This project was started for Produce Pro because the company had transitioned to Salesforce during also changing out time tracking, customer support plan, and our code commit system. The purpose was open ended, but the focus was to help people not be so overwhelmed by the amount of data in the system, and to give higher ups a better picture of how things were going and adjusting post transition. In the end I created 5 main dashboards made up of several reports that provided this information for every level of the company. From there I started getting requests to make supplementary reports and dashboards, as well as modified versions for different managers but I was able to get this project completed in about a month including the time to educate myself on the reporting capabilities of the platform. I’ve included an example of each of the main dashboards that made up the bulk of the project along with a brief description of each of them.

Sub-team Dashboard – The main dashboard that is used by each team and their managers daily.

Graphical user interface

Description automatically generated

Mary’s Metrics – Used monthly in a team-wide game to help with motivation and company morale. The components represent several different KPI’s that people can compete to be first in and win prizes.

Chart

Description automatically generated with medium confidence

JXS Team Case Loads by Team and Person Over Time – Used by the manager to get a more birds eye view of the work that is being done on the team. Shows more of the overall trends by each team.

Graphical user interface

Description automatically generated

JXS Team Critical and Urgent Issues – Dashboard specific to priority issues. Shows both the status of the cases and the information on how the team is handling them over time.

Graphical user interface

Description automatically generated

Company Wide Case Loads by Team and Person Over Time – Generic birds eye view of the entire company for managers to see how work and manpower is being used compared to the case loads

Graphical user interface, chart

Description automatically generated