

# 4action

Better management of your organisation's actions and tasks



[www.insight4grc.com/action](http://www.insight4grc.com/action)



HM Government  
**G-Cloud**  
Supplier

---

“Slough Borough Council have used 4risk and 4action for a couple of years now. Both systems are easily configurable to meet our requirements. Users like the systems because they are easy to use and logical. Our Council members have commented on the improved reporting that both modules allow. Summarising lots of detail in a concise, easy to understand reports“

**Phil Brown, Risk and Insurance Officer, Slough Borough council**

---

---

“4risk and 4action have been a very good investment. The most important feature of the tool is that it provides a repository for all risk management activities and internal audit monitoring. Self-service also provides the flexibility to all staff to update and review their risks when it is more convenient..”

**Dr Rosa Scoble, Director of Planning, Brunel University London**

---

---

“Through the use of 4action we have improved significantly the implementation of recommendations from audit and incident reports, providing further assurance to the Board.“

**Gareth Jones, Director of Finance, Coleg Cambria**

---

# Can you obtain a complete picture of the status of all of your assigned actions and tasks in real time?

Failure to implement agreed actions and tasks can have a detrimental impact on the success of your business and your ability to achieve organisational objectives.

Through the use of 4action™ organisations have significantly improved the visibility of agreed actions, increased the accountability of action owners and made significant savings in reporting.

## Questions organisations should be asking themselves about their action tracking arrangements:



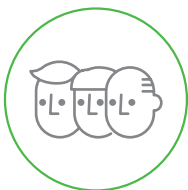
Is the administration and management of actions through spreadsheets time consuming and inefficient?



Is reporting on the status of your agreed actions incomplete?



Is there a lack of accountability and ownership – resulting in required actions not being completed?



As a result of overdue actions, are we more exposed to risk or missing opportunities – thereby harming our business?

### 4action™ enables better management of your business actions and tasks

Below are just some of the benefits you can expect through the use of the software:

- greater likelihood that organisational objectives will be achieved through powerful oversight and task tracking facilities;
- greater likelihood of implementing review, audit and regulatory agencies' recommendations;
- better management of your organisation and improved accountability;
- up to date management information on progress against key actions – organisation wide and for specific individuals;
- can create large savings in time spent tracking and reporting on action and task implementation; and
- ease of reporting for a wide range of different audiences with different information needs – no one size fits all.

4action™ is a cloud based solution, hosted in a secure ISO27001 environment and owned by RSM UK.

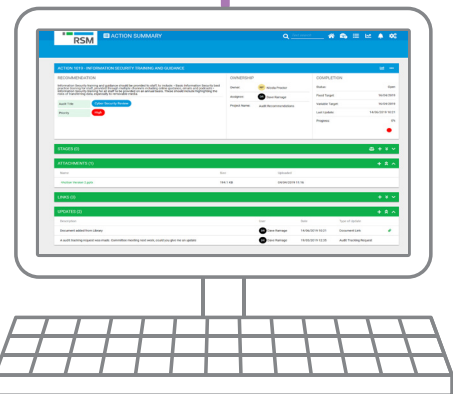
# Key features

4action™ is a customisable and powerful action tracking software tool that gives individuals the ability to update the status of actions and tasks that they have been allocated responsibility for by management. This helps ensure that the action status always reflects a real time position. 4action™ is mobile friendly and works on iOS and Android devices.

## A full audit trail of all assigned actions and tasks

4action™ enables you to record all updates to any assigned tasks and provides a comprehensive audit trail of the progress of individuals' actions and tasks. These can be accessed through a simple click of the interface.

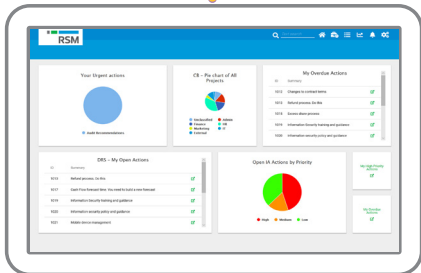
This interface shows the action summary, the dates when the actions were carried out, any evidence uploaded against the action (such as PDF or Word files) and who actioned the specific task.



## Extensive dashboards enable the identification of areas of weakness

4action™ dashboards give management a complete overview of the status of all actions across the entire organisation.

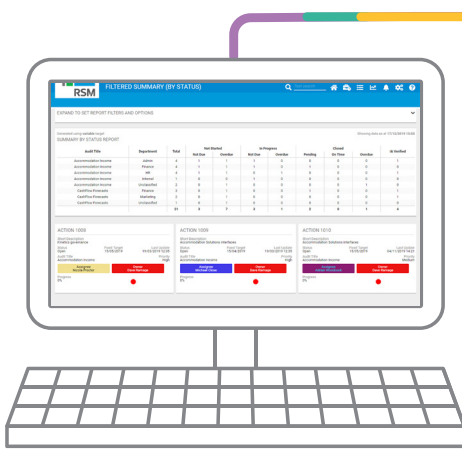
Users are able to interact directly with this interface in order to drill down to the level of each individual action. The dashboards are customisable meaning that different users can see the information most relevant to them.



## Break actions down into stages

Sub-tasks can be attached to actions allowing them to be broken down into smaller parts and assigned to a range of different users. These stages also have time management and progress tracking enabling users to easily monitor progress.

STAGE	START DATE	END DATE	STATUS	COMPLETION
1. Action Planning	2018-01-01	2018-01-15	Open	100%
2. Action Implementation	2018-01-16	2018-01-31	Open	100%
3. Action Review	2018-02-01	2018-02-15	Open	100%



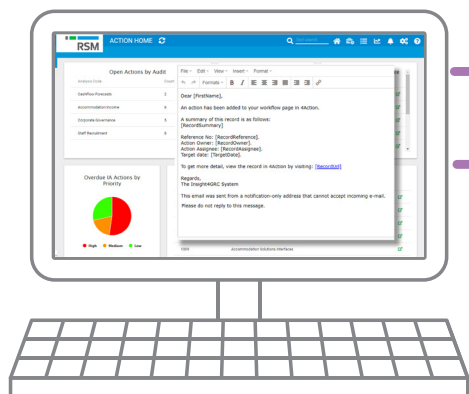
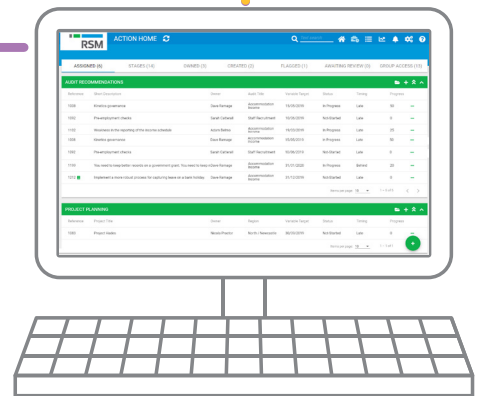
**Flexible onscreen reporting**

4action™ features realtime onscreen reporting with the option to print. The interface makes sure reporting is relevant and actionable and allows further investigation by drilling down to see the underlying detail. Reports can be run not only to show the current status of actions – but to reflect a position at any given historic date.

**Track assigned actions and tasks all from a single simple interface**

4action™ administrators can assign actions and tasks to a user's work queue so they are tracked and owned by that individual. The user is presented with a workflow screen showing all of their assigned actions and tasks and the current status of each.

The user can drill right down to a detailed view of the action or task via a few simple clicks. At this level of detail the user can see any updates to the action and the documentation that has been attached to demonstrate completion of the goal.



**Automatic email reminders ensure users are prompted to update their actions**

4action™ has flexible and tailorable notifications for administrators and action owners. The notification bell signifies to the user of any actions requiring attention. Email notifications can automatically be sent per action or together in an email digest. Create a WebCal and see actions in your Outlook application (or other compatible calendar tool).

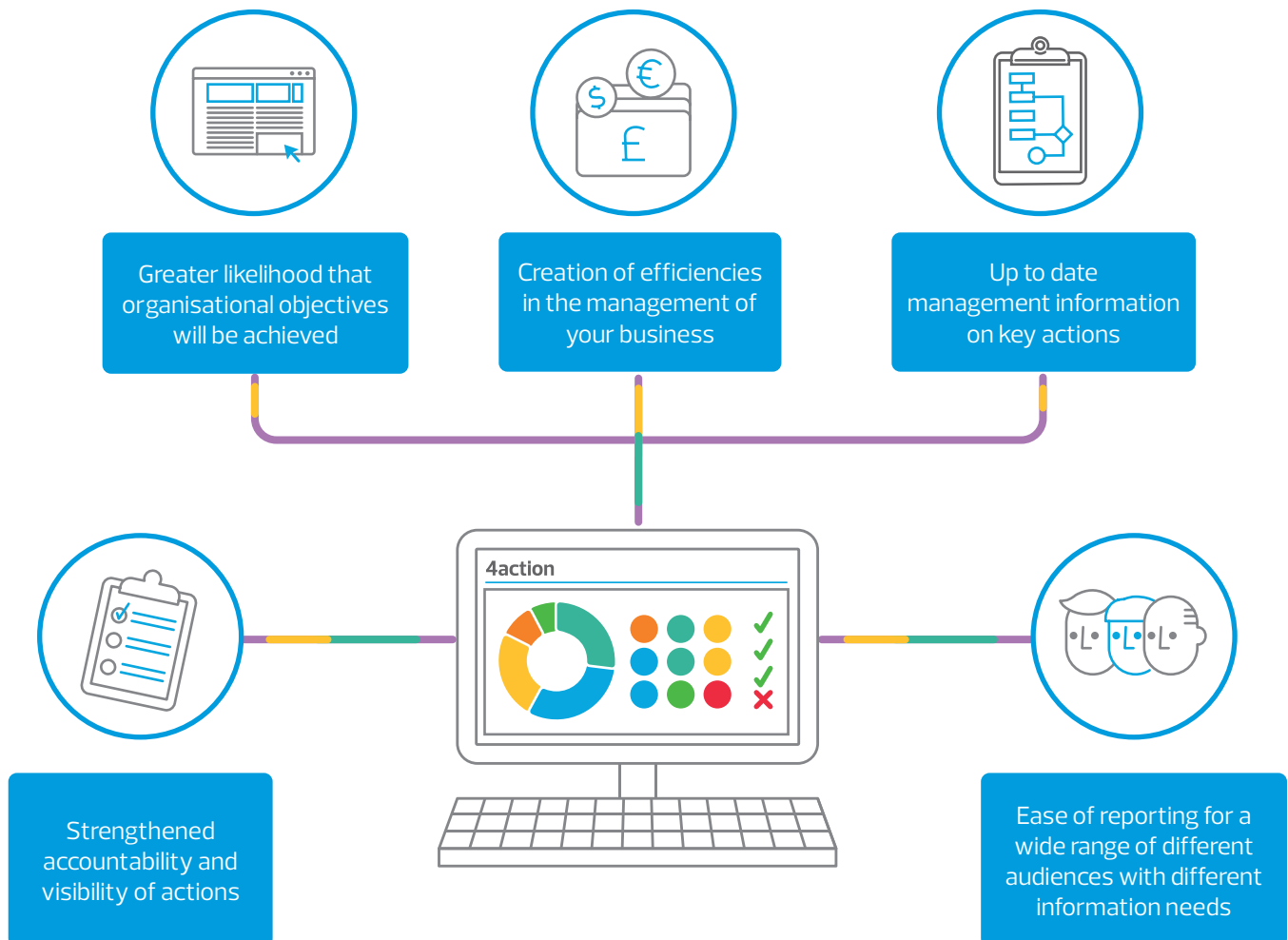
The software also maintains a log of all emails that are sent to users that show the date, time and the recipient – providing you with a full audit trail should the need arise.

# 4action™: Better management of your business actions and tasks

The use of 4action™ will bring clear benefits to your organisation through increased focus on the implementation of agreed actions.

Organisations from both the corporate and the public sector, including PLCs, owner controlled businesses, government bodies, universities, colleges, multi academy trusts, local authorities, NHS Trusts, registered social landlords, charities, the police and justice are already benefiting from the strength that 4action™ gives to the management of their actions and tasks.

**The key benefits of using 4action™ include:**



# 4action™ – part of the Insight4GRC governance, risk and compliance software suite

**Insight4GRC™** is a cost effective governance, risk and compliance (GRC) software suite that provides management teams with the tools needed to monitor and control performance, assess organisational risks, track assigned actions, enable employee awareness and facilitate company policy acceptance.

## Other software solutions in the Insight4GRC™ suite



### **4risk**

**A complete picture of your organisation's risk, controls and assurance environment**

4risk™ is a powerful and flexible risk and business assurance management information software system that enables an organisation to monitor and measure its overall exposure to risk and examine the effectiveness of its control environment.

**Visit: [www.insight4grc.com/risk](http://www.insight4grc.com/risk)**



### **4questionnaires**

**Data collection, surveying, analysis and reporting**

4questionnaires™ is a flexible and intelligent system that facilitates the gathering of data and, more importantly, its analysis to provide insightful management information.

**Visit: [www.insight4grc.com](http://www.insight4grc.com)**



### **4policies**

**Employee policy management**

4policies™ enables organisations to deploy their company policies and procedures to employees, identify levels of awareness and crucially record their acceptance of these policies and procedures thereby reducing operational and legal risks.

**Visit: [www.insight4grc.com/policy](http://www.insight4grc.com/policy)**

Each of our Insight4GRC™ products come with system configuration, implementation and training. Ongoing hosting, support and maintenance is also provided with your solution through our dedicated support programme. Advisory and assistance services are available if required.

**For more information visit: [www.insight4grc.com](http://www.insight4grc.com)**

# Contact us

For more information about 4action™, or to arrange a short demonstration please contact:

**Matthew Humphrey**

Partner

T+ 07711 960 728

matthew.humphrey@rsmuk.com

**Visit: [www.insight4grc.com](http://www.insight4grc.com)**

[rsmuk.com](http://rsmuk.com)

The UK group of companies and LLPs trading as RSM is a member of the RSM network. RSM is the trading name used by the members of the RSM network. Each member of the RSM network is an independent accounting and consulting firm each of which practises in its own right. The RSM network is not itself a separate legal entity of any description in any jurisdiction. The RSM network is administered by RSM International Limited, a company registered in England and Wales (company number 4040598) whose registered office is at 50 Cannon Street, London EC4N 6JJ. The brand and trademark RSM and other intellectual property rights used by members of the network are owned by RSM International Association, an association governed by article 60 et seq of the Civil Code of Switzerland whose seat is in Zug.

RSM Corporate Finance LLP, RSM Restructuring Advisory LLP, RSM Risk Assurance Services LLP, RSM Tax and Advisory Services LLP, RSM UK Audit LLP, RSM UK Consulting LLP, RSM Employer Services Limited, RSM Northern Ireland (UK) Limited and RSM UK Tax and Accounting Limited are not authorised under the Financial Services and Markets Act 2000 but we are able in certain circumstances to offer a limited range of investment services because we are members of the Institute of Chartered Accountants in England and Wales. We can provide these investment services if they are an incidental part of the professional services we have been engaged to provide. RSM Legal LLP is authorised and regulated by the Solicitors Regulation Authority, reference number 626317, to undertake reserved and non-reserved legal activities. It is not authorised under the Financial Services and Markets Act 2000 but is able in certain circumstances to offer a limited range of investment services because it is authorised and regulated by the Solicitors Regulation Authority and may provide investment services if they are an incidental part of the professional services that it has been engaged to provide. Baker Tilly Creditor Services LLP is authorised and regulated by the Financial Conduct Authority for credit-related regulated activities. RSM & Co (UK) Limited is authorised and regulated by the Financial Conduct Authority to conduct a range of investment business activities. Whilst every effort has been made to ensure accuracy, information contained in this communication may not be comprehensive and recipients should not act upon it without seeking professional advice.