



Initiate Data & Business Assessment Reporting

Facilitators:

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Initiate Product Manager

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Initiate Director

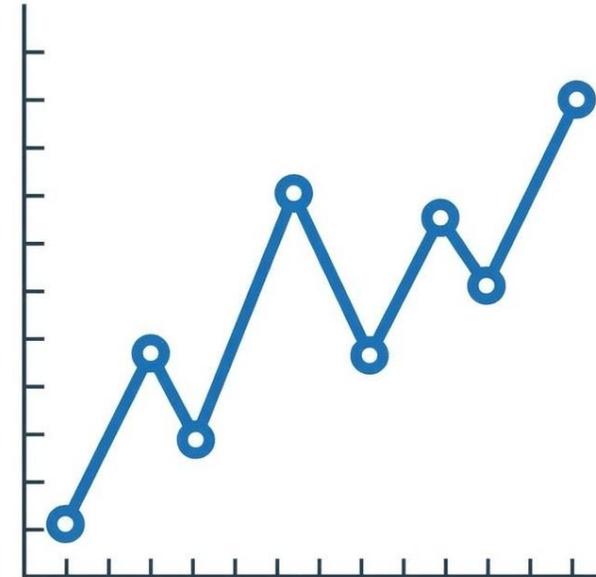
Types of Initiate Reports

- **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

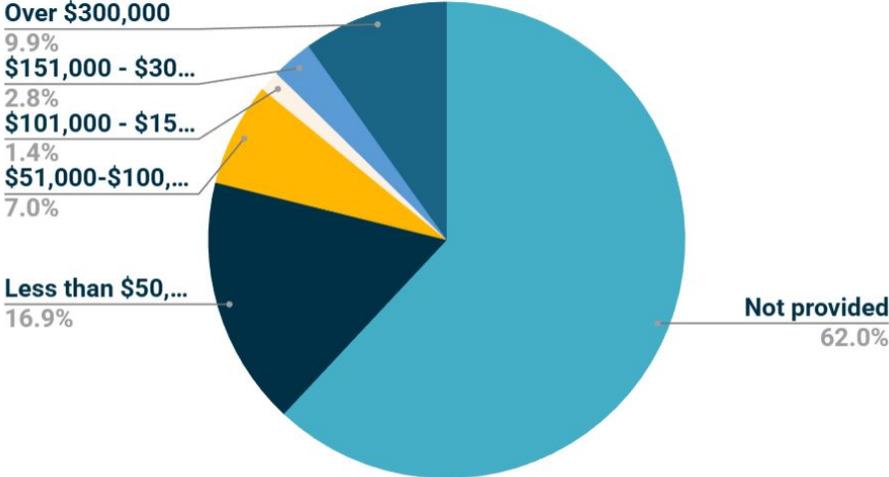
1. Go to the Reports tab
2. Choose the Report type.
3. Choose the Date Range
4. Choose the User Type*
5. Click Export
6. The report will export to a CSV file that can be modified to analyze your Initiate data.



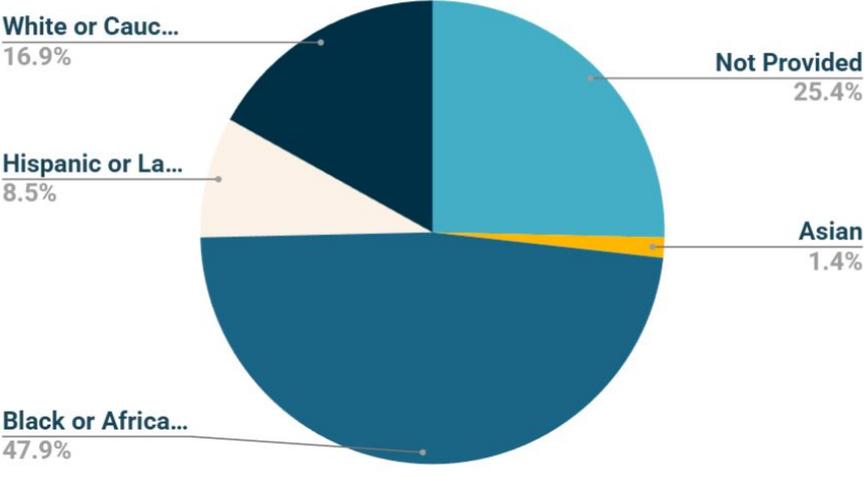
Analyzing Initiate Data:

All User Activity

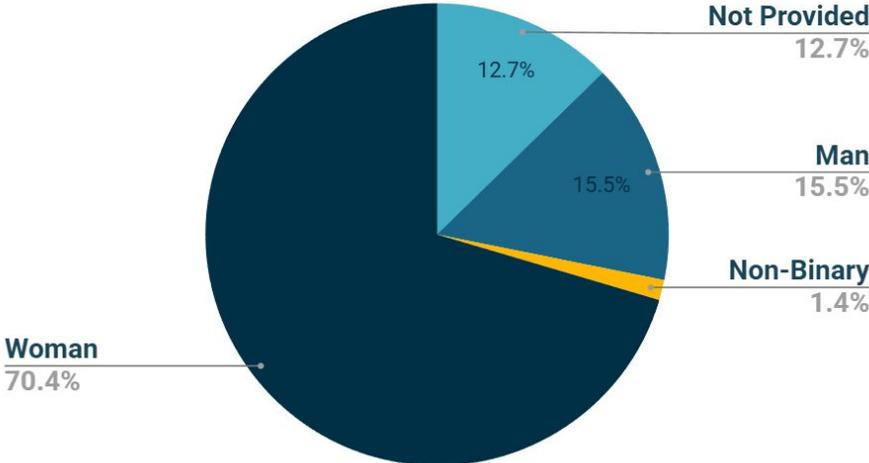
Annual Revenue



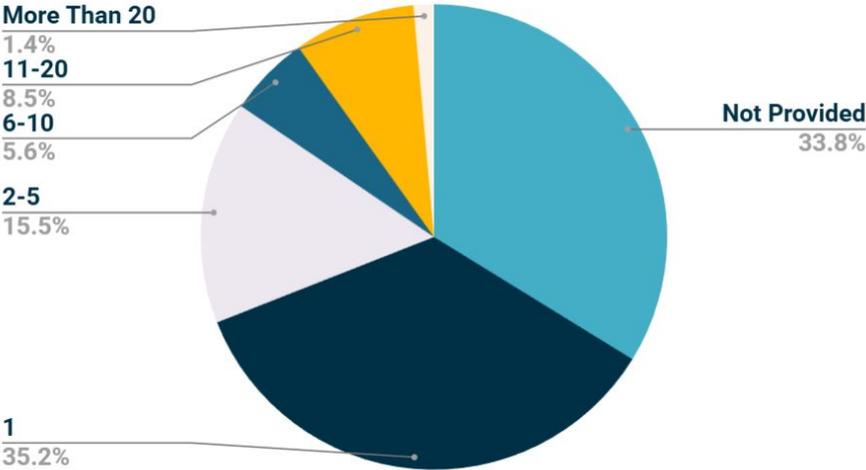
Race or Ethnicity of Learners



Gender of Learners



Number of Employees



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	<ul style="list-style-type: none">The Hiring Process 10 Steps to Getting it Right25 Financial Terms Every Business Owner Should KnowHow to Create A Digital Content Calendar Tips & Templates6 Tips for Promoting Your Job OpeningsSmall Business Strategies to Increase SalesUsing Traditional Marketing ChannelsHow to Develop an Effective Social Media Marketing Plan9 Steps to Developing & Launching an Email Marketing Strategy
Completed Resources	<ul style="list-style-type: none">25 Financial Terms Every Business Owner Should KnowHow to Create A Digital Content Calendar Tips & Templates6 Tips for Promoting Your Job OpeningsSmall Business Strategies to Increase SalesUsing Traditional Marketing ChannelsHow to Develop an Effective Social Media Marketing Plan9 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

Self-Assessment

Money

Creating and using cash flow projections

1 I want to learn

2 I need practice

3 I could improve

4 I apply it well

Creating and understanding a Profit & Loss

1 I want to learn

2 I need practice

3 I could improve

4 I apply it well

Creating and understanding a Balance Sheet

1 I want to learn

2 I need practice

3 I could improve

4 I apply it well

Calculating break-even and profit needed to reach goals

1 I want to learn

2 I need practice

3 I could improve

4 I apply it well

Understanding and staying current on all tax obligations (i.e., sales, payroll, income, etc.)

1 I want to learn

2 I need practice

3 I could improve

4 I apply it well

Marketing

Defining and reaching target market

1 I want to learn

2 I need practice

3 I could improve

4 I apply it well

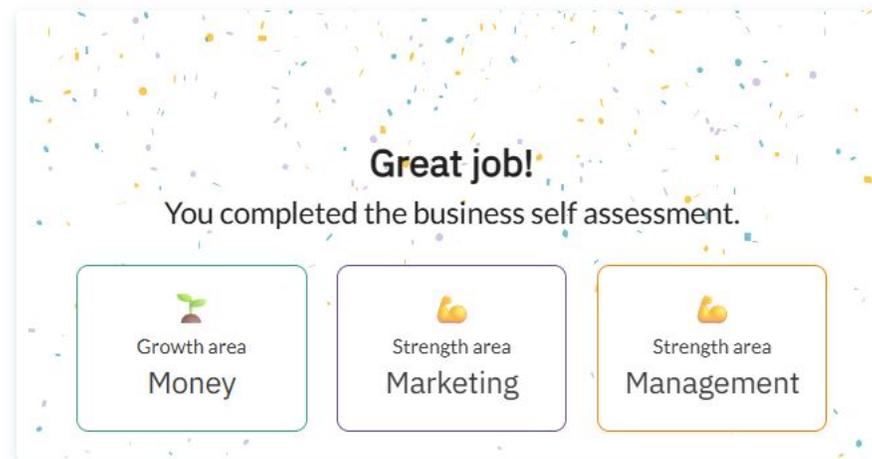
Communicating product/service features and benefits effectively

1 I want to learn

2 I need practice

3 I could improve

4 I apply it well



Explore these resources based on your results



Tracking Learner Progress - Two Ways

Activity Tab - Individual Responses

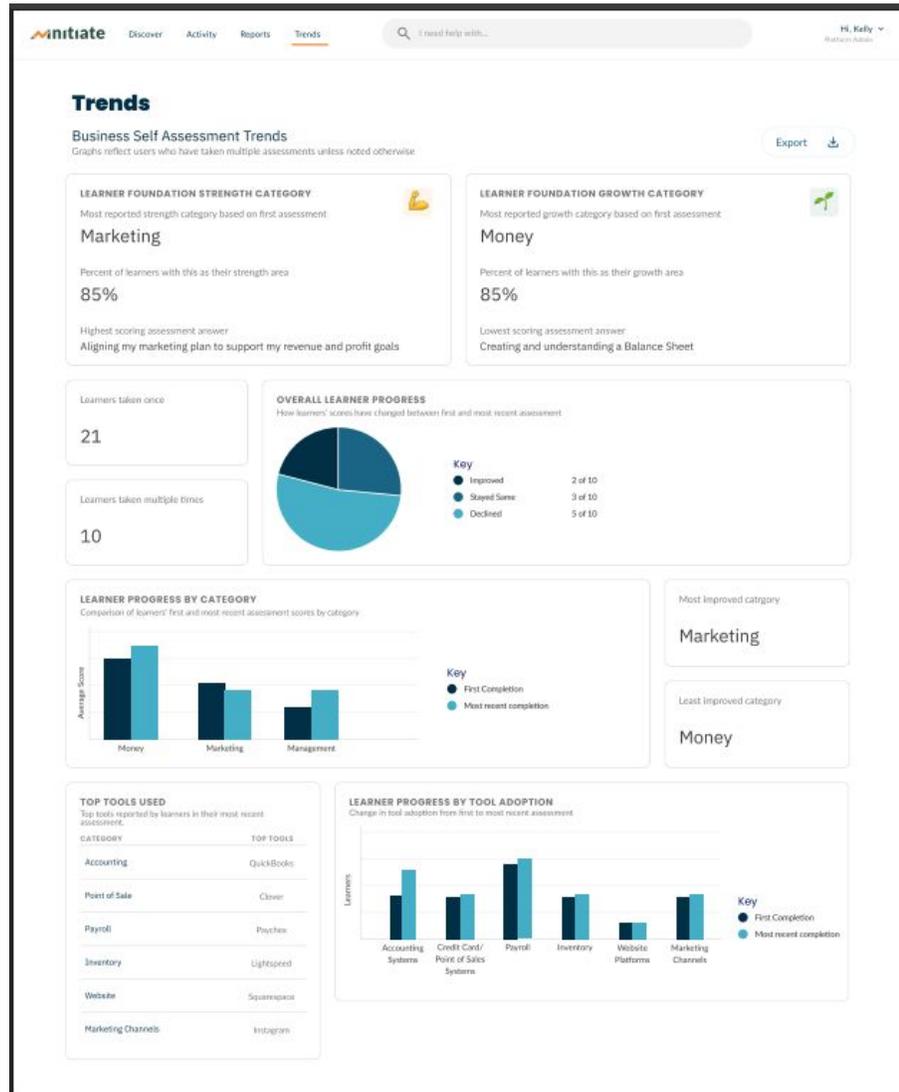
The screenshot shows the 'Activity' tab in the Northern Initiatives system. At the top, there is a navigation bar with 'Discover', 'Activity' (selected), 'Reports', and 'Trends'. Below the navigation bar, the user's name 'Ani Anderson (me)' is displayed in a dropdown menu. A horizontal bar below the menu shows 'Your Action Items', 'Uploads 1', 'Saved Calculators 1', and 'Business Self Assessment 1'. Underneath, two action items are listed: 'Understanding Your Balance Sheet' and 'Business Owner's 3 Go-To Financial Reports', both assigned by Ani Anderson. Two orange arrows point from the 'Activity' title to the user dropdown and the 'Business Self Assessment' category.

Trends Tab - Portfolio/Individual Data

The screenshot shows the 'Trends' tab in the Northern Initiatives system. At the top, there is a navigation bar with 'Discover', 'Activity', 'Reports', and 'Trends' (selected). A search bar is present with the text 'Find A Resource...'. Below the navigation bar, the title 'Business Self Assessment Trends' is displayed. Two orange arrows point from the top right of the page to the 'Export CSV' and 'Export PDF' buttons. The main content area is divided into several sections: 'LEARNER FOUNDATION STRENGTH CATEGORY' (Management, 69%), 'LEARNER FOUNDATION GROWTH CATEGORY' (Money, 51%), 'Learners taken once' (1), 'Learners taken multiple times' (4), and 'OVERALL LEARNER PROGRESS' (a pie chart showing 3 Improved, 1 Declined, and 0 Stayed Same).

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 tir	Evaluating	Knowing w	Training er	Providing c	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	3	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