[A green sign with white text

Description automatically generated](https://www.smartsheet.com/try-it?trp=11990&utm_source=template-word&utm_medium=content&utm_campaign=Reporting+Requirements+Survey-word-11990&lpa=Reporting+Requirements+Survey+word+11990)**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.

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Respondent Information

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| --- | --- |
| NAME |  |
| DEPARTMENT / TEAM |  |
| ROLE |  |
| CONTACT INFORMATION |  |
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1. Report Purpose and Utility

What objectives do you hope to achieve with this report?

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What specific decisions or actions will this report inform?

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1. Data and Content

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

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

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

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1. Frequency and Timing

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

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

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1. Format and Accessibility

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

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

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

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1. Delivery and Distribution

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

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

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1. Security and Confidentiality

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

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1. Additional Features and Comments

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

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

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Closing

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

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