

Building Dashboards for Real Business Results

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BIScorecard

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*The **BIRT** Company*™

Speakers



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Founder, BIScorecard

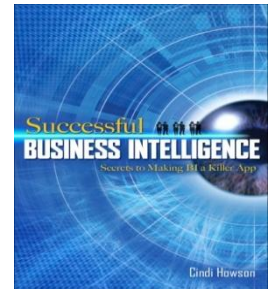
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Biography

- Founder of BI Scorecard, with 20 years experience in business intelligence and management information systems
- Author: *Successful Business Intelligence: Secrets to Making BI a Killer App*
- Write and blog for *Information Week*, *TDWI BI This Week*
- Advise clients on BI strategy and tool selections
- Led decision analytics practice at Deloitte & Touche in Houston, TX
- BI Standards Leader for Fortune 500 company
- MBA from Rice University

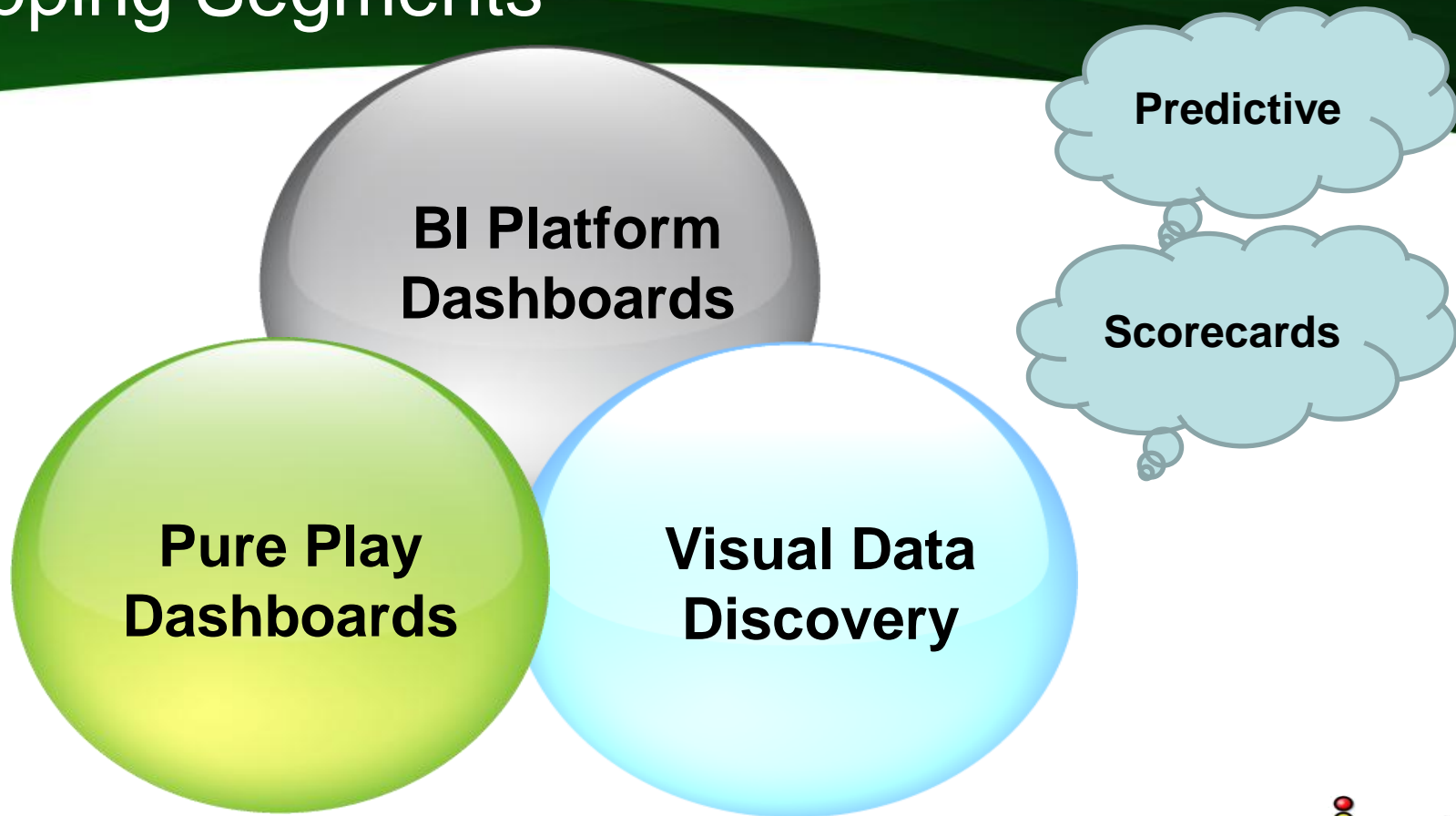


Purpose of Webinar

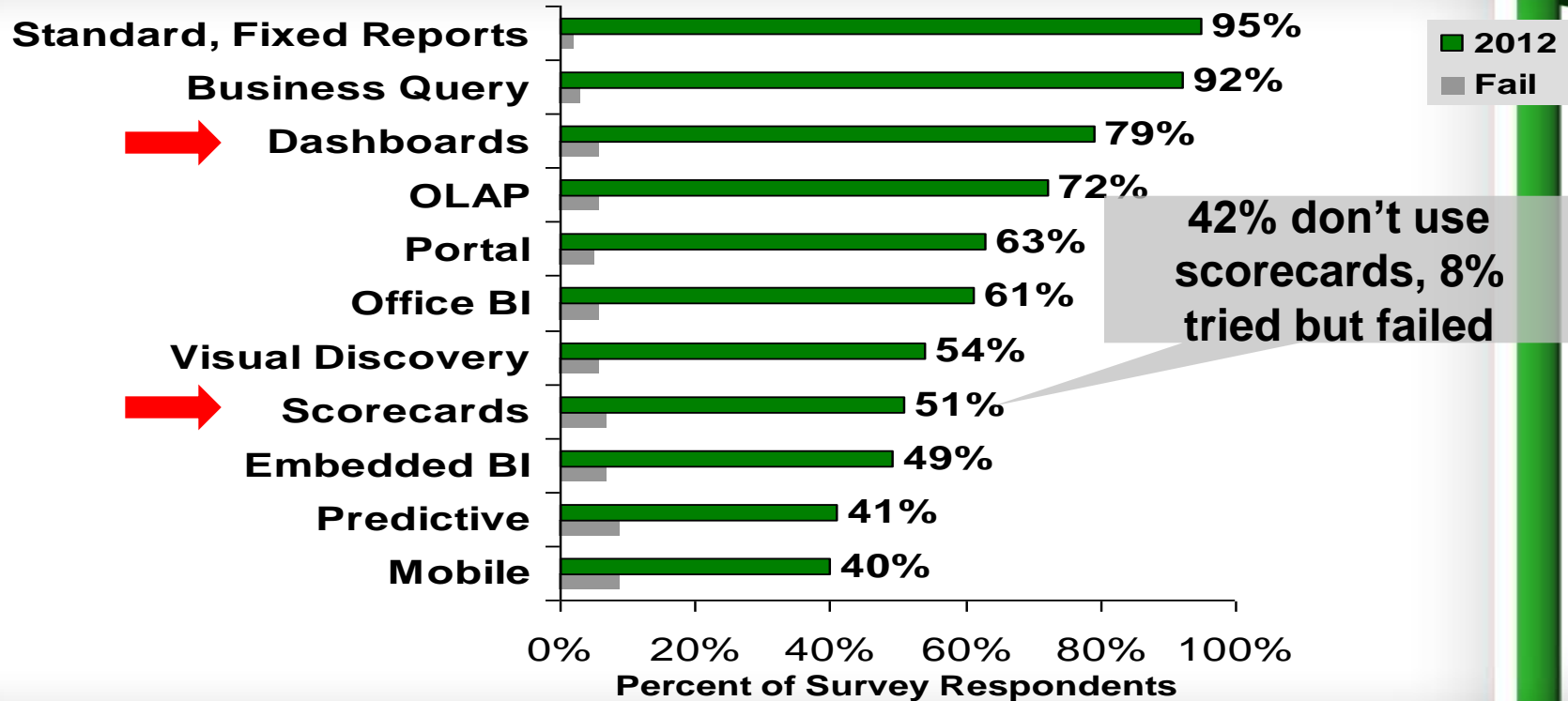
- Understand importance of dashboards in BI tool portfolio
- Understand how scorecards differ
- Key features to consider
- Recommendations for success



Overlapping Segments



BI Tool Module Success Rates



Dashboard Definition

“A dashboard is a visual display of the most important information ... on a single screen so the information can be monitored at a glance.”

Stephen Few, visualization expert

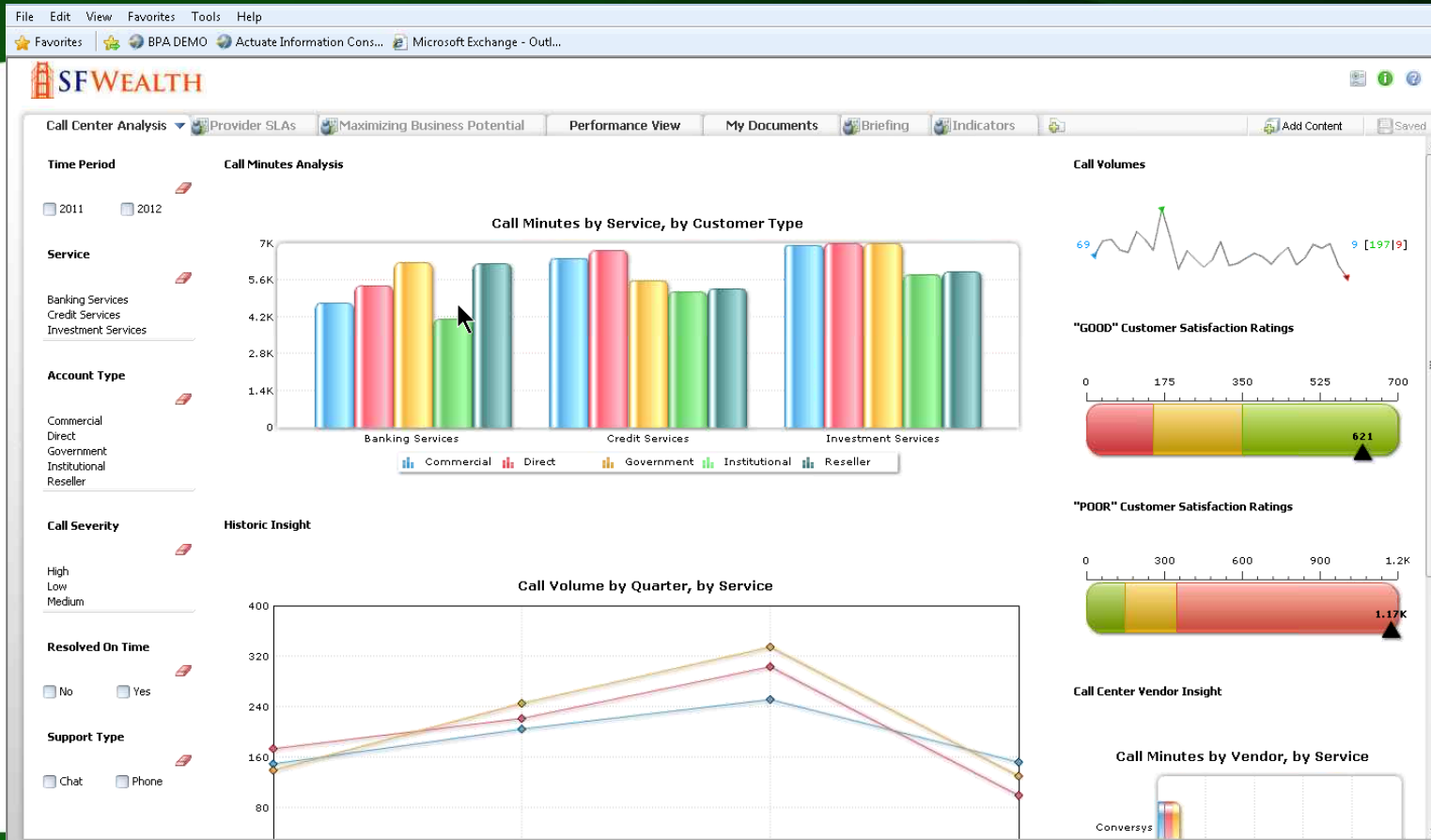
- Multiple data sources
- Multiple visual indicators
- *Interactive*
- *Integrated*
- *Smart visualizations*
- *Actionable*
- *KPIs for Alignment*

Dashboard Constructs

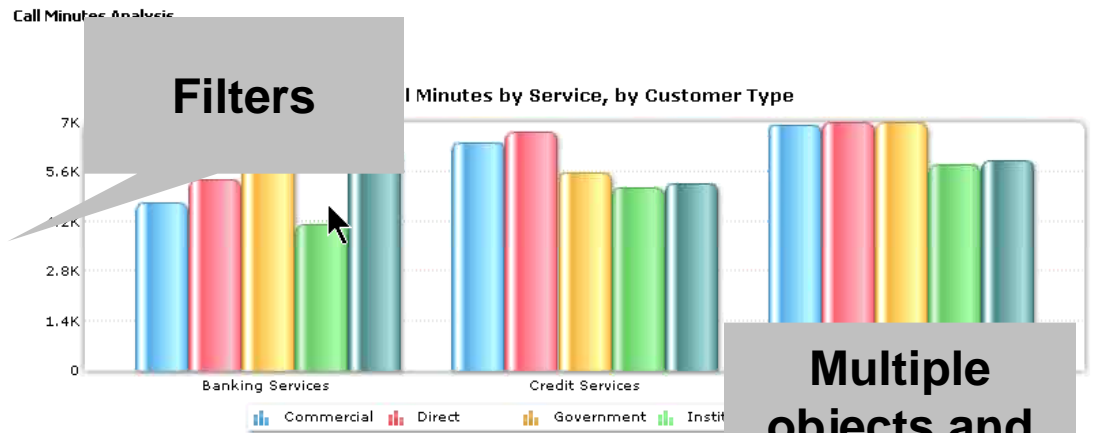
A dashboard can be:

- Portlets within a portal page
- Report with multiple elements
- Dashboard document type

Sample Dashboard: Actuate BIRT 360



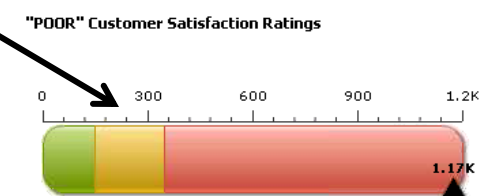
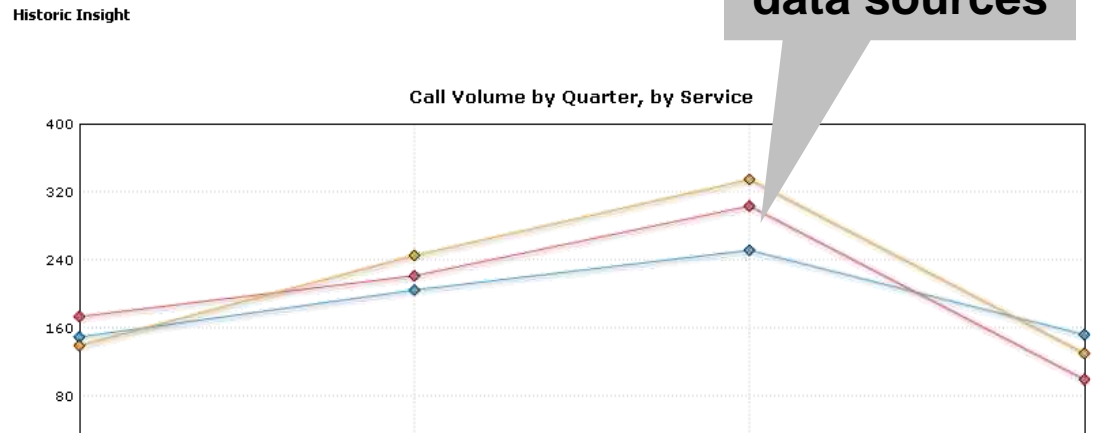
- Time Period**
 2011 2012
- Service**
Banking Services
Credit Services
Investment Services
- Account Type**
Commercial
Direct
Government
Institutional
Reseller
- Call Severity**
High
Low
Medium
- Resolved On Time**
 No Yes
- Support Type**
 Chat Phone



Filters

Multiple objects and data sources

Multiple tabs



Dashboard Use Cases

Operational Dashboards

- Real-time, granular data
- IT designs
- Alerting critical



Management Dashboards

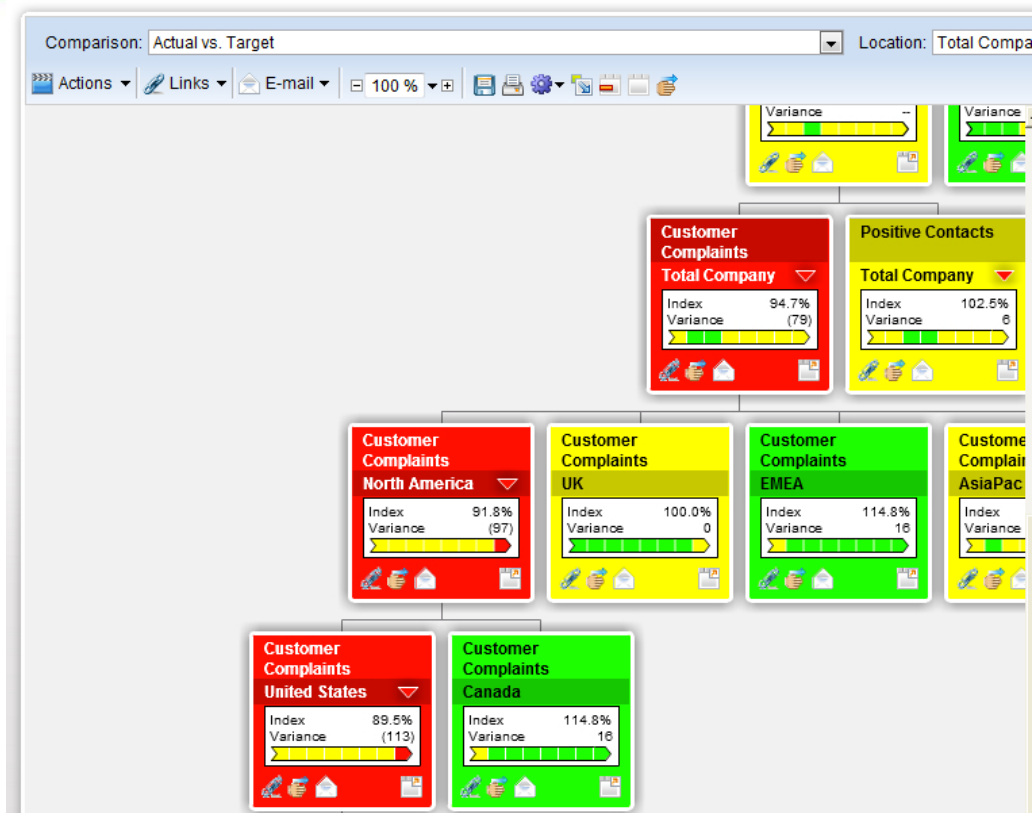
- Summary data
- IT or users design
- Alerting optional



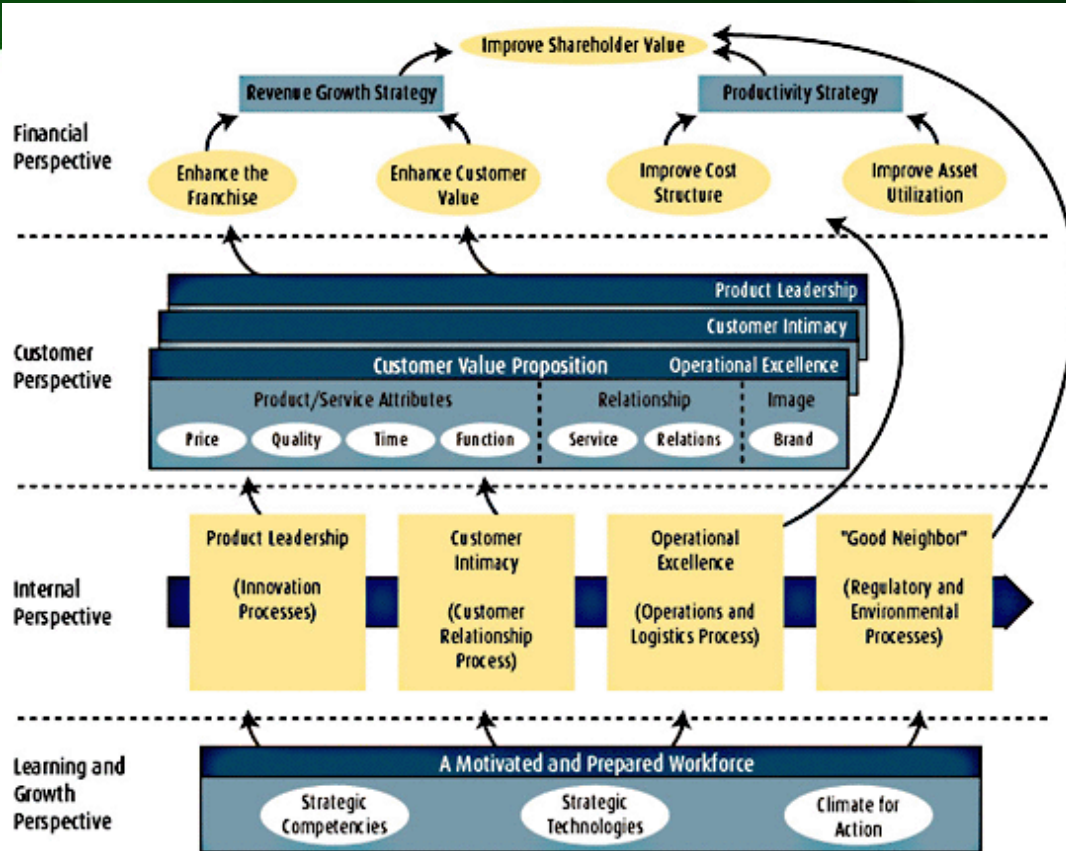
Scorecards – Some Additional Definitions

- Metric – any measure such as sales, inventory, call hold time
- Key Performance Indicator – includes the metric and the target
- Scorecard – a way of viewing multiple KPIs to show how they are related
- Balanced Scorecard – must include the 4 strategic areas of Customer, Financial, Internal Process, Learning and Growth
- Strategy Map – shows the relationship between KPIs, accountability, and goals

KPI Example: Actuate BIRT 360 Plus



Balanced Scorecard Strategy Map



Good Data (Dashboards), Bad Outcomes

**United Airlines:
From First to Worst**

**Borders Closes
Book Stores**

**Eastman Kodak
Bankrupt**

European Debt Crisis

KPIs Help With Alignment & Accountability

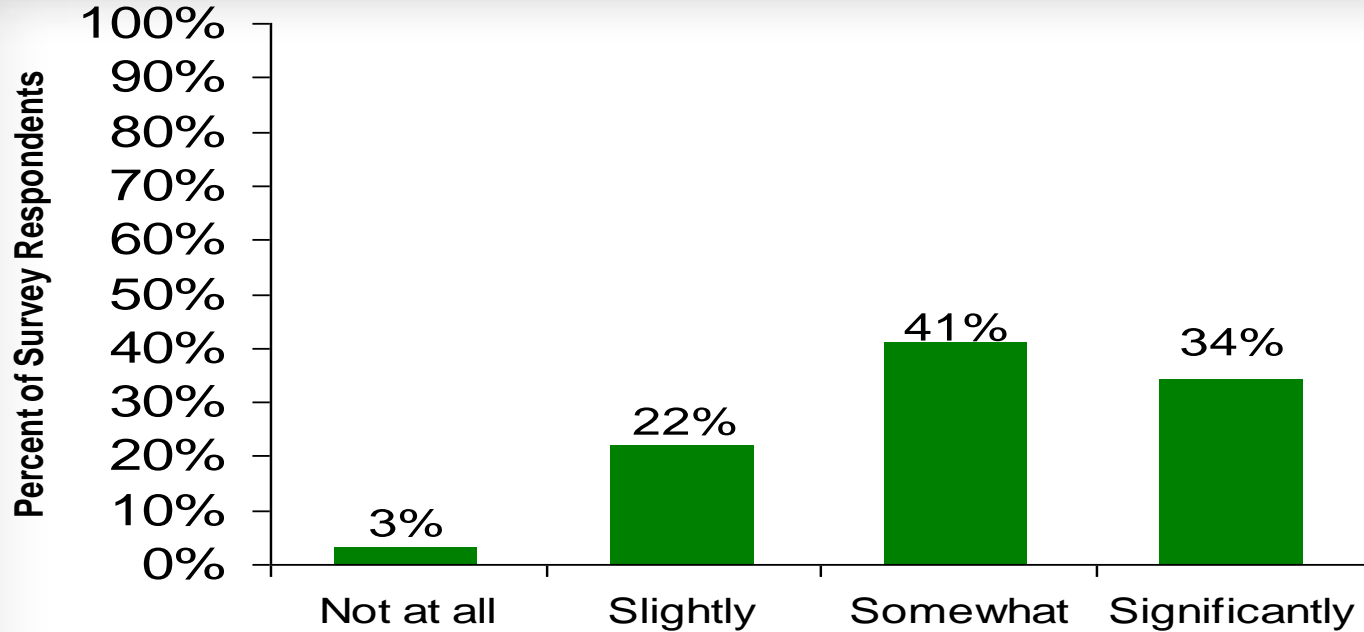
Amazon Revenues Up 35%

Continental: From Worst to First

Walmart Recession Proof

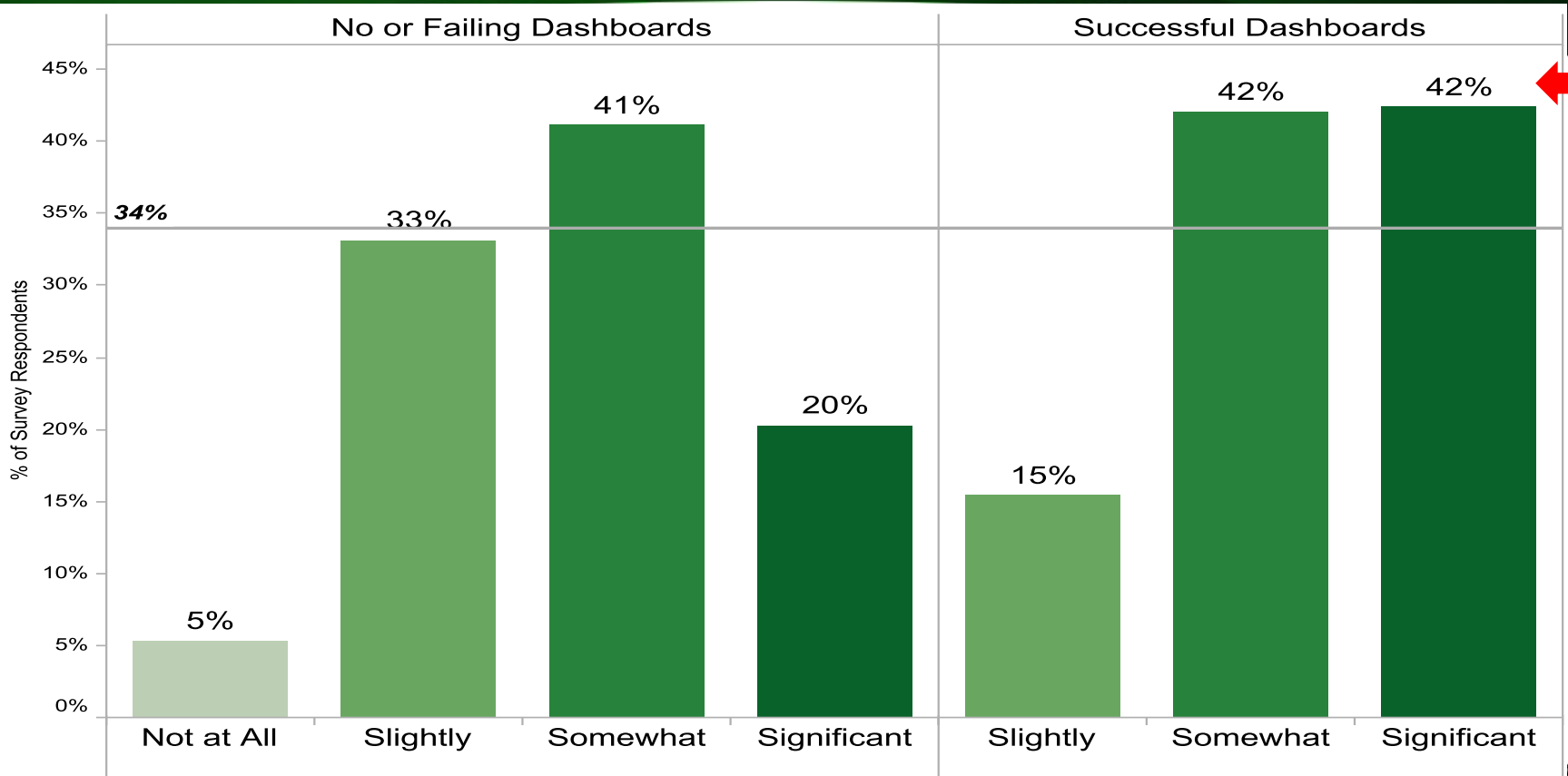
Columbus, Ohio Schools Improve Graduation Rates 30%

BI's Business Performance Impact

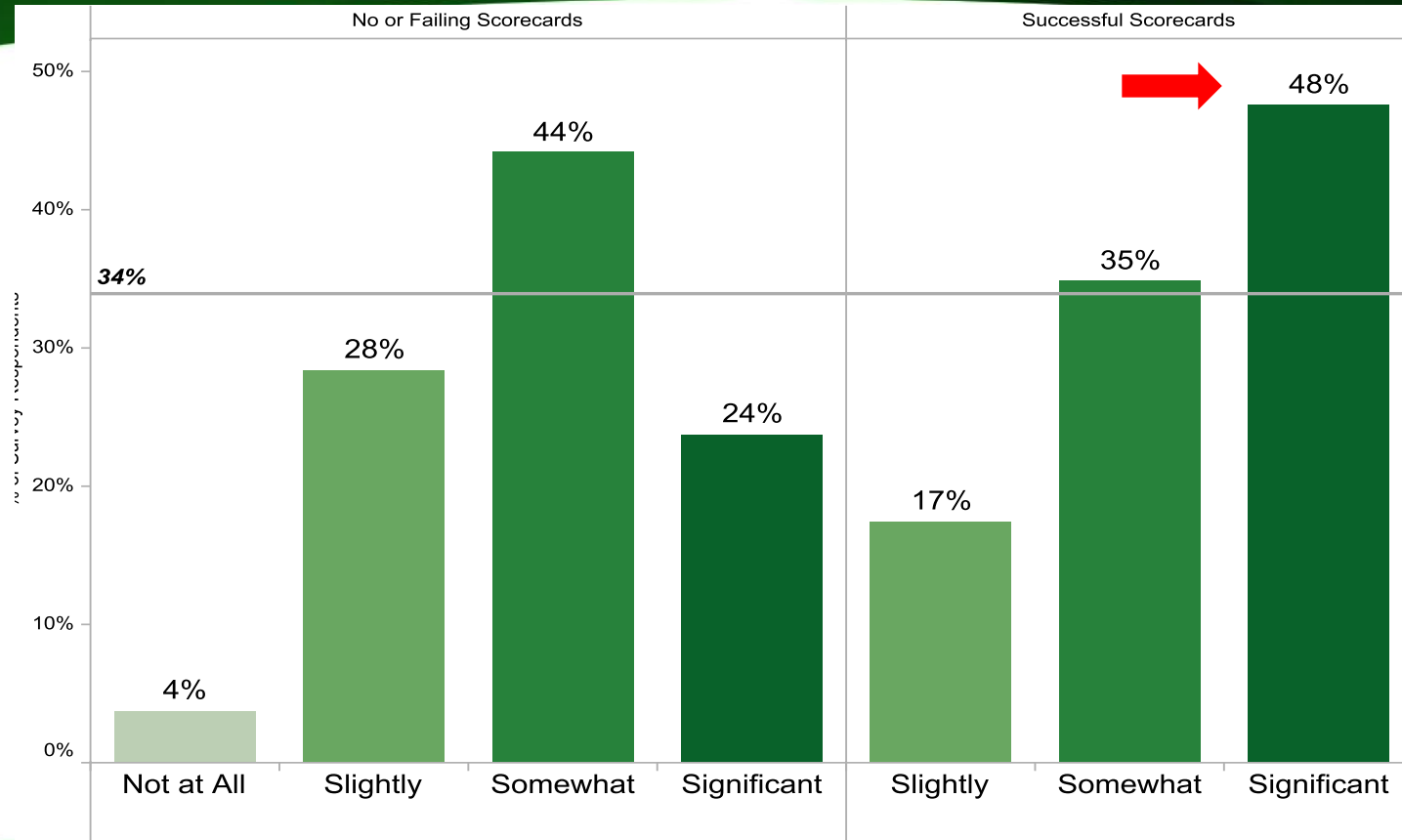


2012 Successful BI Survey, 633 respondents

BI's Business Impact with Dashboards



BI's Business Impact with Scorecards



Key Features to Evaluate in Dashboard Products

- Vendor Strategic Issues
- Dashboard Presentation, Interactivity & Delivery
- Dashboard Design
 - Business user assembled versus IT developed
- Architecture and Administration

Dashboard Layout and Presentation

- Visual appeal
- Multiple panels, layers, or tabs
- Multiple data sources
- Chart types
 - Maps, small multiples or trellis, spark lines, bullet graphs, heat maps, tree maps, tag clouds, network graph
- KPIs
 - Assignment, goals, actual versus target

Dashboard Consumption: Interactivity

- Common:
 - Expand/zoom individual object
 - Filters – global and individual
 - Sort
 - Lasso
 - Drill down or pivot
 - What-if analysis
 - Animation (Flash, AJAX, SilverLight, HTML5)
- Less Common
 - Global search, find, or faceted navigation
 - Change display type (table to chart)
 - Collaborate, discuss, and annotate
 - View detailed data

Dashboard Consumption: Delivery

- Alerts – email or notice on the dashboard
- Export portions of data or images
- Disconnected access
- Other viewing environments
 - PDF, PowerPoint
- Mobile
 - Native iPad, smartphone or browser

Administration

- Maintenance
 - Meta data layer or not
 - Change management
 - Lifecycle management from Dev to Test to Production
 - Re-usable objects and content
- Security
 - Application layer, row-level
- Usage monitoring
 - System monitoring, usage reporting

Architecture

- Real-time or scheduled updates
- Data sources, multiple data sources, and content type
 - URL, RSS feeds, OLAP, relational, flat file
- Operating systems supported
- Load balancing and failover
- Scalability features
 - Caching, connection pooling, compression
- In-Memory and 64-bit

Recommendations



- Make dashboards part of your BI portfolio and delivery
- If previously custom-developed, re-evaluate next generation dashboards
- Incorporate KPIs for alignment, accountability, and bigger business impact
- Design with mobility and the iPad in mind
- Optimize design to facilitate insight and action



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ActuateOne Applications are for Everyone



Traditional BI is for just a few users



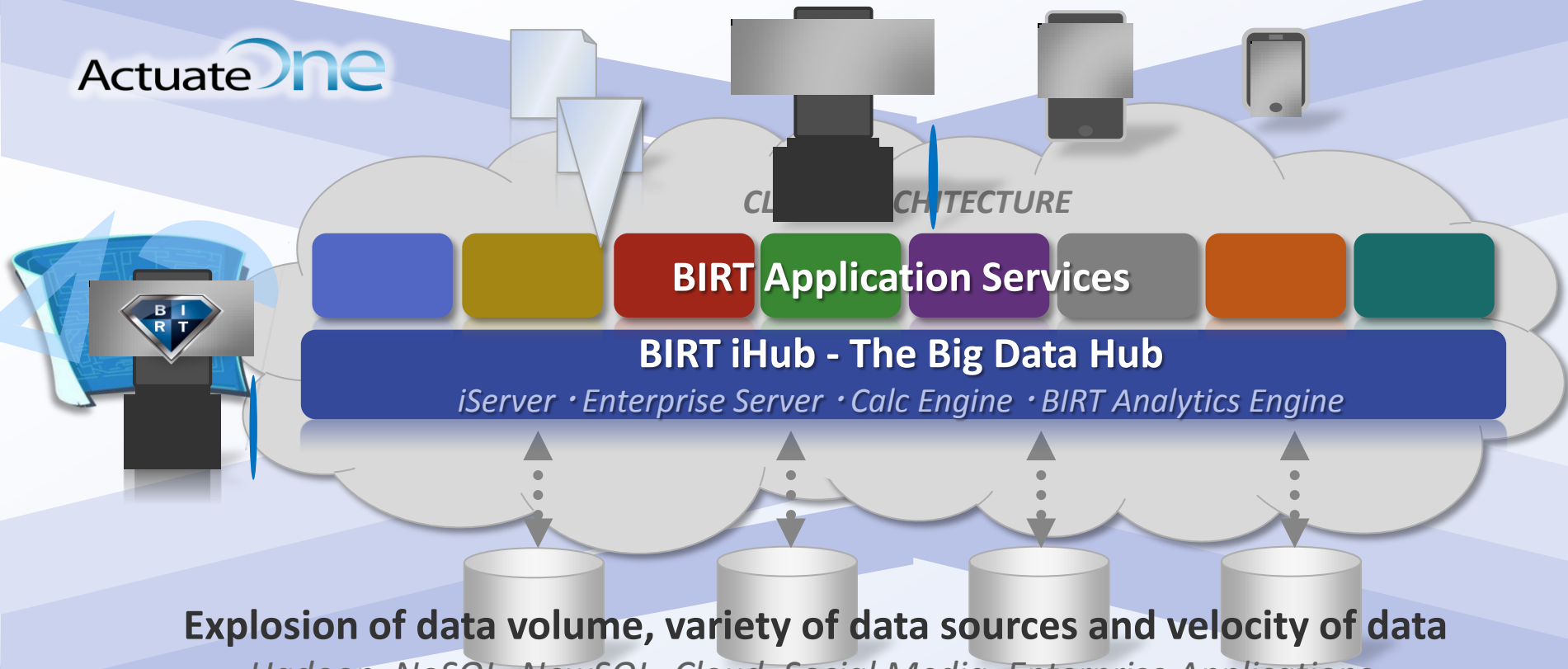
ActuateOne applications deliver
more business and consumer insights to
more people than all BI companies combined

ActuateOne with BIRT iHub – The Big Data Hub

Bridges the Divide Between Big Data and Touch Devices



ActuateOne



Explosion of data volume, variety of data sources and velocity of data

Hadoop, NoSQL, NewSQL, Cloud, Social Media, Enterprise Applications,



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ActuateOne for Performance Analytics

ActuateOne for Performance Analytics

- One solution: Integrated Dashboards, Analytics & Scorecards
- Built on BIRT iHub
- Purpose-built to drive improvements
- Unified user experience
- Cloud and on-premise availability



Discover Operational Insights with Dashboards

Monitor KPIs with stunning interactive visualizations

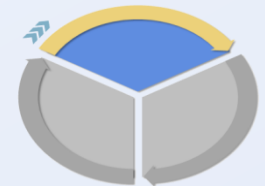


Empowering business users

- Self-service with zero training
- Ease of use
- Customizable

Powered by BIRT iHub

- Access any enterprise data
- Combine visual elements
- Charts, gauges, tables
- Reports and reportlets
- Web pages
- Google Gadgets



In-memory Analytics to Identify the Root Cause

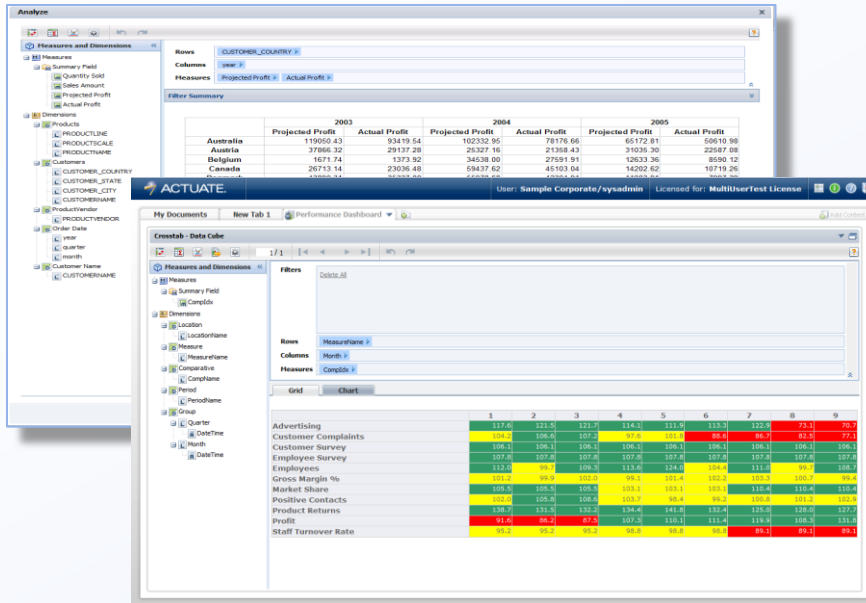
Slice and dice data, integrate directly with Excel

Conduct real-time analysis

- Get detailed insights
- Model what-if scenarios
- Perform analysis in Excel

Powered by BIRT Analytics

- 64-bit in-memory analytics
- Drill down to source
- Patented Excel export

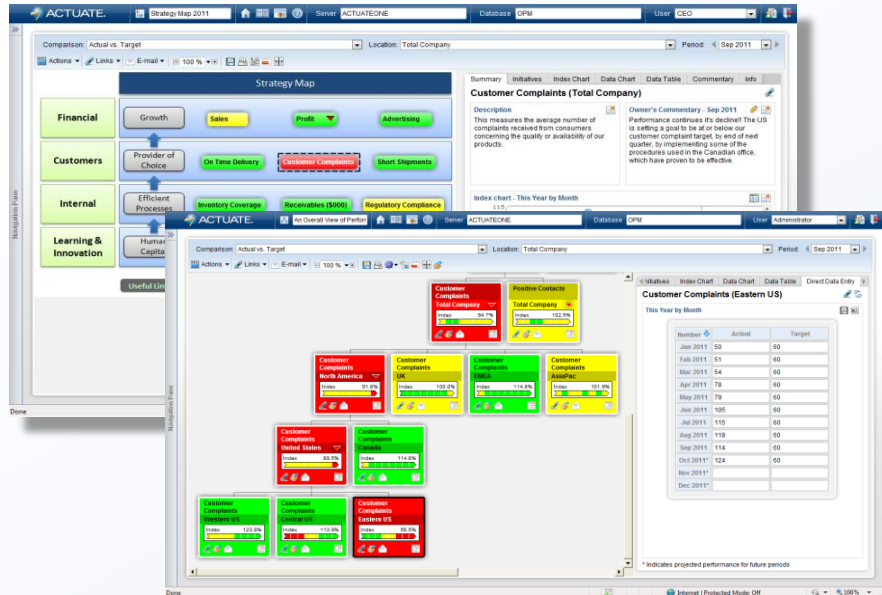


The screenshot displays the ACTUATE software interface, which is designed for real-time data analysis. It features a hierarchical tree view on the left for navigating through various dimensions and measures. The main workspace is divided into several sections: a 'Measures and Dimensions' panel, a 'Filters' section, and a data grid. The data grid shows a comparison of 'Projected Profit' and 'Actual Profit' across three years (2003, 2004, and 2005) for different countries (Australia, Austria, Belgium, Canada). The interface also includes a 'Chart' view and a 'Grid' view, allowing users to visualize the data in different ways. The top of the window shows the user's name, 'Sample Corporate/syadmin', and the license type, 'MultiUserTest License'.

	2003		2004		2005	
	Projected Profit	Actual Profit	Projected Profit	Actual Profit	Projected Profit	Actual Profit
Australia	119050.43	93419.54	102332.95	78176.66	65172.81	50610.98
Austria	37866.32	29137.28	29327.16	21268.43	21036.30	22587.68
Belgium	1671.74	1373.92	34438.90	27591.91	12033.36	8590.12
Canada	26713.14	23036.48	58437.62	46103.64	14292.62	10719.26

Drive Performance Improvement

Scorecards, Maps, Briefing Books, Initiatives

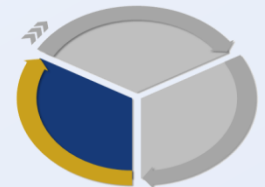


Empower users to act

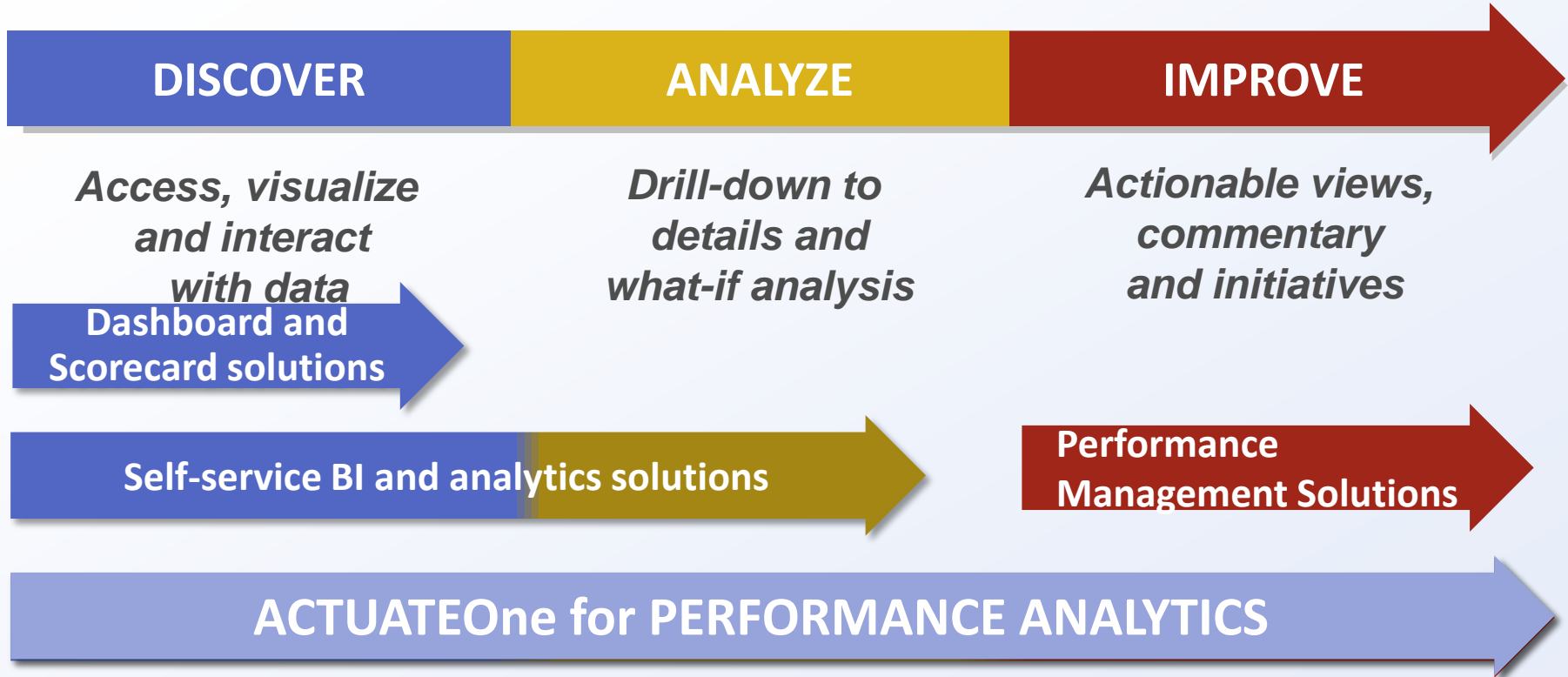
- Identify KPIs
- Define cause and effect
- Set targets and benchmarks
- Define, align and enact actionable initiatives

Powered by 64-bit KPI Engine

- Support for any Performance Management Framework
- Business-driven KPI builder
- Purpose-built visualizations
- Manual data entry



Driving Sustainable Performance Improvements





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Visit [www.actuate.com/Performance Analytics](http://www.actuate.com/Performance%20Analytics)

Questions?



Contacting Speakers

- If you have further questions or comments:

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