Dashboards & Data Visualization

Harnessing Data to Drive Business Decisions

WIPFLI

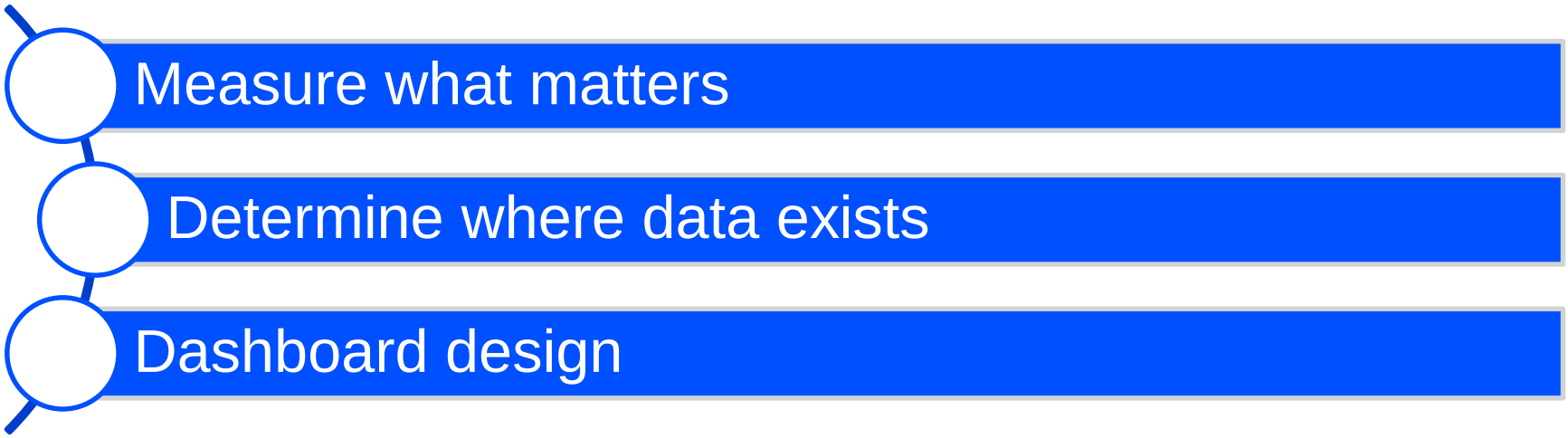
Presenters

Matt Gelb
Principal
Green Bay, WI

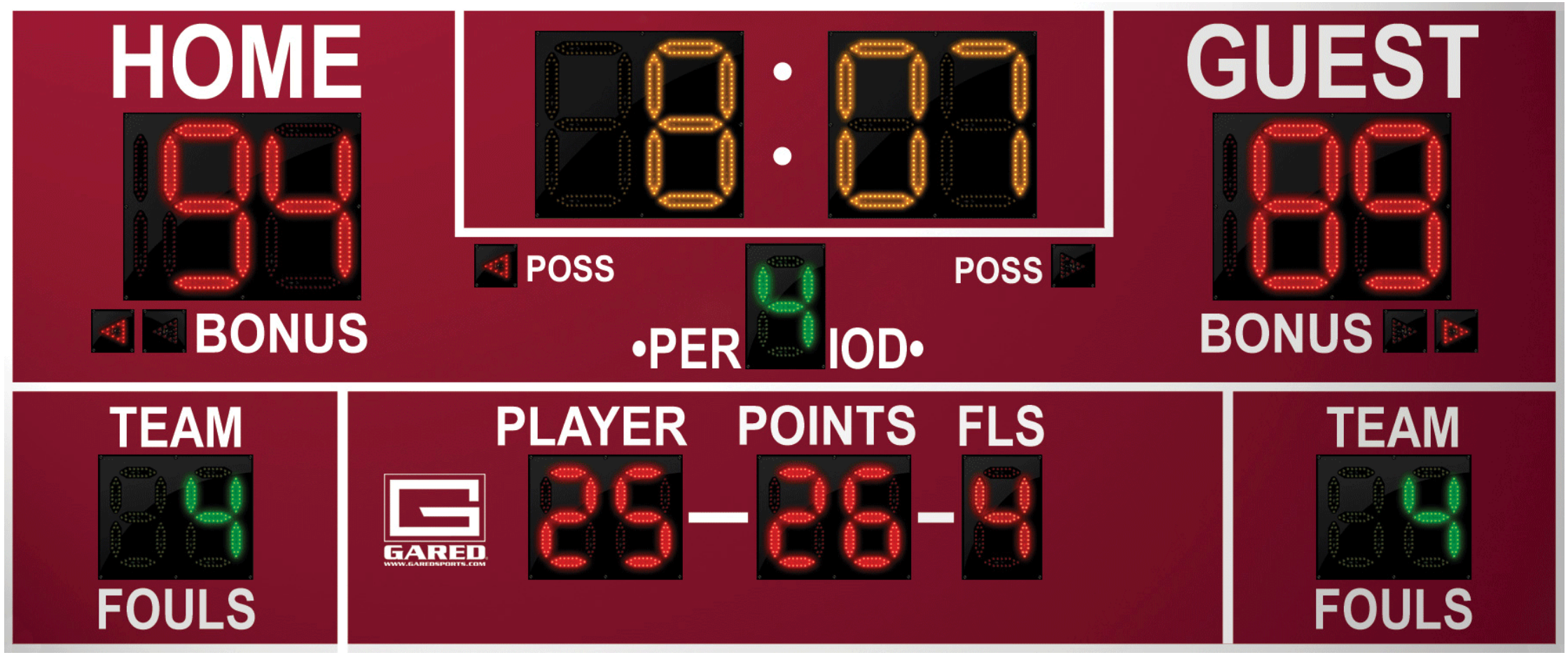
Brett Polglaze
Senior Manager
Madison, WI

Learning Objectives & Agenda

Now more than ever before clear and concise data is a must for making truly impactful decisions. In the past it was possible to wait weeks after the end of a month to understand financial performance, but in the current business environment executives need to make decisions in hours, not weeks. In this session, you will learn how to identify the key metrics for your organization, how to connect disparate information systems together, and how to design dashboards that make it easy to get at this critically important information.



Measure what matters!



https://www.garedsports.com/products/alphatectm-12-x-5-gymnasium-scoreboard

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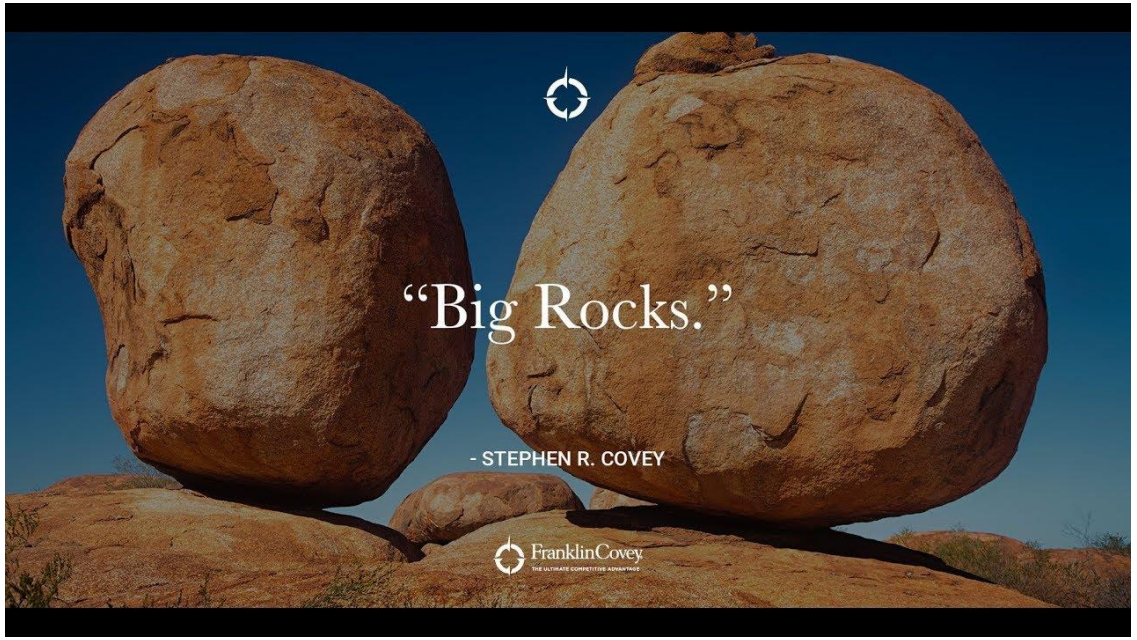
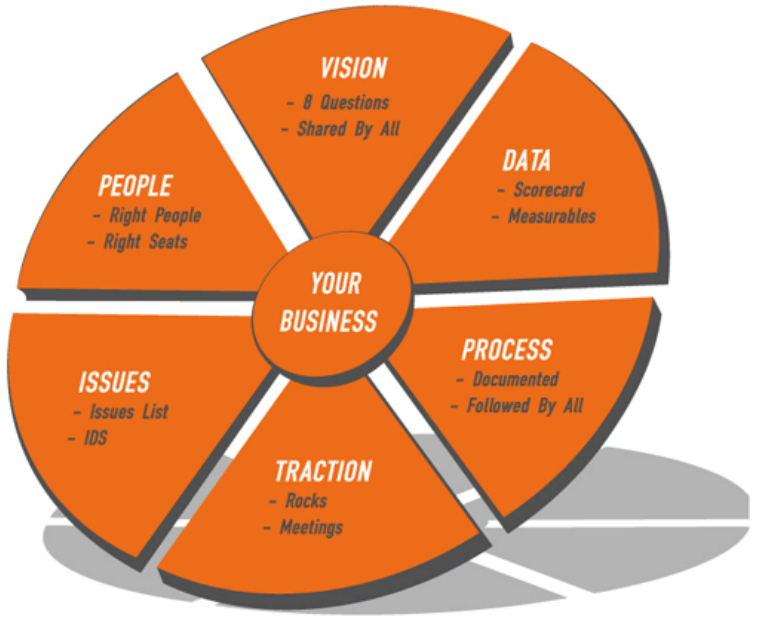
Measure what matters!

https://www.tesla.com/modelx

https://allkpis.com/key_performance_indicators



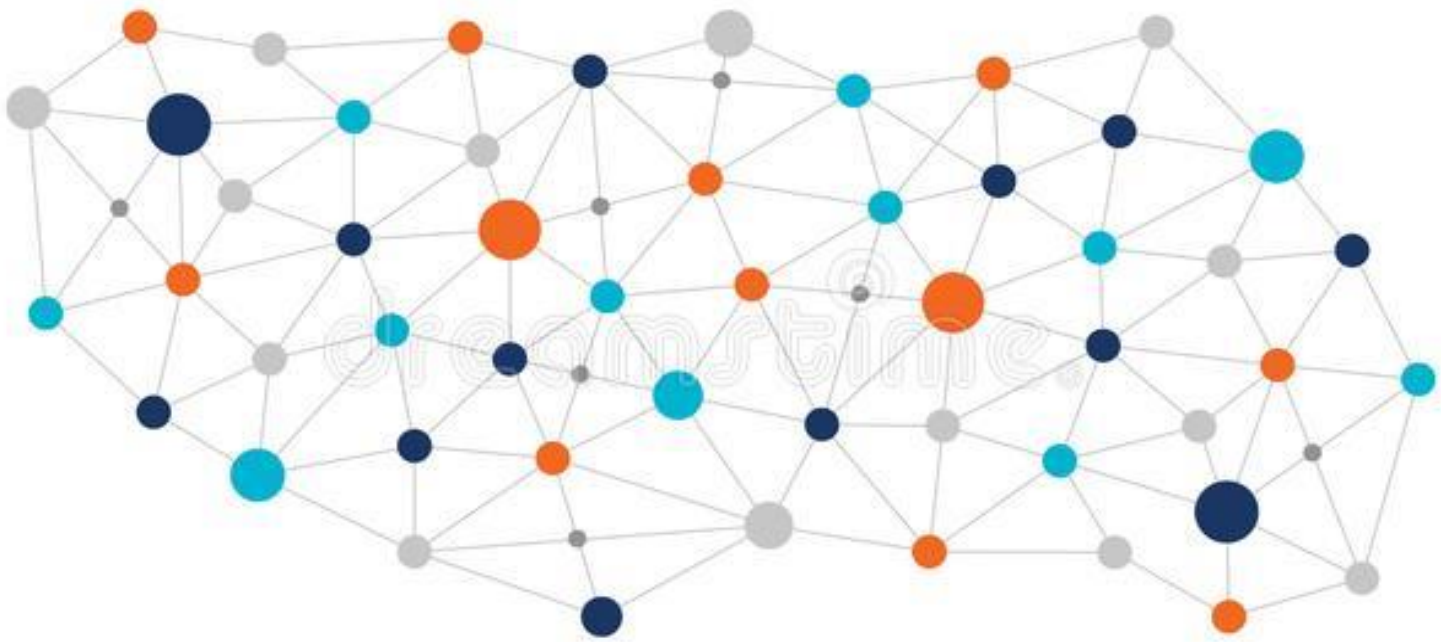


OKR from “Measure What Matters” by John Doerr, Big Rocks from “Franklin Covey”, EOS Model from “EOS Worldwide” https://www.eosworldwide.com/eos-model

Where is my data?

https://www.linkedin.com/pulse/collecting-information-what-salim-al-flaiti-phd-ghrp/

Connect the dots

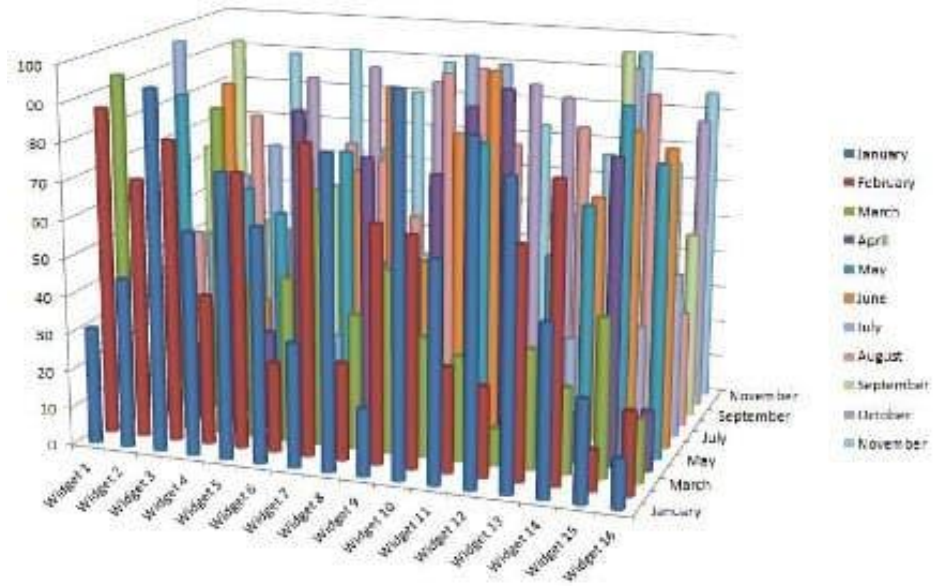


https://www.dreamstime.com/linked-open-data-concept-approach-to-publishing-sharing-web-one-core-pillars-semantic-also-known-as-image142993726

Dashboard Design

http://plananddesigninc.com/services/interior-design-architectural-design/

Quick, easy, concise



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Task vs Decisions

- Task orientation – behaves like an assembly line
  - Queues up the next “to do”

- Decision orientation – surfaces meaningful data to act on
  - Helps to understand “what is happening”

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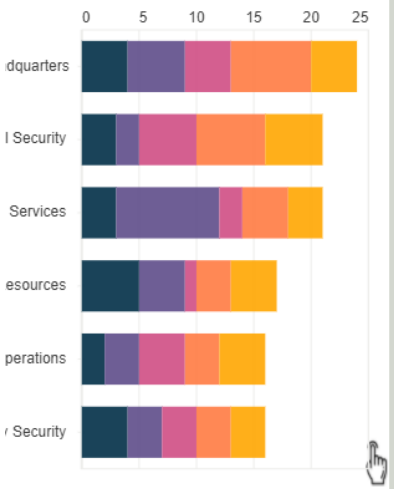
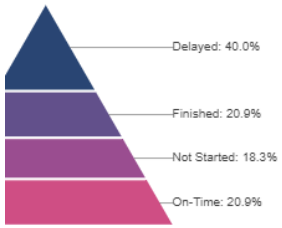
Projects by Department

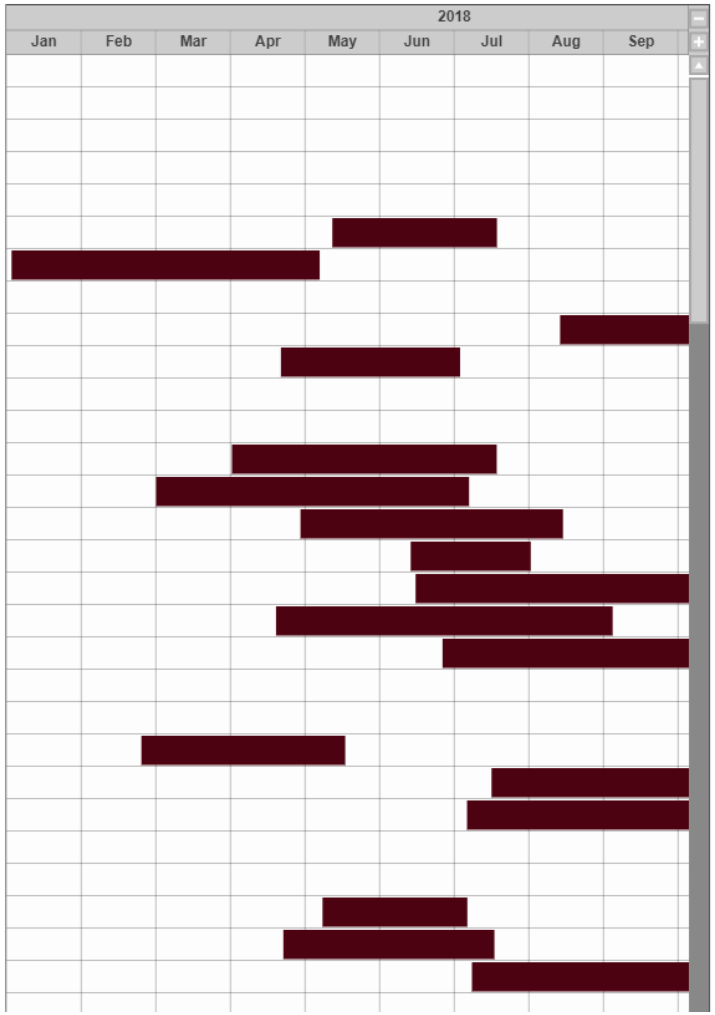


Project by Status - ALL



ALL Projects for ALL Department(s)

Name	Start Date
Project - Laguna	17-Oct-18
Project - Elmer	01-Dec-19
Project - Moonshine	19-Jan-19
Project - Hydra	21-Oct-19
Project - Omega	29-Nov-19
Project - Yosemite	14-May-18
Project - Nautilus	03-Jan-18
Project - Cherrystone	09-Jan-19
Project - Firestorm	15-Aug-18
Project - Orion	23-Apr-18
Project - Quadro	31-Dec-19
Project - Mr. Coffee	31-Oct-19
Project - Aurora	03-Apr-18
Project - Odyssey	03-Mar-18
Project - Honeycomb	01-May-18
Project - Excalibur	15-Jun-18
Project - Barney	17-Jun-18
Project - Einstein	21-Apr-18
Project - Jaguar	28-Jun-18
Project - Bullwinkle	29-Jul-19
Project - Sunergy	25-Oct-18
Project - Sirius	25-Feb-18
Project - Wombat	18-Jul-18
Project - Jiro	08-Jul-18
Project - Cascade	28-Jul-19
Project - Irongate	29-Dec-18
Project - Duraflame	10-May-18
Project - Revolution	24-Apr-18
Project - Kryptonite	10-Jul-18
Project - Sputnik	04-Apr-19



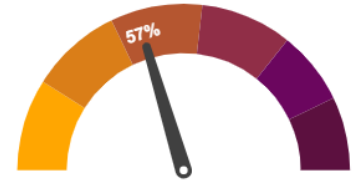
Project - Nautilus

COMPLETED	COMPLETED	IN PROGRESS	WAITING
PLANNING	DESIGN	67% DEVELOPMENT	TESTING

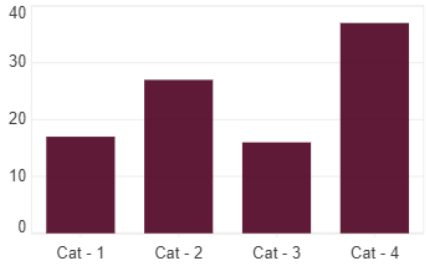
Project Details

Department: Community Security
Manager: Mason Rogers
Program: Smart City
Delay Reason: nomen quoque fecit. nomen Sed fecit. eudis quis manifestum non quorum e in gravum eggredior. et quoque quad Tam

Project Completion Status



Workload in Hrs



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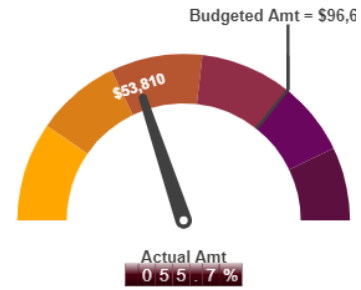

POWERED BY iDashboards

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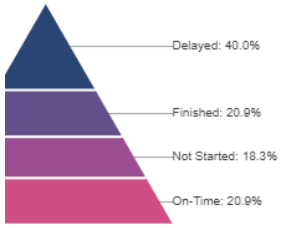

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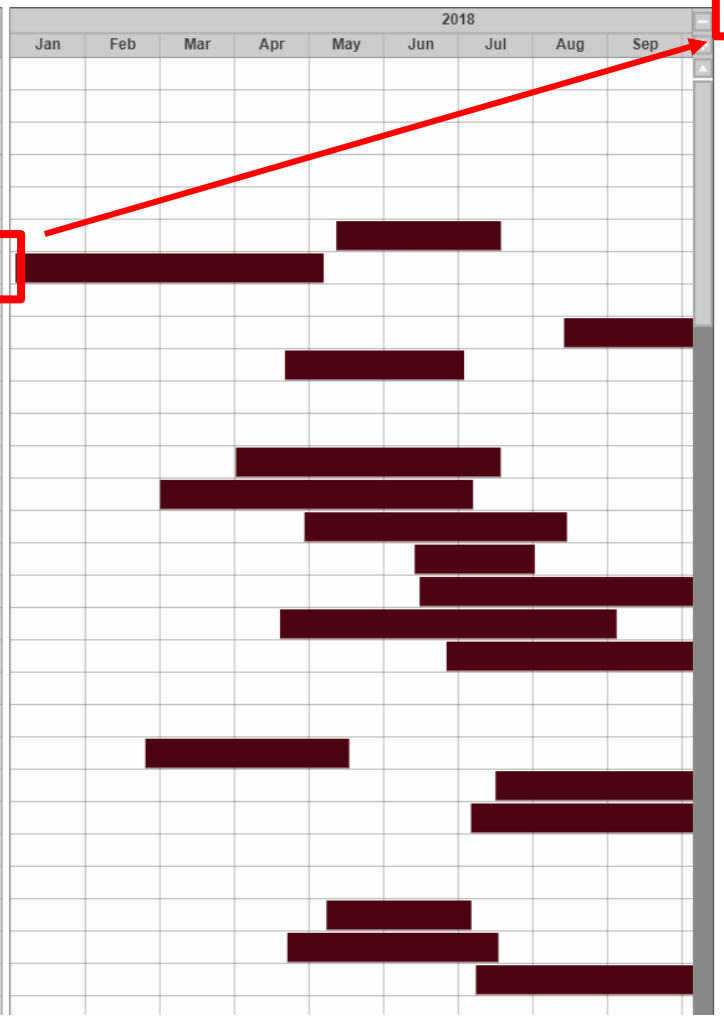

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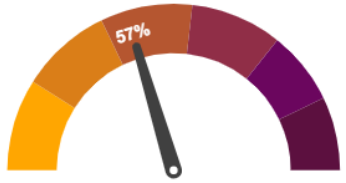

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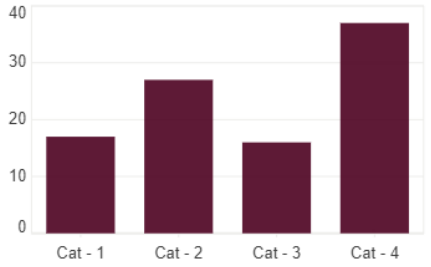

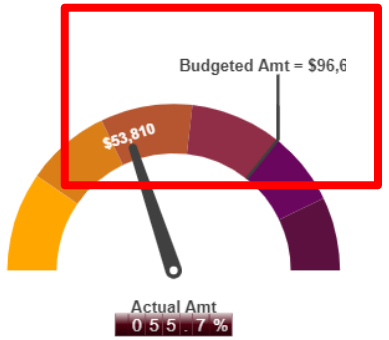

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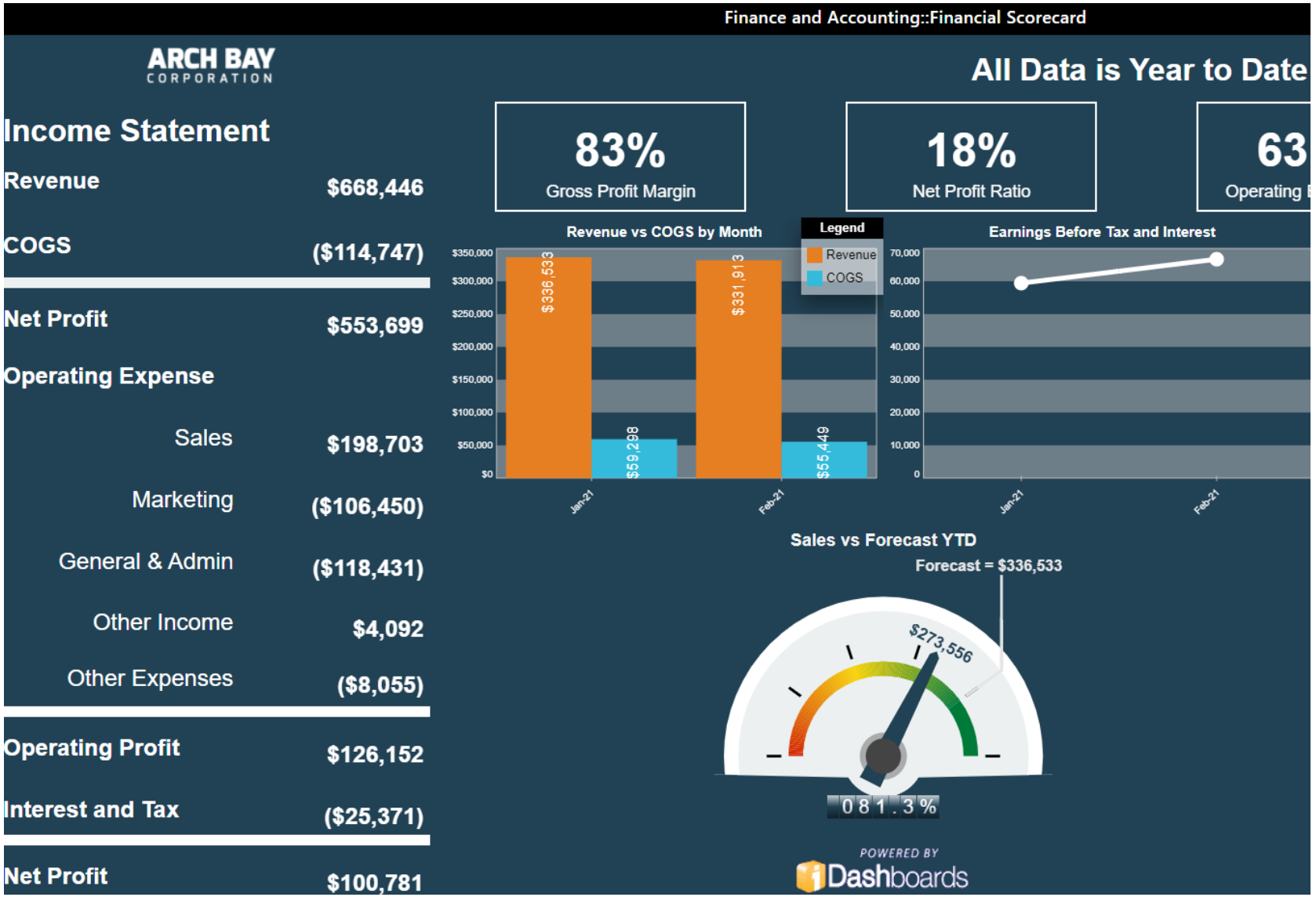
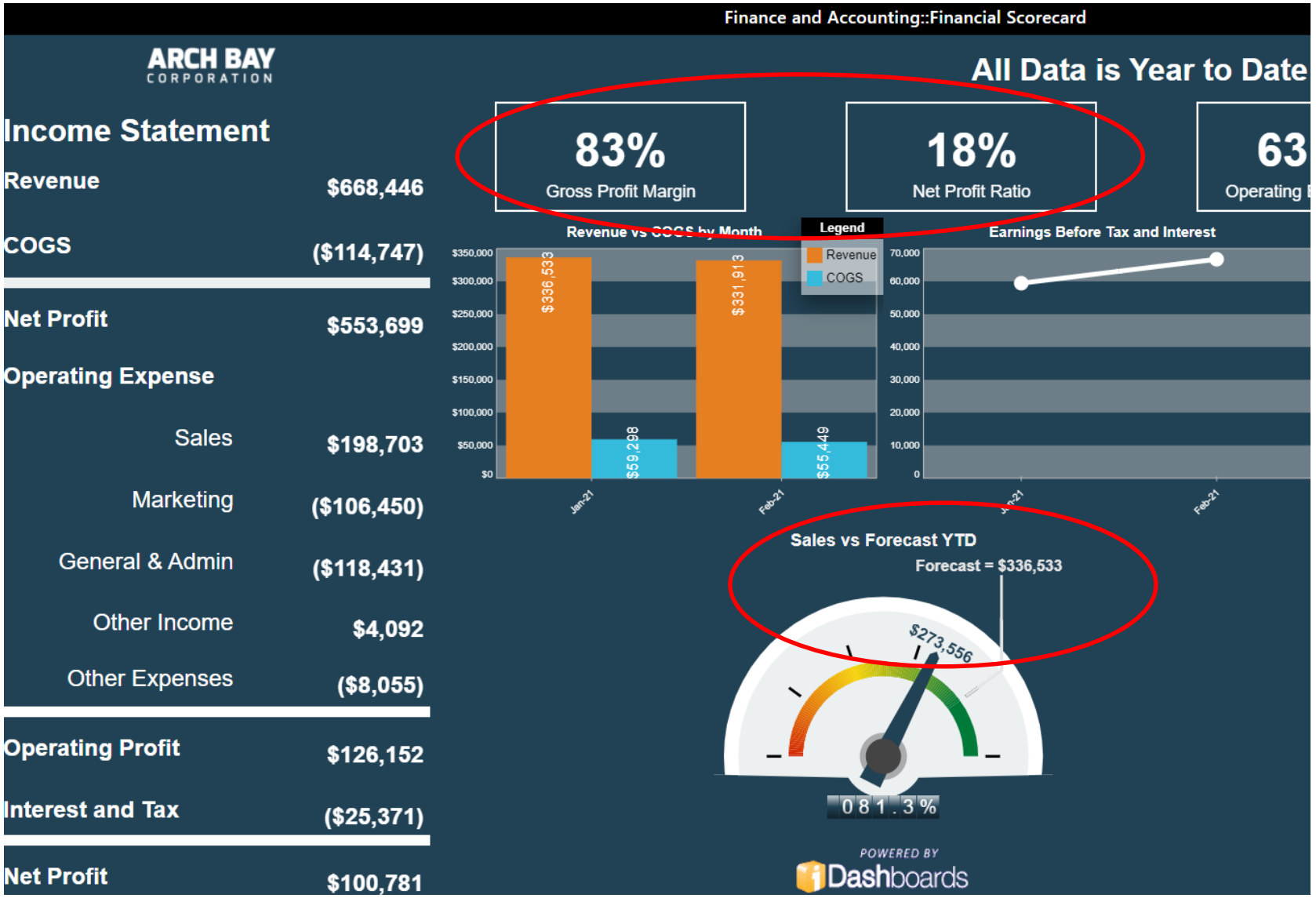

Finance and Accounting::Financial Scorecard
ARCH BAY CORPORATION
All Data is Year to Date
Income Statement
Revenue $668,446
COGS ($114,747)
Net Profit $553,699
Operating Expense
Sales $198,703
Marketing ($106,450)
General & Admin ($118,431)
Other Income $4,092
Other Expenses ($8,055)
Operating Profit $126,152
Interest and Tax ($25,371)
Net Profit $100,781
83%
Gross Profit Margin
18%
Net Profit Ratio
63
Operating
Revenue vs COGS by Month
Legend
Revenue
COGS
$350,000
$300,000
$250,000
$200,000
$150,000
$100,000
$50,000
$0
$336,533
$59,298
$331,913
$55,449
Jan-21
Feb-21
Earnings Before Tax and Interest
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0
Jan-21
Feb-21
Sales vs Forecast YTD
Forecast = $336,533
$273,556
081.3%
POWERED BY
Dashboards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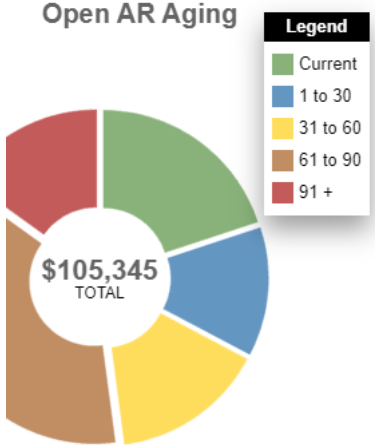
Accounts Payable

Open AR Aging



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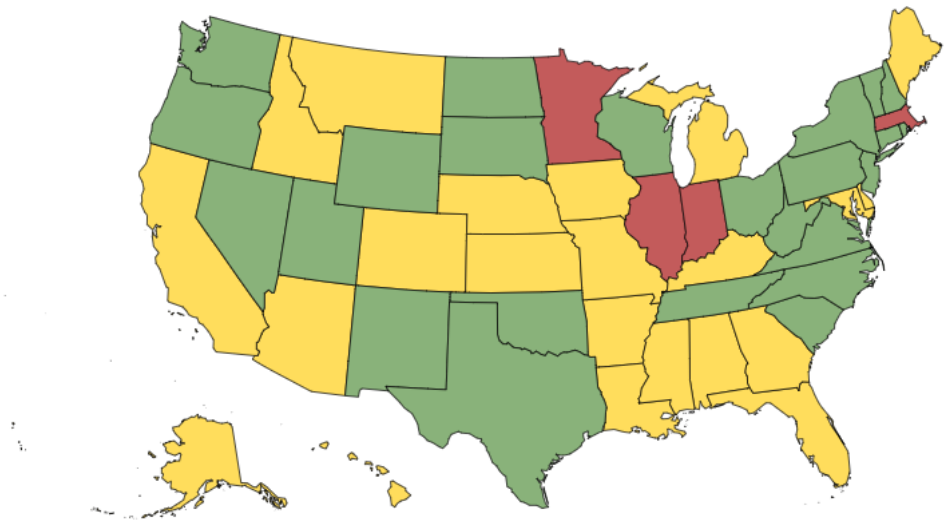
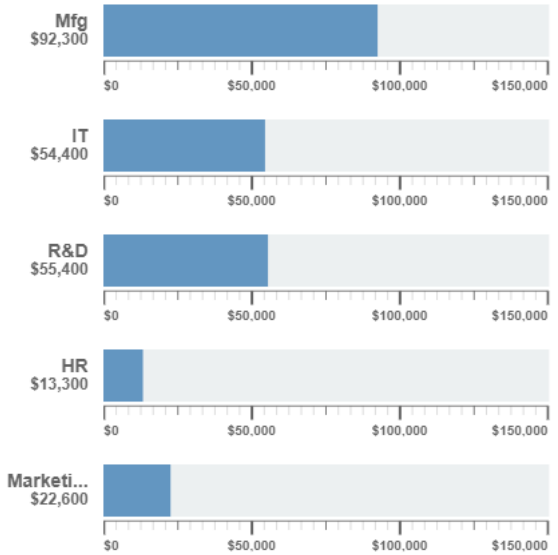
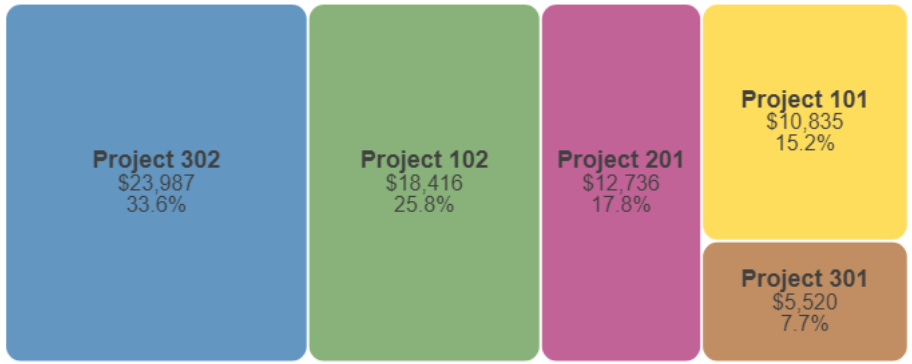
Revenue by State (in thousands) - YTD



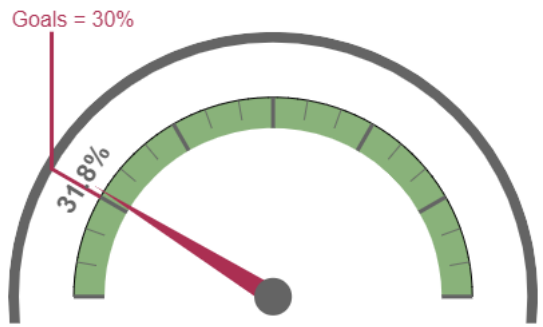
Annual Departmental Budgets (000's) for OH



Project Cost Breakdown



Company Closing Rate vs Goal



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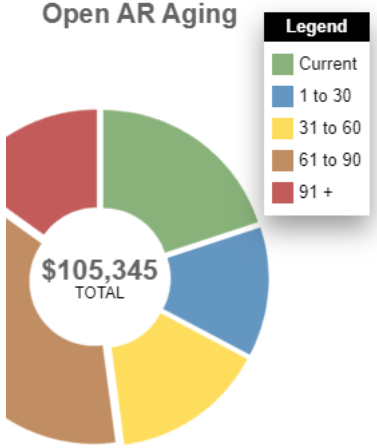

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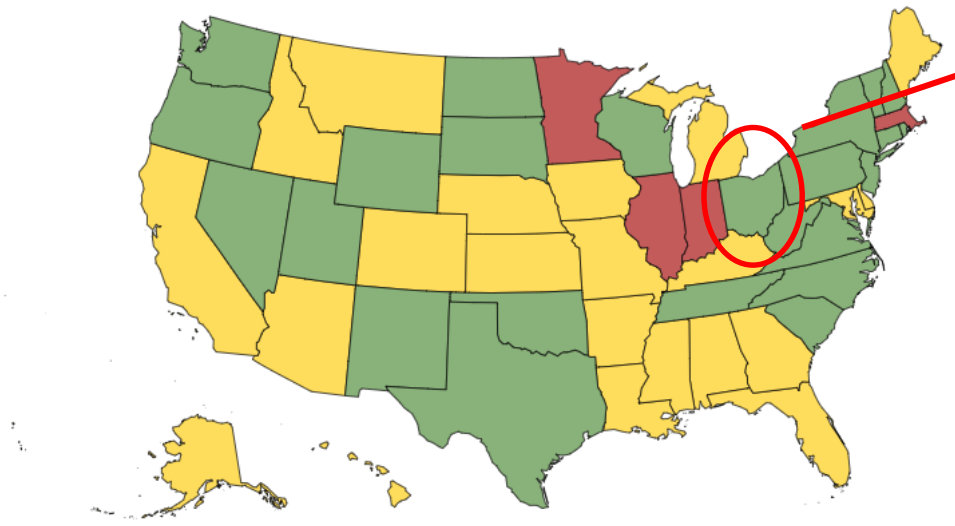

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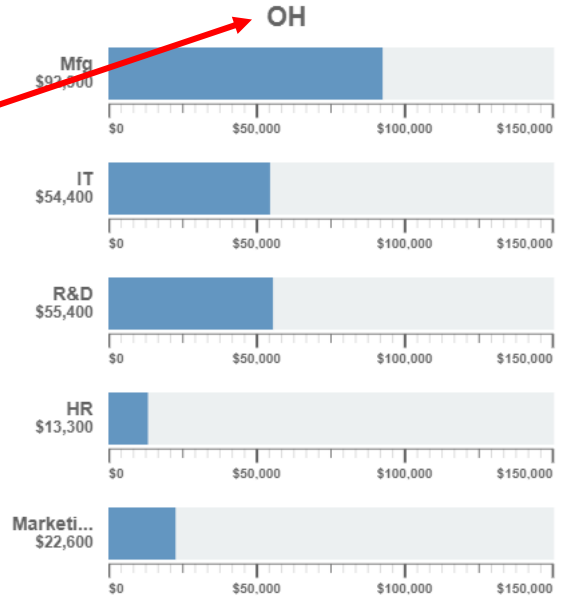

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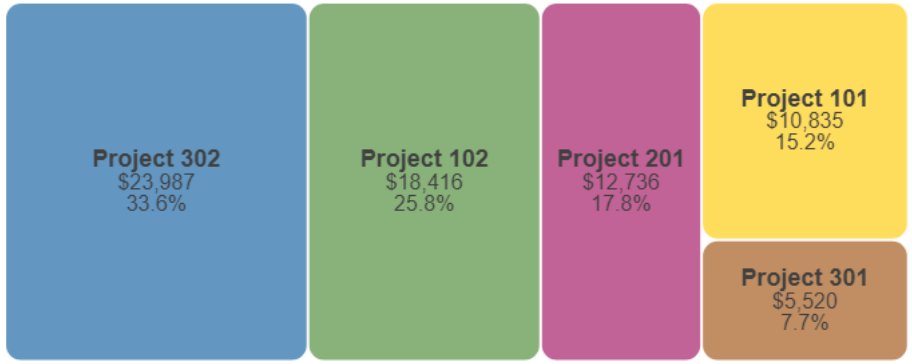

Company Closing Rate vs Goal

Questions?

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