

***Module 3***  
***Dashboards and Scorecards:***  
***Characteristics and***  
***Implementation***



# ***Common characteristics***

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- **Basic characteristics of dashboards and scorecards**
  - Many variations exist among dashboards and scorecards
  - Three common characteristics define them and enable them to provide value to the organizations implementing them
  - Each one has:
    - Three applications
    - Three layers
    - Three types



# Three common applications

Three Applications

	Monitoring	Analysis	Management
Purpose	Convey information at a glance	Analyze exception conditions	Improve coordination and collaboration
Components	<ul style="list-style-type: none"><li>• Multi-paned screens with visual elements</li><li>• Graphs (i.e., dials, gauges, thermometers)</li><li>• Symbols, alerts</li><li>• Charts, tables with conditional formatting</li><li>• Alerts</li></ul>	<ul style="list-style-type: none"><li>• Analytics (i.e., dimensional, time-series, segmentation)</li><li>• Forecasting, modeling, and predictive statistics</li><li>• Visual analysis</li><li>• Reporting</li></ul>	<ul style="list-style-type: none"><li>• Annotations</li><li>• Threaded discussions</li><li>• Meetings</li><li>• Strategy maps</li><li>• Workflows</li></ul>

Figure 5: Three applications

- What is an application?



# Three common layers

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## Three Layers

**Monitoring**

**Graphical Abstracted Data**  
graphs, symbols, charts

**Analysis**

**Summarized Dimensional Data**  
dimensions, hierarchies, "slice/dice"

**Action**

**Detailed, Operational Data**  
DW queries, operational reports



# ***Three common types***

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- **Strategic**
- **Tactical**
- **Operational**



# Differences and measures used

	Dashboard	Scorecard
Purpose	Measures performance	Charts progress
Users	Managers, staff	Executives, managers, staff
Updates	Real-time to right-time	Periodic snapshots
Data	Events	Summaries
Top-level Display	Charts and tables	Symbols and icons

- Functional and design distinctions
- Making dashboards and scorecards effective



# ***Example: Dashboard vs scorecard measures***

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**Scenario:** Manager responsible for outbound renewal collection calls at a large enterprise

- **Example:**

- Dashboard measures
- Scorecard measures



# ***Application and implementation***

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## ■ **Application**

- Popularity of dashboards and scorecards
- Scope of implementations

## ■ **Implementation**

- Implementation prerequisites
- Implementing multiple dashboards
- Implementing dashboards as part of a BI solution
- Selecting the dashboard functions to be implemented
- Providing information to users





# ***Benefits***

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- **Dashboard benefits**
- **Benefits of a dashboard's intuitive environment**
- **Benefits of a properly deployed dashboard or scorecard**
- **Benefit of communicating strategy**
- **Monitoring and adjusting strategy**



# ***Shortcomings***

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- **Dashboard shortcomings**
- **Issues with low-cost dashboards**

