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Enabling Data Driven Decisions w/ GBS Reporting

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Today's Objectives

Define what the **persona-based approach** is and how it drives insightful dashboards

Highlight various **real-life case studies**

Discuss how these case studies have **enabled data driven decision making**
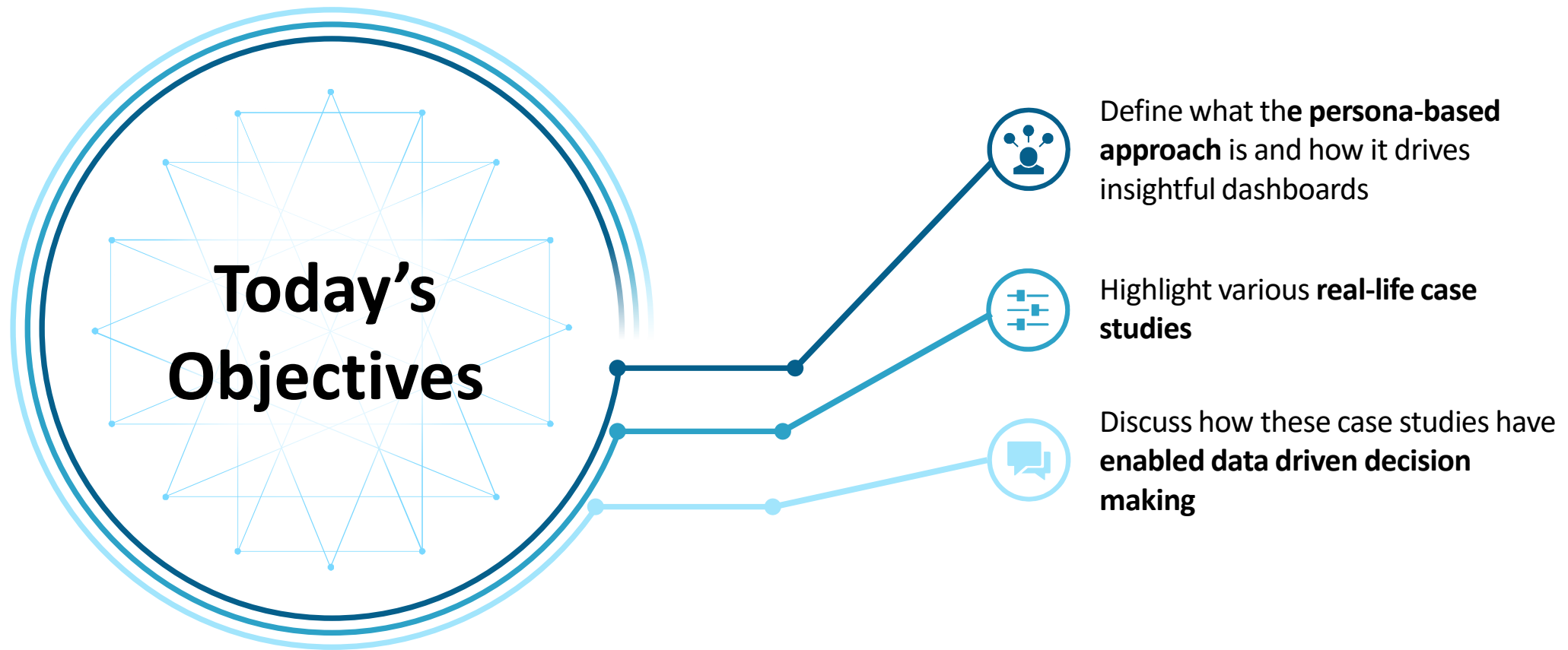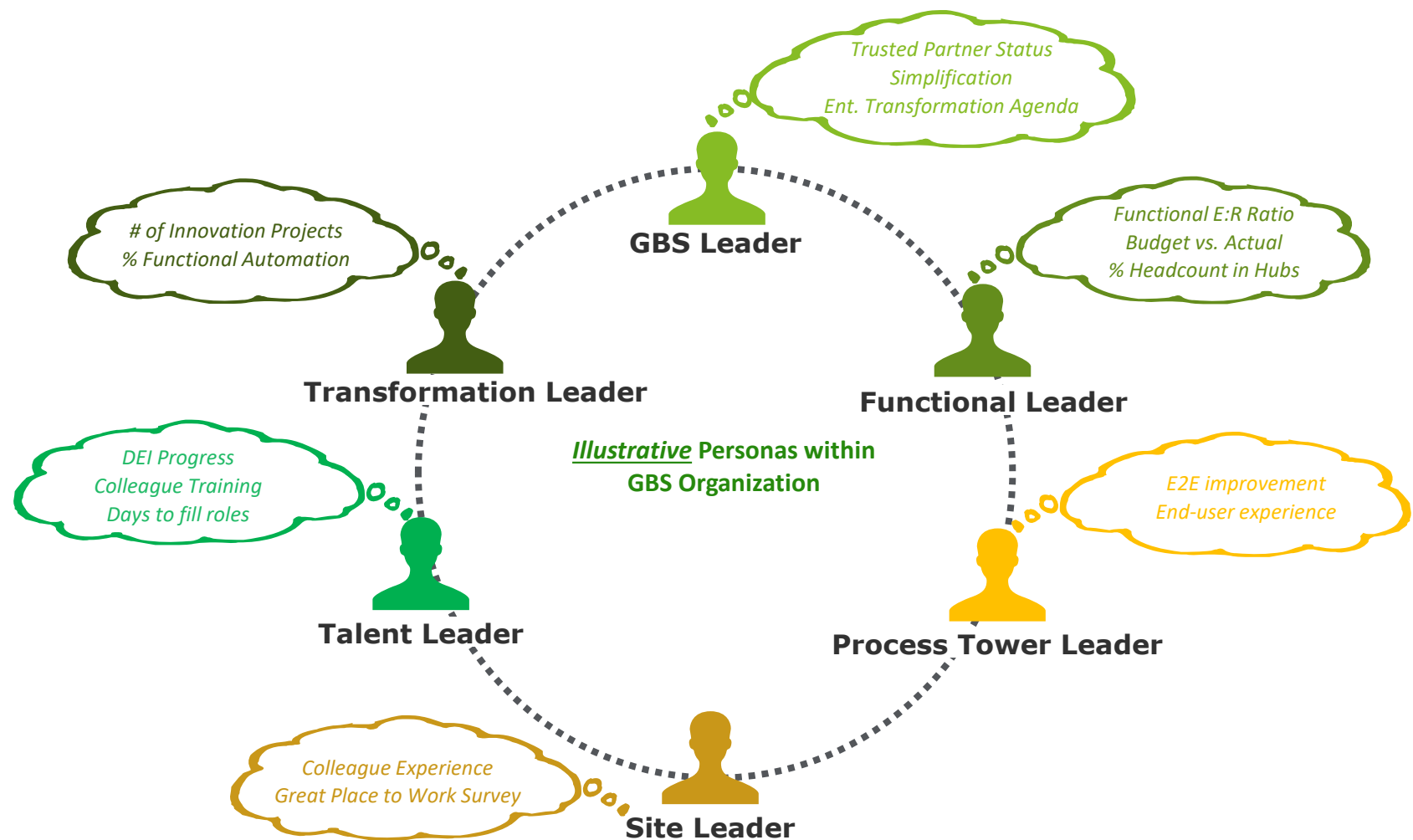
GBS Dashboards

Our Perspective & Approach

Persona-based design *is*

a problem-solving *philosophy*

that focuses on *clusters of users (personas)*

and aligning organization purpose to *their goals,*

value drivers, key decisions, and the insights *that matter*

most to them to create *dashboards*

that are *intuitive* *and deliver* *value.*

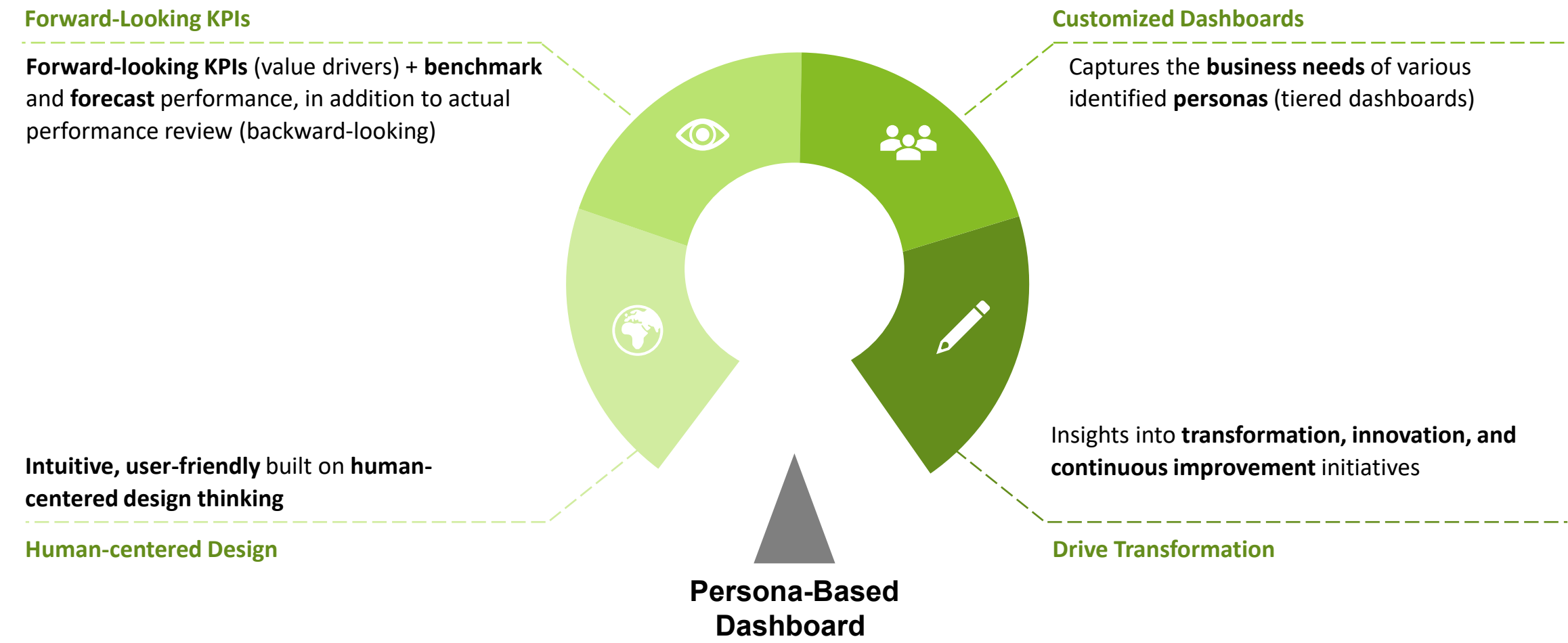# Applying the persona-based design to dashboards

A persona-based designed dashboard focuses on each persona within the GBS organization and helps answer key questions on value creation, value drivers, key decisions and insight generation

Illustrative Personas within GBS Organization

- **GBS Leader** — *Trusted Partner Status / Simplification / Ent. Transformation Agenda*
- **Transformation Leader** — *# of Innovation Projects / % Functional Automation*
- **Functional Leader** — *Functional E:R Ratio / Budget vs. Actual / % Headcount in Hubs*
- **Talent Leader** — *DEI Progress / Colleague Training / Days to fill roles*
- **Process Tower Leader** — *E2E improvement / End-user experience*
- **Site Leader** — *Colleague Experience / Great Place to Work Survey*

1 — Value Creation
"In my specific role, how do I create value for my organization?"

2 — Value Drivers
"What are the key drivers that create that value?"

3 — Key Decisions
"What decisions that impact those drivers do I need to make?"

4 — Insight Generation
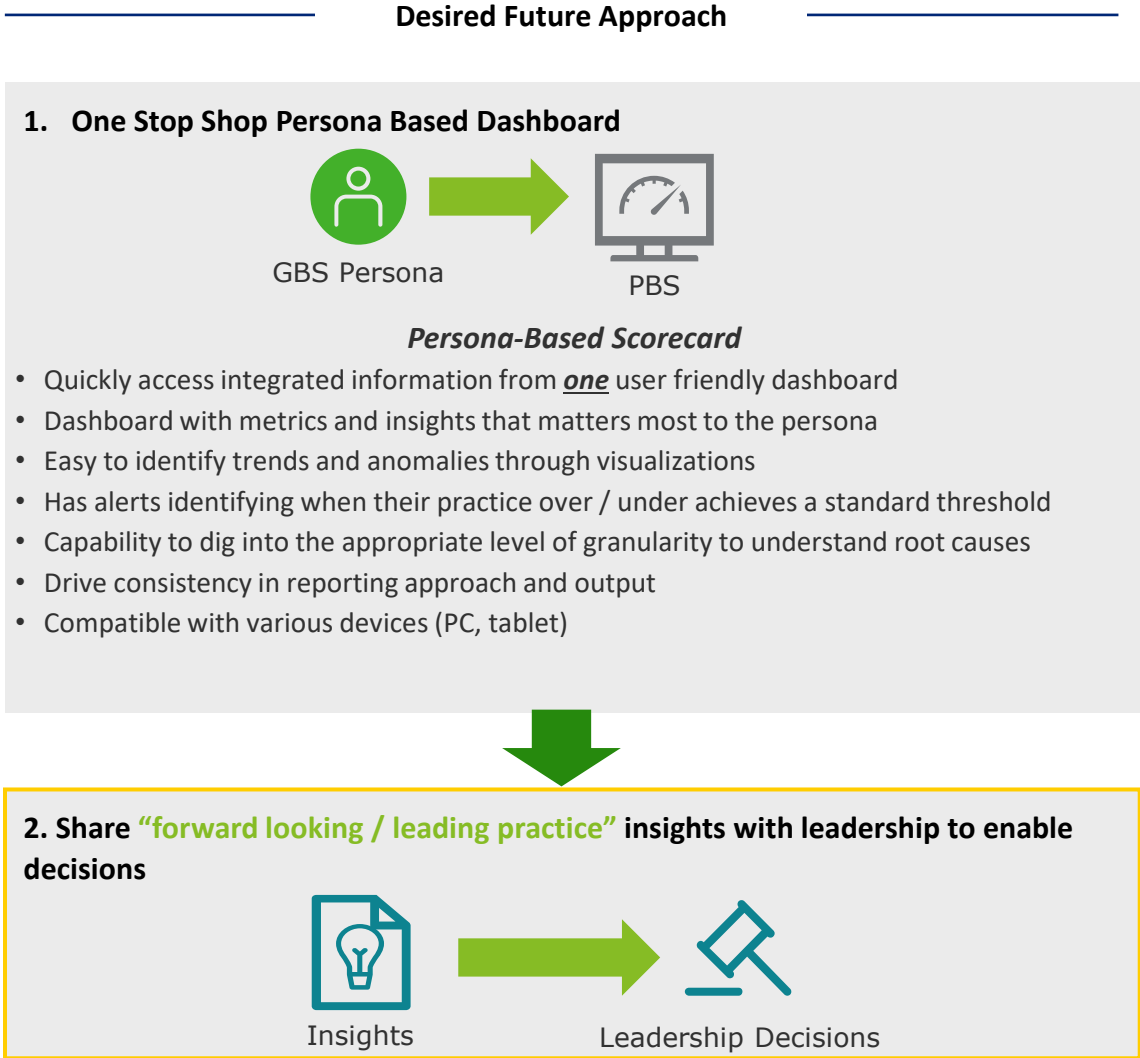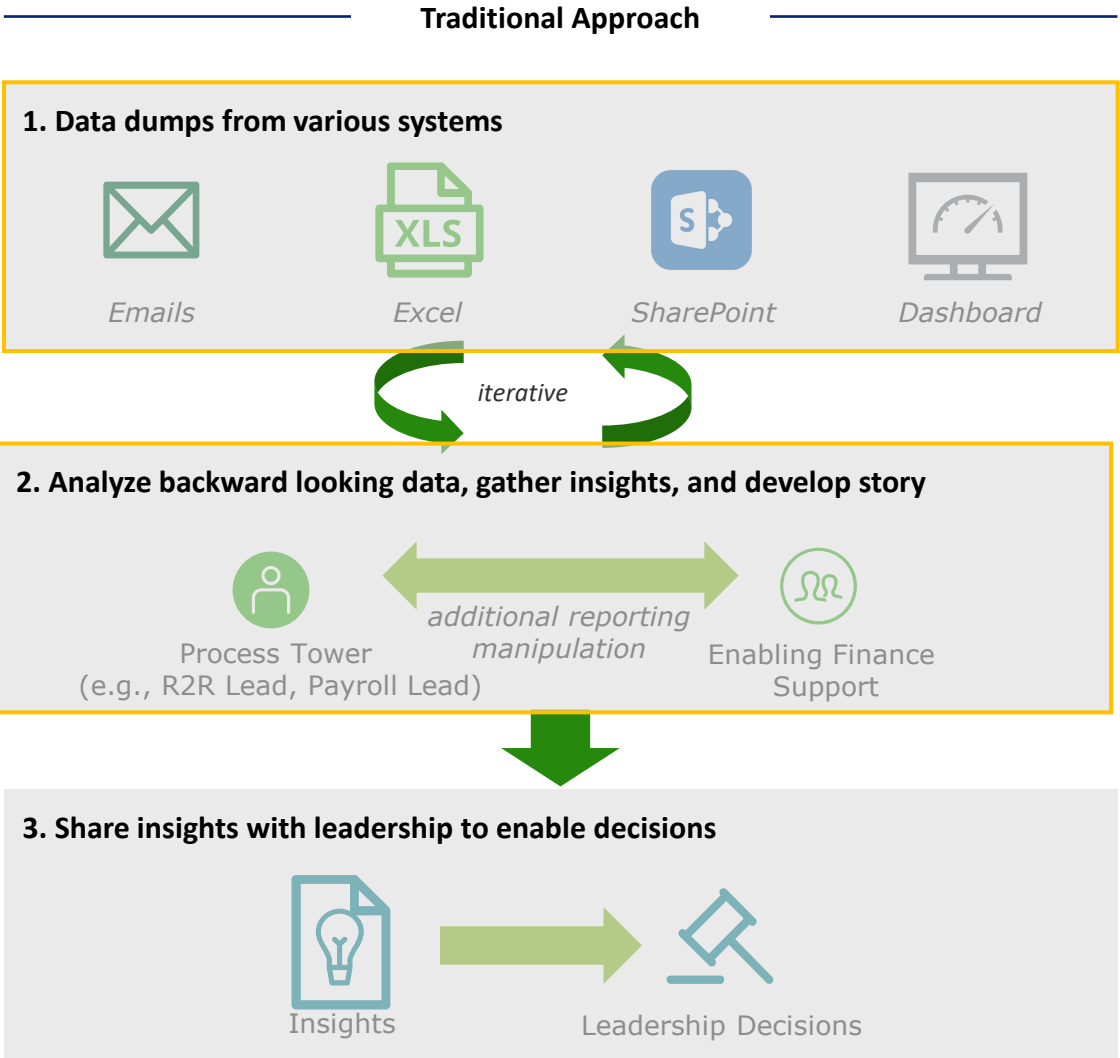*"What information do I need to make those decisions?"*

Persona-Based Dashboards

Leading organizations deploy persona-based dashboards to highlight KPIs and metrics driving insights that are customized, forward looking, and transformation focused all packaged in an intuitive user-friendly layout

Forward-Looking KPIs

Forward-looking KPIs (value drivers) + **benchmark** and **forecast** performance, in addition to actual performance review (backward-looking)

Customized Dashboards

Captures the **business needs** of various identified **personas** (tiered dashboards)

Insights into **transformation, innovation, and continuous improvement** initiatives

Intuitive, user-friendly built on **human-centered design thinking**

Human-centered Design

Drive Transformation

Persona-Based Dashboard

Traditional vs. Persona-based Dashboard

Persona-Based Dashboard (PBD) will provide a customized reporting platform that is relevant to each persona

Traditional Approach

1. Data dumps from various systems

Emails | Excel | SharePoint | Dashboard

iterative

2. Analyze backward looking data, gather insights, and develop story

Process Tower (e.g., R2R Lead, Payroll Lead) ← *additional reporting manipulation* → Enabling Finance Support

3. Share insights with leadership to enable decisions

Insights → Leadership Decisions

Desired Future Approach

1. One Stop Shop Persona Based Dashboard

GBS Persona → PBS

Persona-Based Scorecard

- Quickly access integrated information from **_one_** user friendly dashboard
- Dashboard with metrics and insights that matters most to the persona
- Easy to identify trends and anomalies through visualizations
- Has alerts identifying when their practice over / under achieves a standard threshold
- Capability to dig into the appropriate level of granularity to understand root causes
- Drive consistency in reporting approach and output
- Compatible with various devices (PC, tablet)

2. Share "forward looking / leading practice" insights with leadership to enable decisions

Insights → Leadership Decisions

Key Activity | *Key activity where most time is/will be spent* | Enabling Data-driven Decisions through KPIs and Metrics

A New Way To Visualize Reporting Using The Persona-based Design Thinking

Persona based design thinking provides a structured methodology to help client define the data insights needed from management reporting and align on the right way to visualize it, which serves as the foundation for the data and technology enablement strategy for implementation

1
RESEARCH
Persona Definition

Persona development focuses on the end user and helps drive insights about the user's priorities, goals, and challenges

2
INSIGHTS
Business Questions Framework

Defining business questions helps identify what user needs to make informed decisions. Structuring questions in a framework helps organize information flow according to users' way of thinking
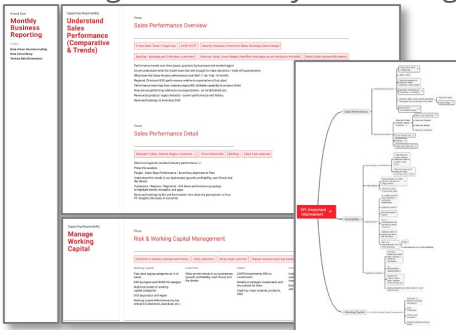
3
IDEAS
Low Fidelity Wireframes

Low-resolution digital mockups that establish the blueprint for the design intent and dashboard functionality, to facilitate speedy iterations based on feedback
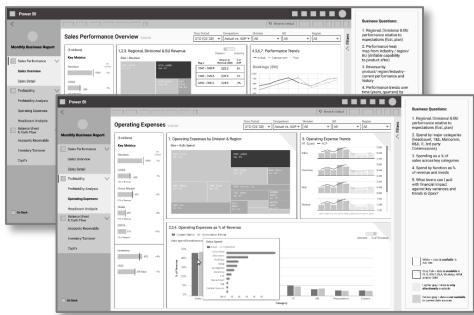
4
PROTOTYPES
High Fidelity Wireframes

Pixel-perfect renderings that convey the dashboard's content and functionality, as well as its final look and feel
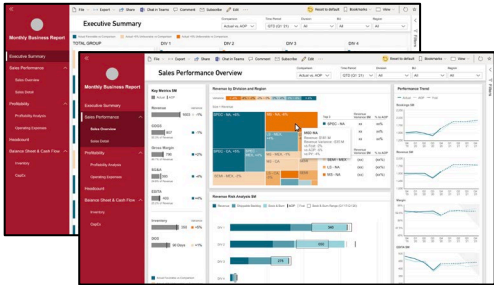
Defining Persona

Defining a persona's goals, responsibilities and challenges helps form a well-rounded understanding of users' needs and priorities, which is fundamental to the dashboard design

Persona Definition Example: Finance Leader (MBR)

1

P e r s o n a   D e f i n i t i o n

- CFO and Divisional VPs tasked with managing the overall financial performance of the business
- Serves as a strategic partner to leadership and business units, providing finance expertise for critical enterprise and business-wide strategic planning and decision-making processes
- Advise and provide strategic guidance on the development of and execute upon Business Strategy
- Conducts analysis and reporting of financial results to business leaders to support strategic decision-making

Goals

"Understand drivers of past financial performance, define call to action, and derive long term focused insights for strategic business making"

- **Clarity around the business decisions** necessary to meet a range of potential outcomes (high and low)
- Visibility into **secular and historical trend of growth, margin, and spend**, and the tracking relative to AOP, Forecast, and PY
- Quality **insights about the risks and opportunities** facing the business to support strategic decision-making
- A clearer understanding of our cost profile, particularly around **Gross Margin composition**

Responsibilities

"Manage the overall financial health of the business, while identifying and addressing emerging risks and opportunities"

- **Understand the trends in our business** (growth, profitability, cash flow) and their corresponding drivers
- Maintain **adequate level of data and information** to evaluate trade-offs and inform strategic business decisions
- **Ensure strategic investments yield the desired outcomes,** with supporting information and data to pivot as necessary
- **Drive insights into rolling forecast (5 quarters)** every month to support inventory planning

Challenges

"Need to instill a culture of using data to generate actionable insights and stories, rather than simply presenting it as is"

- Culture of the company that is very **short-term focused in nature**
- Reporting and insight generating **capabilities are very manual**
- Lack of necessary **people, processes, and skillsets** to deliver on leadership agenda
- **Undefined process and governance model** in place to drive necessary improvements
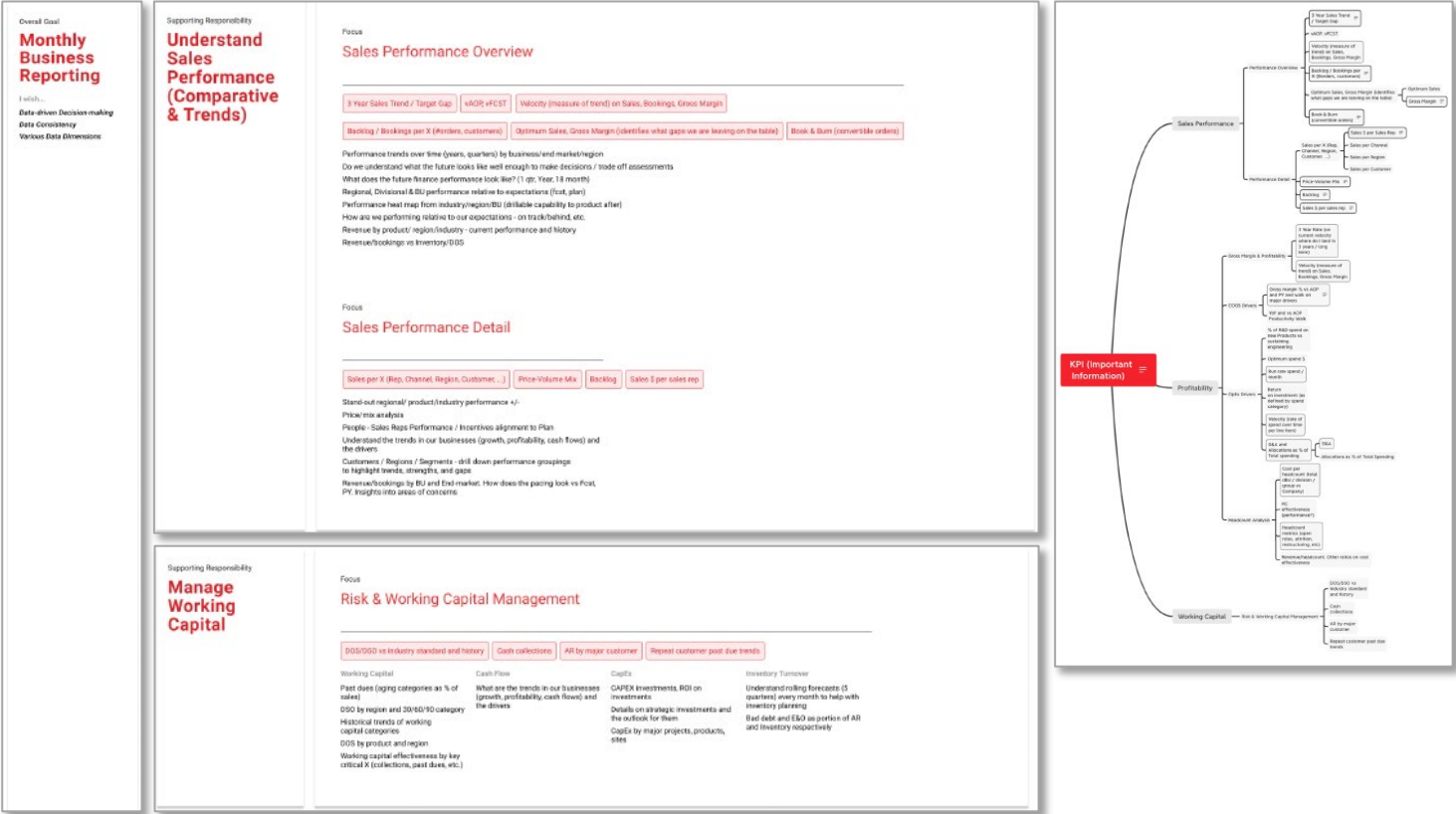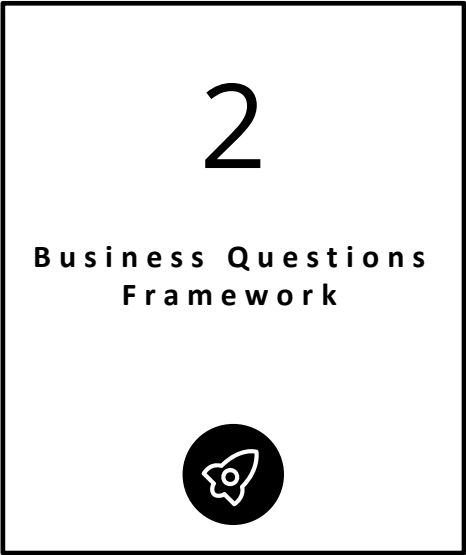
Developing Business Question Framework and KPI Business Definition

Business questions and KPIs will be collected from working sessions, and afterwards synthesized into a persona-driven framework, structuring the most important business questions and KPIs into a logical flow that acts as an initial roadmap for the dashboard wireframes

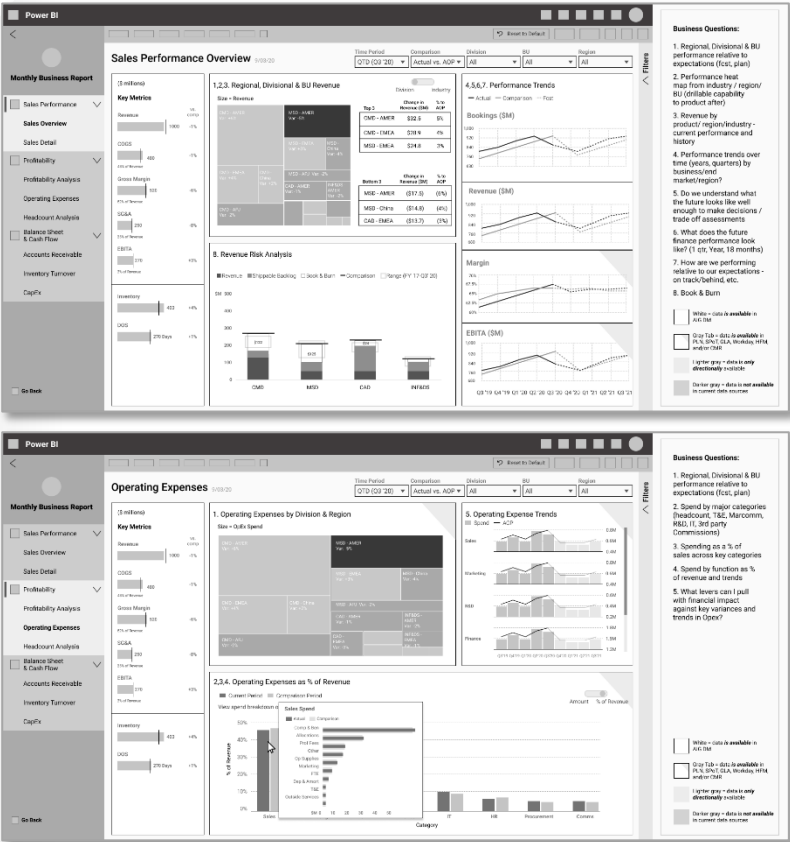**Business Question Framework & KPI Business Definition**

Sketching Low Fidelity Wireframes

With the persona finalized and business question framework defined, initial drafts of the dashboard are developed in low resolution to help focus the user's feedback on the content and design intent (not on the colors) promoting faster iterations


Considerations

- Excluding color at this stage to focus on driving alignment on design intent

- Responding to the goals and needs of the persona

- Visualizing data insights according to the structure of business questions and information architecture

- Agile approach and rapid iterations on low fidelity wireframes based on feedback

Prototyping High Fidelity Wireframes

After finalizing low-fidelity samples, enhance the functionality and visualize ideas of the dashboard utilizing real-world data, pressure test these versions with additional stakeholders and customers, and refine the dashboard into a high-fidelity, interactive prototype

High-Fidelity Prototypes

4

P R O T O T Y P E S
H i g h t   F i d e l i t y
W i r e f r a m e s

Considerations
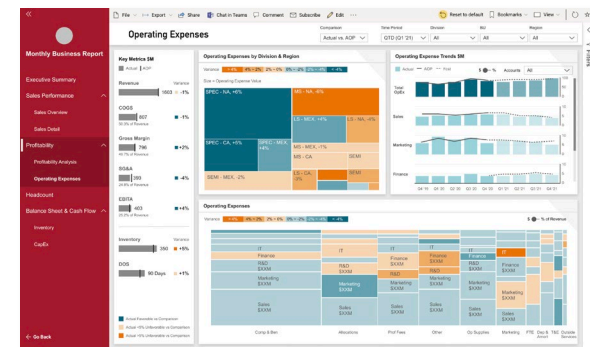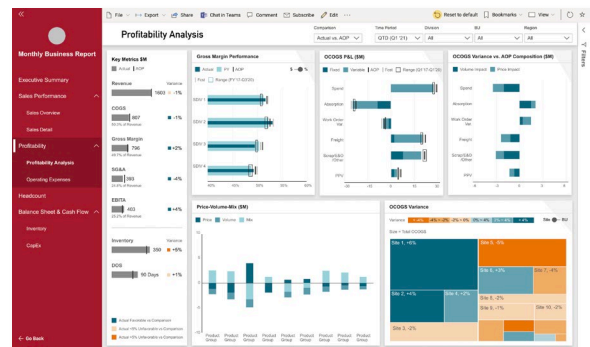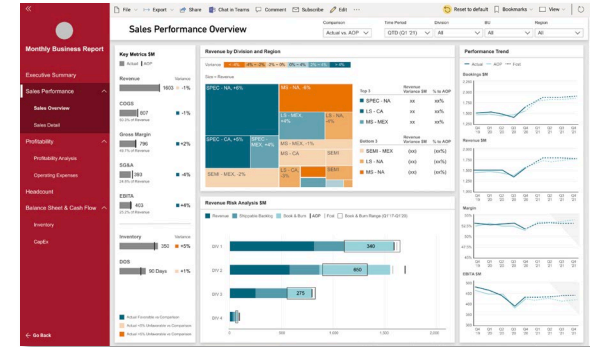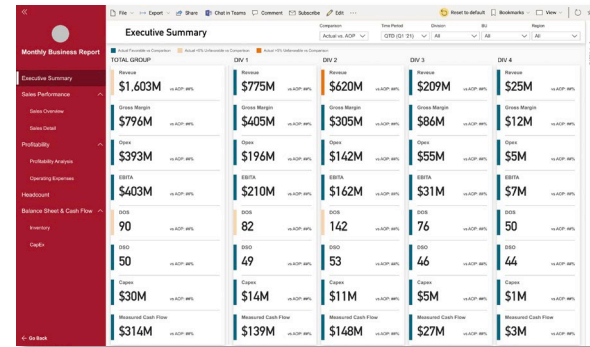
- Add color pattern
- Include interactive functionalities
- Use real world or close to reality data
- Storyboard insights visualized to drive alignment from senior management

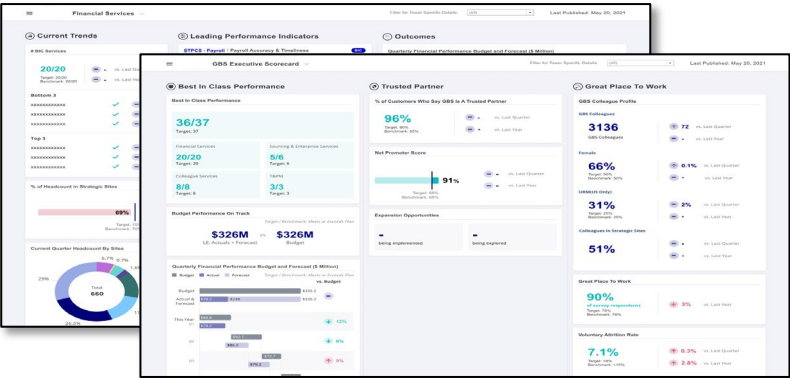# GBS Dashboards

Real-life Case Studies

Our Perspectives Are Built from Real-Life Case Studies

We have done this work for leading organizations, including doing this transformation on ourselves

GBS Dashboard 2.0

Global Biopharma Company

Tiered approach to drive insights and decisions across all levels of leadership within GBS org.

GBS Expansion to EMEA

Global Life Sciences
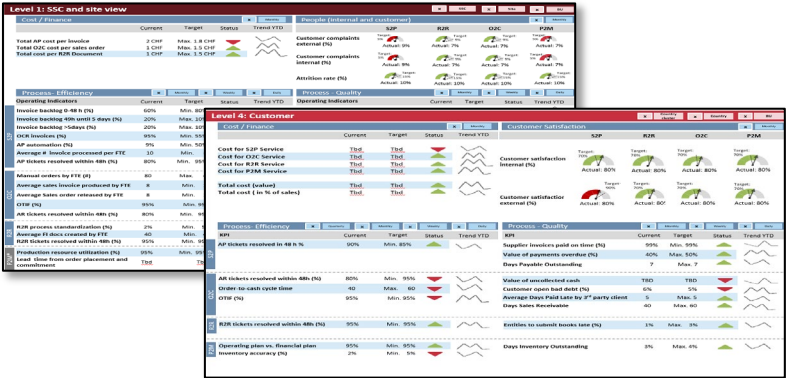
Simplified GBS technology and established governance to facilitate long term GBS operations

Digital Finance

Global Biopharma Company

Faster time from summary level KPIs to detailed bank account data

Persona-based Reporting (PBR)

Deloitte US

Provided leadership consolidated view of projected pursuit revenue with performance targets

Our Perspectives: GBS Dashboard 2.0 Example (1 of 3)

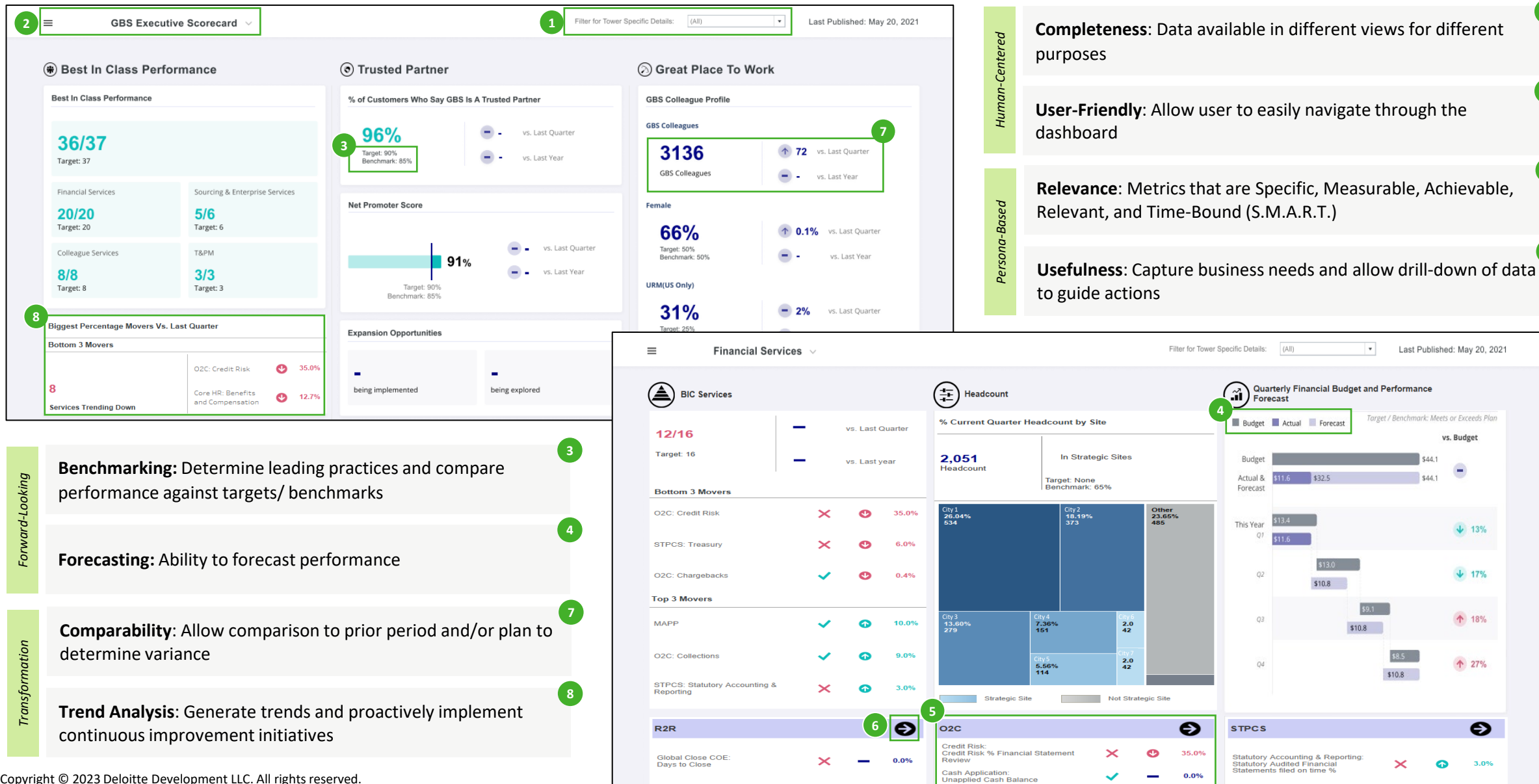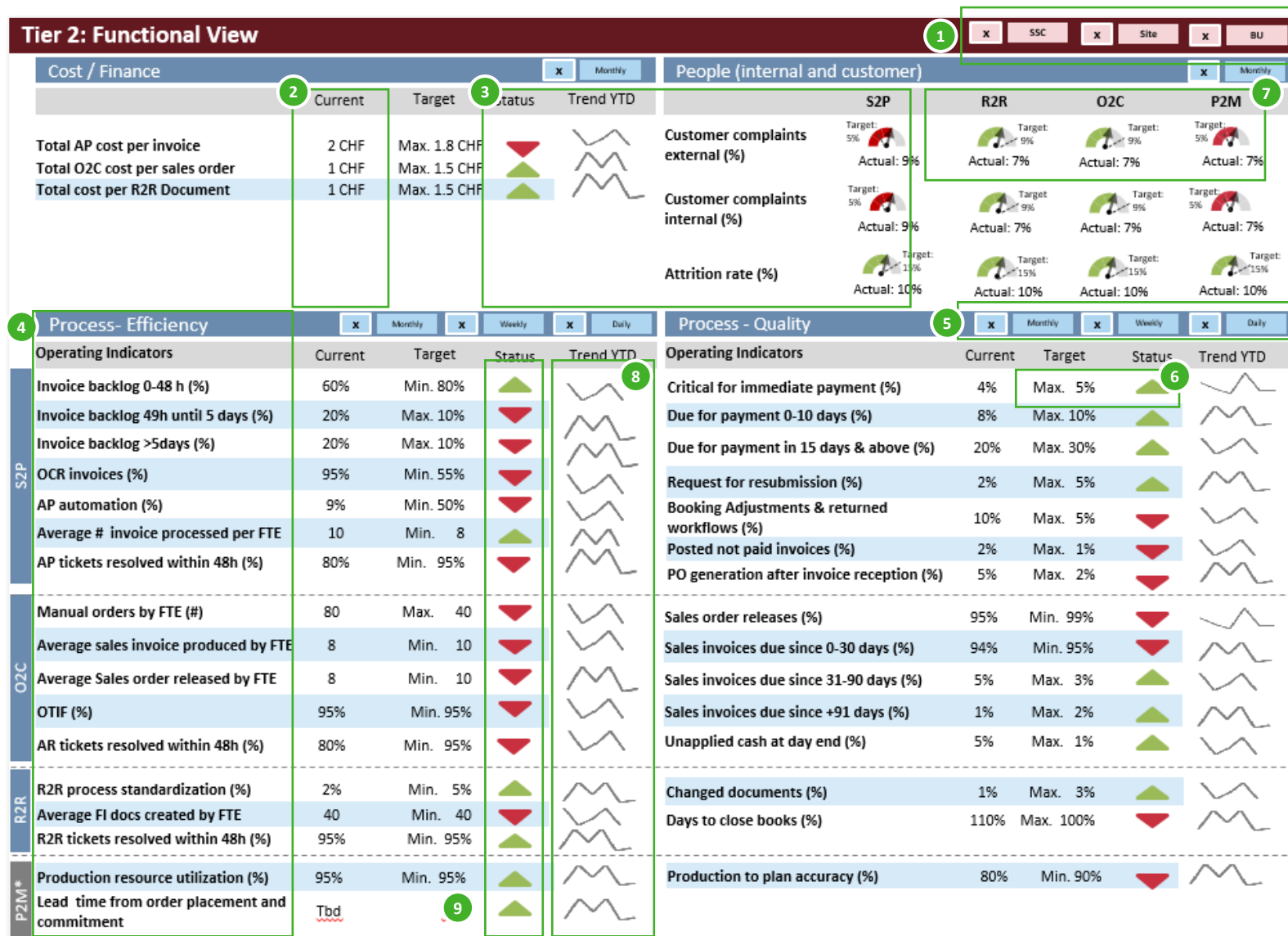A refreshed persona-based dashboard that enables data-driven decisions across all levels of leadership within the GBS

Dashboard 1 — GBS Executive Scorecard

GBS Executive Scorecard ⌄

Filter for Tower Specific Details: (All) ▾   Last Published: May 20, 2021

⊛ Best In Class Performance

Best In Class Performance

36/37
Target: 37

Financial Services	Sourcing & Enterprise Services
20/20	5/6
Target: 20	Target: 6

Colleague Services	T&PM
8/8	3/3
Target: 8	Target: 3

Biggest Percentage Movers Vs. Last Quarter

Bottom 3 Movers

8

| | O2C: Credit Risk | ▼ | 35.0% |
| | Core HR: Benefits and Compensation | ▼ | 12.7% |

Services Trending Down

◎ Trusted Partner

% of Customers Who Say GBS Is A Trusted Partner

96%
Target: 90%
Benchmark: 85%

— vs. Last Quarter
— vs. Last Year

Net Promoter Score

91%
Target: 90%
Benchmark: 85%

— vs. Last Quarter
— vs. Last Year

Expansion Opportunities

— being implemented   — being explored

⊙ Great Place To Work

GBS Colleague Profile

GBS Colleagues

3136
GBS Colleagues

↑ 72 vs. Last Quarter
— vs. Last Year

Female

66%
Target: 50%
Benchmark: 50%

↑ 0.1% vs. Last Quarter
— vs. Last Year

URM(US Only)

31%
Target: 25%

— 2% vs. Last Quarter

Dashboard 2 — Financial Services

Financial Services ⌄

Filter for Tower Specific Details: (All) ▾   Last Published: May 20, 2021

⬢ BIC Services

12/16
Target: 16

— vs. Last Quarter
— vs. Last year

Bottom 3 Movers

O2C: Credit Risk	✗	▼	35.0%
STPCS: Treasury	✗	▼	6.0%
O2C: Chargebacks	✓	▼	0.4%

Top 3 Movers

MAPP	✓	▲	10.0%
O2C: Collections	✓	▲	9.0%
STPCS: Statutory Accounting & Reporting	✗	▲	3.0%

R2R →

| Global Close COE: Days to Close | ✗ | — | 0.0% |

⊟ Headcount

% Current Quarter Headcount by Site

2,051
Headcount

In Strategic Sites
Target: None
Benchmark: 65%

City 1 — 26.04% — 534
City 2 — 18.19% — 373
Other — 23.65% — 485
City 3 — 13.60% — 279
City 4 — 7.36% — 151
City 5 — 5.56% — 114
City 6 — 2.0 — 42
City 7 — 2.0 — 42

Strategic Site   Not Strategic Site

O2C →

| Credit Risk: Credit Risk % Financial Statement Review | ✗ | ▼ | 35.0% |
| Cash Application: Unapplied Cash Balance | ✓ | — | 0.0% |

⬈ Quarterly Financial Budget and Performance Forecast

■ Budget ■ Actual ■ Forecast   Target / Benchmark: Meets or Exceeds Plan

vs. Budget

Budget — $44.1
Actual & Forecast — $11.6 | $32.5 — $44.1   —

This Year
Q1 — $13.4 | $11.6   ↓ 13%
Q2 — $13.0 | $10.8   ↓ 17%
Q3 — $9.1 | $10.8   ↑ 18%
Q4 — $8.5 | $10.8   ↑ 27%

STPCS →

| Statutory Accounting & Reporting: Statutory Audited Financial Statements filed on time % | ✗ | ▲ | 3.0% |

Design Principles

Human-Centered

1. **Completeness**: Data available in different views for different purposes

2. **User-Friendly**: Allow user to easily navigate through the dashboard

Persona-Based

5. **Relevance**: Metrics that are Specific, Measurable, Achievable, Relevant, and Time-Bound (S.M.A.R.T.)

6. **Usefulness**: Capture business needs and allow drill-down of data to guide actions

Forward-Looking

3. **Benchmarking:** Determine leading practices and compare performance against targets/ benchmarks

4. **Forecasting:** Ability to forecast performance

Transformation

7. **Comparability**: Allow comparison to prior period and/or plan to determine variance

8. **Trend Analysis**: Generate trends and proactively implement continuous improvement initiatives

Our Perspectives: Functional Scorecard Example (2 of 3)

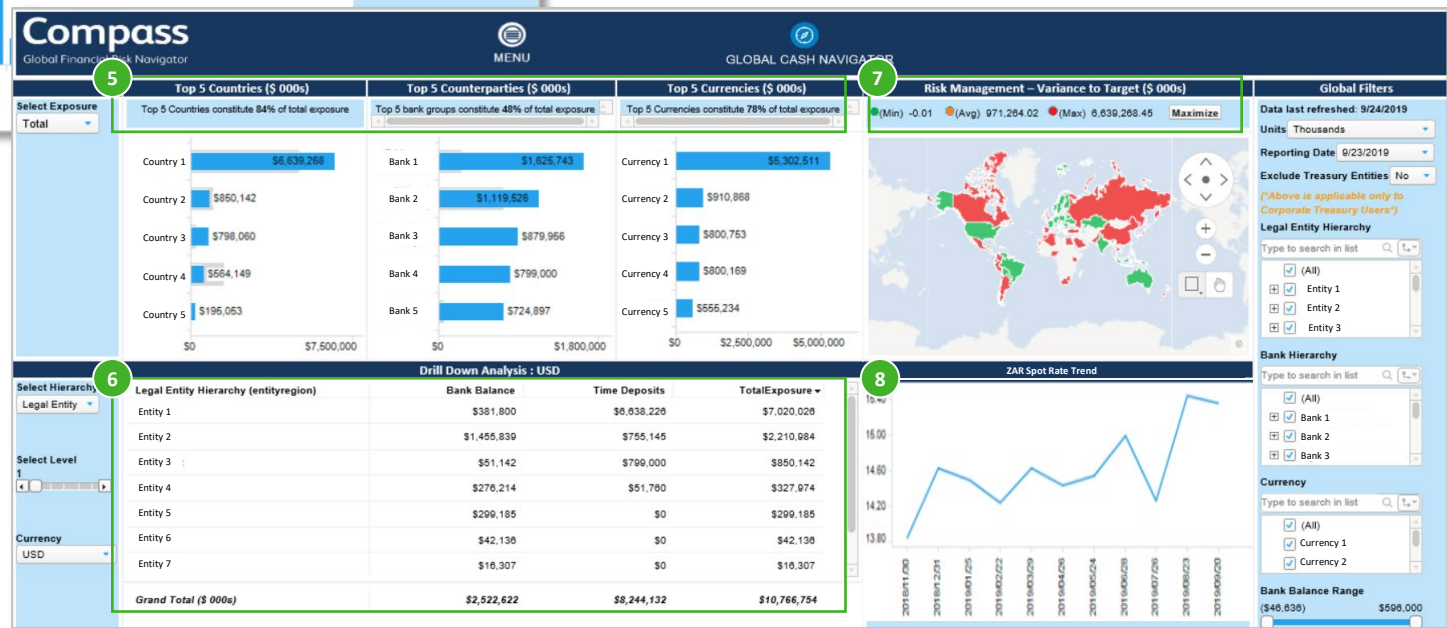Simplified GBS technology and established governance to facilitate long term GBS operations

Our Perspectives: Executive Scorecard Example (3 of 3)

Faster time from summary level KPIs to detailed bank account data

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