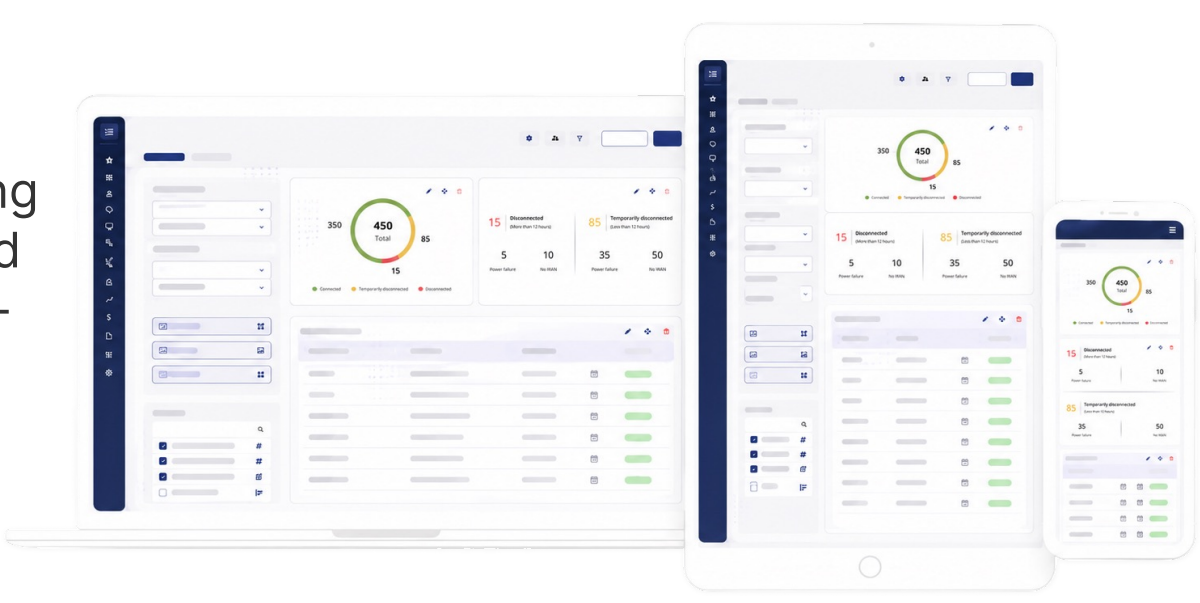
Report Builder

About Report Builder

Redesigning a complex reporting workflow into a scalable, guided experience for MSPs and small-business users.



Design Objective

Preserve the flexibility of advanced reporting while making report creation easier to understand, faster to complete, and more useful throughout the reporting lifecycle.

Problem **Statement**

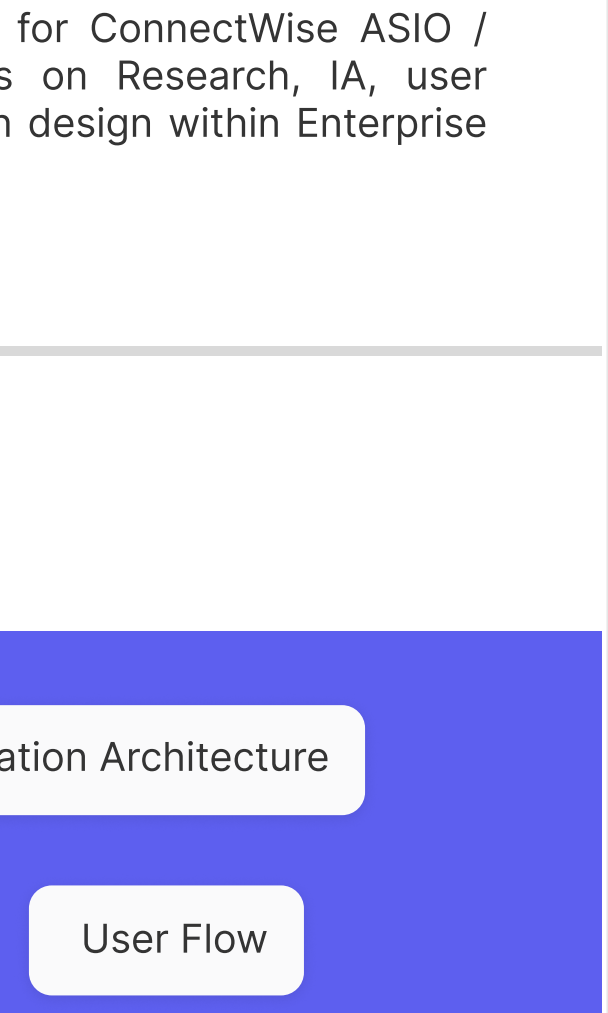
1. Scheduling Complexity: Coordinating Zoom meetings for small groups is cumbersome, lacking an intuitive solution for efficient scheduling and availability submission.
2. Privacy Concerns: Current platforms compromise user privacy, hindering the seamless organization of meetings and causing frustration among users.
3. User Frustration: Existing tools offer a generic approach, leading to user dissatisfaction due to a lack of tailored features for small group coordination.
4. Calendar Integration Hurdles: Challenges in integrating personal calendars add to the complexity, requiring a dedicated solution for seamless synchronization and coordination.
5. Inefficient Solutions: Users face difficulties in managing schedules, with the absence of a streamlined platform that prioritizes simplicity, accessibility, and privacy.

Possible **Solution**

Improve the relationship between report content and its configuration by organizing functionality around the user's goals:

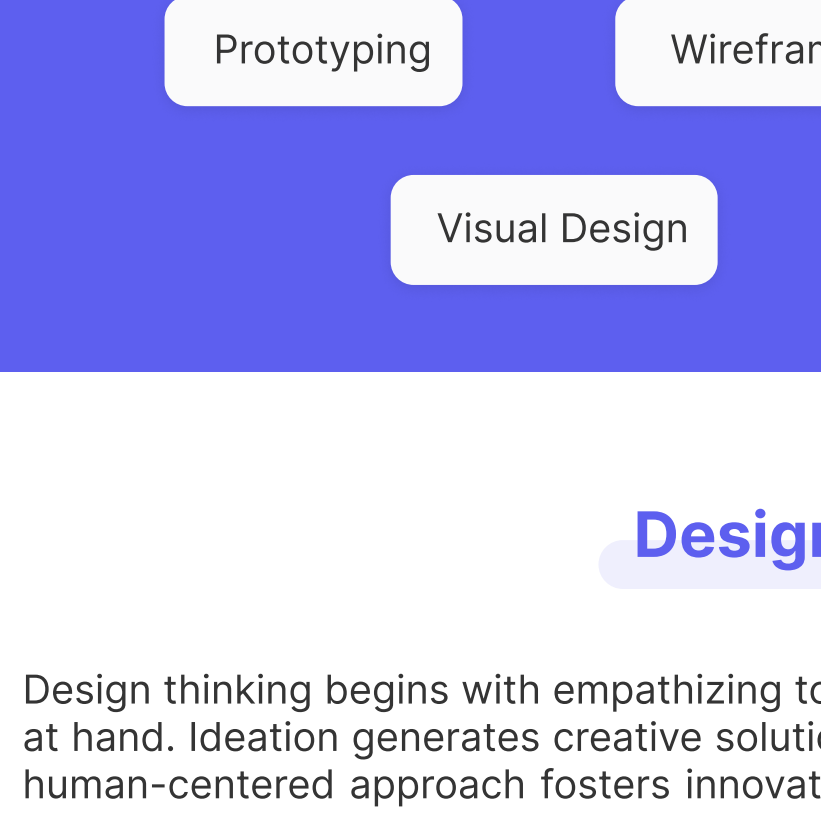
- Template-first entry: Easier report discovery (Recognition over recall).
- Progressive disclosure: Less visible complexity for cognitive load management.
- Contextual editing: Better understanding of changes.
- Modular composition: Flexible components (KPIs, tables, charts).
- Integrated preview & delivery: Workflow continuity and greater confidence before sending.
- Reusable reporting: Saved structures to reduce repeated work.

Target **Audience**



Primary Audience
- MSP Administrators: Configure data, filters, permissions.
- MSP Owners: Monitor business performance.
- Report Owners: Create, maintain, and schedule reports

Secondary Audience
- Small Business Owners: Consume reports.
- Operations Managers: Monitor technician productivity.
- Account Managers: Prepare customer-facing reviews.



The **Approach**

UX/Product Designer for ConnectWise ASIO / Bright Gauge. Focus on Research, IA, user flows, and interaction design within Enterprise SaaS / Web.

My **Role**

Design Strategy
Problem Solution
Information Architecture
Empathy Mapping
Usability Testing
User Flow
Prototyping
Wireframes
Competitive Analysis
Visual Design
User Research
User Persona

Design Thinking Process

Design thinking begins with empathizing to understand user needs, followed by defining the problem at hand. Ideation generates creative solutions, which are then prototyped and tested iteratively. This human-centered approach fosters innovation, encouraging collaboration and continuous refinement to address challenges effectively and create solutions aligned with user requirements.

Emphatize
User Research
User Interview
Entrant Analysis

Define
User Persona
User Jouney Map
Goal Statement
Empathy Map

Ideate
Brainstorming
Card Sorting
User Flow

Design
Paper Wireframes
Visual Design
Prototype

Test
CheckUsability
Survey Insight
Improvements

Empathize **Phase**

Qualitative Research & Understanding Users

I focused on understanding what users were trying to achieve and where they experienced friction.
The central questions were:

What makes reporting difficult for someone who is not an analytics expert?

How can experienced users retain flexibility without overwhelming new users?

User Need	Existing Challenge	Design Opportunity
Create a report quickly	Unclear starting point	Templates and guided entry
Select relevant data	Complex configuration	Structured data selection
Customize a report	Too many visible controls	Contextual editing
Manage multiple reports	Repetitive setup	Reusable templates

Quantitative UX Measurement

Task completion rate
Can users successfully create a report?

Time on task
How long creation takes.

Error rate
Incorrect fields or configurations.

Template adoption
Choosing templates vs. scratch.

Workflow abandonment
Where users leave the process.

Repeat usage
Reusing saved reports.

Key Insights & Decisions

Insight: Users need a clear starting point.
Decision: Introduce template-first creation.

Insight: Too many controls increase cognitive load.
Decision: Apply progressive disclosure.

Insight: Report content and configuration should remain connected.
Decision: Use contextual editing.

Insight: Users need confidence before sharing.
Decision: Integrate preview and validation.

Competitive **Audit**

Landscape & Scope

Evidence boundary — public sources only

Based on supplied vendor sites, marketplaces, pricing pages and analyst roundups. **No hands-on testing.** The report builder's exact scope is unknown; builder assessments are hypotheses to check against the roadmap. Vendor claims and pricing have not been independently verified.

Four-player landscape

Supplied market framing — not a tested product ranking.

Player	Category	Delivery model	Typical fit
Power BI	General-purpose BI	Build it yourself or buy partner packs	MSPs with a data/BI-skilled person
Tableau	General-purpose BI	Build it yourself; role-based licences	Larger or analytics-heavy orgs
MSPbots	MSP-specific BI + automation	Prebuilt dashboards across many tools	MSPs wanting fast time-to-value
Cognition360 (ScalePad)	MSP-specific, ConnectWise-only	Warehouse + prebuilt Power BI apps	ConnectWise Manage MSPs that outgrew PSA reporting

Native incumbent: Reports and Dashboards

Formerly BrightGauge. Supplied ConnectWise context; product and availability claims are time-sensitive, not freshly verified.

Packaging & pricing context

Reported as bundled in RMM packages. Supplied standalone pricing: $325/month Standard and $449/month Enterprise, each with 2 datasources. Pricing is unverified.

Product direction — source claims
- Vendor claims 4,200+ prebuilt metrics and gauge templates.
- Dashboard management is described as moving into an Asio-style interface.
- Sidekick AI chat assistant is described as early access.
- Asio hero reports summarize automated and analyst steps for customer QBRs.

The positioning question

Is your report builder a replacement for, an evolution of, or a complement to native Reports and Dashboards?

Positioning depends on this unresolved relationship.

Competitor Profiles

Evidence status: User-supplied research only. Claims, pricing and assessments below are not independently verified or tested; confirm with vendors before external use.

MSPbots

Strengths & supplied claims
- Integrates **80+ MSP tools**, including ConnectWise Manage, Autotask, HaloPSA, Kaseya, NinjaOne, IT Glue and QuickBooks.
- **5,000+ prebuilt dashboards/widgets**, plus best-practice monthly/quarterly client service report templates.
- ConnectWise-specific **Agreement Profitability** app with margin heat map, bundled in the **Pro tier**.

Constraint to probe

Template dashboards reportedly cannot be edited or deleted; customization requires cloning or building from scratch.

Pricing caveat

Public pricing is inconsistent. A third-party listing starts at **$89 for BI integration**, but this was not verified on the vendor site. Confirm before using in decks.

Cognition360 · ScalePad

Strengths & supplied claims
- **130+ prebuilt reports** in **7 Power BI apps**: Agreements, Benchmarks, Customer, Finance, Projects, Sales and Service Delivery.
- Dedicated **star-schema warehouse**, optimized for ConnectWise Manage: history, fast drill-down and no production PSA load.
- Board-level/peer-group reporting and benchmarking are supplied differentiators.

Constraints & cost caveat

Now under ScalePad. ConnectWise Manage only, with a Power BI surface. The supplied assessment identifies no RMM or multi-vendor stack support. **Power BI licences and skills are needed.** No Cognition360 price was supplied; do not infer a total cost.

Microsoft Power BI

Strengths & supplied assessment

Affordable, familiar IT ecosystem with partner packs; for example, the **Opal ConnectWise PSA operations package** on Microsoft Marketplace.

Constraints & supplied limits

MSP data modeling, pipelines, refresh and client-facing report design are DIY. Supplied refresh claim: **8/day on Pro vs 48/day on Premium Per User**.

Supplied pricing · verify with vendor
- **Pro: $14/user/month**
- **Premium Per User: $24/user/month**
- **Desktop: free**
- **Pro included in Microsoft 365 E5**

These are supplied prices and entitlements, not verified current vendor terms.

Tableau

Strengths & supplied assessment

Strong visual analysis and governance for analysts.

Constraints & fit assessment

The supplied assessment identifies minimal MSP-specific content and a weaker fit for MSP client reporting. This is not an absolute or independently verified finding. **Per-viewer fees scale with headcount.**

Supplied pricing · verify with vendor
- **Standard Creator: $75/user/month**
- **Standard Explorer: $42/user/month**
- **Standard Viewer: $15/user/month**
- **Enterprise Creator: $115/user/month**

These are supplied tier details, not verified current vendor terms.

Feature Comparison

Directional assessment, not vendor-verified

Reading guide — User-supplied research only; vendor claims and licence-cost assumptions are not independently verified. The builder column is a hypothesis: targets and roadmap checks are not shipped capabilities. DIY qualifiers indicate self-built setup.

Capability	Your builder (hypothesis)	MSPbots	Cognition360	Power BI	Tableau
Native to Asio / no extra login	Strong	Weak	Weak	Weak	Weak
Time to first report	Target: minutes	Fast	Fast	Slow	Slow
Prebuilt MSP content	Needs library	Strong	Strong	Via partners	Minimal
Custom report flexibility	Core goal	Medium	Medium (in Power BI)	Strong	Strong
Client-facing / branded reports	Opportunity	Strong	Weak (internal focus)	DIY	DIY
Historical / warehouse analytics	Check roadmap	Medium	Strong	Strong (DIY)	Strong (DIY)
Cross-tool data (non-ConnectWise)	Check roadmap	Strong	None	Strong (DIY)	Strong (DIY)
Benchmarking	Gap	Limited	Strong	None	None
Skill required to build	Low	Low–medium	Low	High	High
Licence cost to MSP	Ideally bundled	Extra	Extra + Power BI	Extra	Extra

Define **Phase**

- User Persona

Alex Morgan, MSP Administrator

Persona & Empathy Map

Persona context

Context
Manages reporting for multiple customers. Works with different data sources, manages configurations and maintains recurring client reports.

Goals
Create reports for different customers, reuse templates, schedule automated delivery.

Frustrations
Repeating similar configurations, navigating advanced controls, time-consuming maintenance.

Needs
Reusable templates, clear navigation, better report management.

Empathy map

SAYS
"I need a reusable reporting structure. I do not want to configure everything again."

THINKS
"How can I create consistent reports for all my clients? Am I selecting the correct data?"

DOES
Selects data, configures filters, creates reports and schedules delivery.

FEELS
Frustrated by complex configurations; concerned about incorrect reporting.

David Wilson MSP Owner

Persona & Empathy Map

Persona context

Context
Owns an MSP business and needs visibility into business performance, service delivery and customer value.

Goals
Understand key business KPIs, share professional reports, make informed decisions.

Frustrations
Technical reporting terminology, complicated setup, understanding raw data.

Needs
Easy-to-understand templates, meaningful visualizations, clear report previews.

Empathy map

SAYS
"I need reports that customers can understand."

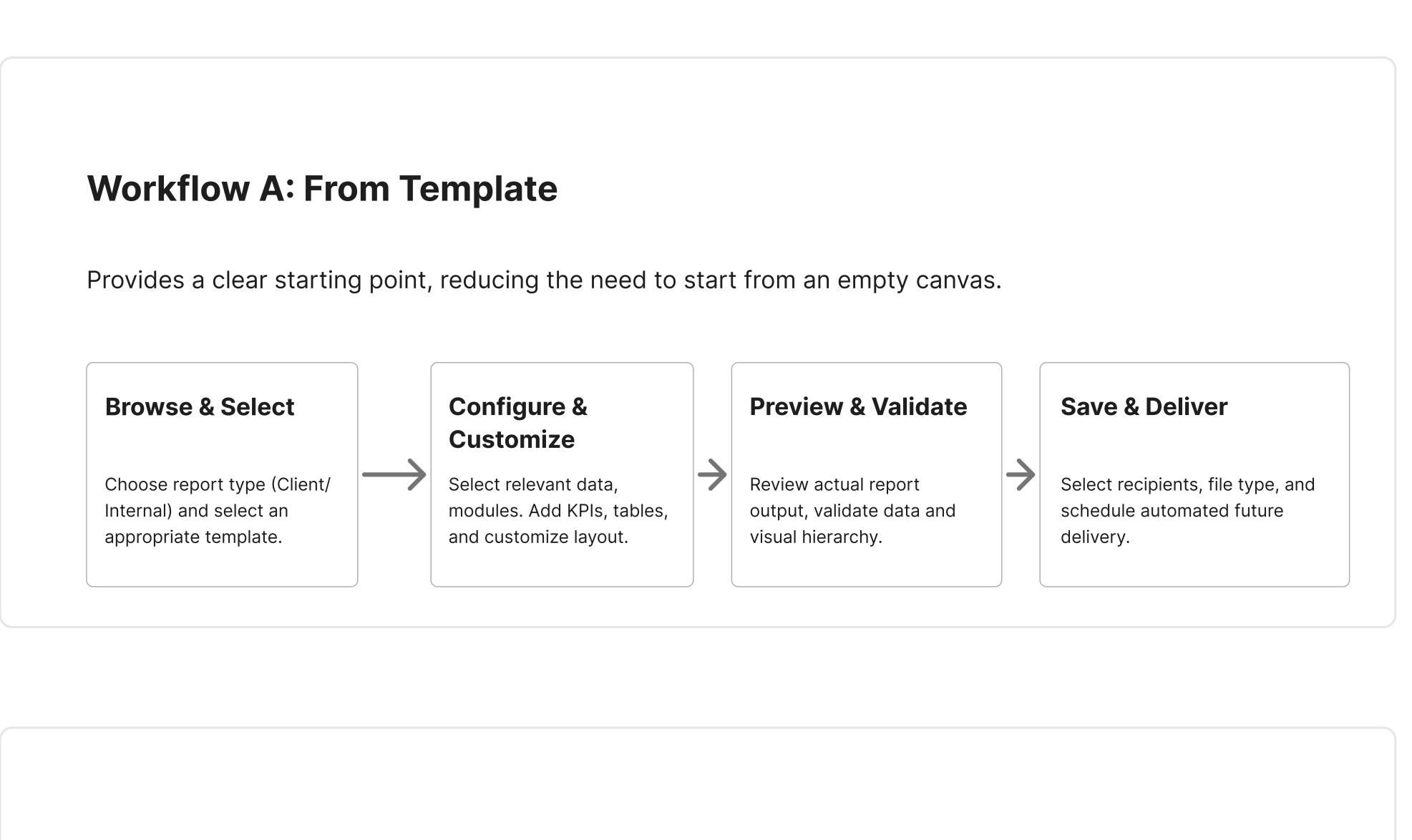
THINKS
"Are our services delivering value? Can I understand business performance quickly?"

DOES
Reviews KPIs, compares performance and shares reports with customers.

FEELS
Wants confidence in the numbers; values transparency.

Information Architecture

I structured the Reports experience so users can understand where they are, what actions are available and how to move between discovery, creation, editing and delivery.



- Data Flow & Ideation

Workflow A: From Template

Provides a clear starting point, reducing the need to start from an empty canvas.

Browse & Select
Choose report type (Client/ Internal) and select an appropriate template.

→ **Configure & Customize**
Select relevant data, modules. Add KPIs, tables, and customize layout.

→ **Preview & Validate**
Review actual report output, validate data and visual hierarchy.

→ **Save & Deliver**
Select recipients, file type, and schedule automated future delivery.

Workflow B: From Scratch

Advanced users need freedom to create their own structure and complex reporting.

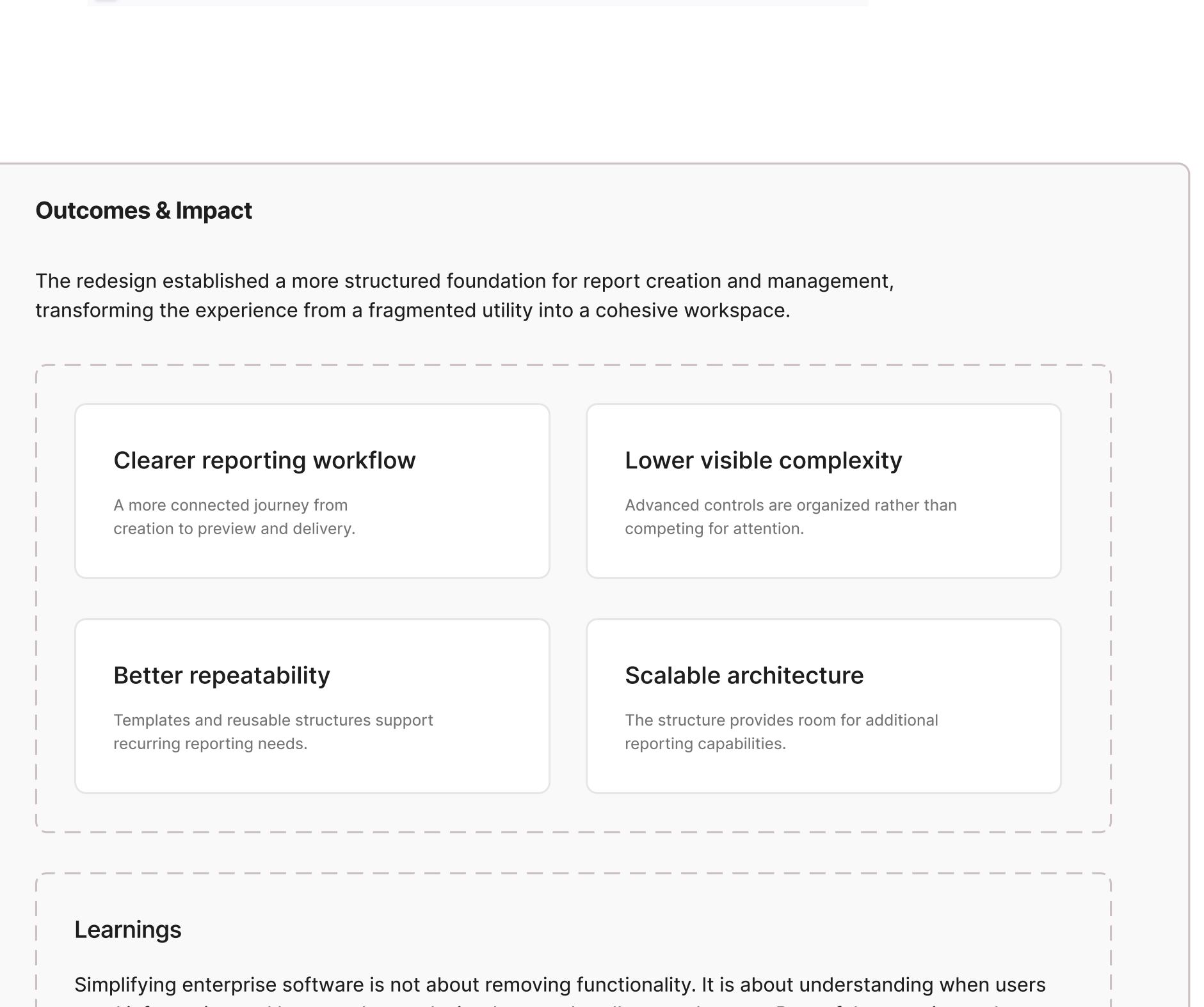
Define Information
Start with a blank canvas, add report name, description, metadata.

→ **Select Data & Build Layout**
Choose data sources, define filters parameters. Arrange structural components.

→ **Preview & Validate**
Review the final output and ensure complex data renders accurately.

→ **Save & Deliver**
Save the custom configuration as a new template or distribute immediately.

UI Screens



Outcomes & Impact

The redesign established a more structured foundation for report creation and management, transforming the experience from a fragmented utility into a cohesive workspace.

Clearer reporting workflow
A more connected journey from creation to preview and delivery.

Lower visible complexity
Advanced controls are organized rather than competing for attention.

Better repeatability
Templates and reusable structures support recurring reporting needs.

Scalable architecture
The structure provides room for additional reporting capabilities.

Learnings

Simplifying enterprise software is not about removing functionality. It is about understanding when users need information and how much complexity they can handle at each stage. Powerful enterprise tools can still feel simple when functionality is organized around the user's goals.