

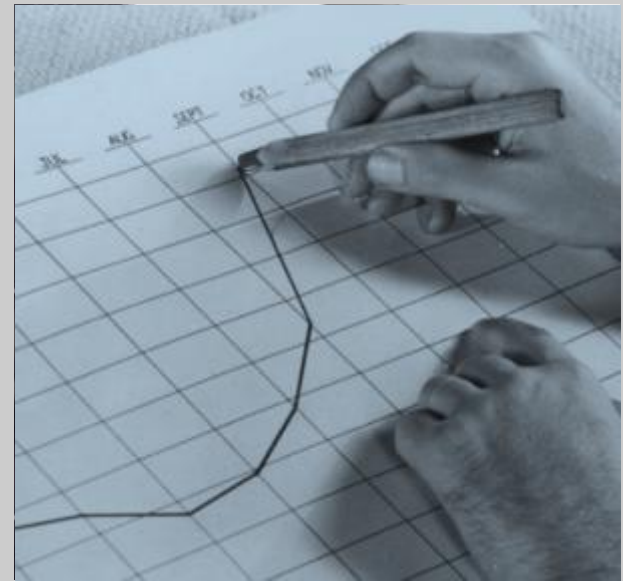
# Dashboards for a Growing Enterprise

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Director of Business Intelligence  
Dunn Solutions Group

November 2008

## 1. Introduction

2. Your challenges
3. Meeting your challenges with dashboards
  1. Who are the users?
  2. Types of dashboards
4. Dashboards With Xcelsius
5. Q&A



# Dunn Solutions Group

# Dunn Solutions Group Overview



Full-service IT consulting firm

Founded in 1988

Offices:

- Chicago
- Minneapolis
- Raleigh
- Charlotte
- Fort Lauderdale
- Bangalore, India

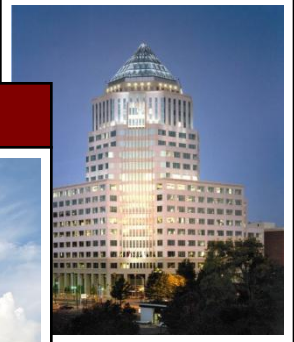
Provide solutions for major corporations, mid-market organizations and governments worldwide

A Cranes company

Chicago, Ill.



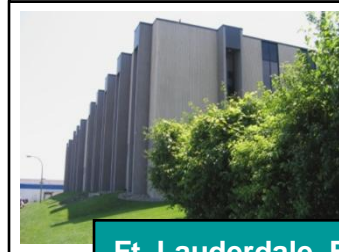
Charlotte, N.C.



Raleigh, N.C.



Minneapolis, Minn.



Ft. Lauderdale, Fla..



Bangalore, India



## Business Intelligence Solutions

End-to-End BI  
Data Warehouse  
Dashboards  
Data Integration  
Data Quality/EIM  
Data Mining  
Budgeting/Planning

## Transactional Solutions

Custom Application Development  
Application Lifecycle Management and Process Consulting  
Portals + Web Design  
IT Management and Governance

## Packaged Solutions

Legal:  
Matter Management Dashboard

Application Development:  
ALM Analytics™

Manufacturing and Business:  
Six Sigma  
Business Scorecard

## Training Solutions

Instructor-Led Training (open-enrollment, on-site, custom)  
Support Services (JumpStart, Mentor+)  
Multimedia Learning/Computer-Based Training

End-to-End Business Intelligence solutions

Data Warehouse

Dashboards & Performance Management

Enterprise Information Management + Data Quality

BusinessObjects Migration

BusinessObjects and Crystal Training

Business Intelligence Assessments

Data Mining & Predictive Analytics

Platinum Partner

Utilize full BOBJ stack

National coverage

Comprehensive BOBJ training

Authorized Education Partner since 1995

Authorized Training Centers: North Carolina, Florida





**Borland**



**Microsoft**

**INFORMATICA**



MITRATECH

**MERCURY**



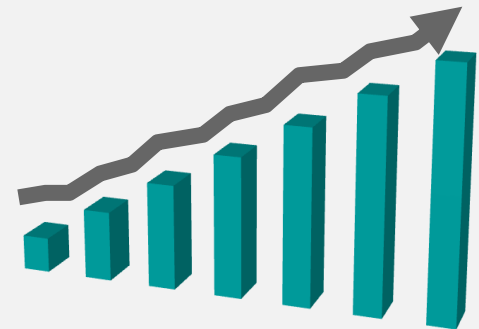
# Selected Clients



1. Introduction
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# Growth is A Primary Need

- 1
  - Not just a nice to have, but a matter of survival
  - Must balance investment in business to grow, with profitability
  - Not all types of growth created equally
    - Growth, but sustainable, healthy growth
    - Growth is an illusive balancing act, with many variables in play.
  - Business Intelligence helps you organize and manage those variables.





## 2 What makes you unique

- Not so easy to determine what is truly distinct about your business
- Differentiators could be at the product level, at the service level, or something surprising to you
- Business Intelligence, through trend analysis, can identify surprising differentiators



## 3 Agility, but...**intelligent** agility.

- Biggest differentiator from your and your large company counterparts is **SPEED**.
- Speed can accelerate, but speed can kill your business as well
- Need business intelligence to make **INFORMED** decisions quickly.

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# Why Dashboards?



Consolidated Statement of Income			
Company ABC (Thousands \$)			
	Q4/06	Q4/07	Variation
Net revenues	\$4,000	\$5,800	45.0%
Cost of sales	\$1,789		
Research and development	\$500		
Marketing	\$470		
Other Expenses	\$23	\$50	117.4%
Operating costs and expenses	\$2,782	\$2,020	-25.4%
Operating income	\$1,218	\$3,780	308.7%
Gains (losses) on equity		\$7	
Interest	\$45		
Included	\$268		
Provision	\$380		
Net income	\$888	\$1,329	49.7%

**Growth**

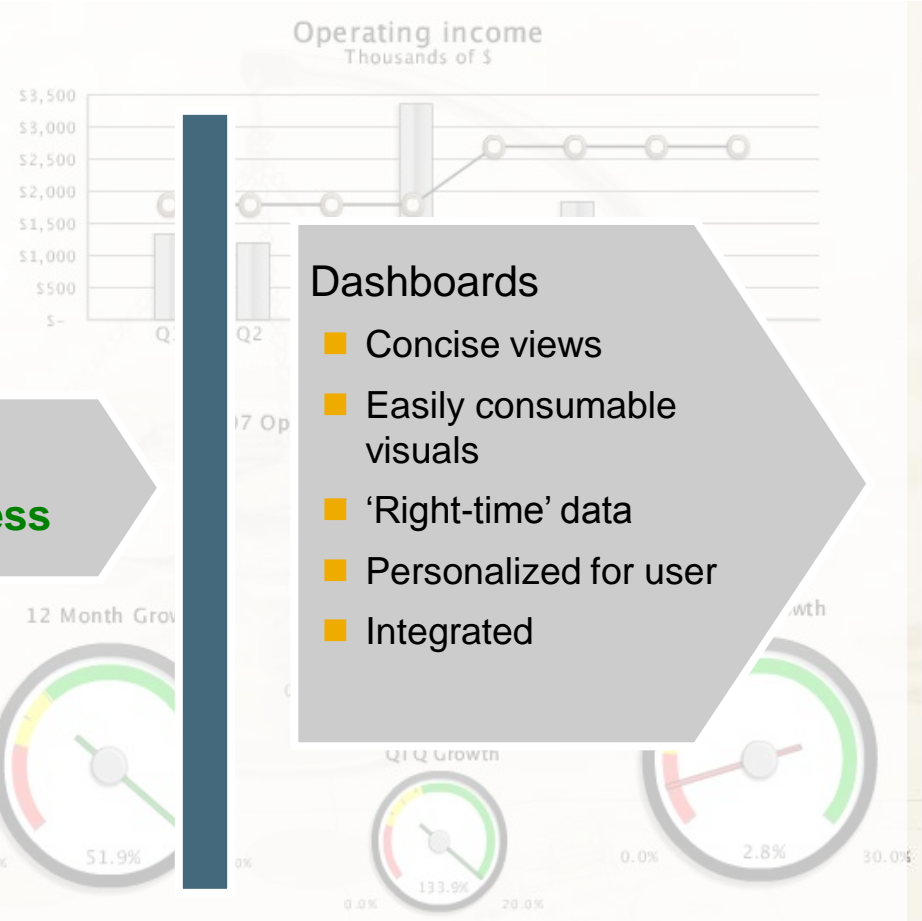
**Agility**

**Differentiate**

**Market Awareness**

**Cost Control**

**Compliance**



## Dashboards

- Concise views
- Easily consumable visuals
- 'Right-time' data
- Personalized for user
- Integrated

## Dashboards are part of a performance management system

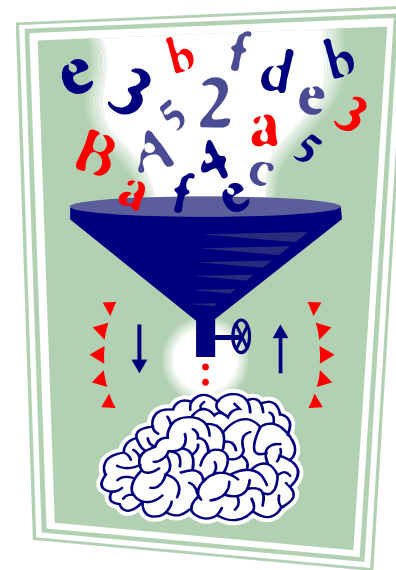
- The most visual parts
- Allow drilling to more detail data
- Help expose the root cause of deviations





## Dashboards bring together Business Intelligence and Performance Management

- Business Intelligence – tools, technologies and processes needed to turn **data** into **information** used to make **decisions**
- Performance Management – the process of **measuring progress** towards specific key **goals**



## Dashboards must provide 3 core services

- Monitoring – convey information at a glance
- Analysis – analyze exception conditions
- Management – coordination and collaboration

The Crystal Xcelsius logo, featuring the word "crystal" in black and "xcelsius" in red, both in a sans-serif font, set against a light gray rounded rectangular background.The Business Objects XI logo, featuring the words "BusinessObjects" in black and "XI" in a large, blue, serif font, set against a light gray rounded rectangular background.

# What Do Dashboard Users Want?



## Business needs

- High impact interactive visualization of key metrics
- Intuitive user interface and navigation
- Ability to manage and monitor metrics effortlessly
- Drill down or through for root-cause analysis
- Personalized content and display



## Technology needs

- Easy dashboard building capabilities
- Flexibility as the needs of an organization change
- Security to ensure proper user access
- Scalable for a growing organization
- Integration to leverage existing BI investments



# Dashboards for All Users



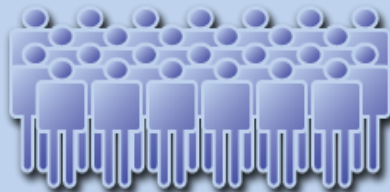
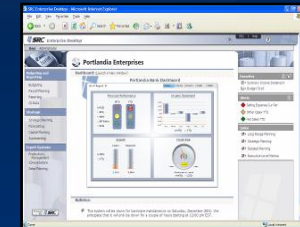
Strategic Alignment



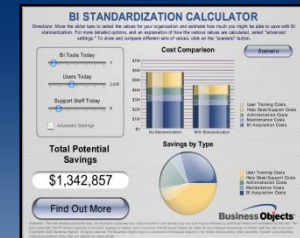
Executive Management  
*Strategic Dashboards*



Financial & Operational Management  
*Operational Dashboards*



"Everyone Else"  
*Tactical Dashboards*





## Author of Dashboard

- Usually authored and maintained by BI

## Consumer

- Used by Line workers to monitor systems or line level performance KPIs

## Example

- Line worker monitoring how much product has shipped from a warehouse in the hour
- May only want to be alerted visually when the deliveries fall below a threshold or when enough product is available to deliver a shipment

## Distinct Requirements

- May require real-time or event driven data
- The data may be streamed to the dashboard in real time for active monitoring
- Or, data is delivered only when an event or threshold is passed.

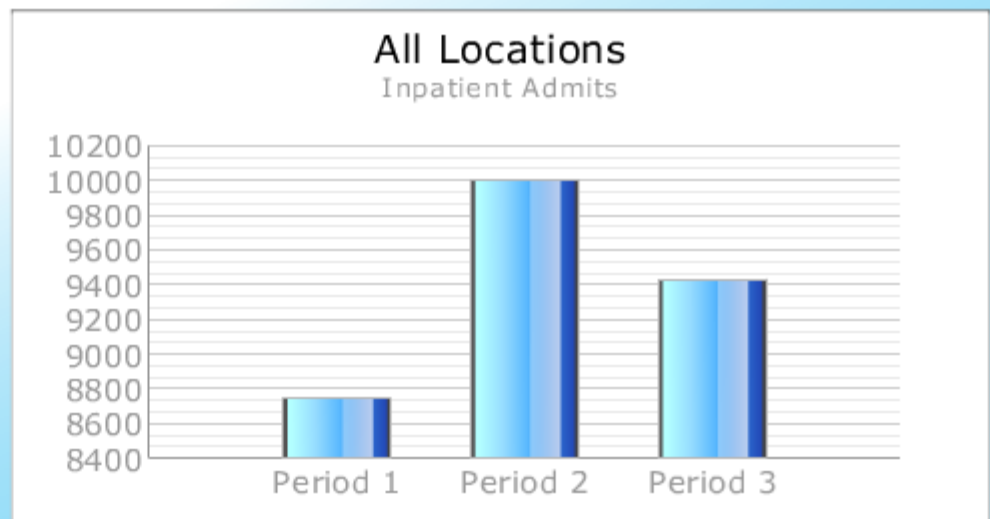
# Use Dashboard to Track and Manage the Growth



All Locations

- Inpatient Admits
- Patient Days
- ALOS
- Total Revenue
- Operating Income
- FTEs



All data is mocked up



## Author of Dashboard

- Usually authored and maintained by BI, may have direct involvement or collaboration of business/power user

## Consumer

- Any user who requires distinct set of information to do their job
- Users serviced with simple reports today

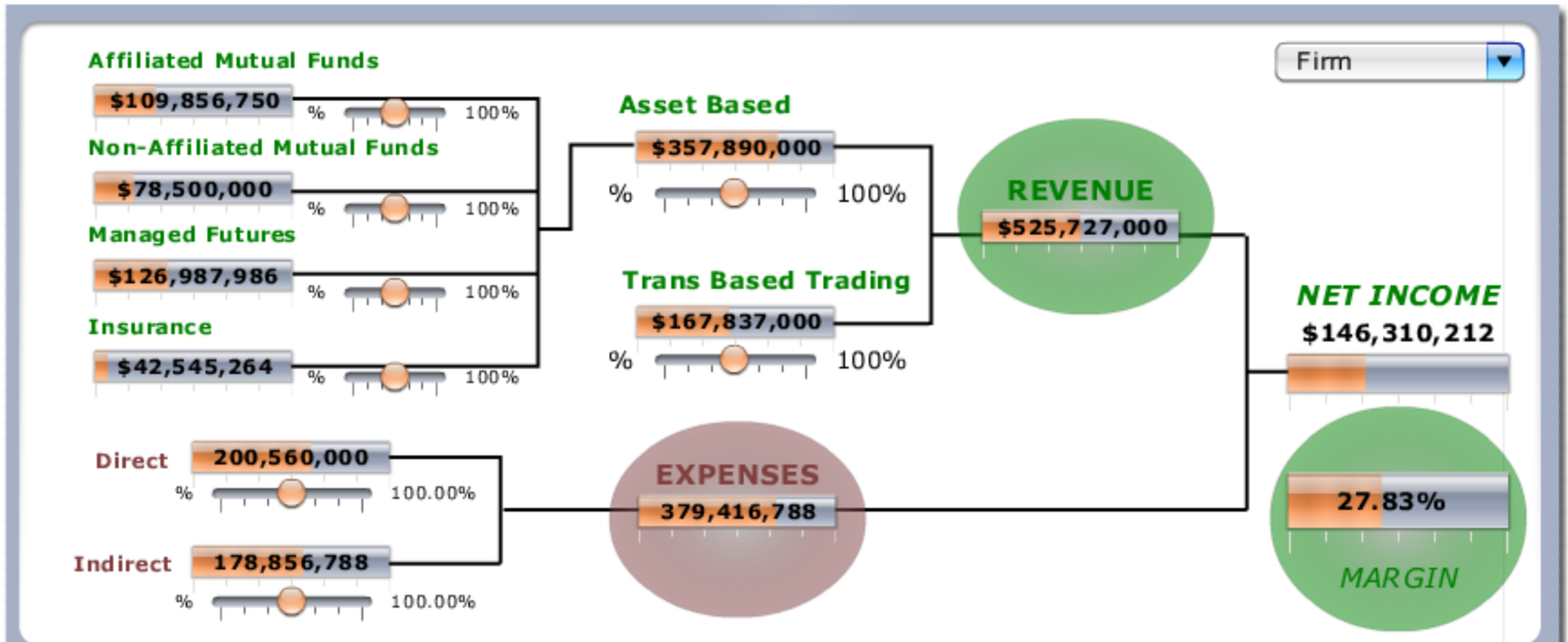
## Example

- Sales or insurance agent, bond portfolio manager
- Sales agent at an electronics store who needs to know how many TVs they need to sell this week in order to hit their target for the month

## Distinct Requirements

- Users will likely only spend a small amount of time in this tool so information must be highly personalized to the individual or role
- Will want to limit amount of information conveyed on the display and link to reports for detailed information

# Tactical Dashboard for Wealth Management



## Market Risk



Interest Rate Risk  
\$0



Market Returns  
\$0

## Business Risk



Mortgage Default Amounts  
\$0



Revenue (Lost Clients)  
\$0



## Author of Dashboard

- Usually authored and maintained by BI

## Consumer

- Built for executives and managers who want insight into how their business is performing

## Example

- Regional Sales manager wants to know at a glance how their team is tracking toward their targets for the quarter. KPIs quickly show who is on track and who is likely to miss the targets

## Distinct Requirements

- May require integration with performance management and balance scorecarding methodology to provide top down and bottom up understanding of the business, such as SAP Strategy Management
- Executives are busy and often on the go, may want to take their dashboards offline to review on the airplane or when otherwise not connected

# Strategic Executive Dashboard



Business Objects

Welcome: Administrator

InfoView Performance Management My Dashboards Setup Corporate Tiered Dashboard

Intelligent Question

Example Dashboard

Overview Dashboard

Ad hoc Analysis

Customize

## Additional Report Prompts

Rolling 5 Months  Last Year  
 Projected



## Company Sales Overview

	Current Month	QTD	YTD	
Region	Enterprise	Mid Market	Internet	Total
Worldwide Total	\$111,398	\$76,970	\$39,695	\$228,063
North America	\$7,116	\$2,846	\$3,558	\$13,520
Asia Pac	\$31,318	\$15,659	\$15,659	\$62,636
EMEA	\$59,564	\$41,695	\$14,891	\$116,150
Latin America	\$6,722	\$11,427	\$3,361	\$21,510
Australia	\$6,678	\$5,342	\$2,226	\$14,246

## Sales

■ Enterprise  
■ Mid Market  
■ Internet

# Different Users Have Different Needs



	Operational	Tactical	Strategic
Application Emphasis	Monitor Operations	Review Progress	Measure Performance
Users	Supervisors	Office Worker	Executives & Managers
Scope	Operational	Individuals	Enterprise & Departmental
Information	Detailed	Detailed / Summary	Summary
Updates	Intra-day	Daily / Weekly	Monthly / Quarterly
“Looks like a...”	“Dashboard”	“Application”	“Balanced Scorecard”

# Agenda



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# Key Characteristics of Dashboards

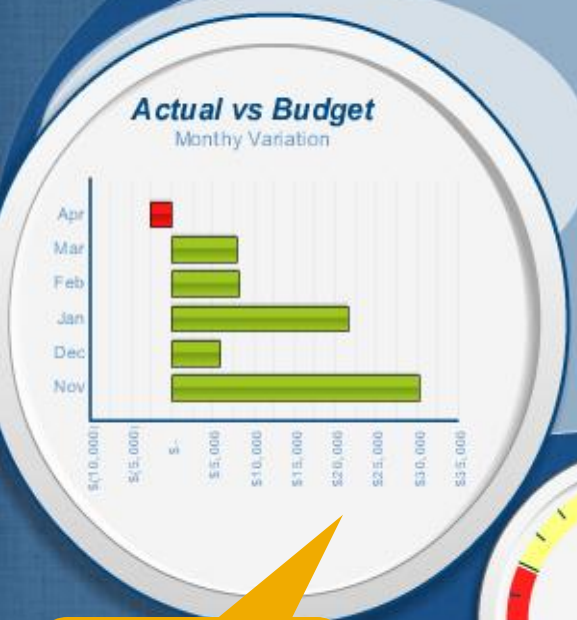


Filter controls for changing views

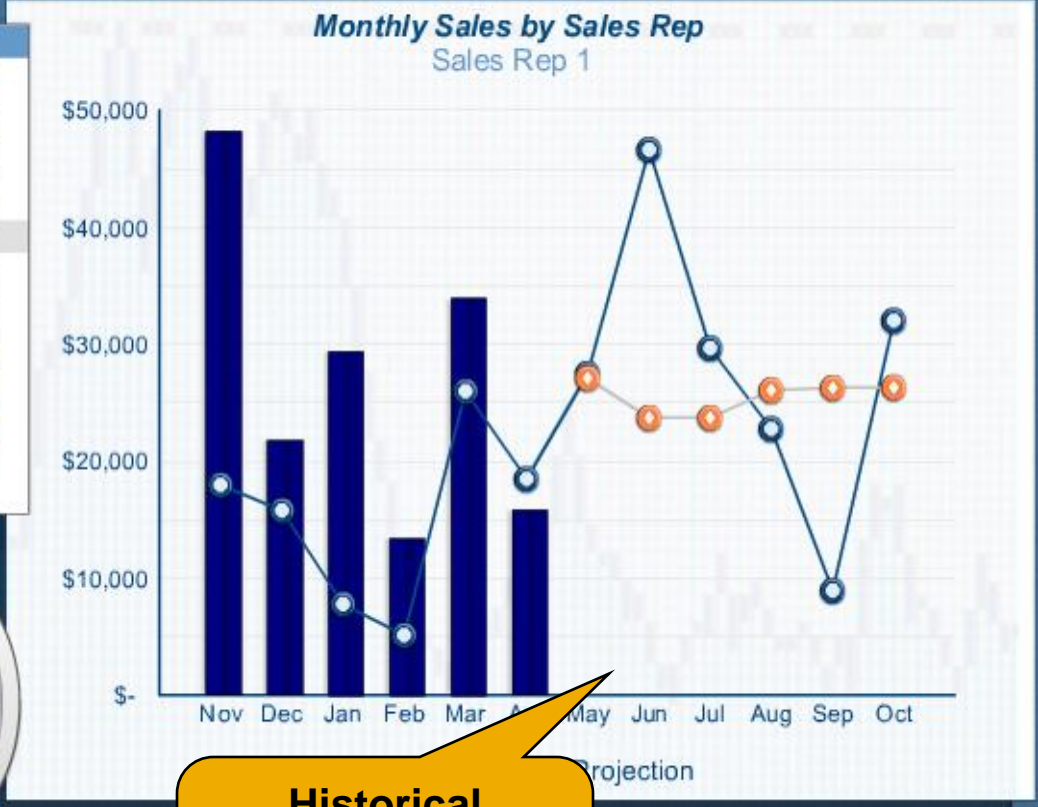
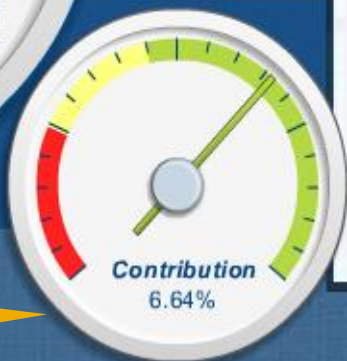
## Monthly Sales Dashboard

Year to Date Sales	Year to Date Budget	Difference
\$162,606	\$91,281	71,324.81

- Sales Rep 1
- Sales Rep 2
- Sales Rep 3
- Sales Rep 4
- Sales Rep 5
- Sales Rep 6
- Sales Rep 7
- Sales Rep 8
- Sales Rep 9
- Sales Rep 10
- Sales Rep 11
- Sales Rep 12
- Sales Rep 13
- Sales Rep 14



Visual gauges, Charts with alerts



Historical information or real time data

## Dashboards should ...

- Provide high-level overview of information
- Provide visual indicators alerting to important information
- Provide interactivity and personalized information so the individual can easily understand the data and has just the information they need to do their job or monitor performance
- Provide guided analysis navigation of constrained amount of information
- Provide historical and real-time data

## Dashboards should not ...

- Provide advanced analysis capabilities – this is an analysis tool
- Show large amounts of detailed information – this is a report
- Provide access to ad hoc and open ended information – this is an ad hoc analysis tool

## But ...

- It should enable easy integration with other BI tools to provide all these capabilities

**Audience requirements:** Who is the solution designed for?

**Decision requirements:** What decisions will be made with the solution?

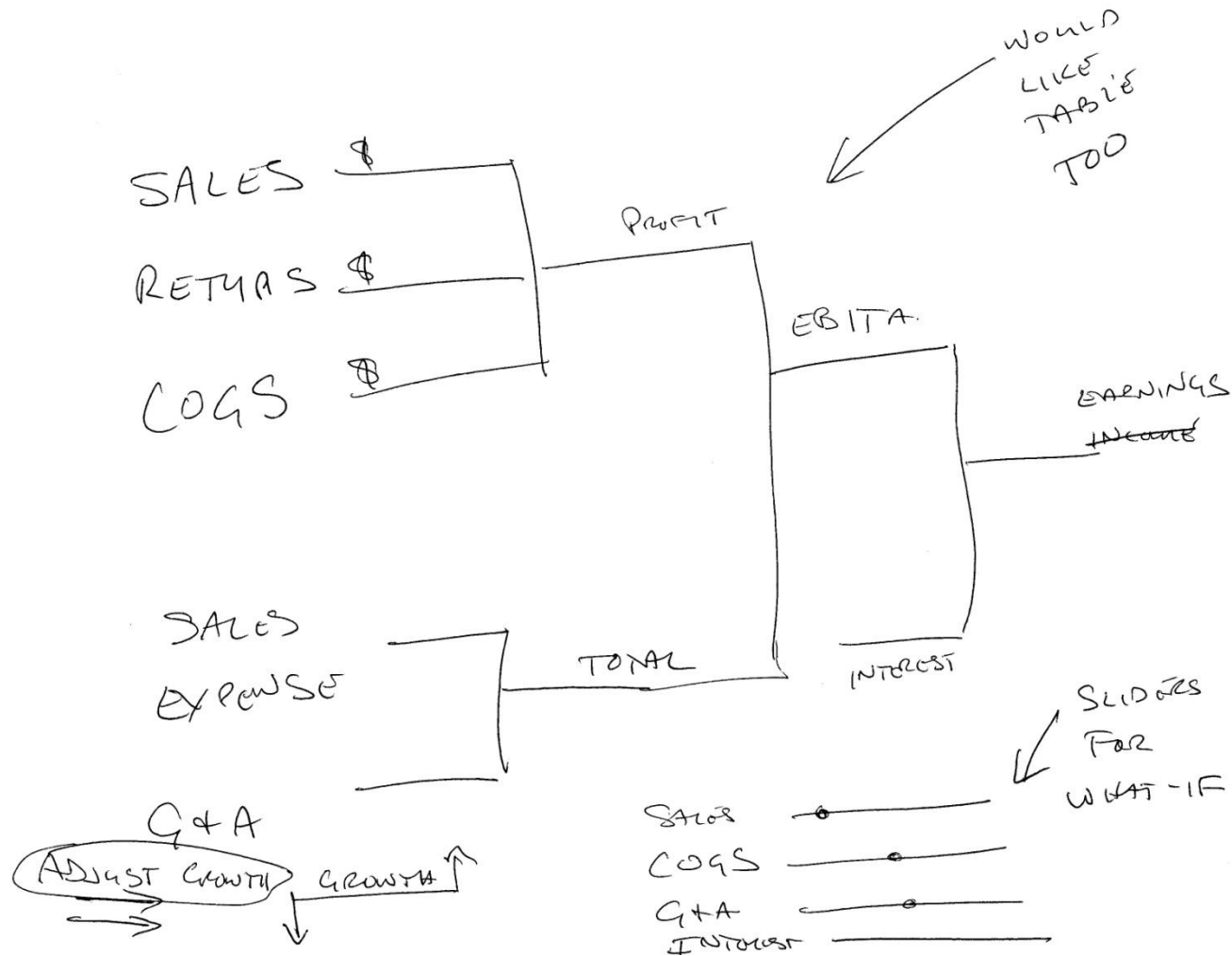
## **Data requirements**

- What metrics are the focus of the solution?
- What dimensions will the metrics be grouped by, if any?
- Will there be a need to provide data in real-time, rather than a data warehouse?

**Visualization requirements:** What visual components best represent the data?

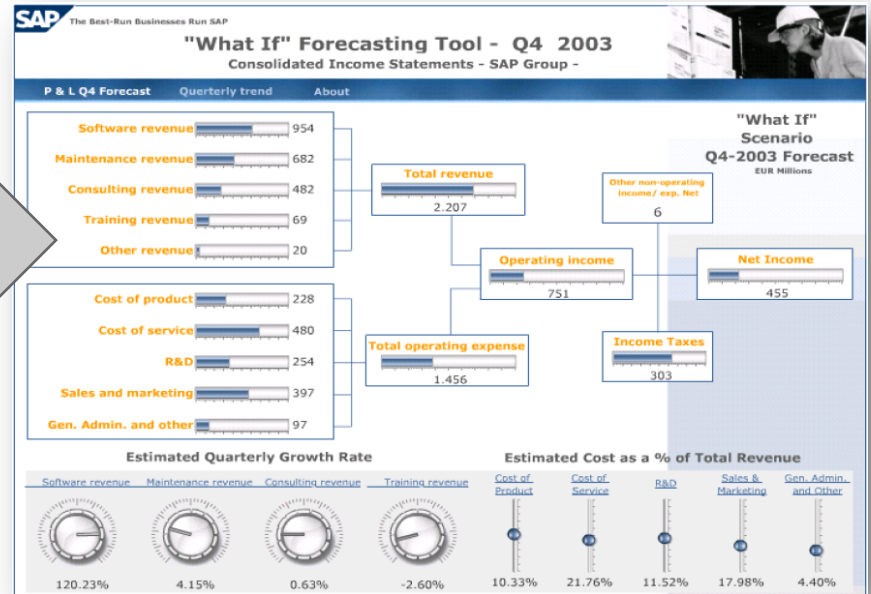
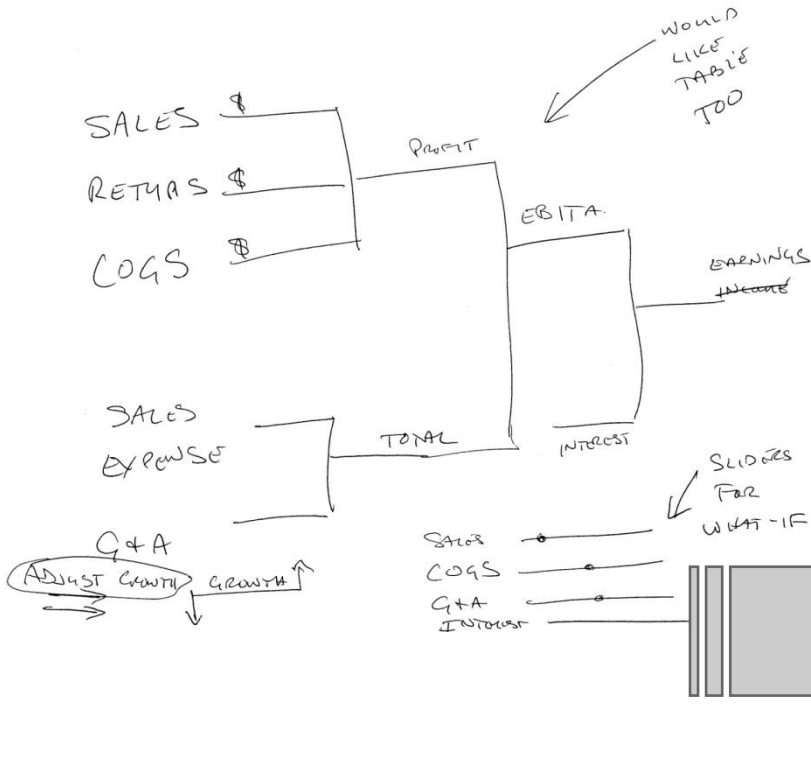
**Interactivity requirements:** When a user clicks on something, what happens next?

# Draw what you'd like...

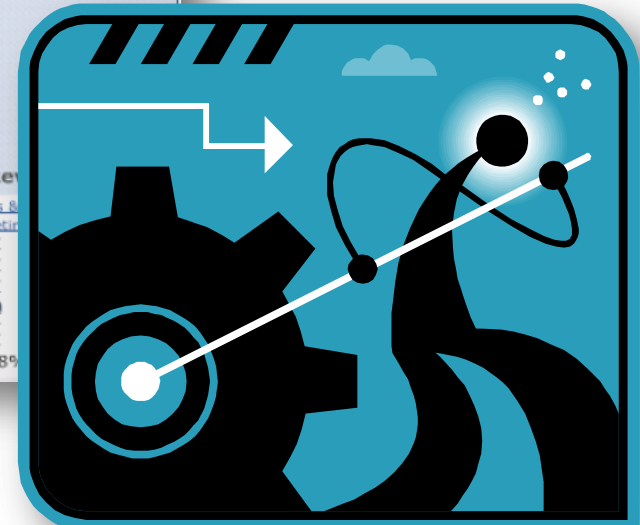
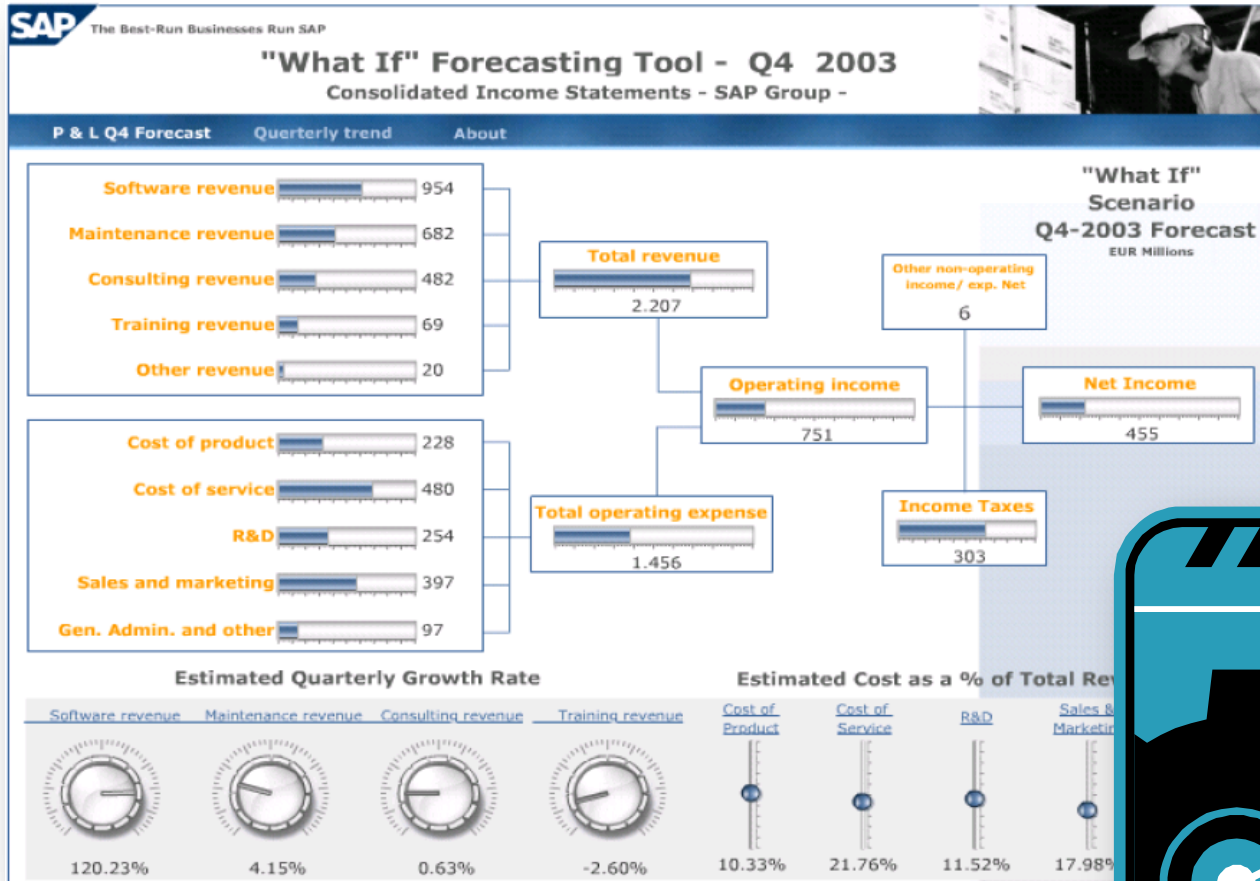




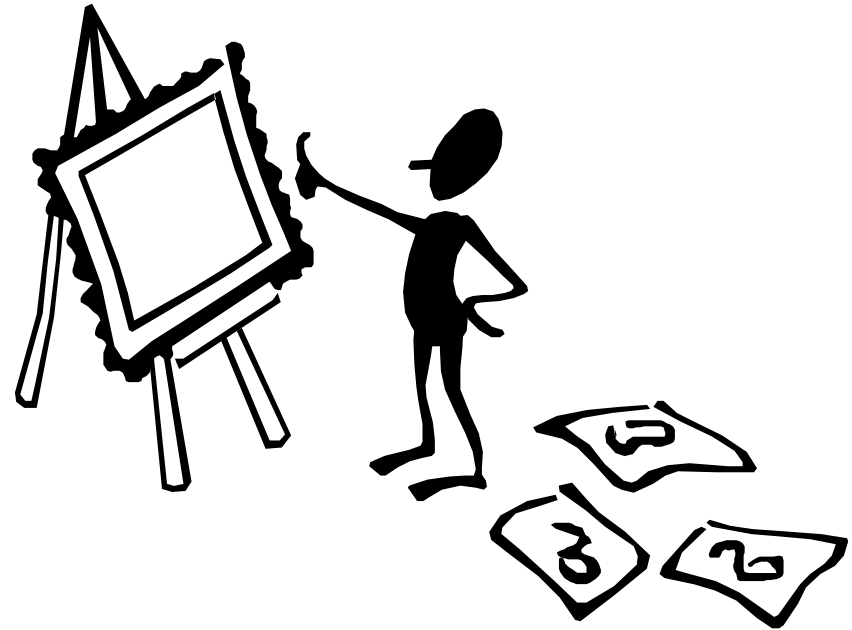
# It can be done...



# Demonstration



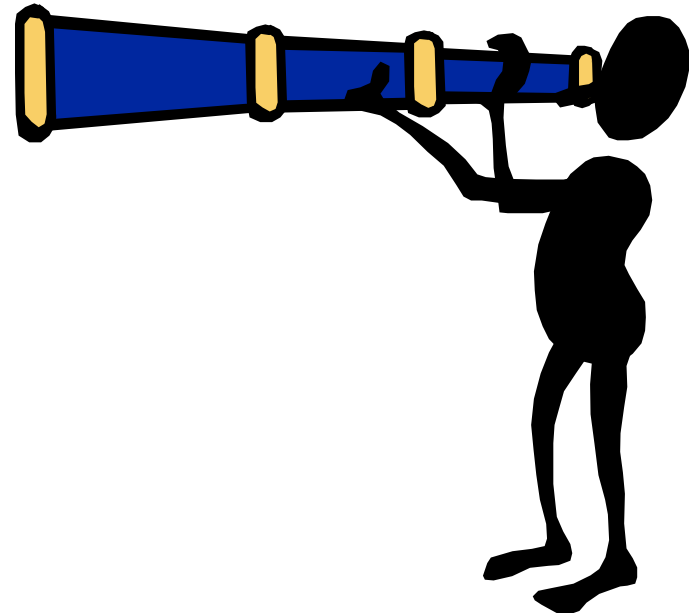
1. Remove yourself from the data
2. Start with Pen and Paper
3. Design your layout based on how you view your data



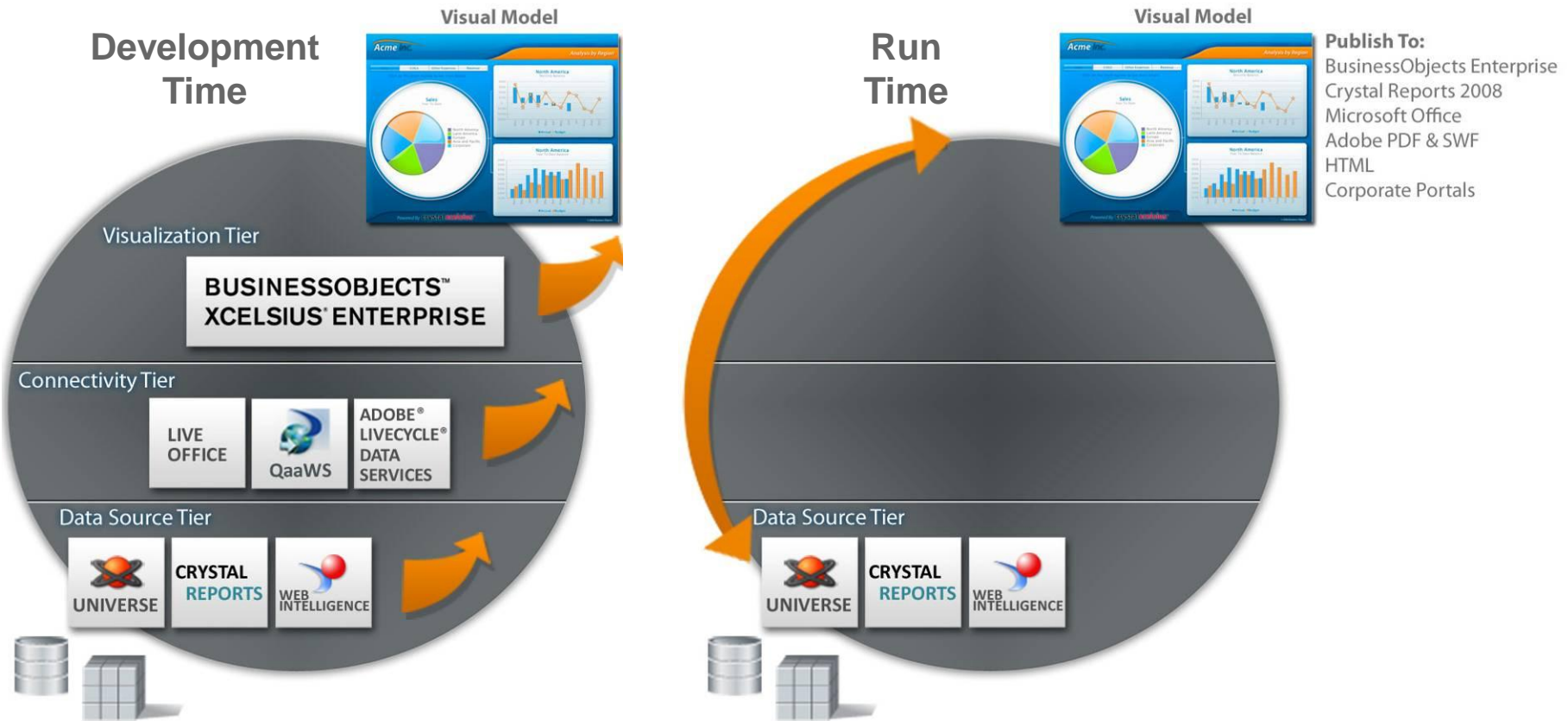
4. Create a mockup/proof of concept
5. Design with the end user in mind
6. Create a layout that scales



7. Don't get lost in the visualization
8. Know product limitations use multiple SWFs if necessary
9. Use summarized data

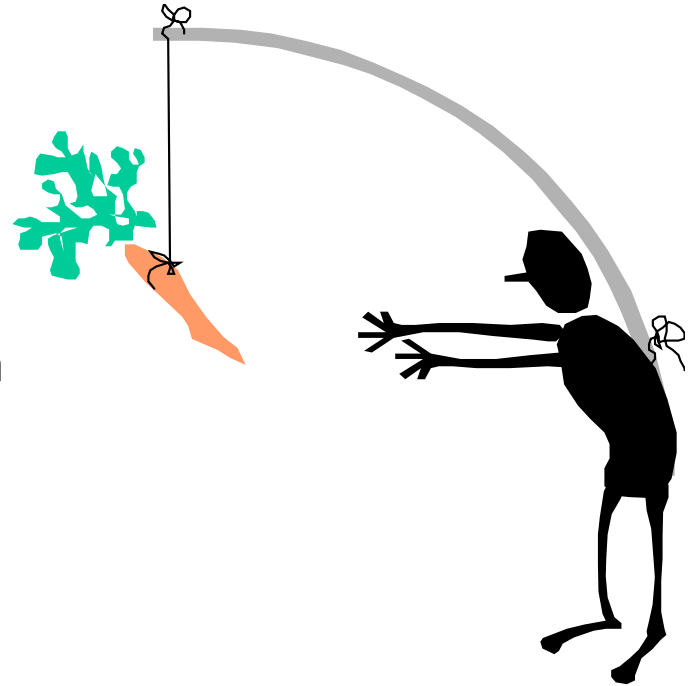


# How It Works



## In Summary...

- No organization is exempt from the need to make good business decisions
- Dashboards as part of an overall BI offering can answer your organization's needs regardless of your size
- Not all dashboards are equal - Different types based on use cases
- Dashboards for different users are based on their different needs
- Xcelsius provides *interactive* and engaging dashboards on top of the #1 BI platform



# Next Steps





# Questions?

**Thank you!**



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