

TDWI Performance Management: Dashboards, Scorecards, and Metrics for Real Business Impact

Course Outline

Module One: Introduction to Performance Management

- Defining Performance Management
 - Performance
 - Management
 - Performance + Management
 - Why Performance Management?
 - Performance Management and Business Analytics
- Performance Management Processes
 - Goal Setting and Measurement
 - Analysis and Action
 - Monitoring and Feedback
 - Alignment
- Performance Management Applications
 - The Balanced Scorecard
 - Financial Management
 - Customer Relationship Management (CRM)
 - Supply Chain Management (SCM)
 - Operations Management
 - Human Capital Management (HCM)
 - A PM Framework

Module Two: Business Aligned Performance Management

- The Balanced Scorecard
 - PM Foundation
 - Adaptation
 - Variations
- Strategy Mapping
 - A Cause-Effect View of the Business
 - From Balanced Scorecard to Strategy Map
 - Map Components
 - A Healthcare Example
- Performance Indicators
 - From Mapping to Metrics
 - From Nodes to Numbers
 - Using the Business Model Canvas
 - More Resources
 - Choosing KPIs

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- A KPI Selection Technique
- Measures and Metrics
 - Measurement Concepts – Why Measure?
 - Measurement Concepts – Kinds of Measures
 - Ratio and Interval Scales
 - Ordinal and Nominal Scales
 - Measurement Scales and Measurement Methods
 - Measures vs. Metrics – The Differences
 - Measures vs. Metrics – The Connections
 - The Anatomy of a Metric
 - Leading and Lagging Indicators
- Implementing Metrics
 - Process Overview
 - Useful Metrics
 - Definition – Naming and Description
 - Definition – Calculation
 - Consistency and Cohesion
- Metrics Applications
 - Purpose of the Numbers
 - Dashboards, Scorecards, and OLAP

Module Three: Performance Dashboards for Performance Management

- Performance Dashboard Concepts
 - Performance Dashboard Defined
 - Dashboard and Scorecard
 - Dashboard vs. Scorecard
- Using Dashboards
 - Who, When, and Why?
 - Example: Cisco Systems
 - Example: Navistar
 - Common Kinds of Dashboards
- Using Scorecards
 - Who, When, and Why?
 - Example: Cisco Balanced Scorecard
 - Example: Rohm and Haas

Module Four: Dashboard and Scorecard Design Techniques

- Implementing Dashboards

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- From Planning to Production
 - The Design Phases
- Dashboard Requirements
 - The Big Picture
 - Business Scope and Stakeholders
 - Features and Functions
 - Performance Indicators
 - Cascading and Dependency
- Dashboard Design
 - Design Tips
 - Item Placement
 - Element layout
 - Filters
 - Drill-Down
 - Help
 - Keep it Simple
 - Adapt Charts to Fit Viewers
 - Choosing Charts
 - Formatting Tables
 - Pre-attentive Processing
 - Choosing Fonts
- Dashboard Examples
 - Balancing Sparsity and Density
 - A Good Example
 - A Bad Example
- Implementing Scorecards
 - From Planning to Production
 - The Design Phases
- Scorecard Requirements
 - Business Stakeholders
 - Features and Functions
 - Performance Indicators
 - Cascading and Dependency
 - Drill to Analysis
- Scorecard Design
 - Scorecards vs. Dashboards
 - Tabular Views
 - Expand and Collapse

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Course Outline

Module Five: The Human Side of Performance Management

- Working with Performance Indicators
 - Comparative, Causal, and Predictive Analysis
 - Awareness and Understanding
 - Decision and Action
- Performance Management Principles
 - Responsibility and Accountability
 - Communication and Feedback
- Performance Management Organizations
 - Measurement and People
 - Performance Management Culture
 - Managing Change

Module Six: Summary and Conclusion

- Integrated Performance Management
 - From Dashboards to Transaction Data
- Summary of Key Points
 - A Quick Review
- References and Resources
 - For More Information

Appendix A: Bibliography and References

Appendix B: Exercises