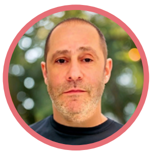
LEADSCALE

Purpose-Driven Reporting

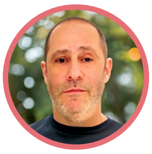
Skip:
Hello and welcome to Week 12 of the LeadScale Engine Gen Five Launch Podcast Series. I'm Skip Fidura, and with me, as always, is Francis Lining. But we have a special guest today—Robin Caller, who hasn't joined us since Episode One! Welcome back, Robin.



Robin:
Thanks for having me back, guys. A lot has happened in the last 12 weeks!

Skip:
Indeed. Today's topic is purpose-driven reporting. Francis, Robin, do you want to kick things off by defining what we mean by purpose-driven reporting?

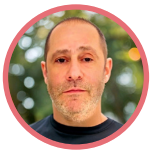
Frankie:
Sure. When we came up with this concept, it was about giving ourselves a better structure for designing future reports. In our industry, a lot of time is wasted creating reports that look like what people expect, rather than what is useful. We wanted to focus on reports that serve a specific purpose.



Robin:
Exactly. I remember discussing the idea of a "single version of the truth" report—one report that contains everything. But we realized that no one really needs a report that covers every possible column. Instead, we asked, "Who is this report for? What problem does it solve?"

Skip:
That makes sense. You want to avoid people scrolling through unnecessary columns to find what they need. Can you tell us more about how the design of purpose-driven reports ties into that?

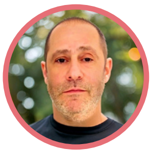
Frankie:
It comes back to something we've been discussing CIA by which we mean Confidentiality, Integrity, and Availability. A report needs to be secure, accurate, and easy to access without overwhelming the user. A key part of this is ensuring the right data is available to the right people without clutter.



Robin:
Exactly. Many systems today deliver broad, catch-all reports that people then must manipulate in Excel to get what they need. But if they simply told us what they were trying to achieve, we could build that report directly into the system.

Skip:
So, it's about making sure that reports are tailored to specific user needs. How does this play out in practice?

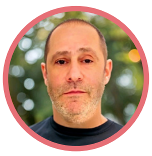
Frankie:
It's all about setting up user roles and permissions. For example, a junior finance user might need a very different report than a campaign manager. With Gen Five, we're building the system so that each user type has access to the reports they need, rather than one generic report for everyone.



Robin:
Absolutely. We're focusing on flexibility while maintaining the core integrity of the data. Once a report template is configured for one user, it can be shared with others who have similar needs, which makes everything more efficient.

Skip:
It sounds like the system is designed to grow with the user's needs, allowing them to create new reports or adjust existing ones.

Frankie:
Yes, exactly. Users can customize reports based on their evolving needs, whether they're focused on financial reporting or campaign pacing. And the best part is that they don't need to rely on Excel for those customizations anymore.



Robin:
Plus, as new reports are created, they become templates that other users can access. This means the system gets smarter and more useful over time.

Skip:
That's fantastic. Thanks, Robin, for joining us again. And thanks, Francis, for another insightful conversation.

For more information about how LeadScale Engine works, email us at: info@leadscale.com