

The year-end report audit

Numbers don't explain why, stories don't scale.

Your year-end report needs both, and
neither a spreadsheet nor an anecdote can
build it alone.



CYSEND

The December gap

Your quantitative logs, redemption rates, budget utilization, active users, feel safe because they fit neatly in a spreadsheet, but they can't tell you why behavior changed.

The emails and survey responses can explain it, but three heartwarming stories don't scale, and no strategy should be built on anecdotes. So the failure is never choosing one over the other.

It's the manual chasm between them. If mapping sentiment to transaction logs is a December job for your team, your infrastructure is the bottleneck, not the data.

So look at your reporting stack right now: who is the bridge between your two datasets? That answer is the audit.

The December sequence

Your year-end report, shuffled. Reorder these four steps:

1. Present one narrative: what changed, why it changed, what to fund next
2. Pull the logs: redemption rates, budget utilization, active users
3. Pair each behavior change with the feedback that explains it
4. Collect the voices: surveys, comments, the emails worth quoting

Your answer: the only order that works is $2 \rightarrow 4 \rightarrow 3 \rightarrow 1$.

If you started at "present," you're reverse-engineering the story in December.

Step 3 is the bridge most legacy tools leave manual, that's the one that sinks the report.
