Business Intelligence Dashboards

Best Practices and why Senior Management loves them

Monday, October 12, 2009
Agenda

- Introductions
- How to create dashboards
- "Lessons Learned"
- Dashboard examples
Introductions

• Brad Ferguson

  – Practice Lead for Business Information Services division of Meridian Partners with a focus on both Public and Private sector

  – Over 10 years experience building enterprise Business Intelligence and Data Warehouse solutions

  – Experience integrating Oracle and SAP ERP’s with Enterprise Business Intelligence solutions such as SAP Business Objects, IBM Cognos, and Oracle Hyperion

  – Responsible for growing the Business Information Services division by 250% since team inception
Introductions

• Bernardo Camarena
  – MBA, PMP, Certified Integrator mySAP Public Sector
  – Program manager for 10 major SAP projects at SFWMD
  – Director of the software solicitation process that resulted in the selection of SAP as the ERP software vendor
  – Architect of the SAP technical landscape and support structure
  – Expert in the SAP areas of Finance, Public Sector Integration and Business Intelligence
About Meridian Partners

‣ Privately-held company founded in November, 2000 by Wil Martinez and J.B. Aleman.

‣ Headquartered in Miami Beach, FL. with satellite offices in West Palm Beach, FL. and Redwood City, CA.

‣ Our team has extensive experience delivering ERP, Data Warehousing, Business Intelligence, and e-Commerce solutions to Public Sector Agencies and Fortune 2000 clients across the country.

‣ SAP Services Partner providing Implementation and Maintenance & Support Services for SAP ERP, Business Intelligence, and Budgeting & Planning

‣ Certified Minority Business Enterprise by Florida Regional Minority Business Council and National Minority Supplier Development Council (NMSDC).

‣ Profitable since inception and rated as the 129th fastest-growing private companies in America by Inc. magazine!
The South Florida Water Management District (SFWMD), an agency of the state of Florida established in 1949, is the principal water resource management authority for a 16-county region extending from Orlando to Key West.

SFWMD operates and maintains the primary water control system of canals, reservoirs, levees, and control structures.
• Contract Management
• Business Support
• Project & Implementations
• Internal Marketing
• Technical Support
• Training
• Support Desk
• Coordination of Development Requirements
Dashboards

- More operational and actionable
- Draw attention to immediate needs through actionable indicators and alerts
- Provide leading indicators that will affect scorecard scores in the months to come
Dashboards

Cockpits and Scorecards

Cockpits

Unique type of dashboard that has a defined layout

All cockpits are dashboards, but not all dashboards are cockpits
Dashboards
Cockpits and Scorecards

Scorecards
Strategic in nature
Align operations with strategic organizational goals
Data is captured in intervals for comparison with target values
Dashboards draw attention to immediate needs, so immediate action is taken.
Dashboards
Scorecards

‣ Scorecard
  ‣ Manages performance
  ‣ Drives behavior
  ‣ Strategy
  ‣ Executives, managers, staff
  ‣ Periodic snapshots
  ‣ Symbols
Dashboards

Scorecards

- Dashboard Monitors
- Performance Track
- Events
- Operations
- Executives
- Managers
- Staff “Real” time
- Charts
how to create dashboards

Executive Management
- Performance Management
- Dashboards
- Scorecards
- KPIs

Business Analysts
- Ad-Hoc Queries
- On-line Analytical Processing (OLAP)

Front Line Employees
- Operational or Standard Reports

Business User

IT
how to create dashboards

- a few, simple, highly informative views
- Alerts: items that require immediate attention
- Actionable indicators: thresholds are exceeded
how to create dashboards

Humans have a hard time remembering, organizing, and retain information that is asymmetrical.

Try to avoid empty spaces, but don’t force unrelated measures.

Don’t use as many types of graphs as possible, and never mix more than 3 types of graphs.
how to create dashboards

Executives typically will drill two layers into a dashboard, managers will drive four layers in. Make sure your dashboards reflect the type and level of drilldowns users will require.
how to create dashboards

Effective Measures

Locked into strategy and stakeholder value

Based on agreed upon understanding of the key business drivers

Cascade strategy down, draw knowledge of the business up

Within the organization’s sphere of influence
how to create dashboards
Lessons Learned

use the same type of graphs (e.g., tachometers or line charts), Users adapt quickly and can absorb the information faster
Lessons Learned

‣ Prototype
‣ Use effective metrics
‣ Match visuals to data
‣ Pay attention to color
‣ do not overcrowd