Multi-channel Video Streaming & Satellite Service Provider

(PMO Analytics)

- **Built a centralized data infrastructure** using Smartsheet to gather raw data from multiple data sources and stakeholders with minimum manual intervention
- **Set up automated checks and notifications** to identify inconsistencies in the data such as missing entries, irregular formats etc. and immediately notify the relevant stakeholders
- Built an **executive dashboard** – Macro View, summarizing the key aspects of the business initiatives in both TPO and TSA in a concise yet insightful manner

PMO DASHBOARD FOR MULTICHANNEL VIDEO PROGRAMMING DISTRIBUTOR

ABOUT THE CLIENT

Client is a multichannel video programming distributor in the U.S. with 15M+ subscriber base

SITUATION

- Client had **limited visibility** into the progress made on the **PMO initiatives across multiple verticals** (with estimated savings of **~$5 Bn**) due to **lack of data warehouse and automated reporting suite**. Client was **spending significant person-hours** to gather data and create aggregated monthly reports manually.
- Merilytics partnered with the client to **develop a robust data architecture** and **create visuals for TPO (Transformation Program Office)** and **TSA (Transition Service Agreement) initiatives** in order to reduce the manual effort to showcase the overall performance of all business initiatives

VALUE ADDITION

- **Built a centralized data infrastructure** using **Smartsheet** to gather raw data from multiple data sources and stakeholders with minimum manual intervention
- **Set up automated checks and notifications** to identify inconsistencies in the data such as missing entries, irregular formats etc. and immediately notify the relevant stakeholders
- **Created consolidated datasets** for data across multiple categories such as financials, milestones, jeopardies etc. in the reporting tables for easy access to stakeholders to create Smartsheet reports and to facilitate data ingestion to the **Power BI model**
- **Created multiple dashboards**, such as Program Overview, Jeopardy Overview, Milestone Summary, Monthly overview, Financial Performance and Scorecards, and Financial Outlook allowing users to track the overall status, jeopardies, and financial data. Added drill down filters to KPI level as well as annual and monthly level within the dashboards to get detailed insights of revenue and savings achieved against the target.
- Built an **executive dashboard** – Macro View, summarizing the key aspects of the business initiatives in both TPO and TSA in a concise yet insightful manner

IMPACT

- The automated reporting suite helped the client **save ~60 person-hours per month** on creating the weekly and monthly reports manually
- The performance reports with daily data updates helped the BU stakeholders have improved visibility into the overall progress of initiatives, milestones, and financial performance to take more informed decisions and **reduce TAT to address jeopardies**
- **Blended Macro-View** helped the **Senior leadership team** to present a **comprehensive insight** of the businesses' present status and prospects

METHODOLOGY/ APPROACH

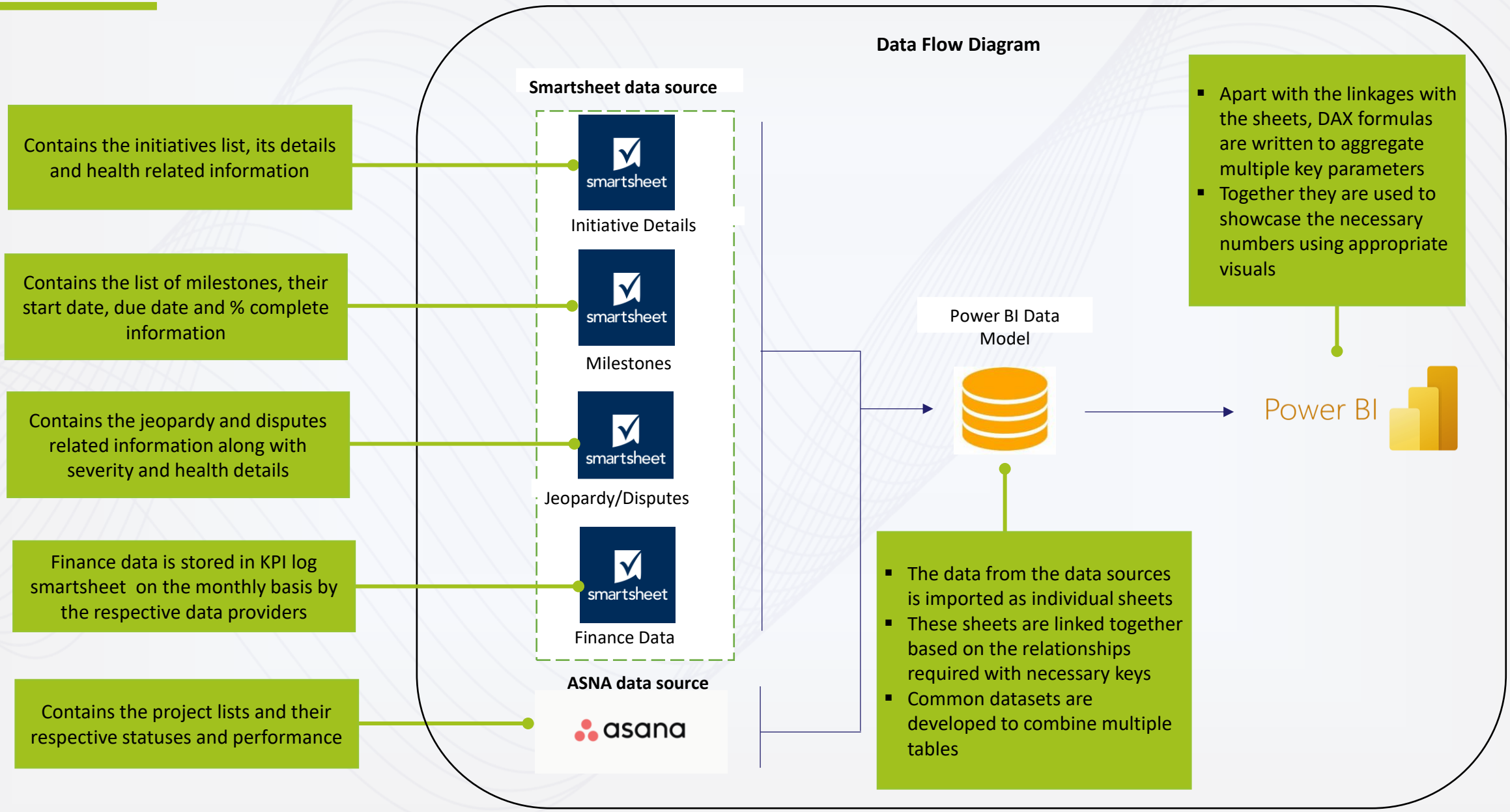
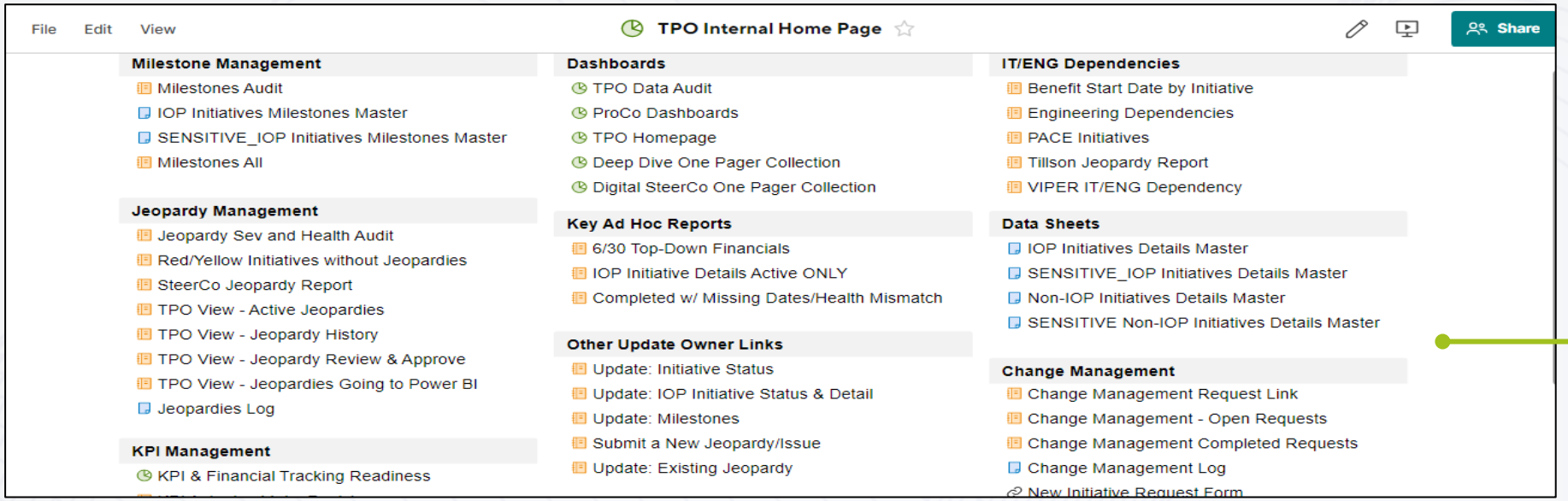
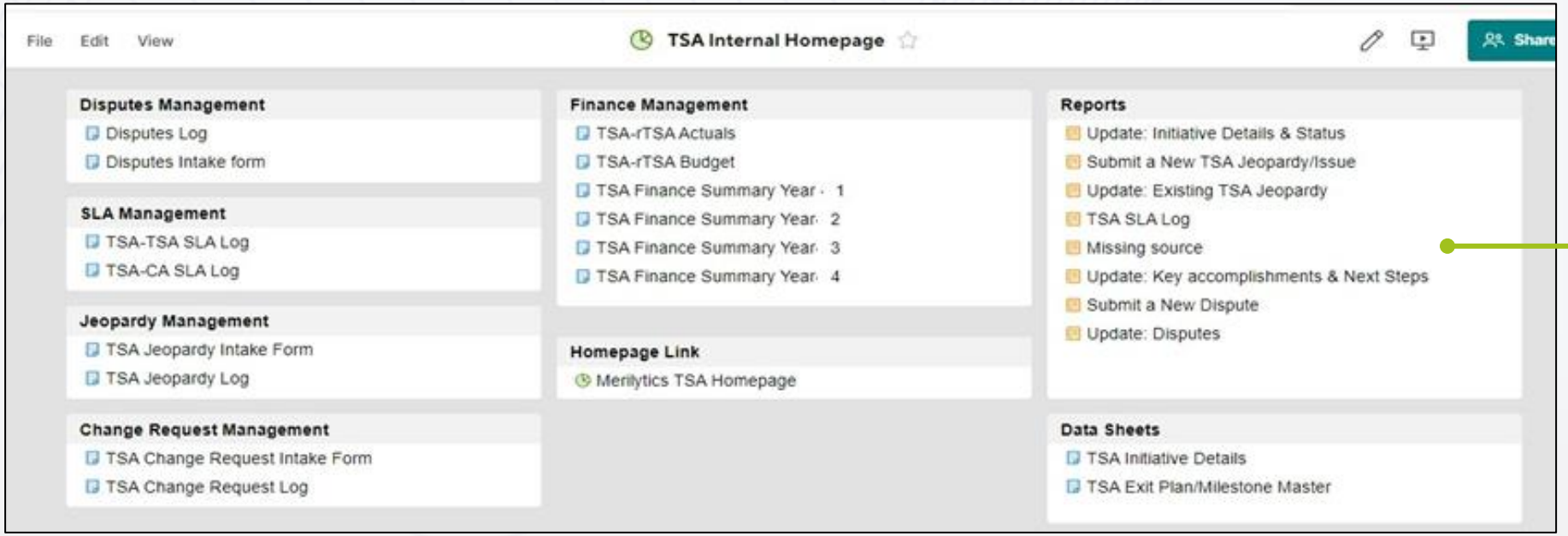


EXHIBIT #1 – SMARTSHEET ARCHITECTURE SETUP

ILLUSTRATIVE



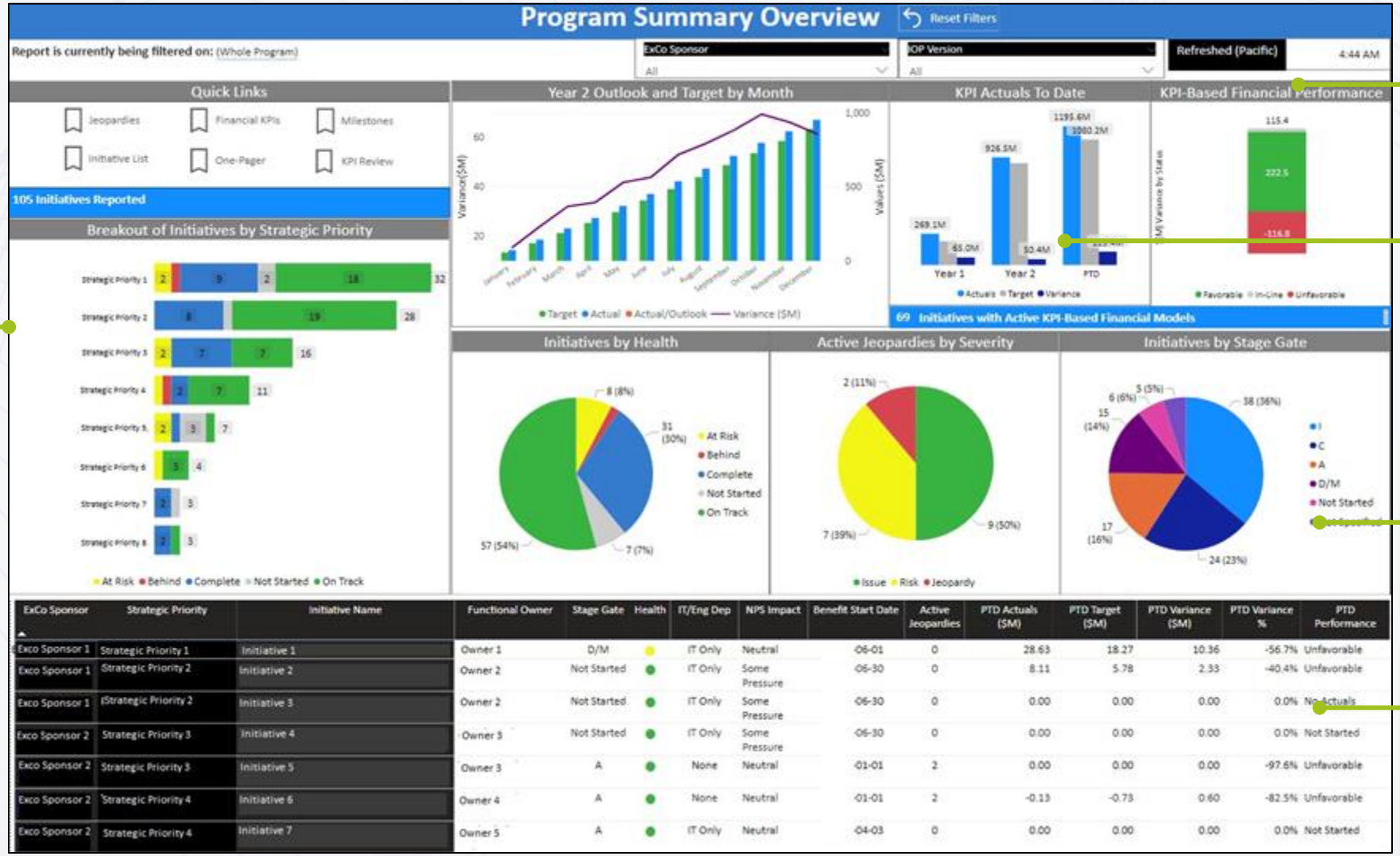
TPO smartsheet dashboard which has the links of various smartsheets and links to insert/update the data in the smartsheet



TSA smartsheet dashboard which has the links of various smartsheets and links to insert/update the data in the smartsheet

EXHIBIT #2 – PROGRAM OVERVIEW PRESENTING OVERALL STATUS

ILLUSTRATIVE



Allows users to select a particular functional owner that would drill through to their respective initiatives in the visual

Allows users to track the variance between actuals and target by number of initiatives in lying in different categories

Allows users to track annual actuals vs target numbers including the variance ($)

Pie graphs that help the users track the status of the progress of initiatives and their bottlenecks

A tabular list of the initiatives that show the progress and have a drill through functionality to the interactive graphs

EXHIBIT #3 – PROGRAM OVERVIEW PRESENTING OVERALL STATUS

ILLUSTRATIVE

Allow users to select a particular initiative

Milestones and tasks associated with the initiative along with their due date and status

Key accomplishments in the preceding month and the next steps for the selected initiative

YTD and annualized actuals, target and other costs

Other finance data related to the selected initiative

TSA Monthly Status Report

Reset Filters

TSA ID	TSA Service Title	Function	TSA/rTSA	ExCo Sponsor	Service Owner	Financial Lead	Health	Top TSA	IT/ENG Dependency	Original Exit Date	Latest Exit Date	Date Code
Finance-23	Credit Checks	Finance	TSA	Exco Sponsor 1	Service Owner 1	Lead 1		No	IT Only			Forecast

Summary

TSA Description
Credit evaluations performed

Legend

Complete · Not Started · On Track · At Risk · Behind · Not Specified

Refreshed (Pacific): 6:13:30 AM

SMO Lead:

Milestone Name	Phase	Due Date	Status
Budget for Go-Forward Solution Obtained	A. Planning	02-07	
Financials associated with exit (Savings/Costs) Confirmed	A. Planning	01-31	
Key Risks Identified	A. Planning	12-15	
Plan for Go-Forward Solution Developed	A. Planning	02-14	
TSA Exit Key Dependencies Identified	A. Planning	12-15	
BU Finance Reviewed/ DDE Estimate Complete	B. Development	02-28	
Business Functionality Defined	B. Development	01-21	
Business Functionality Developed	B. Development	01-28	
Business Functionality Tested	B. Development	02-11	
Go-Forward Solution is ready for Implementation/ Deployment	B. Development	02-25	
Financials Verified	C. Deployment	04-01	

Financials ($M)	Year 1	Year 2	Year 3	Year 4	Year 5	Total
YTD						
Actuals	0.78	1.90	NA	NA	NA	2.68
Target	1.02	1.61	NA	NA	NA	2.63
Actuals Variance	0.24	-0.29	NA	NA	NA	-0.05
Actuals Variance %	23.68%	-18.18%	NA	NA	NA	-1.97%
Annualized						
Target	1.02	1.61	NA	NA	NA	2.63
Implementation Cost	NA	NA	NA	NA	NA	NA
Post Exit Cost	NA	NA	1.78	1.69	1.60	5.07

VIPER Summary

MPID	MP00010801-OTC TSA Exit Strategy	Eng T-Shirt Estimate	
VIPER Status	Inspect Phase	IT T-Shirt Estimate	3: $1M -$2M
VIPER ID	V358	Unified Backlog	Yes
VIPER Rank	184		

Key Accomplishments(Last 30 Days)

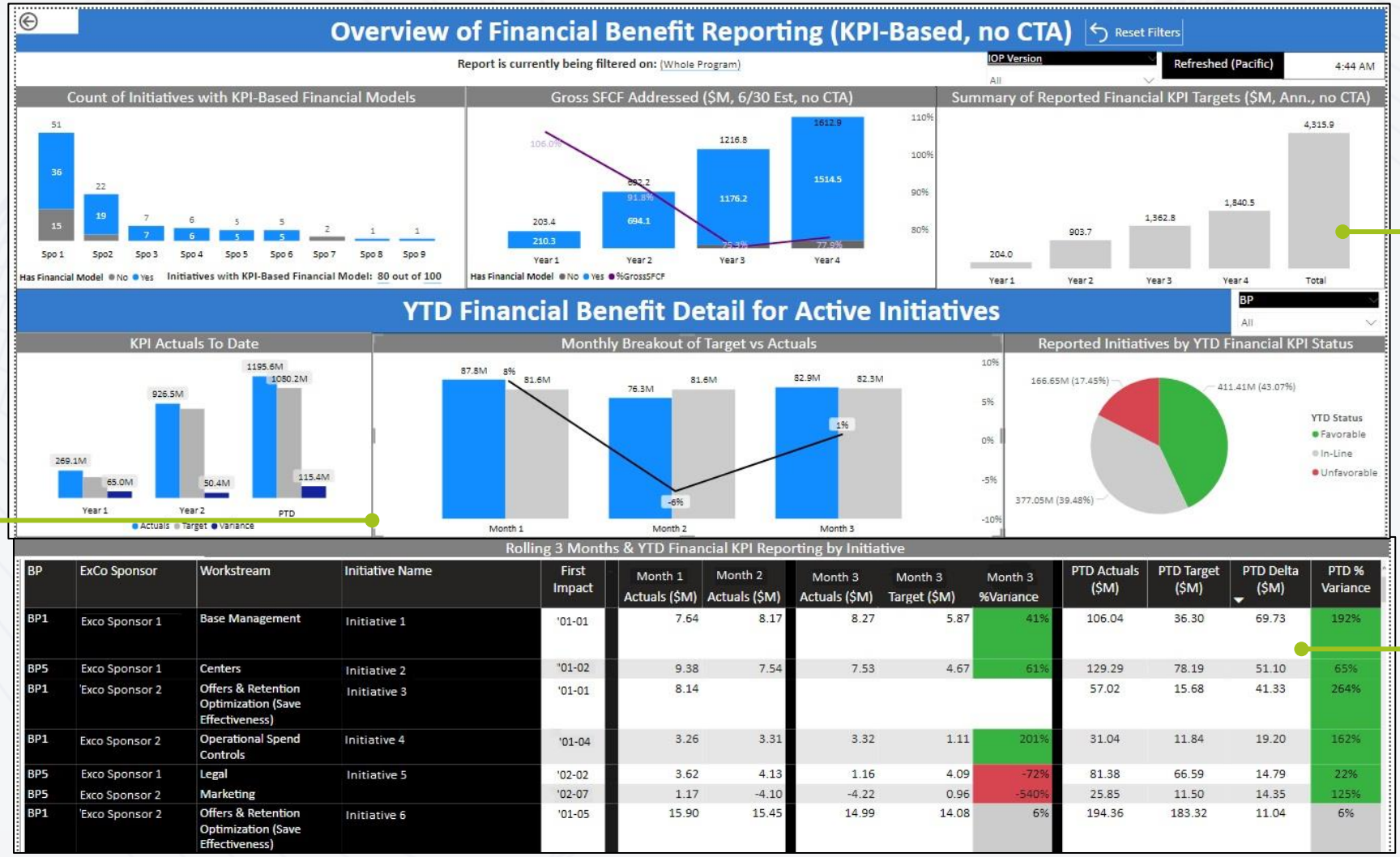
– High Radius design document approved
BEST launch will include existing credit policy and DO fees (only the credit model used will change)

Next Steps(30+ Days Outlook)

>Continue conversations with AaBbCcDd/EeFfGgH (identify additional identification tools needed for MVP, application exception handling, etc.)
>Determine credit model to be used and impact analysis
>Ongoing meetings with Legal (adverse action letters, consent, etc.)

EXHIBIT #4 – ANALYZING FINANCIAL PERFORMANCE

ILLUSTRATIVE



BP	ExCo Sponsor	Workstream	Initiative Name	First Impact	Month 1 Actuals ($M)	Month 2 Actuals ($M)	Month 3 Actuals ($M)	Month 3 Target ($M)	Month 3 %Variance	PTD Actuals ($M)	PTD Target ($M)	PTD Delta ($M)	PTD % Variance
BP1	Exco Sponsor 1	Base Management	Initiative 1	'01-01	7.64	8.17	8.27	5.87	41%	106.04	36.30	69.73	192%
BP5	Exco Sponsor 1	Centers	Initiative 2	'01-02	9.38	7.54	7.53	4.67	61%	129.29	78.19	51.10	65%
BP1	Exco Sponsor 2	Offers & Retention Optimization (Save Effectiveness)	Initiative 3	'01-01	8.14					57.02	15.68	41.33	264%
BP1	Exco Sponsor 2	Operational Spend Controls	Initiative 4	'01-04	3.26	3.31	3.32	1.11	201%	31.04	11.84	19.20	162%
BP5	Exco Sponsor 1	Legal	Initiative 5	'02-02	3.62	4.13	1.16	4.09	-72%	81.38	66.59	14.79	22%
BP5	Exco Sponsor 2	Marketing		'02-07	1.17	-4.10	-4.22	0.96	-540%	25.85	11.50	14.35	125%
BP1	Exco Sponsor 2	Offers & Retention Optimization (Save Effectiveness)	Initiative 6	'01-05	15.90	15.45	14.99	14.08	6%	194.36	183.32	11.04	6%

Allows user to track the benefit targets annually and also at an overall level

The bar graphs gives users an insight on the latest benefits achieved as compared to the targeted benefits

The tabular chart gives a detailed insight into the financial performance for the rolling 3 months which drill throughs to the visuals above

EXHIBIT #5 – FINANCIAL OUTLOOK FOR THIS YEAR

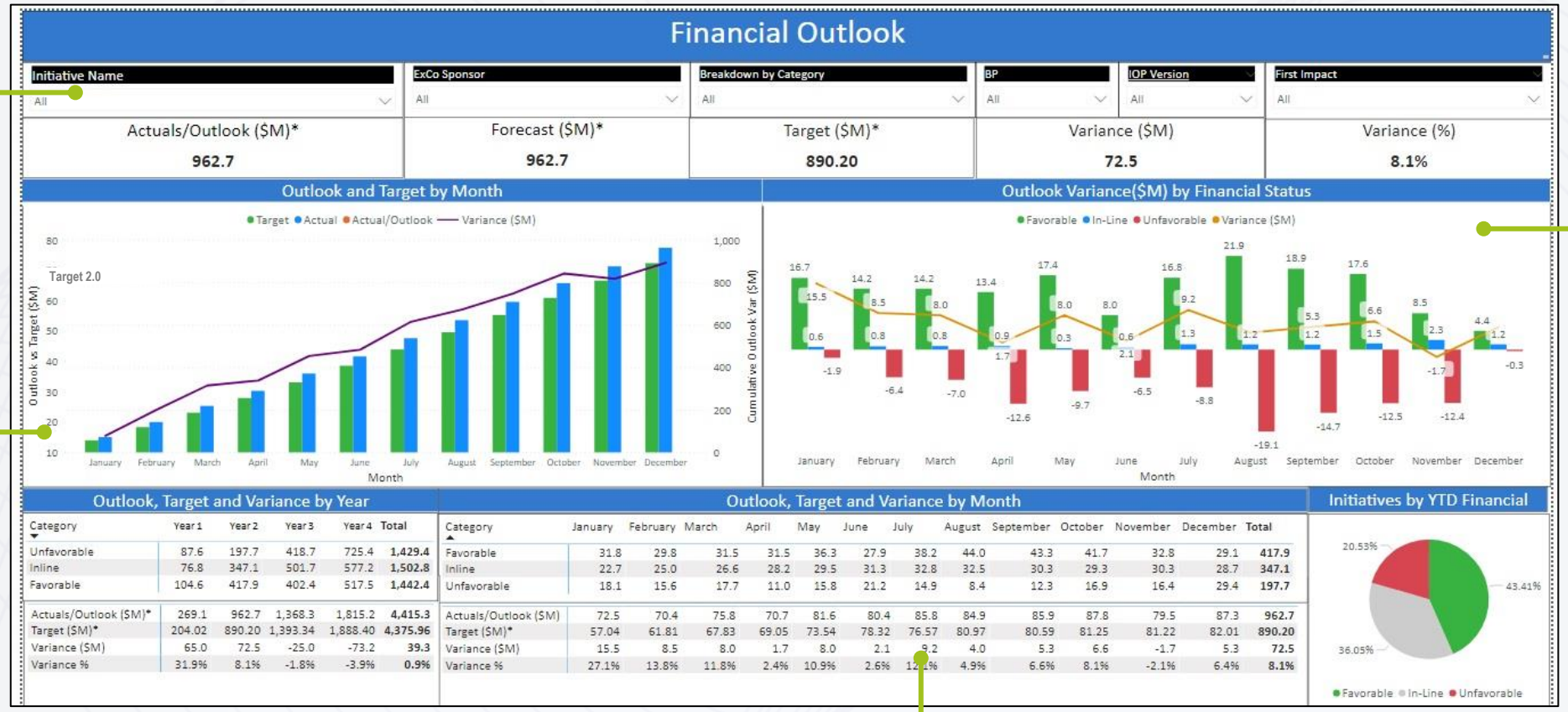
ILLUSTRATIVE

Slicers are provided to deep dive into specific initiatives, their functional owners, and the category they belong

Line graph provides users an insight into the targeted values against the calculated values expected based on past performance. bar graphs expressing the cumulative difference of actuals to target

Bar chart helps users keep track of past as well as future variances in benefit values.

Tabular list provides a detailed insight into the actuals achieved in the previous months and expected actuals to be achieved in the future months with a drill through functionality to the visuals



Category	Year 1	Year 2	Year 3	Year 4	Total
Unfavorable	87.6	197.7	418.7	725.4	1,429.4
Inline	76.8	347.1	501.7	577.2	1,502.8
Favorable	104.6	417.9	402.4	517.5	1,442.4
Actuals/Outlook ($M)*	269.1	962.7	1,368.3	1,815.2	4,415.3
Target ($M)*	204.02	890.20	1,393.34	1,888.40	4,375.96
Variance ($M)	65.0	72.5	-25.0	-73.2	39.3
Variance %	31.9%	8.1%	-1.8%	-3.9%	0.9%

Category	January	February	March	April	May	June	July	August	September	October	November	December	Total
Favorable	31.8	29.8	31.5	31.5	36.3	27.9	38.2	44.0	43.3	41.7	32.8	29.1	417.9
Inline	22.7	25.0	26.6	28.2	29.5	31.3	32.8	32.5	30.3	29.3	30.3	28.7	347.1
Unfavorable	18.1	15.6	17.7	11.0	15.8	21.2	14.9	8.4	12.3	16.9	16.4	29.4	197.7
Actuals/Outlook ($M)	72.5	70.4	75.8	70.7	81.6	80.4	85.8	84.9	85.9	87.8	79.5	87.3	962.7
Target ($M)*	57.04	61.81	67.83	69.05	73.54	78.32	76.57	80.97	80.59	81.25	81.22	82.01	890.20
Variance ($M)	15.5	8.5	8.0	1.7	8.0	2.1	9.2	4.0	5.3	6.6	-1.7	5.3	72.5
Variance %	27.1%	13.8%	11.8%	2.4%	10.9%	2.6%	12.1%	4.9%	6.6%	8.1%	-2.1%	6.4%	8.1%

LEARNINGS

- We were able to get a better understanding on smartsheet architecture given this was the first project on smartsheet in Merilytics
- We got a good understanding of various services and products offered by the client and the milestones that can be associated with the initiative
- Overall, it gave us a better idea of functioning of program management office