Initiate

Initiate Data & Business Assessment Reporting

Facilitators:

Jessa Armstrong
Initiate Product Manager
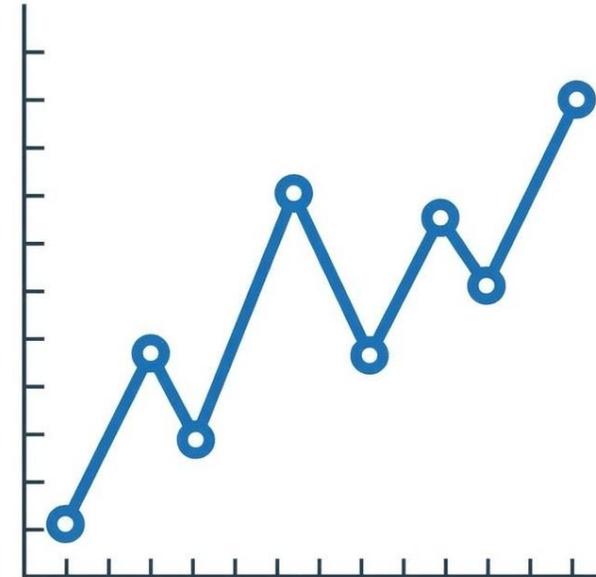
Stacy Zielinski
Initiate Director

Types of Initiate Reports

- **All User Activity:** This report returns profile data like demographics, years in business, email, and other information found on a user's account profile as well as their all time utilization.

- **Daily User Activity:** This report provides a summary of each user's engagement with Initiate broken down by day such as; active hours, number of resources viewed, which resources they viewed, and number of action items completed.

- **Invitation Report (Org Admin Only):** This report shows recent invitations that have been sent and whether or not they have been redeemed to create an Initiate account.

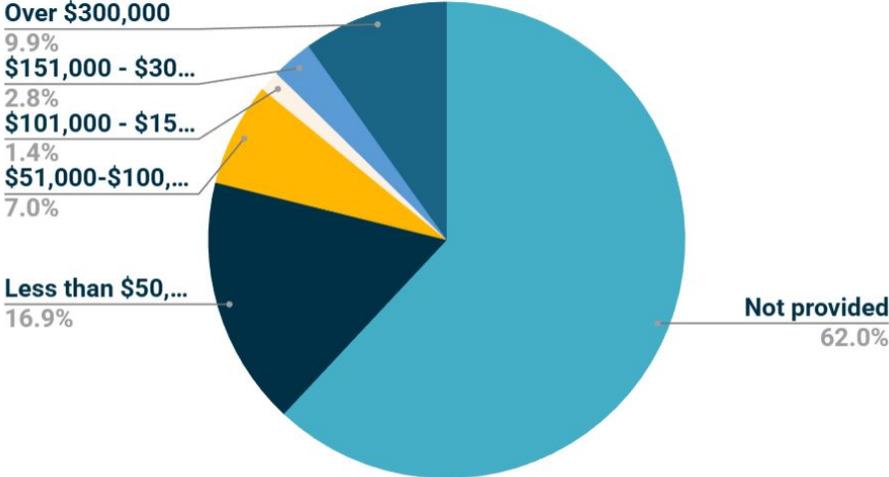# How to Run & Export an   Initiate Report

1. Go to the Reports tab

2. Choose the Report type.

3. Choose the Date Range

4. Choose the User Type*

5. Click Export

6. The report will export to a CSV file that can be modified

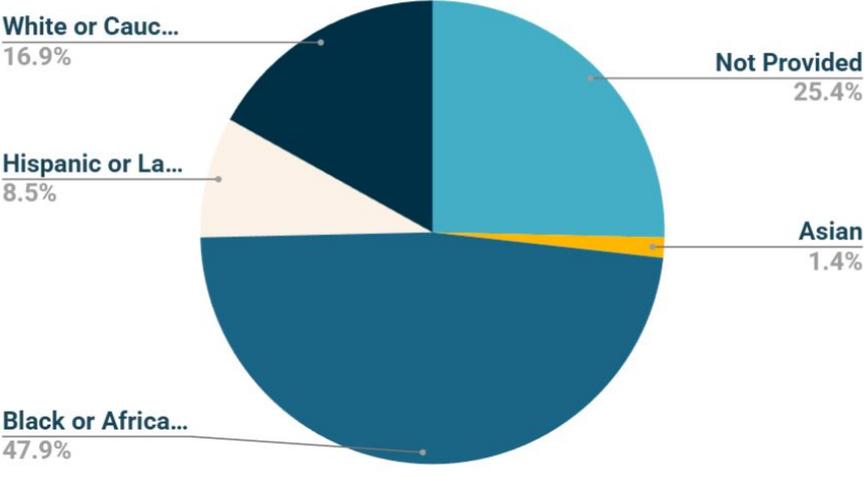   to analyze your Initiate data.
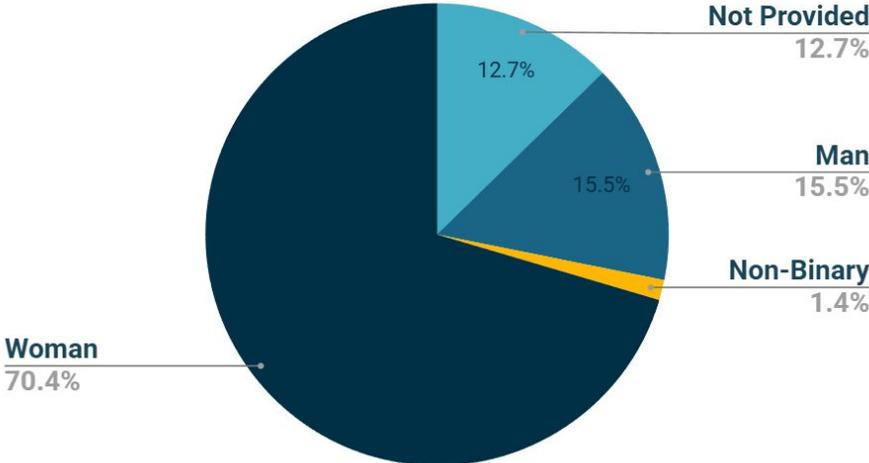
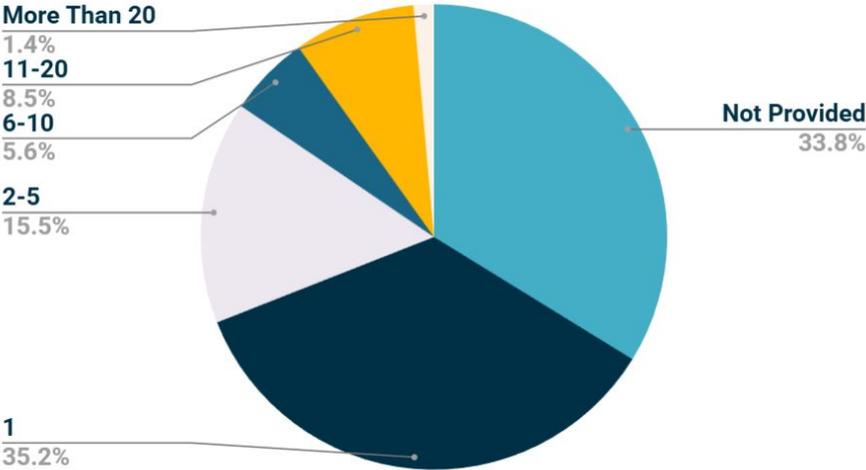# Analyzing Initiate Data: All User Activity

Annual Revenue

- Over $300,000 — 9.9%
- $151,000 - $30... — 2.8%
- $101,000 - $15... — 1.4%
- $51,000-$100,... — 7.0%
- Less than $50,... — 16.9%
- Not provided — 62.0%

Gender of Learners

- Not Provided — 12.7%
- Man — 15.5%
- Non-Binary — 1.4%
- Woman — 70.4%

Race or Ethnicity of Learners

- White or Cauc... — 16.9%
- Hispanic or La... — 8.5%
- Black or Africa... — 47.9%
- Not Provided — 25.4%
- Asian — 1.4%

Number of Employees

- More Than 20 — 1.4%
- 11-20 — 8.5%
- 6-10 — 5.6%
- 2-5 — 15.5%
- 1 — 35.2%
- Not Provided — 33.8%

Analyzing Initiate Data: Daily User Activity

Date of Training	12/16/2025
Total Hours	1.50
Resource Views	14
Unique Resource Views	8
Completed Action Items	8
Completed Module Action Items	1
Viewed Resources	The Hiring Process | 10 Steps to Getting it Right 25 Financial Terms Every Business Owner Should Know How to Create A Digital Content Calendar | Tips & Templates 6 Tips for Promoting Your Job Openings Small Business Strategies to Increase Sales Using Traditional Marketing Channels How to Develop an Effective Social Media Marketing Plan 9 Steps to Developing & Launching an Email Marketing Strategy
Completed Resources	25 Financial Terms Every Business Owner Should Know How to Create A Digital Content Calendar | Tips & Templates 6 Tips for Promoting Your Job Openings Small Business Strategies to Increase Sales Using Traditional Marketing Channels How to Develop an Effective Social Media Marketing Plan 9 Steps to Developing & Launching an Email Marketing Strategy
Completed Modules	Choosing Your Marketing Channels
SBA TA PRE OR POST?	Pre-Loan
SSBCI TA Services Provided	Financial advisory services: Other
SSBCI TA Services Provided (Other)	Online educational resources on managing business finances

Supporting Learner Growth

Assess → Coach → Measure

Assess
- Establish baseline in key business areas
- Identify priority gaps & strengths

Coach
- Guide goals & coaching focus
- Ensure consistent support

Measure
- Track progress over time
- Show impact across clients

Business Self-Assessment

Tracking Learner Progress - Two Ways

Activity Tab - Individual Responses

Trends Tab - Portfolio/Individual Data

Learner Portfolio Summary

Downloadable pdf
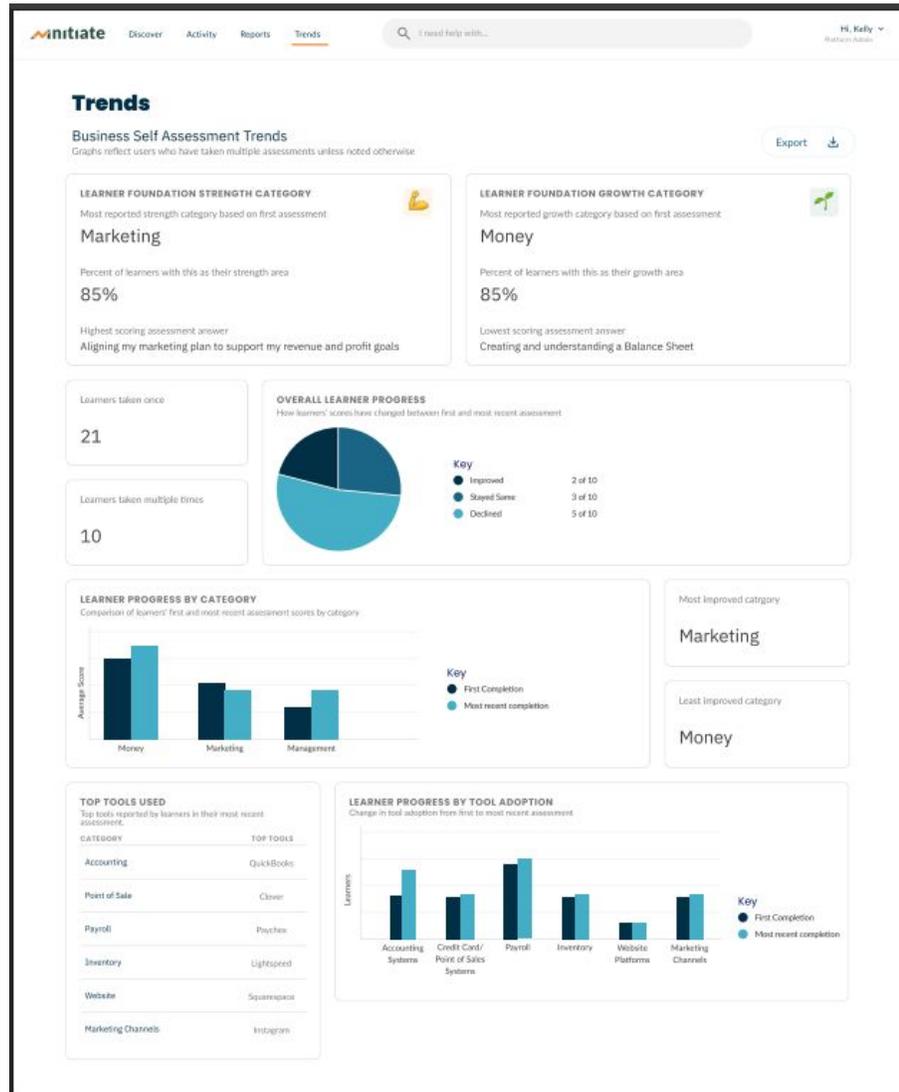
Individual Learner Data

Downloadable csv

User ID	Date	Name	Email	Creating a	Creating a	Creating a	Calculating	Understan	Defining a	Communic	Aligning m	Creating a	Utilizing sc	Measuring	Utilizing ti	Evaluating	Knowing w	Training er	Providing	Retaining	Money Av	Marketing
137928	########	Stacy Zieli	szielinski@	3	3	2	2	2	3	3	4	4	4	4	2	2	1	2	2	1	2.4	3.666667
18328	########	jessa arms	jessa.arms	3	3	3	3	3	3	4	4	3	4	4	4	4	4	4	4	4	3	3.666667
18328	########	jessa arms	jessa.arms	1	2	1	1	2	2	3	2	2	3	2	3	4	3	4	3	4	1.4	2.333333
137928	########	Stacy Zieli	szielinski@	2	2	1	1	1	2	3	4	4	4	4	1	1	1	1	1	1	1.4	3.5
177	########	Jessa Arms	jarmstrong	3	4	4	3	3	3	4	4	4	4	4	4	3	4	4	3	4	3.4	3.666667
177	########	Jessa Arms	jarmstrong	3	3	3	3	3	3	4	3	3	4	3	2	4	2	4	3	3	3	3.333333
177	########	Jessa Arms	jarmstrong	2	2	2	2	2	2	2	2	2	3	3	1	3	1	1	1	2	2	2.333333
6353	########	Janet Smit	learner1@	1	2	1	2	2	3	2	3	3	4	2	3	2	3	2	3	2	1.6	2.833333
5752	########	Ida Tate	info@initia	4	3	3	3	3	1	1	1	1	1	1	3	2	4	2	3	4	3.2	1
5752	########	Ida Tate	info@initia	1	1	1	2	2	3	4	1	4	4	3	4	3	4	3	4	2	1.4	3.166667