

SOP: Daily and Weekly Reporting and Analytics Review

This SOP details the process for **daily and weekly reporting and analytics review**, ensuring accurate data collection, timely report generation, performance analysis, and actionable insights. It covers report scheduling, data validation, KPI monitoring, trend identification, and communication of findings to relevant stakeholders to support informed decision-making and continuous improvement.

1. Purpose

To establish a standardized process for daily and weekly reporting and analytics review to guarantee data accuracy, timely reporting, and actionable insights for business improvement.

2. Scope

This SOP applies to all team members involved in the preparation, review, and analysis of reports within the organization.

3. Responsibilities

- **Report Owner:** Prepares, validates, and delivers reports according to the schedule.
- **Analyst:** Conducts analysis, identifies trends and anomalies, and generates insights.
- **Manager/Supervisor:** Reviews reports and analytics, provides feedback, and communicates findings to stakeholders.
- **IT/Data Team:** Ensures systems and data sources are accessible and functioning correctly.

4. Definitions

Term	Definition
KPI	Key Performance Indicator, a measurable value to gauge performance.
Stakeholder	Any individual or group affected by or involved in the reporting process.
Data Validation	Process to ensure report data is accurate, complete, and reliable.

5. Procedure

5.1. Daily Reporting Process

1. **Data Collection:**
Retrieve and aggregate required data from designated sources by **[specified time each day]**.
2. **Data Validation:**
Check data completeness and accuracy; resolve discrepancies before report generation.
3. **Report Generation:**
Produce daily report using approved templates and formats.
4. **KPI Monitoring:**
Compare current values to targets and previous periods.
5. **Distribution:**
Share report with relevant stakeholders via **[email, dashboard, etc.]** by **[specified time]**.

5.2. Weekly Analytics Review

1. **Data Aggregation:**
Compile weekly data and ensure all records are complete and validated.
2. **Performance Analysis:**
Analyze trends, variances, and performance against KPIs.
3. **Identify Insights & Anomalies:**
Highlight key findings, potential issues, and improvement opportunities.
4. **Prepare Weekly Report:**

Create and format analytics summary with visuals (charts/graphs as needed).

5. **Review and Approval:**

Submit draft to manager/supervisor for feedback and approval.

6. **Distribution & Communication:**

Distribute finalized report to stakeholders. Present findings in meetings if required.

6. Report Schedule

Report Type	Frequency	Due By	Recipient(s)
Daily Operations Report	Daily	9:00 AM	Operations Team, Manager
Weekly Performance Analytics	Weekly (Monday)	12:00 PM	Management, Key Stakeholders

7. Communication of Findings

- Summarize key insights, trends, and recommended actions.
- Use visualization tools (e.g., charts/graphs) for clarity.
- Schedule regular review meetings, or include as agenda items in existing meetings.
- Create a centralized repository for all reports and findings for reference and auditing.

8. Continuous Improvement

- Collect feedback from stakeholders to enhance report quality and relevance.
- Regularly review and update report templates, KPIs, and procedures based on business objectives.
- Document and implement process improvements.

9. References

- Approved report templates
- Data sourcing and validation documentation
- KPI definitions

10. Revision History

Version	Date	Description	Author
1.0	2024-06-30	Initial SOP creation	[Author Name]