



Data Driven Board Reporting

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Learning Objectives

At the end of the session, you will be able to:

- Identify updates and trends on data in the nonprofit industry
- Discuss predictable and similar challenges across nonprofits
- Recognize how board-specific reporting can be a catalyst to digital transformation
- Understand data centralization and centralized data repositories



Creating Opportunities for Our Clients

201,000+

Active clients

107,000+

Private households served

74,000+

Private businesses served

9,300+

Nonprofit
organizations served

4,100+

Government
organizations served

630+

Higher education
organizations served

4,500+

Financial institutions served

12,100+

Health care
organizations served

8,400+

Clients engaged
in global capabilities

3,600+

Clients engaging employee
benefit plan capabilities

30,700+

Clients engaging
outsourcing capabilities

7,100+

Clients engaging wealth
advisory capabilities

14.2%

Organic growth

Today's Presenters



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What is Digital?

- CLA Digital uses data, automation, and software to meet our clients where they are and help them make data driven decisions.



DATA

Business Intelligence and Decision Support Derived from:

- Analytics & Reporting
- Loss Prevention
- Predictive Modeling
- Artificial Intelligence
- Assessments

AUTOMATION

Efficiency and Capability is created from:

- System Integration
- Process Automation
- Platform Optimization
- Custom App
Development
- Strategy and Innovation

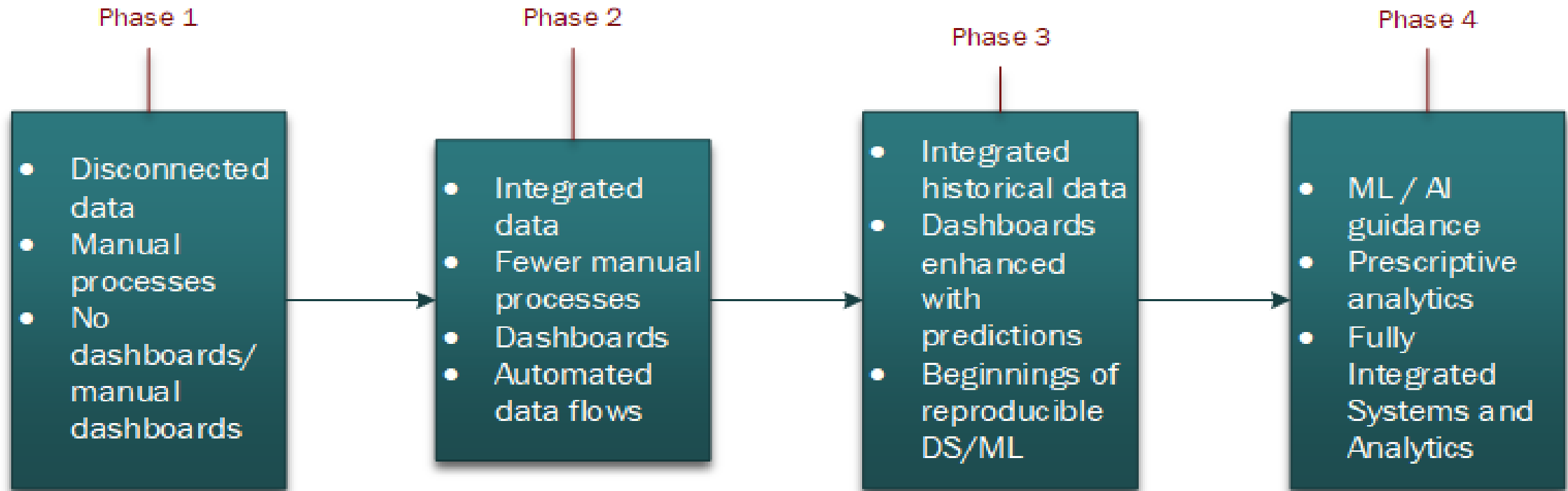
SOFTWARE

We maintain strategic partners to help our clients:

- Software
Implementation
- Sage Intacct
- Acumatica
- Microsoft & Azure

Client lifecycle: CLA Digital

We meet you where you are



The Issue



How to get your board useful, timely, and automated Data to drive effective decisions?

The World is Changing

Best in breed software, mountains of data, how to take advantage?

Many board members come from private sector – expect the data.

Do More With Less

Short staffed, budget constrained, need “good enough” solution

Competition for resources and talent makes digital capability a cost of entry

Everything is Manual

Multiple disparate systems, murky process, creates “reinventing the wheel” for every board meeting

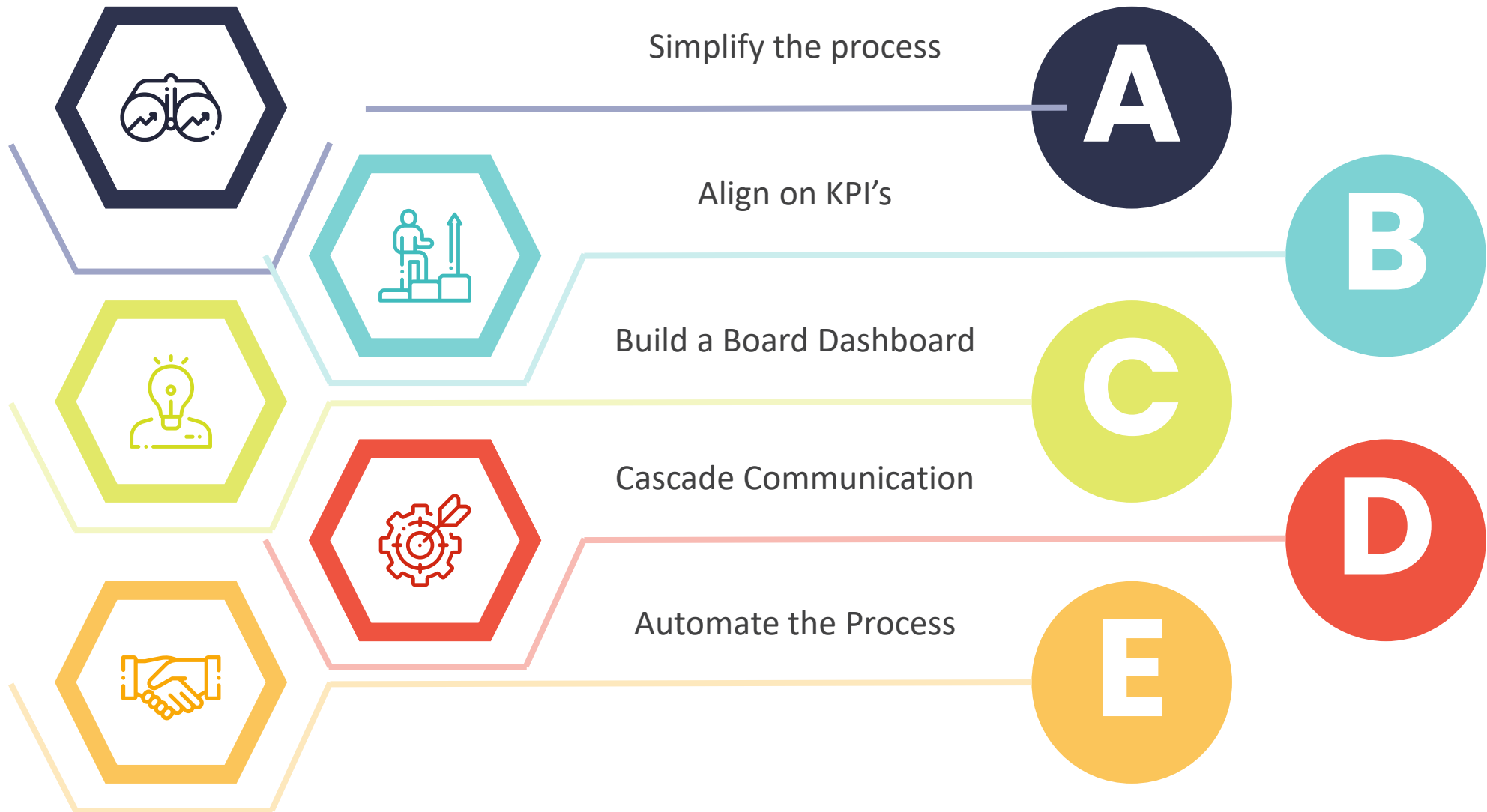
Seemingly endless cycle of governance exhausts staff

Lack of Clarity About What Data Matters

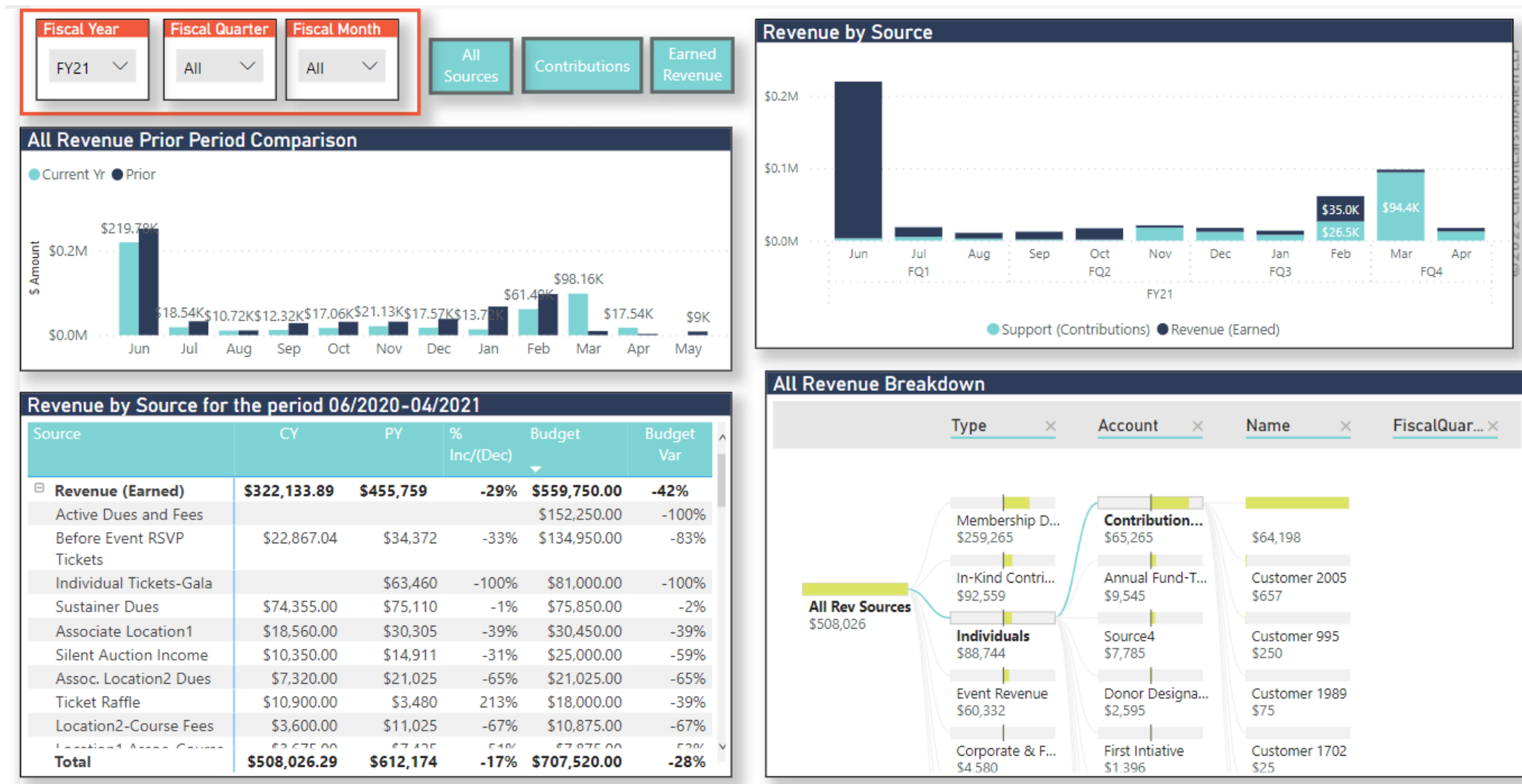
Translating the vision of your strategic plan into simple, measurable, and consistent KPI's.



What to Do About It?



Example – Board Report

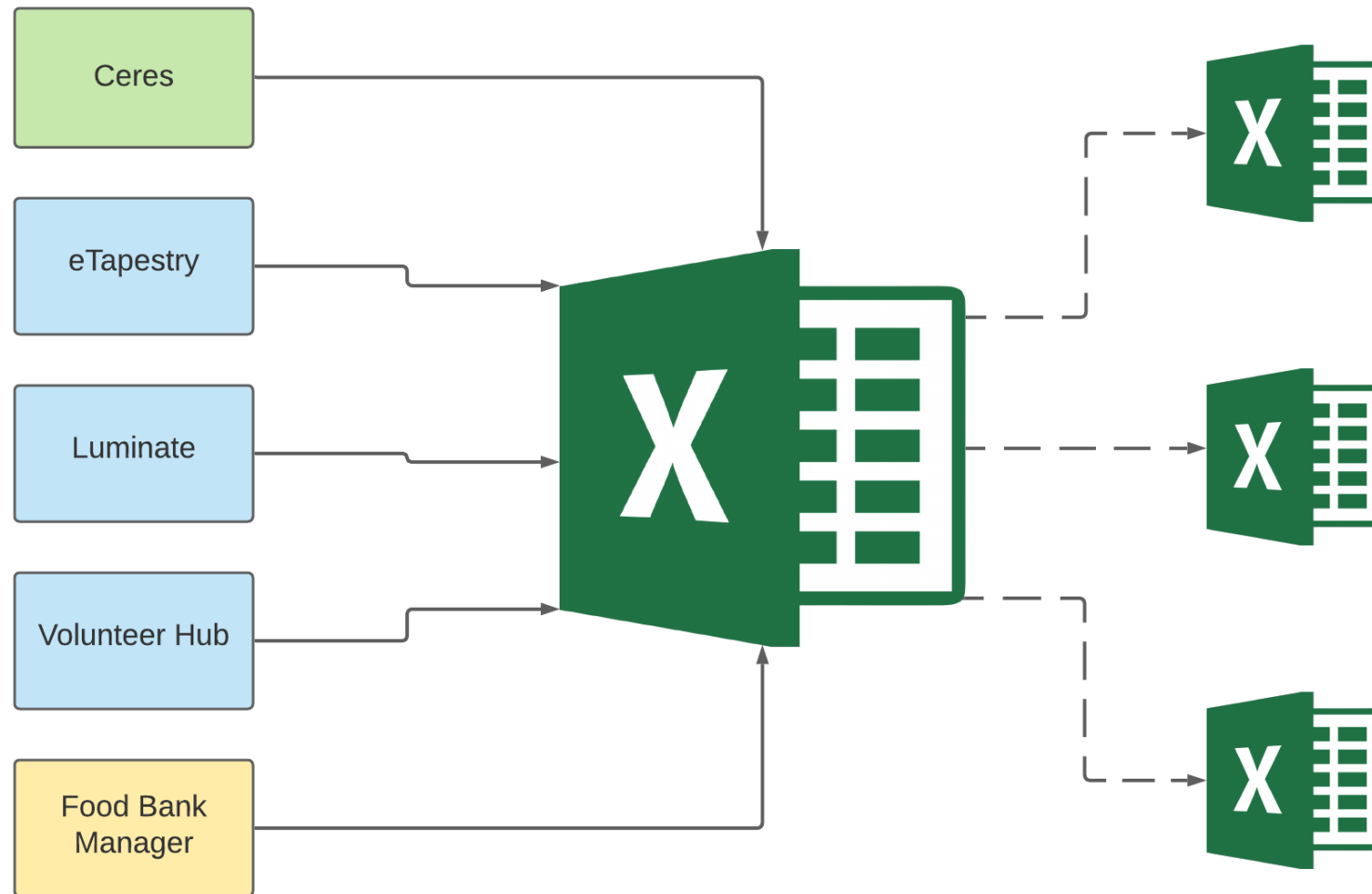




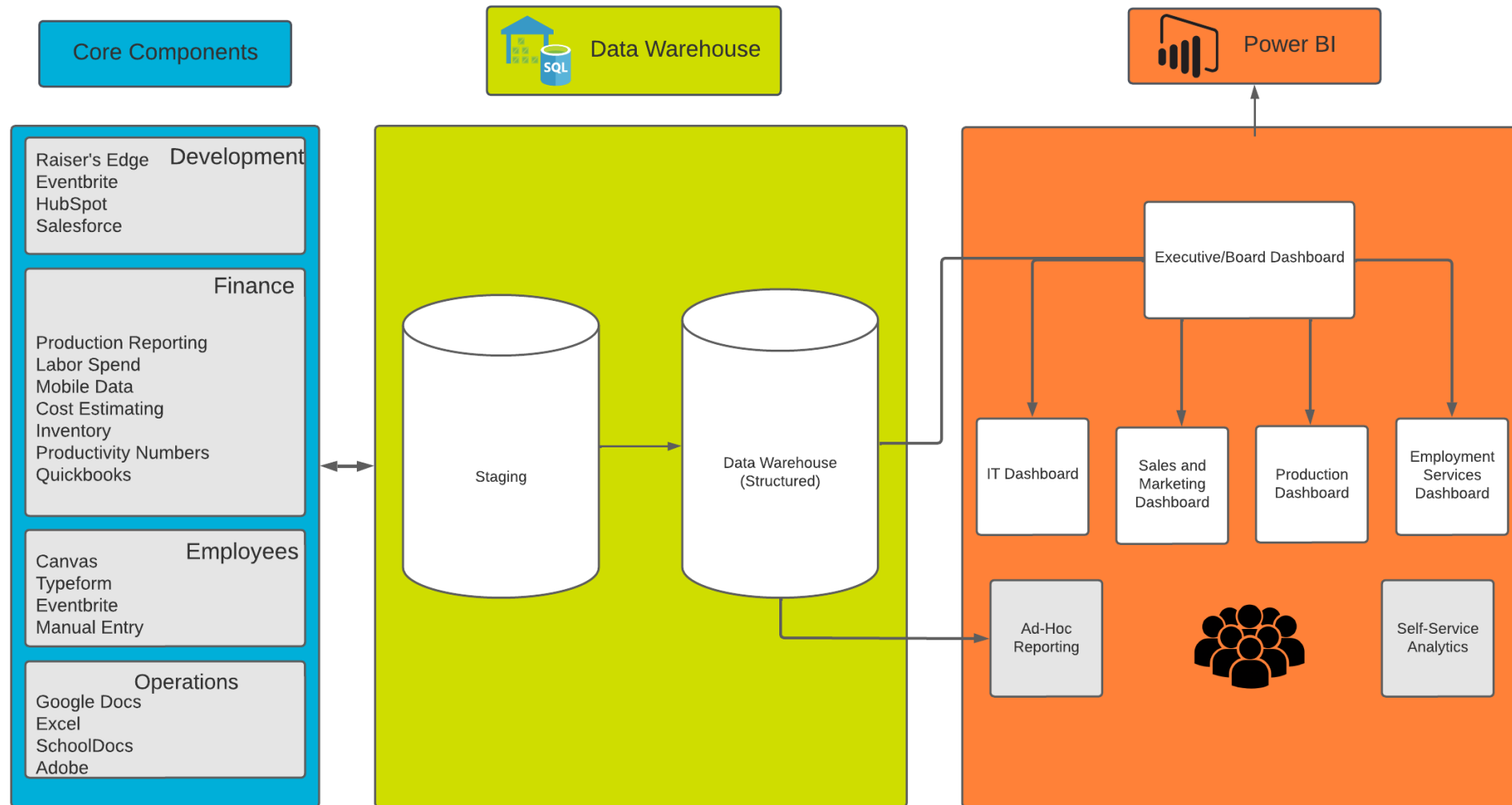
Where to go from here?

Board Reporting as the catalyst to become a
data driven organization

Sample Current State



Sample Future State



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