

5 Signs You've Outgrown Your Current Reporting Process

Check every box that applies, then see what your score means below

- ☐  **Every cycle starts with a rebuild.**
Data gets exported from QuickBooks, pasted into a spreadsheet, and cleaned up by hand before anyone can act on it.
Why it matters: *the hours spent assembling the report are hours not spent reading it.*
- ☐  **More than one QuickBooks file.**
Each entity lives in its own file, set up a little differently, and only a few people remember the workarounds needed to line them up.
Why it matters: *comparing performance across locations means reconciling formats before anyone reconciles numbers.*
- ☐  **Close takes longer every cycle.**
Someone consolidates the files by hand each month, and small errors and workarounds pile up faster than the team can clear them.
Why it matters: *every added day at close is a day leadership waits on final numbers.*
- ☐  **Leadership questions trigger a scramble.**
A single question about performance means dropping everything to pull and assemble a custom report outside the system.
Why it matters: *the next question starts the same fire drill again, with no system of record to point to.*
- ☐  **Decisions run on data that is already old.**
By the time a report reaches an inbox, it reflects last week, not this moment, and the window to act has already started closing.
Why it matters: *the gap between when the numbers update and when someone sees them is where opportunities slip away.*

Your Score

Count the boxes checked above and find your range.

0 to 1: Steady Room to grow before this becomes a bottleneck.	2 to 3: Strained Consolidation gets harder with every entity you add.	4 to 5: Outgrown Manual reporting is costing more than time, and the cost compounds every quarter.

Intuit Enterprise Suite consolidates every entity in one cloud-native dashboard, with intercompany eliminations built in and reports that pull live from your books. What used to take days takes minutes.

Next Steps

Talk to an Advisor

Get a candid read on your current reporting setup.

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