ClearPoint Software Package Features Comparison

Manage your strategic planning process with ease.	Basic	Pro	Enterprise
Use any framework including Balanced Scorecards, Strategy Maps, and OKRs.	✔	✔	✔
See your goals, KPIs and projects in one place.	✔	✔	✔
Link goals across departments and teams.	✔	✔	✔
Make updates with on-page editing.	✔	✔	✔
Manage from any device with ClearPoint's responsive design.	✔	✔	✔
Track any information with custom fields and custom status indicators.	✔	✔	✔
Create open workflows with notifications and approvals.		✔	✔
Customize your charts, tables and reports to match your organization's brand.		✔	✔
Bulk change scorecards and plans for an easy annual rollover process.			✔

Create dashboards and reports for every audience.	Basic	Pro	Enterprise
Create different report views for different audiences.	✔	✔	✔
Design an unlimited number of reports and dashboards with drag-n-drop.	✔	✔	✔
Export Reports in PDF, PowerPoint and Excel.	✔	✔	✔
Filter reports to show the information you need.		✔	✔
Create meeting agendas by custom sorting each report.		✔	✔
Export reports as HTML web pages.		✔	✔
Sync reporting with Excel to make updates in either tool.			✔

Manage projects so they are always on time and on budget.	Basic	Pro	Enterprise
Visualize projects with Gantt charts that update as you make progress.	✔	✔	✔
Calculate and chart the percentage of projects or milestones in each project phase.		✔	✔
Track project data including budget and percent complete in data tables and charts.			✔
Automatically evaluate project status based on percent complete, budget or other project data.			✔

Track and manage your data.	Basic	Pro	Enterprise
Enter data and updates in custom data entry screens.	✔	✔	✔
Visualize data with unlimited charts for each measure.	✔	✔	✔
Setup basic or advanced calculations to eliminate errors	✔	✔	✔
Aggregate data from departments with dynamic calculations.		✔	✔
Create custom charts and share them with embed codes.		✔	✔
Run trendlines or other regressions within your charts.		✔	✔

ClearPoint Strategy

www.clearpointstrategy.com

ClearPoint Software Package Features Comparison

Automate your reporting process.	Basic	Pro	Enterprise
Receive alerts when information has changed.	✔	✔	✔
Schedule your data, analysis, and reports to run automatically.		✔	✔
Load data from any application that can be queried, or from Excel.		✔	✔
Integrate with your data sources using our open API.			✔
Leverage webhooks and Zapier for specific repeatable actions.			✔

Share your data.	Basic	Pro	Enterprise
Create clickable reports and share as PDF, PowerPoint and Excel files.	✔	✔	✔
Email reports directly to your team.	✔	✔	✔
Publish reports as HTML web pages.		✔	✔
Embed charts in your website pages.		✔	✔
Leverage the ClearPoint API to share data in a custom built WordPress website.			✔
Benchmark with your peers with ClearPoint Peer-To-Peer Sharing.			✔

Manage your account security.	Basic	Pro	Enterprise
Assign user permissions by scorecard and access level.	✔	✔	✔
Control system use with revision history and undelete.	✔	✔	✔
Protect your account with password management and two-factor authentication.	✔	✔	✔
Set up single sign on and IP restrictions for advanced protection.			✔

Work with strategy and performance management experts.	Basic	Pro	Enterprise
Search the ClearPoint Support Center for articles and videos on every topic.	✔	✔	✔
Email or call the support team with questions.	✔	✔	✔
Find recommendations for improvements within the application with ClearPoint tooltips.	✔	✔	✔
Contact your dedicated Account Manager for a guaranteed fast response time.		✔	✔
Get started with initial account setup, kick-off call, user setup and administrator orientation session.		✔	✔
Receive instant support with in-app messaging.		✔	✔

ClearPoint Strategy

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