



Making the Most of Your Reports

Report Options 101

Making the Most of Your Report Options



April Cole

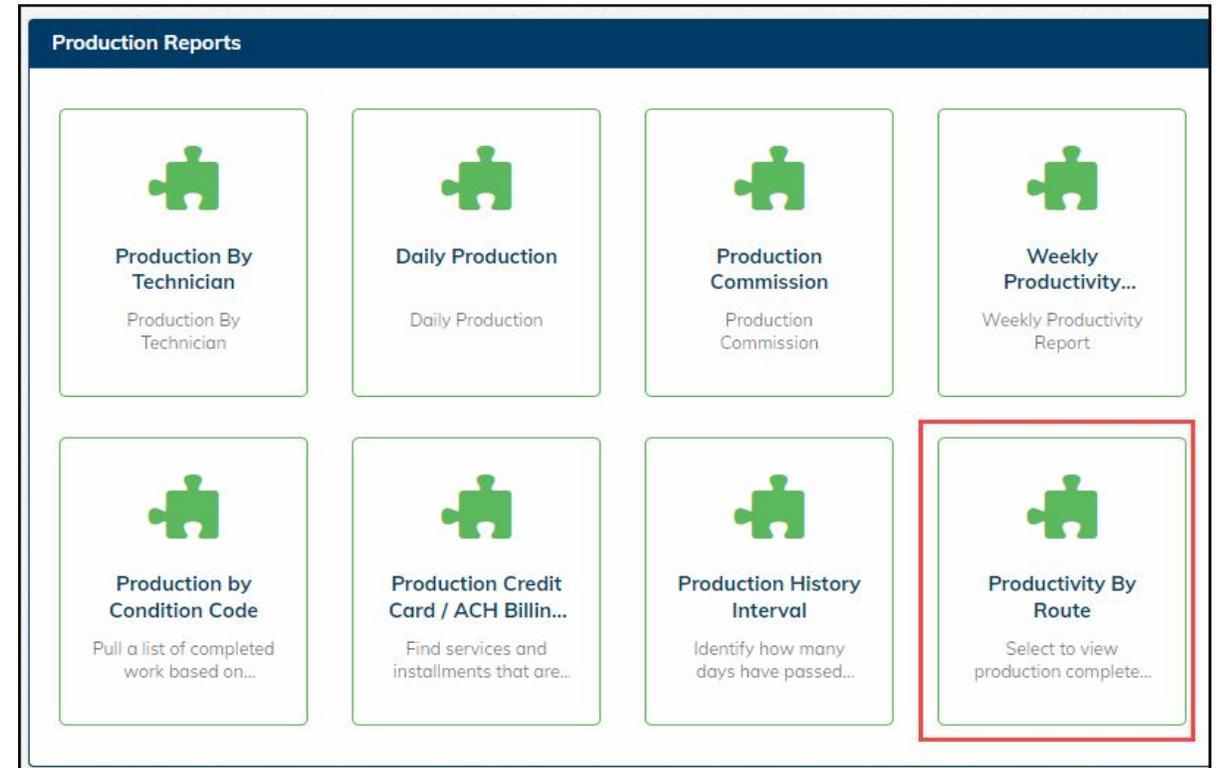
Sr. Customer Success Manager
RealGreen by WorkWave

Agenda

- The Power of RealGreen SA5 Reports
- Common Reports
- Reporting Deeper Dive
- Send-To Options
- Setting Report Favorites

The Power of Real Green SA5 Reports

Real Green SA5 Reports provide powerful insights that help you make informed business decisions and optimize operations.



The Power of Real Green SA5 Reports

- **Track Business Growth:** Monitor sales trends and cancellations to determine if your company is growing or shrinking.
- **Identify High-Value Customers:** Focus on clients that contribute the most to your revenue.
- **Improve Operational Efficiency:** Analyze weekly productivity and spot opportunities for upselling.
- **Enhance Marketing Strategies:** Identify areas with strong or poor market penetration.
- **Automate and Streamline Processes:** Leverage advanced options for data segmentation and automated call campaigns.

The Power of Real Green SA5 Reports

With 100+ available reports, it can be overwhelming deciding which reports make the most sense for your business. Report categories include:

- Sales
- Cancels
- Customers
- Estimates
- Summaries
- Scheduling
- Financial
- History
- Production
- Inventory
- Time
- Other
 - Change Log
 - Call Log
 - Price Discrepancy
 - Daily Employee Recap
 - Daily Technician Recap

Common Reports



Scheduling Reports

- Unserviced List
- Skipped Services
- Services on Hold
- Season Summary

Production Reports

- Production By Technician
- Daily Production
- Weekly Productivity Report

Setup Reports



Financial Reports



- Aging Report
- Credit Balance Report
- Credit Hold Report
- Detailed Aging Report
- General Ledger
- Payment Report
- Sales Tax Report
- Payment Reconciliation (WWP Only)



Sales Reports



- Sales Report
- Sales Commission
- Production By Sales Person
- New Sale Production Efficiency (NEW)
- Customer Cancel
- Prog/Job Cancel
- Estimate Summary

Customer (Job) Growth Analysis

Purpose: Shows if your new sales are outpacing your cancels.

Key Insight: Determine if your company is growing or shrinking.



Customer Growth Analysis

Customer Growth Analysis Report

Customer Value Report

Purpose: Identify your best customers based on the annual value of services

Key Insight: Focus on high-value clients for retention and targeted upselling



Customer Value

Customer Value Report is used to determine the net worth of a customer

Weekly Productivity

Purpose: Compare a week-by-week summary across various categories.

Key Categories:

- Production
- Leads
- Sales
- Cancels



Production by Condition Code

Purpose: Spot trends and identify opportunities for upsells.

Key Insight: Use this data to improve service offerings and increase revenue.



Production by Condition Code

Pull a list of completed work based on condition code, rating or pH levels reported

Marketing Summary

Purpose: Assist in building your marketing plan.

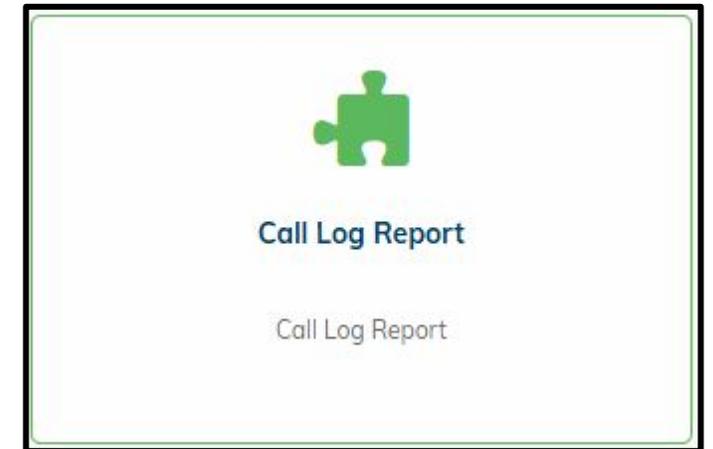
Key Insight: Identify areas with good or poor market penetration.



Call Log Report

Purpose: Comprehensive list of all call logs

Key Insight: View current status of the call, the employee(s) the call is assigned to, and the date type & range desired



Advanced Options: Customer Information

Filtering Options:

- With/Without Phone Number
- With/Without Email
- On/Off Credit Hold
- Part of Group Billing

— Advanced Options *(3 Option(s) Selected)*

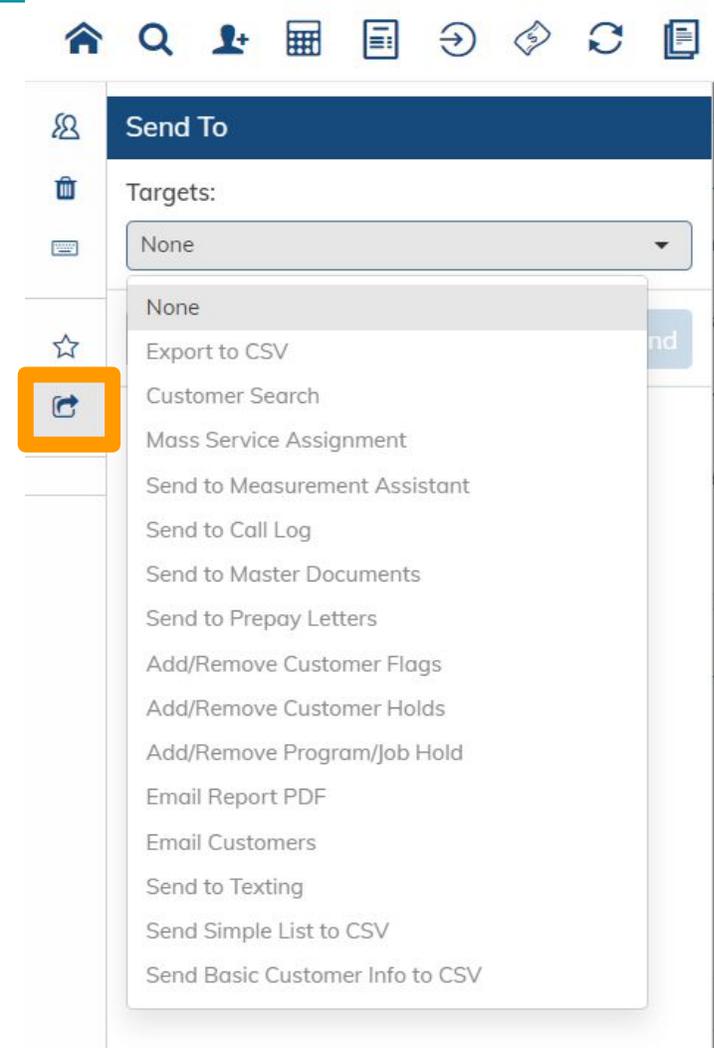
Customer Information* ▼

Customer Phone:	With Phone Number ▼
Customer Email:	Without Email Address ▼
Credit Hold:	Customers on Credit Hold ▼
Group Billing Account:	All ▼

SA5 Reports: Send To Options

Best Practices

- CSV
- Customer Search
- Call Log
- Add/Remove Flags



Send to Call Log

- **Purpose:** Create a call log for every customer in the report.
- **Use Cases:**
 - **Collections:** Use credit hold reports to create collection calls.
 - **After-Service Surveys:** Use production reports to generate follow-ups.
 - **Upsell Campaigns:** Use Production by Condition Code or Customer List by Program/Job.
 - **Call-Ahead Campaigns:** Use Unserviced List reports.
- **Automation:** Option to send calls to TCN for robo-calling.

Send To

Targets:
Send to Call Log

Call Status:
\$ - Collection Call

Assigned To:
COL - Collections

Outcome:
New Collection Call

Assigned Date:

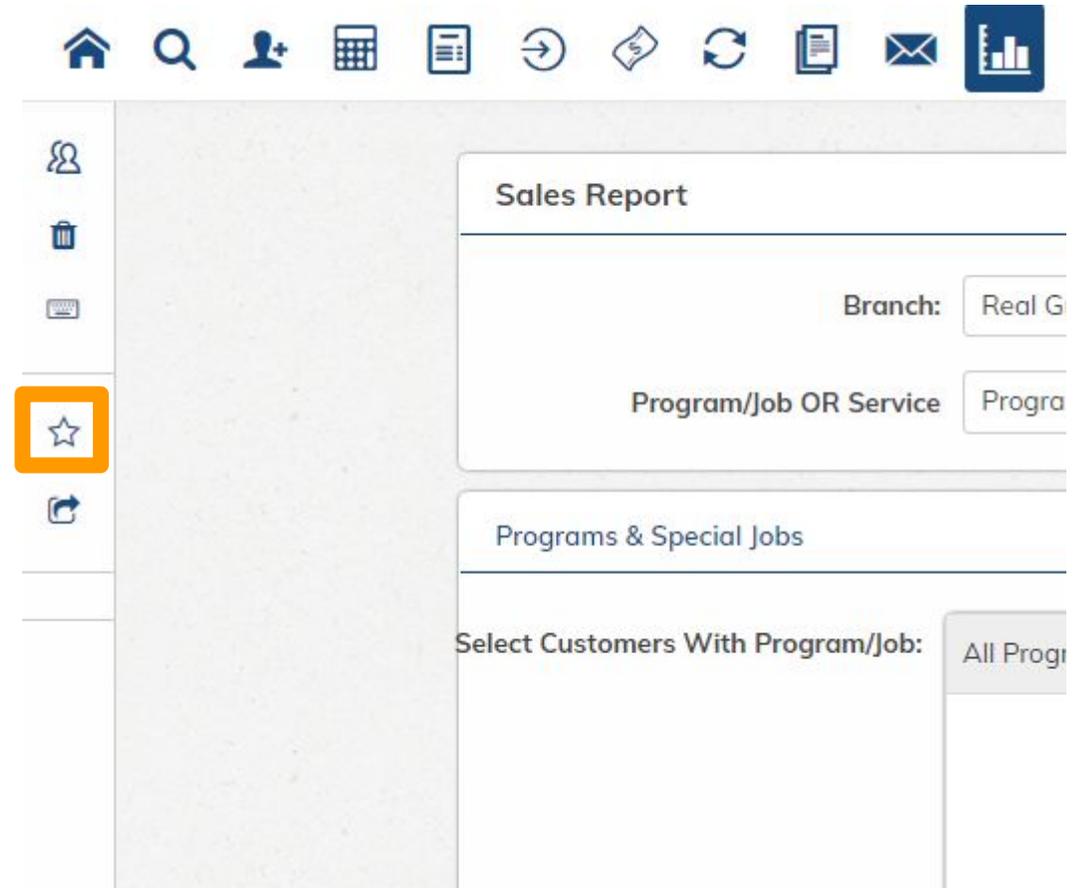
Subject:
Nothing selected

Export to TCN Broadcast

Notes:

Creating Favorites

- **Steps:**
 - Go to the report you want to make a favorite.
 - Configure the settings.
 - Click the star in the left panel.
- **Tips:**
 - Organize by groups.
 - Set custom titles for easy reference.



Questions?

Session Feedback

We appreciate your feedback and attendance

- Login to the event mobile app
- Add this session to your schedule
- Click “Survey”
- Select a rating 1-5 stars