

2026 Planning Toolkit

Top ActivTrak Reports for Data-Driven Decision Making



2026 Planning Toolkit

Executive Overview

Most organizations struggle to measure the impact of workforce investments, creating blind spots that lead to wasted budget and missed opportunities. As you plan for 2026, use your ActivTrak data as a strategic advantage.

This toolkit illustrates which reports answer your most critical planning questions and includes templates for translating insights into action for operational improvements.

Content

- [Workforce Optimization](#) **WORKFORCE**
- [Technology & AI Impact](#) **TECHNOLOGY**
- [Analyze & Operationalize](#)
- [Planning templates for an Executive](#)

Key In-App Reports for Planning

	Purpose	Planning Impact	Best For
Financial Loss Analysis	Quantify productivity gaps and untapped capacity across teams	Identify \$X+ in potential monthly savings; guide hiring decisions	Executives, VPs evaluating headcount needs
Schedule Performance	Monitor adherence to core hours and workplace policies	Ensure policy compliance (e.g., RTO, core hours), improve collaboration windows	Operations Managers, HR
Technology Usage	Track application adoption and usage by category	Identify \$X+ in potential license savings; guide software renewals	IT Leaders, Procurement
Impact Analysis	Measure before/after effects of technology implementations (including AI tools)	Prove ROI of AI investments; guide future tool selection	CTOs, Functional Leaders

Key BI Reports for Planning *(requires ActivConnect)*

	Purpose	Planning Impact	Best For
Contractor Billing	Validate contractor productivity and billing accuracy	Optimize contractor spend, ensure ROI on external resources	Procurement, Finance Teams
Financial Loss Analysis	Quantify productivity gaps and untapped capacity across teams	Identify \$X+ in potential monthly savings; guide hiring decisions	Executives, VPs evaluating headcount needs
Headcount Planning	Long-term workforce modeling based on utilization trends	Support annual headcount planning and budget allocation	Finance, Executives
Tailored Technology Reports (e.g., license optimization)	Custom analyses for specific tools or departments	Support specialized technology strategies	IT, Departmental Leaders

2026 Planning Toolkit

Workforce Optimization

Key Workforce Optimization Planning Questions

Cost Control

- How can we reduce workforce-related expenses without sacrificing output and outcomes?
- Do billed hours match actual activity data?

Performance Optimization

- Where are our biggest productivity gaps and opportunities?
- Do we have team coverage during core business hours?

Capacity Management

- Do we have the right number of people in the right roles?
- What will our staffing needs look like in 2026?



IN-APP

WORKFORCE

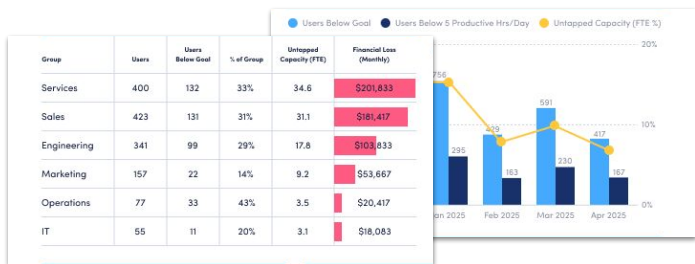


BI Solution

Reports for Workforce Optimization

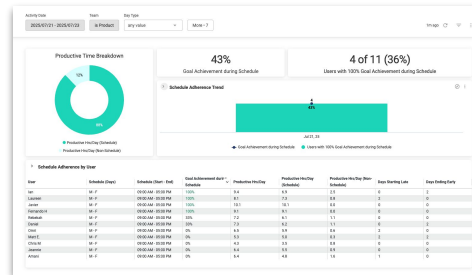
Financial Loss Analysis

How can we reduce workforce related expenses?



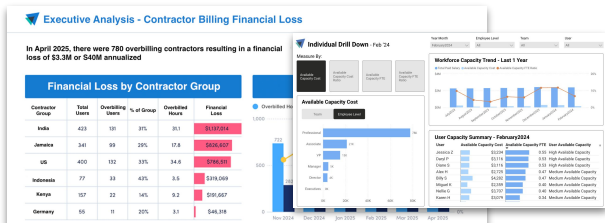
Schedule Performance

Do we have team coverage during core business hours?



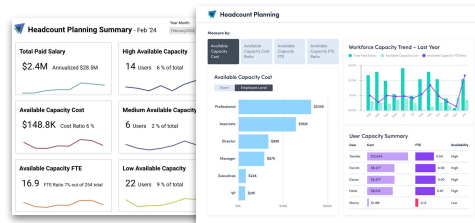
Contractor Billing

Do billed hours match actual activity data?



Headcount Planning

Do we have the right number of people in the right roles?



Capturing Impact

Cost Optimization Opportunities

- **Immediate Savings:** Identify \$X+ in 6-month savings through capacity optimization
- **Headcount Efficiency:** Reduce hiring needs by X% through better work distribution
- **Untapped Capacity:** Reclaim X+ FTE equivalent through utilization improvements

Implementation Approach

1. **Baseline Assessment:** Use Financial Loss Analysis to establish current state
2. **Targeted Interventions:** Focus on departments with X%+ untapped capacity
3. **Progress Tracking:** Monitor quarterly improvements in utilization rates
4. **ROI Measurement:** Calculate dollar impact of productivity improvements

2026 Planning Toolkit

Technology & AI Impact

Key Technology & AI Planning Questions

License Optimization

- Which software licenses are underutilized and can be eliminated?
- How can we consolidate redundant tools to reduce costs and complexity?

AI Measurement

- How are AI tools actually impacting productivity and work behaviors?
- Which AI tools should we expand, eliminate or integrate?

Technology Adoption

- Are new tool investments driving the expected behavioral changes?
- Where should we invest in technology training to maximize adoption and ROI?

Security & Compliance

- What unauthorized tool usage poses risks that need addressing?
- What unauthorized tools are creating security vulnerabilities or compliance issues?



IN-APP

TECHNOLOGY



BI Solution

Reports for Technology & AI Impact



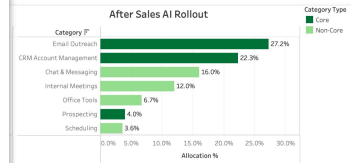
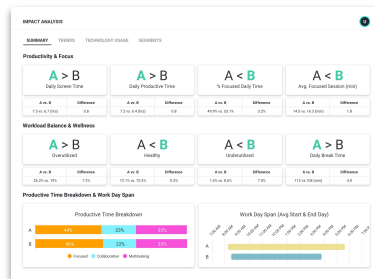
Technology Usage

Which software licenses are underutilized?



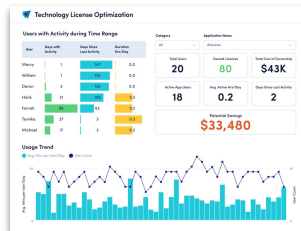
Impact Analysis

Which AI tools should we expand, eliminate or integrate?



Tailored Technology Reports

Where should we invest in technology training to maximize adoption and ROI?



Capturing Impact

Cost Optimization Opportunities

- **Adoption Tracking:** Monitor uptake rates of new tools across functions
- **Cost Justification:** Correlate technology spend with measurable gains
- **Risk Management:** Identify unauthorized tool usage for security and compliance review
- **License Optimization:** Track utilization to eliminate waste and consolidate redundant tools

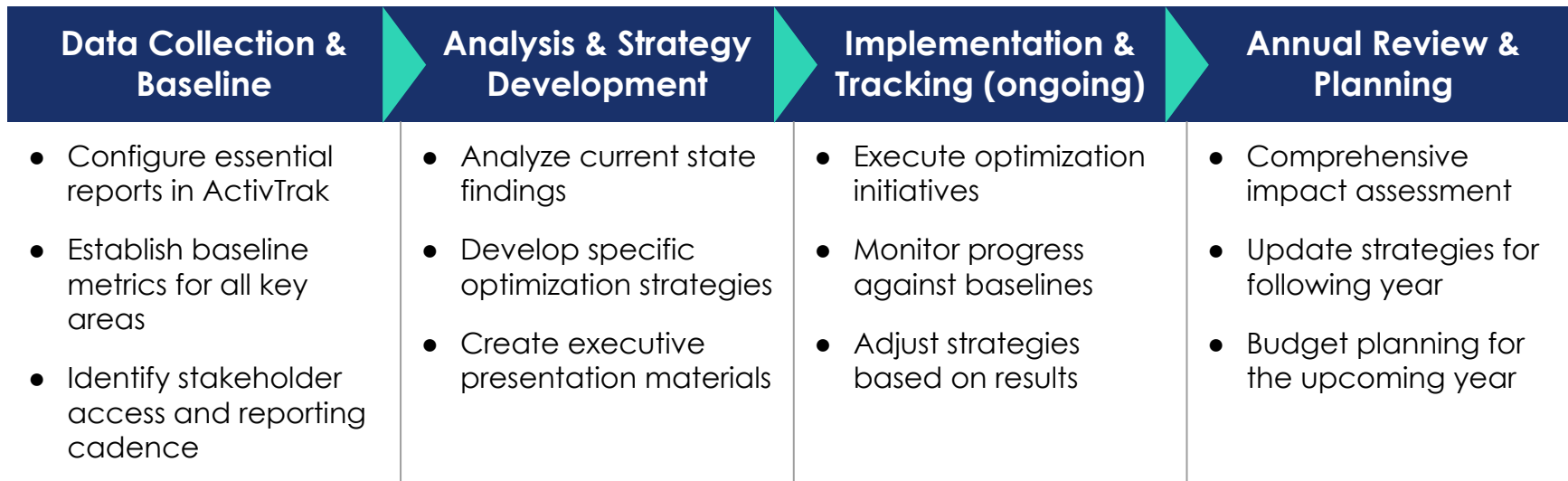
Implementation Approach

1. **Baseline Assessment:** Capture current state before new tool rollouts
2. **Targeted Interventions:** Focus on high-cost underutilized tools and strategic technology gaps
3. **Progress Tracking:** Monitor improvements in adoption rates
4. **ROI Measurement:** Quantify impact of changes and optimizations

2026 Planning Toolkit

Analyze & Operationalize

Insights to Action



Best Practices for 2026 Planning

Plan for Change Management	Communicate the "why" behind workforce and technology changes
Start with Clear Goals	Define specific, measurable objectives for each planning area
Use Data, Not Assumptions	Base decisions on actual ActivTrak insights rather than perceptions
Consider Context	Account for seasonality, business changes and external factors
Involve Stakeholders	Ensure department heads understand and support data-driven decisions
Monitor Continuously	Use ActivTrak for ongoing tracking, not just annual planning
Celebrate Wins	Share success stories and improvements to build support for data-driven management

2026 Planning Toolkit

Planning Templates

How to Present Your Findings to Executives

- Clearly outline the goal vs. the actual result
 - Productivity data, without goals or expectations, can leave the audience confused
- Outline actions to improve results
- Provide trended insights for additional context on performance
- Ensure that *productivity* is positioned as a *leading indicator* of success

Resources available to you:

- [On-demand webinar](#)
- Executive presentation templates (on the following slides - **update the areas highlighted in yellow**)
- [ActivTrak Academy](#)
- Customer Success Manager*

*For customers on a paid support plan

Strategic Workforce Planning Considerations

Capacity Analysis

- Current workforce utilization by function
- Projected needs based on business growth
- Skills gap identification

Cost Management

- Headcount optimization opportunities
- Contractor vs. FTE analysis
- Budget allocation recommendations

Operational Excellence

- Policy compliance rates
- Productivity improvement initiatives
- Employee engagement and retention factors

Template: Productivity Optimization: \$ Opportunity

Savings/Wins

- \$423K savings in last 6 months
- Reduced untapped capacity by 12%, or 6 FTE QoQ
- Reduced headcount requisitions/hiring by 42%

Org-wide Opportunity

- Monthly loss is \$624K
- Greatest opportunity sits in Services organization
- Critical assessment required of this organizational design

#%

% Healthy

#%

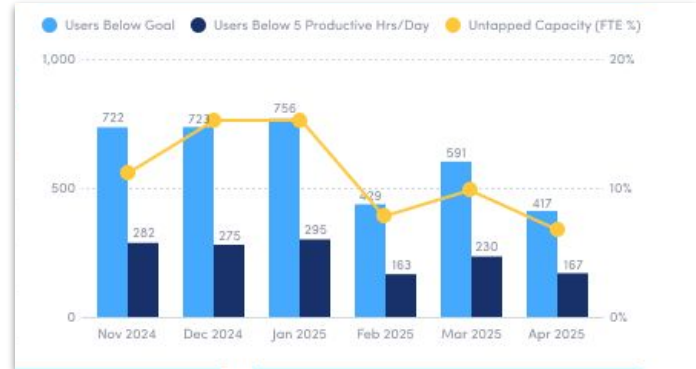
% Underutilized

\$\$

Savings QoQ

\$\$

Current Loss



Group	Users	Users Below Goal	% of Group	Untapped Capacity (FTE)	Financial Loss (Monthly)
Services	400	132	33%	34.6	\$201,833
Sales	423	131	31%	31.1	\$181,417
Engineering	341	99	29%	17.8	\$103,833
Marketing	157	22	14%	9.2	\$53,667
Operations	77	33	43%	3.5	\$20,417
IT	55	11	20%	3.1	\$18,083

Slide generated from the following ActivTrak Report: Financial Loss

Technology Investment Review Considerations

Current Portfolio

- License utilization rates by application
- Cost per active user analysis
- Unsanctioned tool identification and risk assessment

Optimization Opportunities

- Immediate license reduction possibilities
- Consolidation opportunities
- Budget reallocation recommendations

Future Technology Strategy

- AI adoption roadmap
- Technology ROI measurement framework
- Integration with business objectives

Template: Technology License Optimization

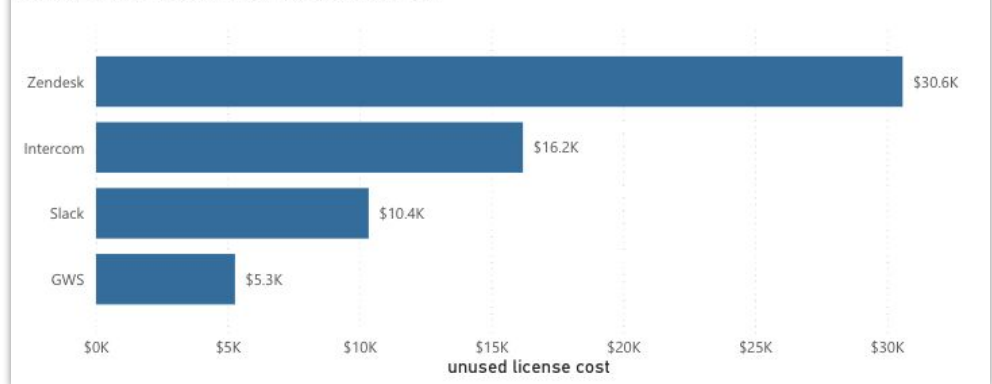
Savings/Wins

- **Zendesk** is the biggest cost sink, with nearly **\$31K** in potential savings from unused licenses.
- The top three apps (**Zendesk, Intercom, Slack**) account for **~\$57K** in waste combined.
- **GWS**, while lower, still represents a notable savings opportunity.

Actions We're Taking

- Focus cost-optimization efforts on **Zendesk** and **Intercom** first — they represent the highest ROI from license reductions.
- Consider reviewing usage policies, **offboarding inactive users or right-sizing plans.**

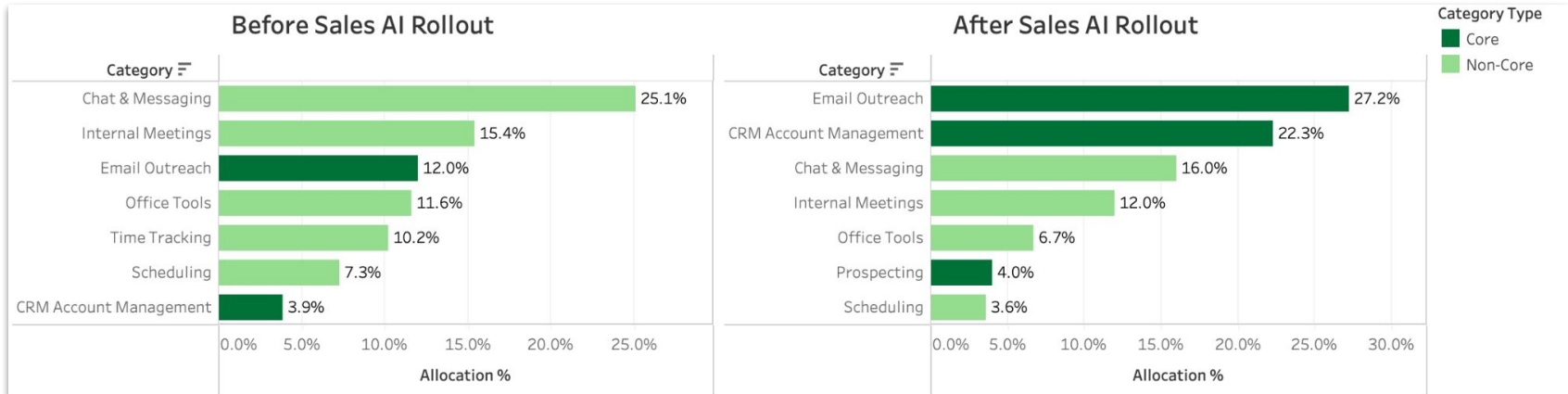
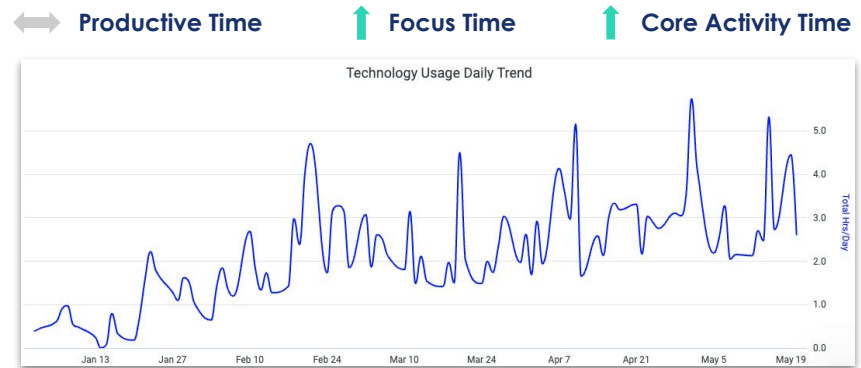
Top Applications With Saving Opportunities



Slide generated from the following ActivTrak Report: Technology License Optimization

Template: Impact of AI Investments Across the Business

Tool	Claude
Team	Sales
Desired impact	Increase time on customer outreach and account management Reduce time on internal collaboration & research
Cost:	\$1.2M
Adoption	+14%, (242 of 600 users)



Questions?

- Contact the Productivity Lab
- Request a demo