



ACCESS ANALYTIC

Business Decision Infrastructure Checklist



Introduction

Most growing businesses are not short on data.

They have accounting systems, spreadsheets, operational reports, CRMs, payroll platforms and dashboards. Yet many leadership teams still struggle to make fast, confident decisions.

Why?

Because the challenge is usually not access to information. The challenge is turning information into clear, trusted insight.

As businesses grow, complexity increases quickly. Reporting becomes fragmented, teams create their own spreadsheets, systems stop talking to each other and leaders spend more time verifying numbers than acting on them.

That is where decision infrastructure becomes critical.

Decision infrastructure is the combination of systems, reporting, processes and data practices that help leaders make informed, timely and confident decisions.

This checklist is designed to help you assess the maturity of your organisation's decision infrastructure across five key areas:

1. Leadership visibility
2. Financial reporting and forecasting
3. Data and systems integration
4. Operational efficiency
5. AI and future readiness

The assessment is intentionally practical and business-focused. You do not need technical expertise to complete it.

HOW TO USE THIS CHECKLIST

For each statement, select:

- Yes → this is working well within our business
- No → this is currently a gap or challenge
- Unsure → we do not yet have enough visibility or confidence

There are no right or wrong answers.

The goal is to identify areas where your business may be experiencing hidden inefficiencies, reporting risks, operational bottlenecks or missed opportunities.

In many organisations, even small improvements in visibility, forecasting, reporting or automation can create significant benefits including:

- Faster decision making
- Improved profitability visibility
- Reduced manual administration
- Better cash flow forecasting
- Increased operational efficiency
- Stronger scalability
- Improved accountability across teams
- Better readiness for AI and automation initiatives

WHAT TO DO AFTER COMPLETING THE ASSESSMENT

If you identify several “No” or “Unsure” responses, it may indicate opportunities to strengthen your organisation’s reporting, systems or decision-making processes.

A useful next step is to prioritise the areas creating the greatest friction or consuming the most management time.

For some businesses, the priority may be improving reporting visibility.

For others, it may involve:

- Streamlining manual processes
- Improving budgeting and forecasting
- Integrating disconnected systems
- Reducing spreadsheet dependency
- Improving operational reporting
- Preparing for AI and automation initiatives

NEED HELP?

Access Analytic works with growing organisations to improve decision infrastructure through:

- Power BI reporting and dashboards
- Financial modelling and forecasting
- Budgeting and forecasting systems
- Data warehouse development
- AI and automation strategy
- Process improvement and PowerApps development

If you would like help interpreting your results or identifying practical improvement opportunities, feel free to contact the Access Analytic team for a confidential discussion.

The businesses that perform best over time are rarely the ones with the most data. They are the ones who can turn information into confident decisions.



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Comprehensive Decision Infrastructure Assessment

This assessment contains 32 practical diagnostic questions across five key business capability areas. It is designed to help identify operational, reporting, technology and decision-making gaps that may be limiting growth, efficiency or scalability.

1. LEADERSHIP VISIBILITY

Do your leaders have fast access to trusted information?

- ☐ We have a single source of truth for key business metrics
- ☐ Leadership reports are consistent across departments
- ☐ We trust the accuracy of our reporting
- ☐ Management meetings focus on decisions, not debating numbers
- ☐ Key KPIs are clearly defined and aligned to strategy
- ☐ Leaders can quickly identify emerging risks

Score:

Yes ___ No ___ Unsure ___

2. FINANCIAL REPORTING & FORECASTING

How strong is your financial decision-making capability?

- ☐ Budgeting and forecasting processes are efficient
- ☐ We have all the metrics we need to monitor the performance of our business
- ☐ Cash flow forecasting provides sufficient forward visibility
- ☐ We understand profitability by customer, product or service line
- ☐ Variance analysis identifies root causes, not just movements

- ☐ Finance teams spend more time analysing than compiling data
- ☐ Financial reporting supports strategic decision making

Score:

Yes ____ No ____ Unsure ____

3. DATA & SYSTEMS INTEGRATION

Are your systems connected and scalable?

- ☐ Key business systems integrate effectively
- ☐ Staff are not manually consolidating spreadsheets each month
- ☐ Reporting processes are largely or fully automated
- ☐ Data definitions are consistent across the organisation
- ☐ We confidently combine financial and operational data
- ☐ Our systems can scale as the business grows
- ☐ We can reforecast quickly as business conditions change

Score:

Yes ____ No ____ Unsure ____

4. OPERATIONAL EFFICIENCY

Are manual processes slowing the business down?

- ☐ Critical workflows are documented and repeatable
- ☐ Manual administration has been reduced where possible
- ☐ Operational bottlenecks are visible to management
- ☐ Teams collaborate effectively across departments
- ☐ Staff spend more time on high-value activities than on administration
- ☐ We can identify repetitive processes suitable for automation

Score:

Yes ____ No ____ Unsure ____

5. AI & FUTURE READINESS

Is your business positioned to benefit from AI and automation?

- ☐ Our data is structured and reliable enough for AI initiatives
- ☐ We have identified areas where AI could improve efficiency
- ☐ Leadership is discussing AI strategically
- ☐ Our systems support automation and workflow integration
- ☐ We are investing in scalable systems rather than temporary workarounds
- ☐ Our technology strategy aligns with long-term business objectives

Score:

Yes ____ No ____ Unsure ____



YOUR RESULTS

Mostly “Yes”

Your business likely has a solid decision-making infrastructure. Focus on continuous improvement, automation opportunities and future scalability.

Mix of “Yes”, “No” and “Unsure”

There are likely opportunities to improve visibility, efficiency and reporting confidence. Small improvements in reporting and systems can create significant operational and financial benefits.

Mostly “No” or “Unsure”

Your business may be experiencing hidden inefficiencies, reporting risks or decision-making delays that could impact growth and profitability. A structured review of systems, reporting and processes may unlock substantial value.

COMMON WARNING SIGNS

Businesses often benefit from improving their decision infrastructure when they experience:

- Reporting delays
- Multiple versions of spreadsheets
- Uncertainty around KPIs
- Manual monthly consolidation
- Cash flow surprises
- Difficulty forecasting accurately
- Limited visibility across departments
- Excessive reliance on key staff
- Growing operational complexity
- Frustration with disconnected systems

NEXT STEPS

Access Analytic helps growing organisations improve decision clarity through:

- Power BI reporting and dashboards
- Financial modelling and forecasting
- Budgeting and forecasting systems
- Data warehouse development
- AI and automation strategy
- Process improvement and PowerApps development

If you would like a complimentary discussion about the maturity of your current reporting and decision-making infrastructure, contact the Access Analytic team.

Website: www.accessanalytic.com.au

LinkedIn: Access Analytic

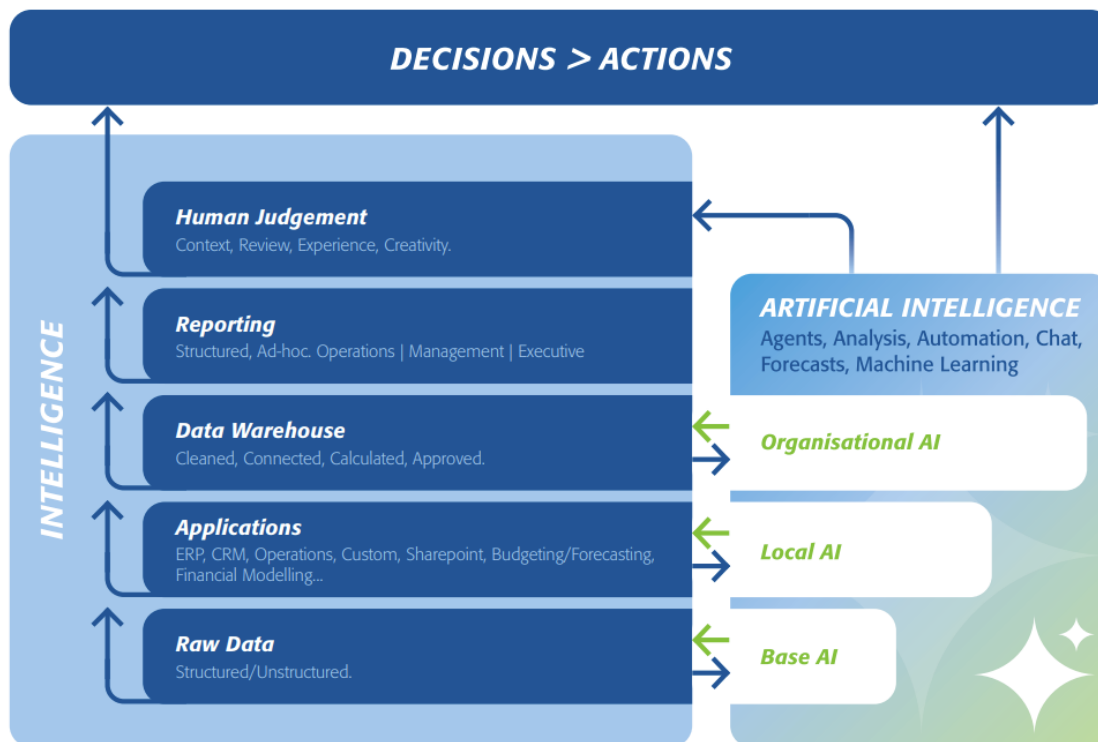
SUGGESTED USE

This checklist is designed for:

- CEOs and business owners
- CFOs and finance leaders
- Operations managers
- Leadership teams
- Businesses experiencing growth or increasing complexity

It can also be used as a discussion framework during strategic planning sessions or management workshops.

Access Analytic Overview



At Access Analytic, we help CFOs and executive teams in medium to large organisations build their **Decision Infrastructure**. The integrated systems, data foundations, and reporting capabilities that turn raw data into clear, trusted insights for faster, more confident decision-making.

Most organisations are surrounded by data but struggle to consistently turn it into meaningful business intelligence. Information is often fragmented across spreadsheets, ERP systems, operational platforms and manual reporting processes, making it difficult for leaders to gain a reliable, real-time view of performance.

We solve these problems with Decision Infrastructure.

We create a connected environment where financial and operational data flows seamlessly through the organisation, providing decision-makers with timely, accurate and actionable insights. We provide the foundation that enables organisations to plan better, forecast more accurately, improve operational efficiency and respond quickly to changing business conditions.

Put simply:

We help CFOs in medium and large organisations build the decision infrastructure that transforms data into business clarity.

We combine deep financial expertise with modern data, analytics and AI capabilities to deliver solutions that business leaders can trust and actually use. Unlike traditional IT projects that

focus purely on technology, our approach is grounded in commercial outcomes, financial performance and executive decision-making.

Our Decision Infrastructure solutions include components such as:

- Power BI dashboards and executive reporting
- Financial modelling and forecasting frameworks
- Budgeting and planning systems
- Microsoft Fabric and data warehouse development
- AI-powered analytics and forecasting
- PowerApps process automation
- ESG and operational reporting
- Data governance and reporting frameworks
- Executive training and capability uplift

The result is an organisation that can:

- Make faster, more confident decisions
- Reduce reliance on manual spreadsheets and disconnected reporting
- Improve forecasting accuracy and planning agility
- Create a single source of truth across the business
- Increase trust in data and reporting
- Identify risks and opportunities earlier
- Scale decision-making capabilities as the organisation grows
- Unlock the practical value of AI and automation

Decision Infrastructure is no longer just a technology initiative. It is a strategic business capability that underpins financial performance, operational efficiency and long-term growth. Access Analytic partners with organisations to design, implement and continuously improve Decision Infrastructure that delivers measurable business outcomes and empowers leaders to operate with clarity and confidence.

We are based in Perth, Western Australia, and the business was established in 2000.

A selection of our clients is shown below:



LEADERSHIP

Jeff Robson, Managing Director

Masters (Applied Finance), BCom (Accounting & Information Systems), CISA, GAICD, FAIM, F Fin, Microsoft Excel Expert

Jeff is the founding Director at Access Analytic Solutions. He has over 25 years of experience in chartered accounting, business management and consulting.

Jeff leads a dedicated team that helps organisations realise the potential of their data to generate transformative insights that drive strategic decision-making. Focusing on building strong, long-term partnerships, he is committed to delivering innovative solutions for clients that add value and increase their success.



He leads the team in AI, advanced data analytics, financial modelling, and reporting using cutting-edge tools like ChatGPT, Copilot, Power BI, and the Microsoft suite. By understanding the unique challenges faced by CFOs and senior leaders across diverse industries, including oil and gas, mining, property, agribusiness, finance, and healthcare, Access Analytic delivers insights that empower leaders to make informed decisions and achieve sustainable growth.

Jeff is the Founder of the CFO Access Groups and the CFO Access Podcast. He has also run workshops and provided his expertise to clients in 27 countries since 2007. He regularly speaks on AI, data analytics, financial modelling, and corporate performance management.

Wyn Hopkins, Director

B.Sc. (Hons) Accounting & Financial Management, Microsoft MVP, Excel Expert (MS), Author



Wyn has been awarded MVP status by Microsoft every year since 2017, he is the only MVP in Australia to hold both Excel and Data Platform awards and is the author of the book "Power BI for the Excel Analyst". He is known worldwide for sharing his knowledge via the Access Analytic YouTube channel with over 6 million views and 100,000+ subscribers.



He gained his Chartered Accountant qualification at PwC in 2000 and has extensive Business Analyst experience with HBOS and Barclays in the UK plus multinational clients in Perth.

Wyn is skilled in Excel and Power BI development, Power Query automation, and management reporting. He is also in demand as a highly experienced Excel and Power BI trainer, having run many international and national workshops.

Yury Tokarev, Director

CA, PhD (Business Administration & Economics), GradDip (Accounting), BBS (Management & Economics), Microsoft Excel Expert

Yury Tokarev is a Chartered Accountant with a proven track record of transforming complex financial data into strategic insights.

With extensive experience in financial modelling, Power BI development, Power Query automation, data modelling, and budgeting and forecasting systems, Yury delivers high-impact solutions that enhance financial visibility and drive effective decision-making. His diverse background includes business advisory roles at a leading chartered accountancy firm and corporate finance consultancy at a top European investment bank.



As an international trainer in Power BI and Financial Modelling, Yury empowers finance professionals globally to master data-driven strategies that fuel growth and efficiency.

Contact us

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