Dashboard Introduction

- A single screen showing 3 views of your business (Operational/monitoring, Tactical/analysis, and Strategic/management).
- Each of these views will contain 3 layers of information (Detailed, Multidimensional, and Summarized).
- The purpose is to show the status of key performance indicators as determined by the strategic objectives, goals, and outcomes of an organization.
- Visuals for the purpose of effective communication of data.

Communicating organizational strategy

- Business - strategy
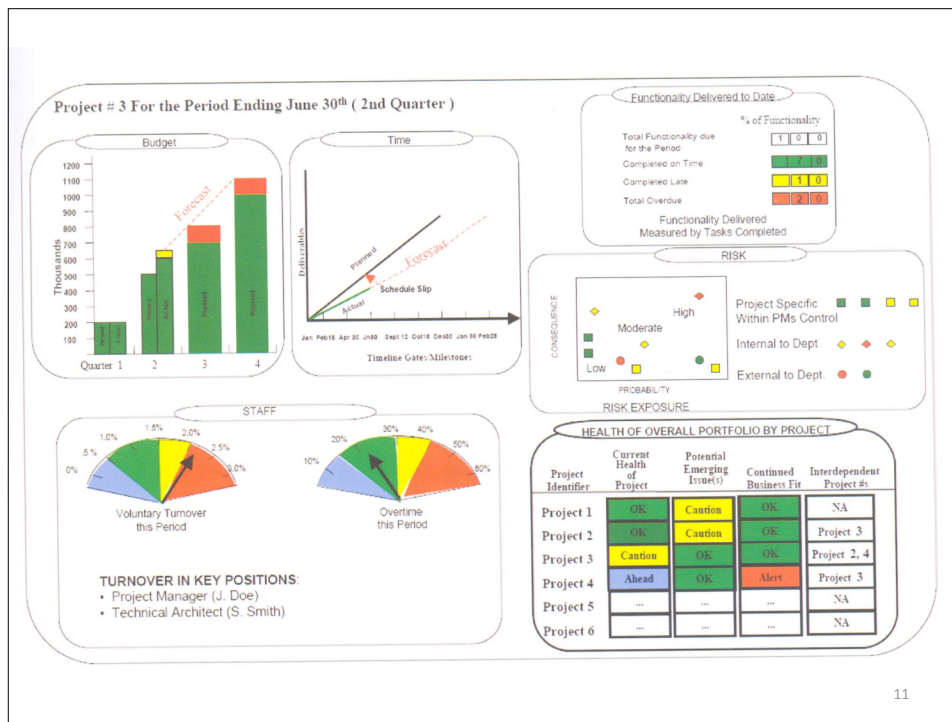 - Objectives, initiatives, metrics, customizing tasks
  - Determining metrics – what measuring why
  - Initiatives – based on strategy

- Academic - teaching
  - Outcome based teaching strategy
  - Measuring competencies, performance, grades, affective, retention, motivation
  - Initiatives – lesson plan, instructional design, learner center, individual learning paths, customizable

Key Performance Indicators

- KPI's help you take actions
- Aligned with strategic objective
- Predictive
- Owned by someone
- Actionable
- Only need a few
- Easy to understand
- Trigger a change – what is that?
- Standardized
- Context driven
- Lagging
  - Historic activity
  - Value drivers
  - Grades, time on task,
  - Student teacher evaluation – ratio of positive/negative comments
  - Stock sales price, monthly sales,
- Leading – what drives performance of test measure
  - Value drivers
    » Hours of study, completion of preliminary tasks or prerequisites
    » Activity of current state that predicts future success

Figure 8-1. A sample sales dashboard that puts into practice the principles we've discussed throughout this book.
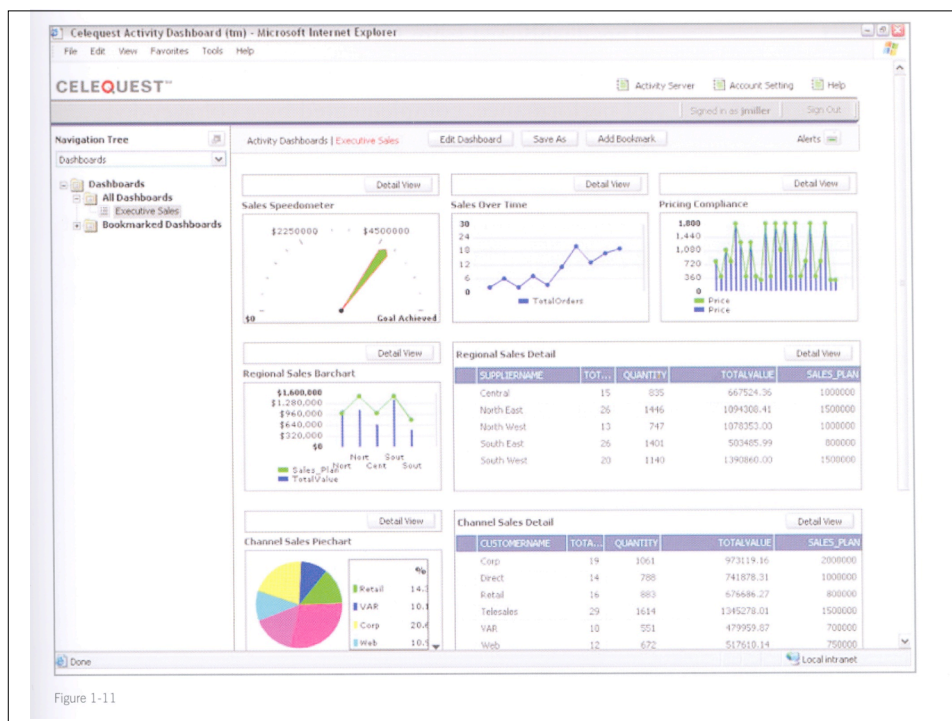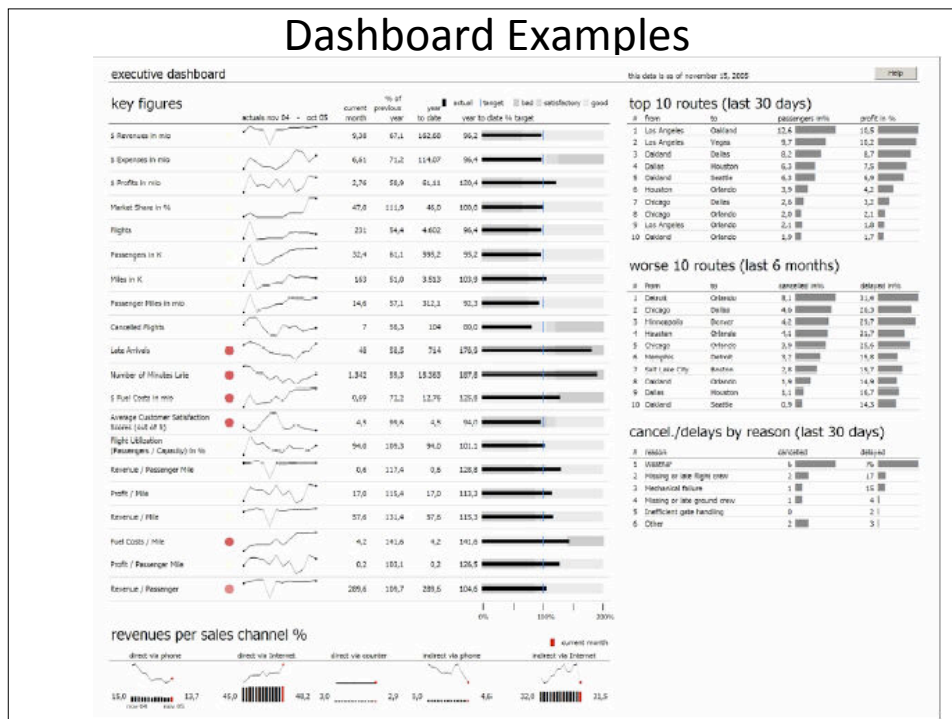
Project # 3 For the Period Ending June 30th (2nd Quarter)

Budget

Thousands
1200
1100
1000
900
800
700
600
500
400
300
200
100

Forecast
Actual
Planned
Planned

Quarter 1   2   3   4

Time

Deliverables
Planned
Forecast
Actual
Schedule Slip

Jan Feb18 Apr 30 Jn80 Sept 12 Oct18 Dea80 Jan 90 Feb28

Timeline Gates/Milestones

Functionality Delivered to Date

% of Functionality

Total Functionality due for the Period	1	0	0
Completed on Time	7	1	0
Completed Late	1	0	
Total Overdue	2	0	

Functionality Delivered
Measured by Tasks Completed

RISK

CONSEQUENCE

High
Moderate
Low

PROBABILITY

Project Specific Within PMs Control
Internal to Dept.
External to Dept.

RISK EXPOSURE

STAFF

0% .5% 1.0% 1.5% 2.0% 2.5% 3.0%

Voluntary Turnover this Period

10% 20% 30% 40% 50% 60%

Overtime this Period

TURNOVER IN KEY POSITIONS:
- Project Manager (J. Doe)
- Technical Architect (S. Smith)

HEALTH OF OVERALL PORTFOLIO BY PROJECT

Project Identifier	Current Health of Project	Potential Emerging Issue(s)	Continued Business Fit	Interdependent Project #s
Project 1	OK	Caution	OK	NA
Project 2	OK	Caution	OK	Project 3
Project 3	Caution	OK	OK	Project 2, 4
Project 4	Ahead	OK	Alert	Project 3
Project 5	...	...	...	NA
Project 6	...	...	...	NA

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Celequest Activity Dashboard (tm) - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help

CELEQUEST

Activity Server   Account Setting   Help

Signed in as jmiller   Sign Out

Navigation Tree

Dashboards

- Dashboards
  - All Dashboards
    - Executive Sales
  - Bookmarked Dashboards

Activity Dashboards | Executive Sales   Edit Dashboard   Save As   Add Bookmark   Alerts

Detail View
Sales Speedometer
$2250000 $4500000
$0   Goal Achieved

Detail View
Sales Over Time
30
24
18
12
6
0
TotalOrders

Detail View
Pricing Compliance
1,800
1,440
1,080
720
360
0
Price
Price

Detail View
Regional Sales Barchart
$1,600,000
$1,280,000
$960,000
$640,000
$320,000
$0
Nort   Sout
Cent   Sout
Sales_Plan
TotalValue

Regional Sales Detail
Detail View

SUPPLIERNAME	TOT...	QUANTITY	TOTALVALUE	SALES_PLAN
Central	15	835	667524.36	1000000
North East	26	1446	1094308.41	1500000
North West	13	747	1078353.00	1000000
South East	26	1401	503485.99	800000
South West	20	1140	1390860.00	1500000

Detail View
Channel Sales Piechart
%
Retail   14.1
VAR   10.1
Corp   20.4
Web   10.1

Channel Sales Detail
Detail View

CUSTOMERNAME	TOTA...	QUANTITY	TOTALVALUE	SALES_PLAN
Corp	19	1061	973119.16	2000000
Direct	14	788	741878.31	1000000
Retail	16	883	676686.27	800000
Telesales	29	1614	1345278.01	1500000
VAR	10	551	479959.87	700000
Web	12	672	517610.14	750000

Done   Local intranet

Figure 1-11

Figure 1-3

Dashboard Examples

Dashboards Characteristics

- "At a glance" overview and alerts of important information

- Information from different sources gathered in one place – UIS, College/Dept, Operations

- Flexibility, ability to zoom, drill, pivot, and analyze information as needed

- , information presented according to user needs

- Massage and filter data for analysis and exploration

- Alerts of changes, thresholds, reminders