

Sheet 1 - Daily Team KPI Tracking Sheet

Link to sheet :

https://docs.google.com/spreadsheets/d/1e03cEUkYH6uNMZe_7_fN_1P8wiXvpwBGvqAhvEI4TQY/edit?gid=602449821#gid=602449821

This first sheet to address was a daily KPI tracking sheet that was used multiple times per day, by the entire team of 12. It was a simple sheet used to understand where they performed on the main KPIs for that week, these KPIs were also attached to our bonuses. There was a predecessor to this sheet and whilst it did work, it was confusing to understand without clear instructions, had several points of data redundancy, it required manual calculations, and very limited function/features with considerable opportunity for improvement. I included an example of the previous model for comparison under "Previous Tracker".

Since so much of this sheet needed changing, I started from scratch. Here's a list of all the things I improved:

1. Removed the need for manual calculations as this is an extremely basic function of spreadsheets, introducing cells C8 & C9 to make the calculations, thus minimizing the chance of human error and improving efficiency. Totalling only 3 entries needed per person taking less than 30 seconds instead of 2 minutes, multiple times per day from 12 people this adds up!
2. Introduced a visual flag in the form of a countdown, combined with conditional formatting. Which can be found in cells E4:F6. This allowed the team members to clearly see how close they were to each tier of their bonuses. I believe this contributed to the overall significant increase in our team's KPI performance as it became a tangible number instead of guessing, and incentivizing people to check it more often.

| Weekly Bonuses : | |
|------------------|--------------|
| Key Metric 1 | Key Metric 3 |
| -3 | -8 |
| 4 | -2 |
| 10 | 5 |

3. Previously each team had their sheets separated. With the teams and leads approval, I merged them all as one and built in a little friendly weekly competition to encourage higher performance. Below cell 27 you can see a grouping for each team's scores, which had conditional formatting to highlight which team had the best score in each of the 3 main KPIs. A fun and light hearted competition, where there were many occasions that it was clear this encouraged people to do better for their team, in order to edge the other teams! In turn positively affected the KPIs and the team had good fun with it!

| Team 1 | | | | Team 2 | | |
|--------------------|-----|--|--|--------------------|-----|--|
| Total Data Input 1 | 832 | | | Total Data Input 1 | 567 | |
| Total Data Input 2 | 196 | | | Total Data Input 2 | 157 | |
| Total Data Input 3 | 45 | | | Total Data Input 3 | 28 | |
| | | | | | | |
| Key Metric 1 Total | 636 | | | Key Metric 1 Total | 410 | |
| Key Metric 3 Total | 591 | | | Key Metric 3 Total | 382 | |
| Key Metric 1 as % | 76% | | | Key Metric 1 as % | 72% | |
| Key Metric 2 as % | 7% | | | Key Metric 2 as % | 7% | |
| Key Metric 3 as % | 71% | | | Key Metric 3 as % | 67% | |

4. Added some basic 'fail-safes' using IFERRORS() across this sheet, simply reminding people to "check numbers" if they entered something non numerical.
5. Overall made various improvements to the designs, much easier on the eye, clearer to understand at a glance, better data to read from, and finally if there was any confusion, I added instructions as a note in cells B4:B6 for any new joiners.

The feedback was great from the team and much appreciated the changes. Albeit a simple redesign, it was quicker and offered much more actionable information to the team.