**REPORTING REQUIREMENTS**

**SURVEY TEMPLATE**

REPORTING REQUIREMENTS SURVEY

Introduction

Briefly explain the purpose of the survey, and describe how you will use the information you collect to develop or improve the reporting process.

|  |
| --- |
|  |

Respondent Information

|  |  |
| --- | --- |
| NAME |   |
| DEPARTMENT / TEAM |   |
| ROLE |   |
| CONTACT INFORMATION |   |
|  |  |

1. Report Purpose and Utility

What objectives do you hope to achieve with this report?

|  |
| --- |
|  |

What specific decisions or actions will this report inform?

|  |
| --- |
|  |

1. Data and Content

What type of data do you believe is crucial for this report (e.g., sales, operational, financial)?

|  |
| --- |
|  |

Are there any key metrics or KPIs you expect to see in this report?

|  |
| --- |
|  |

Do you need the report to include comparisons to historical data or benchmarks? If yes, please specify.

|  |
| --- |
|  |

1. Frequency and Timing

How frequently do you need this report (e.g., daily, weekly, monthly, on demand)?

|  |
| --- |
|  |

Are there specific times when you need us to deliver the report
(e.g., first day of the month, every Monday)?

|  |
| --- |
|  |

1. Format and Accessibility

What format do you prefer for the report (e.g., PDF, Excel, web dashboard)?

|  |
| --- |
|  |

What devices will you use to access this report (e.g., desktop, mobile, tablet)?

|  |
| --- |
|  |

Do you have any specific requirements for the report's visual design or layout?

|  |
| --- |
|  |

1. Delivery and Distribution

How would you like to receive this report (e.g., email, online portal, printed copy)?

|  |
| --- |
|  |

Should the report be accessible to others in your department / on your team? If yes, to whom?

|  |
| --- |
|  |

1. Security and Confidentiality

Are there any sensitivity or confidentiality considerations we should be aware of?

|  |
| --- |
|  |

1. Additional Features and Comments

Are there any additional features or capabilities you would like the report to have?

|  |
| --- |
|  |

Please provide any other comments or suggestions that can help us better understand your reporting needs.

|  |
| --- |
|  |

Closing

Thank the respondent for their time and input, and explain the next steps in the reporting development process.

|  |
| --- |
|  |

|  |
| --- |
| **DISCLAIMER**Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |