



Business Intelligence
Dashboards and Scorecards



Scalable from discrete operational projects to entire business units, Inviso’s custom dashboards and scorecards allow their clients to manage the entire scope of their business. Inviso leverages extensive technical and subject matter expertise to assist their clients through all phases of dashboard development, from helping define what should be measured to implementation and follow-up support. With custom designed user interfaces and data visualizations, Inviso merges intelligent performance management with the power of Microsoft’s BI technology stack.

Leading product consulting firm

Firm lacked tools to monitor operational performance

Difficulties accessing, understanding and formatting corporate data

Inefficient and ineffective performance management

Need for functionality, flexibility and customization

Contracted Inviso

Corporate Challenge

For a local product design consulting firm, tracking and collecting detailed project and financial information and improving performance management were critical to their operational success. However, cumbersome manual report generation and ineffective and uninformed performance management metrics hindered the firm.

Reliance on manual report generation forced the client to wait for reports to be generated from disparate sources throughout its organization, costing valuable time, resources and people. There were no easy solutions for comparing financial data from one business unit with project data from another. Furthermore, without agreed upon standards between units, no two reports looked the same. Effective situational awareness was almost impossible to achieve. Without these standards the client was forced to spend time rereading and reformatting data rather than devoting resources towards analysis and decision-making. As a consequence the client fell behind on projects that required immediate action, hampering business interactions with clients, and damaging the bottom line.

Uninformed performance management also hindered the client’s performance. Senior management was having difficulty accurately monitoring and grading the performance of projects and individual employees. They were looking for a tool to help monitor and display operational performance of the company, discrete projects and even individual employees but existing methods were not sufficient.

After considering other companies and products on the market, the client contracted with Inviso to develop a customized, web accessible, visually appealing dashboard as well as streamline data collection and business rules processing. With the goal of improving efficiency, data flow and performance management the client saw Inviso’s proven dashboard and scorecard successes as the answer to their business efficiency needs.

Building a Solution

Near real time reporting of corporate, project and employee performance

Dashboards and scorecards provide a powerful competitive

This dashboard system allows managers near real time access to project progression data, financial information and custom reports, meaning more time is spent on analysis and less on manual report creation and data standardization. Inviso's custom dashboards insure that the right person has the right information to make the right decision.

Inviso's dashboards and scorecards are fully functioning business information tools, designed specifically to enhance the consistency and relevance of pertinent information while improving and accelerating strategic decision-making. They help monitor the past and present while forecasting the future in near real-time.

| | Monitoring | Analysis | Management |
|-------------------|--|---|---|
| Purpose | Convey information at a glance | Analyze exception conditions | Improve coordination and collaboration |
| Components | <ul style="list-style-type: none">• Multi-paneled screens with visual elements• Graphs• Symbols, alerts• Charts, tables with conditional formatting | <ul style="list-style-type: none">• Analytics• Forecasting, modeling and predictive statistics• Visual analysis• Reporting | <ul style="list-style-type: none">• Annotations• Threaded discussions• Meetings• Strategy maps• Workflows |

Source: Performance Dashboards: Measuring, Monitoring, and Managing Your Business, by Wayne Eckerson (John Wiley & Sons), 2005