

Internal Reporting

Internal reporting is a repetitive, manual process shared by public and private companies alike. As executive teams, boards and investors require increasing transparency into the business, internal reports must be created frequently and with maximum accuracy and cross-departmental precision.

Best-in-class internal reports go beyond the data to seamlessly incorporate narrative that effectively tells the story behind the numbers. Most companies want to achieve this depth of reporting, but encounter roadblocks because it's a time-consuming and manual process.

In addition to producing external financial reports, Certent Disclosure Management helps organizations overcome the traditional monthly management reporting challenges such as versioning overlap and risky manual processes. Certent helps companies produce automated and scalable recurring reports that include narrative around the numbers to effectively communicate business performance to important stakeholders.

CERTENT DISCLOSURE MANAGEMENT INTERNAL REPORTING ADVANTAGES

- ✔ **Narrative Performance Reporting** - Elevate traditional data-centric internal reports by seamlessly combining your company's data with meaningful narrative to provide context and tell a story.
- ✔ **Direct Connection to Data Sources** - Reduce the risk of manual errors and ensure consistency, accuracy and confidence with the ability to connect directly to your company's internal data sources.
- ✔ **Easy Report Roll Forward** - Don't recreate the wheel every month – instead, just update the report period and the data and narrative will automatically refresh without requiring any additional manual intervention.
- ✔ **Version Control & Audit Trail** - Eliminate cross-departmental versioning issues and report inaccuracies with report check in/out features, permissions and a robust audit trail.
- ✔ **Microsoft® Office Integration** - Efficiently produce and format reports working within the Microsoft Office programs you already know how to use.



CREATE YOUR INTERNAL REPORTS WITH CERTENT

- Board Packages
- Industry and/or Finance Color Books (Ex: Red, Yellow, Blue Book)
- Forecast, Flash & KPI Reports
- Management Reports
- Budget Books
- Periodic Line of Business Narrative Performance Reports (Sales, Marketing, Operations)
- Variance/Threshold Analysis Reports
- Internal PowerPoint Presentations

ONBOARDING AND EDUCATION

When you choose Certent for your automated internal report creation needs, you choose one of the most comprehensive onboarding and training programs available:

- A dedicated implementation specialist
- Set-up and formatting for your first internal report
- Assistance with narrative linking automation
- Best practice documentation
- Ongoing support, training and education services

See how Certent will streamline and automate your internal reporting processes – [request a demo today!](#)



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ABOUT CERTENT

Certent, Inc. is a leading provider of software-as-a-service (SaaS) solutions for equity compensation and financial disclosure management. Our open ecosystem allows for comprehensive partner integrations enabling best-in-class stock plan administration, robust financial reporting for ASC 718, and high quality EDGAR/SEDAR filings in XBRL, HTML, and Inline XBRL. Founded in 2002, Certent has helped more than 1,800 public, private, and pre-IPO companies worldwide innovate their stock plan and financial reporting processes.