

Case study: Business Performance Dashboard

Client: The Brand Stable

Brief

To design and develop a monthly data dashboard with the aims of:

- Providing clearer and more timely insights into the sales activities of the business
- Reducing the time it takes to manage and prepare regular reports
- Supporting the Board, managers, and sales agents to make informed (and often time-critical) decisions

Background

The Brand Stable had ambitions to move to a dashboard-style monthly report using all their sales, inventory and financial data. They also wanted to compare and monitor the performance of each of the three brands they own to understand and manage seasonality and cashflow. They needed additional expertise and resource to develop a dashboard tool and implement the fresh approach within the business.

The Data Refinery worked with The Brand Stable to understand their needs, and recommended an excel-based tool. Using excel had the advantage of no additional investment in software, and working with a package employees were already familiar with. The Data Refinery uses advanced excel techniques to mimic the functionality of dashboard software (a web-based tool such as Tableau is more appropriate for some projects).

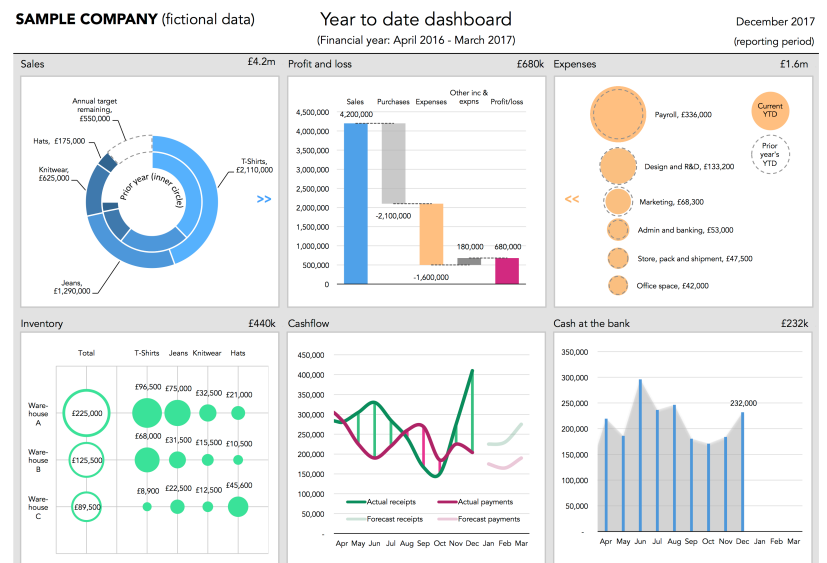
Solution and project outputs

- Excel dynamic dashboard tool to monitor sales progress against budget, prior year and forecasts
- Updating graphs activated by month drop down
- File includes source data tables, which draws upon exports from existing systems, and pdf-friendly report (similar to sample page right)
- Updating steps and troubleshooting guide
- Data quality recommendations
- Consultancy advice on implementation, roll out procedures and next steps

Client testimony

“The Board Pack that Kathryn has produced is clear, concise and with excellent graphics that immediately lets the reader know key points without having to delve through long lists of numbers. I believe that it has given real value. The Pack is also easy to produce and is adaptable to the company's changing needs. Kathryn is very pleasant and professional to work with and has a vast knowledge of her subject.”

– Melissa Wiltshire, Financial Controller



Skills and knowledge demonstrated

- Vision, advice and constructive challenge on project objectives and outcomes
- Understanding of business data and objectives
- Attention to detail and ability to channel the detail into higher level messages
- Bespoke excel dashboard design, with dynamic features that automatically update with new source tables
- Creation of simple and engaging reports, that are intuitive to update and understand
- Ability to find creative and practical solutions to data, technical and operational challenges

Other potential applications of this approach

- Transforming the curation and visual presentation of performance and financial reporting in the public sector
- Using online, interactive data software to share insights that allow for active filtering and drill-down views (The Data Refinery provides a Tableau design and publish service)
- Monitoring cashflow patterns, inventory, profit and loss and expenses