OPERATIONAL EXECUTIVE DASHBOARD TEMPLATE

Overall Operational Health

Overall Equipment Effectiveness (OEE)	88%
Downtime Percentage	6%
Production Yield	95%
Process Efficiency Index	0.92
Quality Defect Rate	2%

Production Metrics

Units Produced last week	15,000
Scrap Rate	2%
Cycle Time minutes per unit	32.0
First Pass Yield	85%
Utilization Rate	75%

Supply Chain Management

Inventory Turnover Ratio	8.5
Supplier On-Time Delivery Rate	95%
Lead Time Variability	10%
Stockout Incidents in the last month	2
Raw Material Cost Variance	-1.2%

Maintenance and Reliability

Mean Time Between Failures (MTBF)	320 hours
Mean Time to Repair (MTTR)	4 hours
Preventive Maintenance Completion Rate	92%
Critical Equipment Health Index	85%
Predictive Maintenance Success Rate	90%

Process Efficiency

Six Sigma Quality Level	4.8 near Six Sigma
Process Lead Time	2.5 days
Bottlenecks Identified	Identified bottlenecks in Assembly Line B
Process Redesign Initiatives	3 processes streamlined for efficiency
Employee Suggestions Implemented	35 suggestions implemented this quarter

Health and Safety

Total Recordable Incident Rate (TRIR)
0.75 incidents per 100,000 hours worked
Near Miss Reporting Rate
5 near misses reported this month
Safety Training Completion
100% of employees completed safety training
Ergonomics Improvement Initiatives
Implemented ergonomic improvements in Assembly Line A
Lost Time Injury Frequency Rate (LTIFR)
0.15 incidents per 100,000 hours worked

Energy and Environmental Impact

Energy Consumption Reduction
Achieved 12% reduction in energy consumption
Water Usage Efficiency
Reduced water usage by 20%
Waste Recycling Rate
75%
Carbon Emission Reduction Initiatives
Implemented LED lighting, resulting in 8% reduction in carbon emissions
Sustainability Certifications Achieved
Obtained ISO 14001 certification

Technology and Innovation

Automation Implementation
Implemented robotic automation in Packaging Department
Innovation Projects Launched
4 innovation projects started this quarter
Technology Upgrades
Upgraded data analytics software for real-time process monitoring
Digital Twin Implementation
Piloted digital twin technology in Production Planning
Cost Savings from Technology Initiatives
Achieved $150,000 in cost savings from technology-driven process improvements

Employee Performance and Engagement

Employee Training Hours
480 hours of training completed this quarter
Employee Engagement Score
82%
Cross-Training Implementation
Cross-trained 25% of employees across different departments
Employee Feedback Utilization
Implemented process changes based on employee feedback

Executive Messages and Insights

Brief Message from COO / Operations Leadership
"Our operational excellence initiatives continue to drive efficiency and quality across the organization."
Summary of Key Insights
"Q3 showed strong improvements in production yield, maintenance efficiency, and safety performance."
Actionable Recommendations
"Focus on further reducing downtime and optimizing supply chain processes to ensure sustained operational success."

1. Title Page (Basic)

Purpose: Establish context and ownership.

Include:

- Dashboard title (clear and outcome-oriented)
- Organization / Project name
- Analyst name
- Tools used (e.g., Excel, Power BI, Tableau)
- Date and version

Example:
Sales Performance Dashboard – Q4 FY2025
Prepared by: Data Analytics Team

2. Executive Summary (Basic → Intermediate)

Purpose: Provide decision-makers with a quick, high-level understanding.

Write in 6–10 concise lines covering:

- Business objective of the dashboard
- Key metrics tracked
- Major insights or trends
- High-level recommendation or outcome

Best Practice:
Avoid technical language. Focus on *what changed*, *why it matters*, and *what to do next*.

3. Business Objective & Problem Statement (Basic)

Purpose: Define *why* the dashboard exists.

Structure:

- Background context
- Business question(s)
- Scope and limitations

Example:

- Objective: Monitor monthly sales performance across regions.
- Key Questions:
    - Which regions are underperforming?
    - What products drive revenue growth?

4. Stakeholder & Audience Definition (Intermediate)

Purpose: Align insights with decision-makers.

Include:

- Target audience (Management, Operations, Finance, HR)
- Decision level (Strategic / Tactical / Operational)
- Expected actions from the dashboard

Tip:
Dashboards for executives emphasize KPIs; operational dashboards emphasize granular trends.

5. Data Sources & Data Description (Basic → Intermediate)

Purpose: Establish data credibility.

Include in a table format:

- Data source (ERP, CRM, Excel, SQL, API)
- Time period covered
- Number of records
- Update frequency

Optional (Intermediate):

- Data assumptions
- Known data quality issues

6. Data Preparation & Transformation (Intermediate)

Purpose: Explain how raw data became analysis-ready.

Cover briefly:

- Data cleaning steps (missing values, duplicates)
- Transformations (date hierarchies, calculated fields)
- Data modeling (fact & dimension tables, joins)

Example Tools Mention:

- Power Query
- SQL
- Python / Pandas

7. Key Metrics & KPIs Definition (Intermediate)

Purpose: Ensure clarity and consistency.

For each KPI, define:

- KPI name
- Formula
- Business meaning
- Target or benchmark

Example:

- KPI: Revenue Growth %
- Formula: (Current – Previous) / Previous × 100
- Insight: Measures sales momentum

8. Dashboard Design Structure (Intermediate)

Purpose: Explain dashboard layout logic.

Describe:

- Sections (Overview, Trends, Drill-downs)
- Filters & slicers used
- Navigation flow

Design Principles to Mention:

- Minimalism
- Consistent color coding
- Logical hierarchy (KPIs → trends → details)

9. Visualization Explanation (Intermediate → Advanced)

Purpose: Justify chart selection.

For each visual:

- Chart type (Bar, Line, Map, Table, KPI card)
- Why this chart was chosen
- What insight it delivers

Example:

- Line chart used to show monthly sales trends over time.
- Heatmap used to compare regional performance intensity.

10. Insights & Analysis (Core Section – Advanced)

Purpose: Convert visuals into business intelligence.

Write in bullet points:

- Key trends
- Anomalies or outliers
- Comparisons (MoM, YoY, Region-wise)
- Root cause hints (if possible)

Best Practice:
Every insight should answer *"So what?"*

11. Business Impact & Recommendations (Advanced)

Purpose: Drive action.

Include:

- Impact on revenue, cost, efficiency, or risk

- Data-backed recommendations
- Priority level (High / Medium / Low)

Example:

- Increase inventory for Product X in Region A due to sustained demand growth.
- Re-evaluate pricing strategy in underperforming segments.

12. Interactivity & Advanced Features (Advanced)

Purpose: Demonstrate technical maturity.

Mention if applicable:

- Drill-through pages
- Dynamic filters
- Tooltips
- Row-level security
- Scheduled refresh

13. Limitations & Assumptions (Advanced)

Purpose: Maintain analytical transparency.

Include:

- Data gaps
- Time lag issues
- External factors not considered
- Model assumptions

14. Conclusion (Basic)

Purpose: Reinforce value.

Summarize:

- Dashboard usefulness
- Key outcomes

- How it supports decision-making

15. Appendix (Optional – Advanced)

Purpose: Support without clutter.

May include:

- Detailed calculations
- Data dictionary
- SQL / DAX logic (high-level)
- Additional charts

Professional Writing Tips

- Use business language, not tool-centric language.
- Avoid describing *how to click*; explain *what it means*.
- Keep visuals central, text supportive.
- Align insights with business goals.