

Present reports
modern data.
(CIMA, 2017)

THE DIGITAL PREBOOT

How tech disruption is
enhancing the role of the
management accountant

The five principles for effective report visualisation

Report visualisation will remain a core skill for the management accountant to develop and evolve. The tools available are ever changing and improving as technology continues to develop at a rapid pace. The following five key principles should always be considered:

5

1 Ensure data is optimised for report visualisation

Once you have identified the right measures that are to be reported, you will need to identify the relevant data sources, which might be more than one for each report.

It is at this point that you should consider whether it is appropriate to create a data storage layer. Aside from providing a robust data extraction process and a single repository of data from multiple sources, this can provide a key role in optimising the data for report visualisation, clean the data, and provide a common definition to measures. Consider creating a dimensional structure that stores your data against reporting hierarchies.

2 Apply the relevant visualisation tool

The principal factor in choosing the relevant technique will undoubtedly be driven by what the customer for the report feels comfortable with.

3 Apply appropriate report layout

As visualisation skills become more and more important for the management accountant, he or she must think of designing a report from the perspective of the graphic designer too. Consider the following: layout, message positioning, colours, and scaling.

4 Optimise the reader experience

Engaging with the report user is key to ensuring the message is transmitted effectively from the paper or screen. When reporting on paper, think about the size and weight of the pack and consider dividers to help readers switch between sections. For online reporting consider:

- Personalised reporting
- Intuitive navigation
- Touch and interactive experience
- Customisation capability

5 Optimise visualisation to the appropriate delivery channel

Reports can be delivered via many different channels, such as desktops, laptops, tablets, mobile devices, or paper. It is clear that a mobile phone is considerably smaller than an A4 sheet of paper, and it is therefore logical that in order to produce a powerful report, the design will need to change. The previous visualisation principles become even more important when thinking of various delivery channels. Technology is just the enabler to appropriately satisfy these.

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