to prioritize long-term strategic actions, allocate resources effectively, and guide decision-making at a senior management level.

Strategic Impact Urgency - Consequences Strategic Advice

Add title for the first page

Add text and/or image for the first page

High Strategic Impact / Low Urgency	High Strategic Impact / High Urgency
Medium Strategic Impact / Low Urgency	Medium Strategic Impact / High Urgency

Using the Strategic Impact/Urgency Consequences/Strategic Advice analysis report template:

Prepare and summarize posts (trends, events) related to the area of analysis. Evaluate the degree of impact and urgency and position the posts in the matrix

using the analysis model. Open the posts and use the "consequences" and "strategic advice" fields to further analyse the consequences and add strategic advice on the trends and events with the highest impact and urgency. Summarize the result of your analysis on the first page.

Template Specifications:

Columns = 2

Activated settings:

1. Show matrix label on posts
2. Show trend icon on posts

Matrix Sections = 4

1. High Strategic Impact/Low Urgency
2. High Strategic Impact/High Urgency
3. Low Strategic Impact/Low Urgency
4. Low Strategic Impact/High Urgency

X-axis: Urgency

Y-axis: Strategic Impact

Fields:

Strategic Advice

Consequences

GAP Analysis

GAP analysis is useful when you want to identify the differences (gaps) between the current state and the desired target state of a business, product, market or organization.

This report template utilizes data and insights to pinpoint areas for improvement, helping organizations develop strategies to bridge these gaps and achieve their goals.

Gap analysis in market research and market intelligence involves assessing the disparity between current market conditions and the desired state or potential opportunities. It helps identify areas where a product or service is not meeting customer needs, where competitors may have an advantage, or where there are unexplored market segments.

By defining and analyzing the gaps, you can create an action plan to move the organization forward and fill in the performance gaps.

Gap Analysis Report

Add title for the first page

Add text and/or image for the first page

High Impact / Low Readiness	High Impact / High Readiness
Low Impact / High Readiness	Low Impact / Low Readiness

Using the GAP analysis report template:

To prepare your GAP analysis you need to identify the area of analysis, for example a particular market. Prepare and summarize posts related to the area of analysis.

Evaluate the degree of impact and readiness and position the summarized posts in the matrix using the analysis model. Add fields to deepen the analysis or to add your comments and reflections. Suggest actions where you find the biggest gaps (high impact in combination with low readiness).

Template Specifications:

Columns = 2

Activated settings:

1. Show matrix label on posts
2. Enable report strategies on posts
3. Show trend icon on posts

Matrix Sections = 4

1. High Impact/Low Readiness
2. High Impact/High Readiness
3. Low Impact/Low Readiness
4. Low Impact/High Readiness

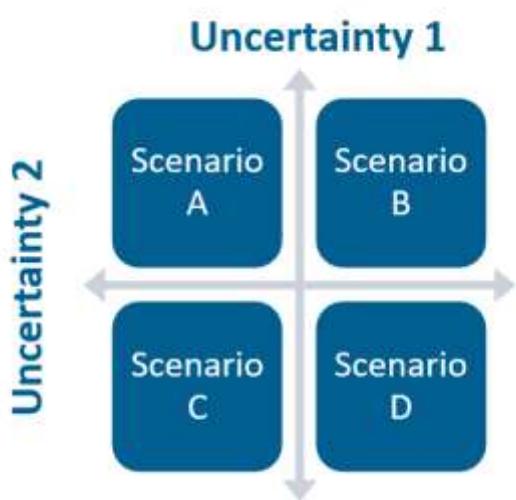
X-axis: Readiness

Y-axis: Impact

Scenario Analysis

Uncertainty is a common challenge to any long-term planning.

A Scenario Analysis report is an essential tool for strategic planning and risk management. By exploring multiple potential future scenarios, this report helps organizations anticipate challenges, identify opportunities, and make informed decisions. Leveraging data analysis, predictive modelling, and comprehensive impact assessments, it provides actionable insights and recommendations to enhance organizational preparedness and strategic flexibility. The report combines rigorous analysis, data visualization, and strategic guidance to support proactive and informed decision-making in an uncertain environment.



Using the Scenario Analysis report template:

Prepare the content by summarizing posts (external factors and trends) with high impact on your question, market or business. Identify the two most challenging uncertainties related to your questions, market or business.

Name the matrix axes and squares with these uncertainties to prepare for the analysis of opposite outcomes for each uncertainty. Then, use the report template to analyze each trend in relation to each uncertainty combination and position the posts in the matrix using the analysis model. Summarize the consequences of each scenario on the first page and evaluate the probability of each scenario.

Scenario Analysis

Add title for the first page

Add text and/or image for the first page

Scenario A: High Y / Low X

Scenario C: Low Y / Low X

Scenario B: High Y / High X

Scenario D: Low Y / High X

Template Specifications:

Columns = 2

Activated settings:

1. Show matrix label on posts
2. Enable report strategies on posts
3. Show trend icon on posts

Matrix Sections = 4

1. Scenario A: High Y/Low X
2. Scenario B: High Y/High X
3. Scenario C: Low Y/Low X
4. Scenario D: Low Y/High X

X-axis: Uncertainty X Low X-High X

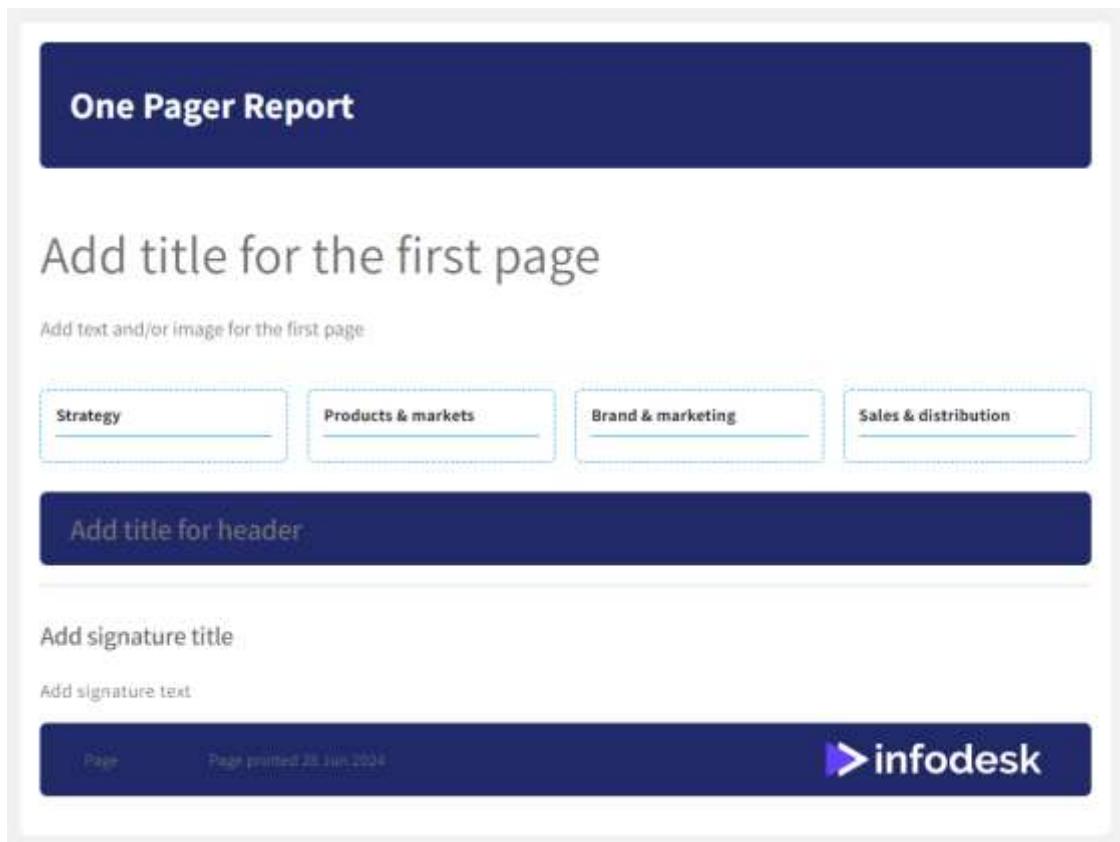
Y-axis: Uncertainty Y Low Y-High Y

Fields: Trends, Consequences, Preparedness

One Pager

A one-pager report is a concise, single-page document that provides a snapshot of key metrics, insights, and trends relevant to business performance. It is designed to offer a high-level overview that aids in quick decision-making and strategic planning.

The template does not include any analysis model.



Using the One Pager report template:

Prepare the content by summarizing posts of key metrics, insights, and trends relevant to business performance. Then, use the report template to present the posts in a one-pager high-level overview. The template includes four default squares with default names. You can remove and add squares and change the square names and colours to suit your needs. Please note that to keep the one

pager format, you cannot add more than 8 squares and max 8 posts to this template.

Template Specifications:

Columns = 4

Activated settings: Show matrix label on posts

Matrix Sections = 4

1. Strategy
2. Products & Markets
3. Brand & Marketing
4. Sales & Distribution

X-axis:

Key Conclusions

Theme Report, No Analysis/No Matrix

A theme report focuses on specific themes or topics of interest within an organization or industry. This report leverages data and insights to provide an in-depth analysis of identified themes, helping organizations understand trends, make informed decisions, and align strategies with emerging opportunities or challenges.

Using the Theme Pager report template:

Prepare the content by summarizing posts in a Workspace and add them to the report. This template does not include any analysis model or matrix and can be used if you want to present the posts after each other without performing any analysis or using any presentation model. Go to report settings to add fields or other design elements to structure your report content.

Theme Report

Add title for the first page

Add text and/or image for the first page

Posts

Add title for header

Add signature title

Add signature text

Page

Page printed 28 Jun 2024

 infodesk

Template Specifications:

Columns = 1

Activated settings:

1. Show matrix label on posts
2. Show trend icon on posts

Matrix Sections = 1: Posts

No X/Y axis labels

Best Practice

The Best Practice analysis report template is useful when you want to evaluate and identify the most effective methods and strategies within an industry or organization. This report leverages data and insights to benchmark current practices against industry standards, providing actionable recommendations for adopting best practices to enhance performance and achieve strategic goals.

Using the Best Practice report template:

Prepare the content by summarizing posts describing problems, solutions, goals, outcomes and impact, and key takeaways relevant to your industry or organization. Then, use the report template to present the posts in a high-level overview. The template includes five default squares with default names. You can remove and add squares and change the square names and colors to suit your needs. Use the first page to write a short introduction and summary.

Best Practice Report Template

Add title for the first page

Add text and/or image for the first page

Problem
Solution
Goal
Outcomes and impact
Key Takeaways

Template Specifications:

Columns = 1

Activated settings:

Show matrix label on posts

Matrix Sections = 5 in rows

1. Problem
2. Solution
3. Goal
4. Outcomes and impact
5. Key takeaways

No X/Y axis labels