

Digital Reporting & Analytics

Must-Haves Checklist

When selecting a Reporting & Analytics tool, the following is a list of features or capabilities that should be considered. Does the application support the ability to:

Must-Haves Checklist

- ⊕ Approvals
 - ☐ Auto-create necessary reviews by package type, discipline, contract, and status
 - ☐ Assign responsibilities and due dates for submission and approval of key items
 - ☐ Restrict approval permissions by role, contract, and user to ensure proper completion
 - ☐ Utilize notifications and reporting to ensure approvals are completed
- ⊕ Workflow
 - ☐ Customize workflows based on status and set up rules to ensure proper process
- ⊕ Task Tracking
 - ☐ Create, edit, and closeout actions, issues, decisions, studies
- ⊕ Notifications
 - ☐ Easily track items due with automated reminders and notifications
- ⊕ Digital Meetings
 - ☐ Collaborate virtually or in person without the need for whiteboards or sticky notes
 - ☐ View and update agenda items, action items, and vital data to run smoother meetings across multiple companies and contractors
 - ☐ Identify action items and resolve issues in real time
 - ☐ Configure digital meeting dashboards based on out-of-the-box default templates and widgets
- ⊕ Goals Tracking
 - ☐ Create and track custom goal progress and scoring in real-time
- ⊕ Global Task Management
 - ☐ Track tasks and activities across multiple contractors, PMs or stakeholders
- ⊕ Run My Meeting
 - ☐ Enter meeting mode to run meetings in real time directly in O3
 - ☐ Stay on track with structured meeting dashboards and live-updated agenda items
 - ☐ Follow up after meetings easily with automated minutes, action tracking, notifications, and reporting
- ⊕ Manage My Team
 - ☐ Track action item progress and provide look ahead reports for each stakeholder
 - ☐ Monitor separate outcomes and action progress using team goals and action plans

Looking for a new tool? Let us know!
Contact us at www.o3.solutions

