Dashboard of the future

Vision

Amstelveen, 1 October 2013
Contents

Introduction

Event 1. Wake-up

Event 2. Management by exception

Event 3. Weekly management meeting

Event 4. Quarterly management meeting

Encore. End of day

Appendix. Overview of functionality
Introduction
In Deloitte’s vision, the performance management system of the future is exception-based, real time and predictive

**Early warning**  
Information is based on leading indicators from both internal and external big data sources. Deviations from plan are put in context.

**Real time**  
Information is available at any moment.

**Slice and dice**  
Information is available for all dimensions and hierarchies and everything can be compared with everything.

**Management by exception**  
Management reporting focuses on actionable exceptions. Personal notifications are based on the enterprise governance model.

**Collaboration**  
Agile decision making through connection to the enterprise social network.

**Predictive**  
Predicting outcome and timing of actions through Intensive use of scenario analysis and what-if analysis.
We present the dashboard of the future in four sample events

In the future performance management is a way of living. Independent from time, location and device the performance management system fulfills all performance information needs. To illustrate this we present four sample future events:

<table>
<thead>
<tr>
<th>Sample future event</th>
<th>Early warning</th>
<th>Real time</th>
<th>Slice and dice</th>
<th>Management by exception</th>
<th>Collaboration</th>
<th>Predictive</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Wake-up</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>2 Management by Exception</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>3 Weekly management meeting</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>4 Quarterly management meeting</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>
Event 1. Wake-up
Manager X wakes up and checks his phone for important notifications. During breakfast he/she further analyses the latest real time performance information.

Manager X wakes up ...

... and analyses latest notifications during breakfast
He/she checks for details on the notification – integrating both internal and external big data sources – and decides that further discussion is necessary.

- By using the touch screen more detailed information is available any moment.
- Internal information (such as leading indicators) and external information (such as news articles) is combined to provide a comprehensive overview of the situation.

Note: See Appendix for explanation of the menu options.
On his/her way to the office Manager X contacts Manager Y and shares his/her screen to facilitate the conversation
Manager Y explains that his/her team is already working on the issue. Both managers agree on the actions to resolve the issue.

An action log is maintained during the call. Actions are automatically set from both ends and stored in the system.

Apparently, the factory in the industrial zone is not the reason of the strike. The strike is related to a different factory in the same industrial zone.

Manager X

Manager Y

Actions Initiated

- Increase Sensitivity
- Set alert if situation escalates
- Set alert if not solved in 12 hours
Event 2. Management by exception
In between two meetings Manager X receives a notification for a class 1 issue. Immediate action is required.

Agenda

- **Strategy Meeting – Project Atlanta**
  - Video Meeting / War Room

- **Prepare for quarterly mgt meeting**
  - Reply on E-mail

- **Weekly management meeting**

- **Quarterly management meeting**
  - Video Meeting

Funnel health is outside of bandwith

Details...
The personal dashboard shows that the ‘Funnel Health’ KPI is outside the acceptable bandwidth

<table>
<thead>
<tr>
<th>Funnel Health</th>
<th>Win rate</th>
<th>Order intake forecast accuracy</th>
<th>Weighted distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>45%</td>
<td>82%</td>
<td>3.2 mio</td>
</tr>
<tr>
<td>Plan: 35</td>
<td>Plan: 43</td>
<td>Plan: 78</td>
<td>Plan: 3.2</td>
</tr>
</tbody>
</table>

Active Filters:  Years = 2017 | Months = Jan – Dec
He/she uses the predictive time slider to assess the impact of the issue on the value drivers.
This shows serious impact on the ‘Volume’ value driver in three months if no serious action is taken
To gain additional understanding Manager X looks for details on the KPI ‘Funnel Health’. This shows the opportunities that are the cause of the issue.

- Step 1. By touching the KPI ‘Funnel Health’ two graphs with more details are displayed.
- Step 2. By touching a specific opportunity in the graph on the right more information regarding this opportunity is provided below the graphs.

Note: See Appendix for explanation of the menu options.
Based on a pre-populated list of contacts Manager X decides to collaborate with the Account Manager to either accelerate or kill the deal.

**Subject:** Acme International

Jim,

Sales funnel bandwidth is unacceptable. Please choose:
1) push the deal e.g. plan private meeting with CEO hospital & me, or
2) kill the deal, too much effort is put in it already

Manager X
Event 3. Weekly management meeting
During the weekly management meeting, the view option is used. Different views with real time information are available.
A heatmap shows the most important KPIs
The heatmap is easily customized by filtering on dimensions and hierarchies...

- Each column represents a dimension.
- The grey scrollbar at the bottom indicates that there are additional columns/dimensions.
- Hierarchies are displayed under each dimension (vertically in the column):
  - At the top the currently applicable hierarchies are shown (multiple selections are possible).
  - At the bottom the other hierarchies are shown.
  - The grey inverted triangle at the bottom of a column indicates that there are additional hierarchies.
...and actuals and plan versions

- Base values (e.g. actuals) are confronted with comparison values (e.g. AOP)
- At the top the currently applicable values are shown (only one selection is possible). At the bottom the other values are shown.
- The grey scrollbar at the bottom indicates that there are additional values that can be selected (e.g. benchmark)
Step 1 of 6. After having touched on an important KPI in the heatmap, the Value Driver Tree is shown as the starting point for drilling down.
Step 2 of 6. Drill-down from ‘Revenue Growth’ to ‘Volume’
Step 3 of 6. Drill-down from ‘Volume’ to ‘Acquire New Customers’
Step 4 of 6. Drill-down from ‘Acquire New Customers’ to ‘Product & Service Innovation’
Step 5 of 6. Drill-down from ‘Product & Service Innovation’ to ‘% products with successor in pipeline’
Step 6 of 6. A detailed context analysis shows internal and external information about the KPI ‘% products with successor in pipeline’
Event 4. Quarterly management meeting
Manager X enters the company war room for the quarterly management meeting with the management team in Asia
The agenda is presented. The second topic is how to return EBITA% for widgets in Asia ‘back to green’

Agenda

• Action points follow up
• **How to return EBITA% back to plan**
• Market update Q1 2017
• Succession plan 2018
• Employee Engagement Survey
• AOB
To analyze opportunities for improving EBITA% various KPIs are used as variables in a what-if analysis.
The what-if analysis indicates that improving on the KPI ‘Sales revenue – absolute’ has the largest positive impact on EBITA%.
Next Manager X discusses geographical expansion in Asia. Myanmar is selected based on GDP growth.
Additional relevant info on Myanmar is displayed, integrating internal and external big data. Manager X decides to invest in a growth Business Case.
Encore. End of day
Manager X goes to bed and checks his/her dashboard one more time. All KPIs are on green. He/she smiles and falls asleep...

...reassured that everything is in control.
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