

# MAS DSE 260: Capstone Project

*İlkay ALTINTAŞ, Ph.D.*

## Lecture 9: Developing a Communication Plan and Monitoring Dashboard

# Process Roadmap (260 B)

- ✓ Step 6: Modeling and Visualization
  - ✓ REPORT 6: due 4/12
  - ✓ PRESENTATION 3: 4/13
- ✓ Step 7: Evaluating and Interpreting Modeling Results
  - ✓ REPORT 7: due 4/26
- ✓ Step 8: Deploying a Robust and Scalable Solution
  - ✓ REPORT 8: due 5/10
  - ✓ PRESENTATION 4: 5/11
- Step 9: Developing a Communication Plan and Monitoring Dashboard
  - REPORT 9: due 5/24
- Step 10: Optimization
  - FINAL REPORT AND POSTER: due 6/8
  - FINAL PRESENTATION AND DEMO: due 6/9

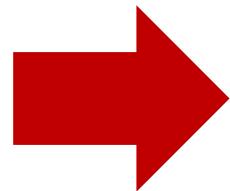
# What is needed in this step?

- Find the right way to communicate your insights
  - Websites, charts, spreadsheets, dashboards, other programs and business tools
- Operationalize the project and plan for monitoring
  - Focus on measurement and monitoring of effectiveness
- Create a story board for communication

Turn insight into a benefit...



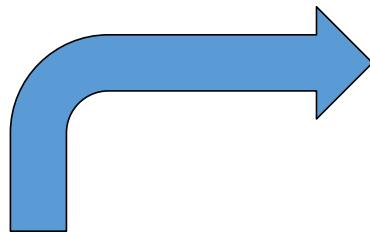
**Amplifying the  
Value of Data  
Related to X**



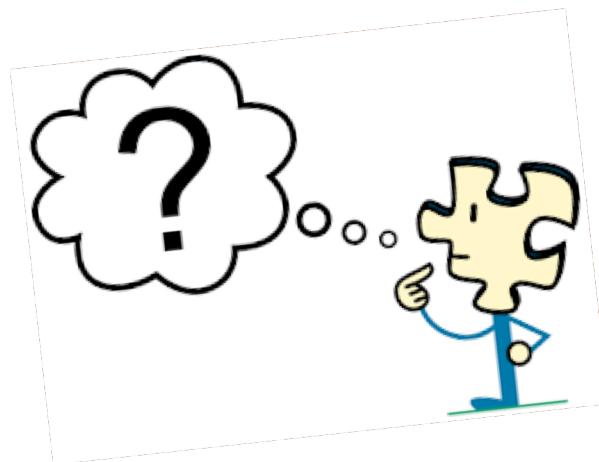
**Benefit Y for  
Science,  
Business,  
Society or  
Education**

**What would Y be if X was your dataset?**

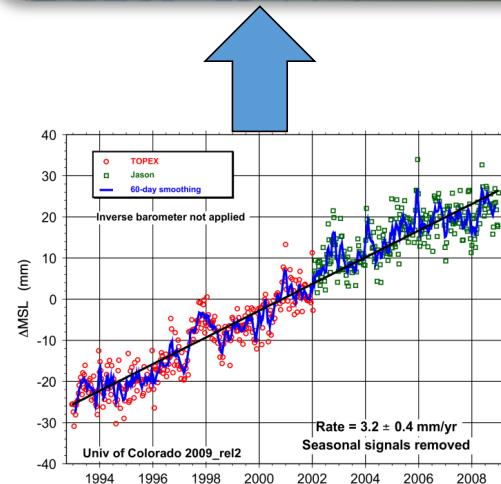
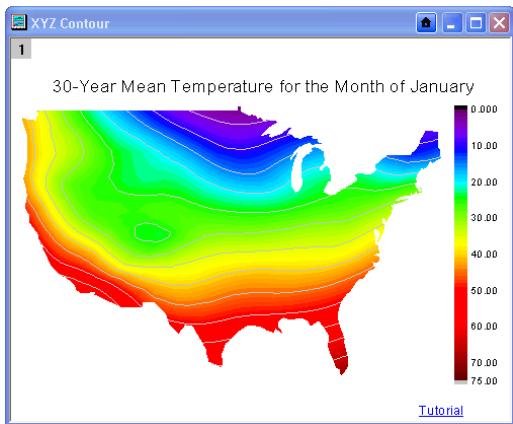
# What to Present



# What to Present



# How to Present

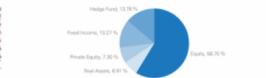


Litvak Wealth

## Portfolio Asset Allocation

| ASSET CLASS    | VALUE                | ALLOCATION      | TARGET ALLOCATION | DEVIATION (%) |
|----------------|----------------------|-----------------|-------------------|---------------|
| Equity         | \$ 10,946,400        | 58.75 %         | 60.00 %           | -1.35 %       |
| Fixed Income   | \$ 2,470,700         | 13.75 %         | 12.00 %           | +3.75 %       |
| Hedge Fund     | \$ 2,587,100         | 13.75 %         | 15.00 %           | -1.25 %       |
| Private Equity | \$ 2,307,400         | 7.00 %          | 5.00 %            | +4.00 %       |
| Real Assets    | \$ 1,287,400         | 6.91 %          | 5.00 %            | +1.91 %       |
| <b>Total</b>   | <b>\$ 18,633,100</b> | <b>100.00 %</b> |                   |               |

Edward Carter  
Portfolio Overview  
Dec 31, 2012



## Total Returns

| ASSET CLASS    | VALUE                | TOTAL RETURN        | RETURN (%)     | ATTACHMENT     |
|----------------|----------------------|---------------------|----------------|----------------|
| Equity         | \$ 14,340,400        | \$ 2,240,126        | 24.44 %        | 13.80 %        |
| Fixed Income   | \$ 2,470,700         | \$ 197,200          | 8.27 %         | 1.21 %         |
| Hedge Fund     | \$ 2,587,100         | \$ 23,901           | 1.00 %         | 1.49 %         |
| Private Equity | \$ 2,307,400         | \$ 23,901           | 1.07 %         | 0.14 %         |
| Real Assets    | \$ 1,287,400         | \$ 23,901           | 1.87 %         | 0.14 %         |
| <b>Total</b>   | <b>\$ 18,633,100</b> | <b>\$ 2,365,203</b> | <b>18.20 %</b> | <b>18.20 %</b> |

## Monthly Total Returns



## Investment Results

| CURRENT PERIOD           |               |
|--------------------------|---------------|
| Value as of Dec 31, 2011 | \$ 17,712,712 |
| New Entries              | \$ 2,449,033  |
| Net Income               | \$ 303,268    |
| Net Gains                | \$ 5,032,000  |
| Accrued Income           | \$ 6,481      |
| Value as of Dec 31, 2012 | \$ 18,633,100 |
| Change in Value          | \$ 1,922,400  |

# Visualization Tools

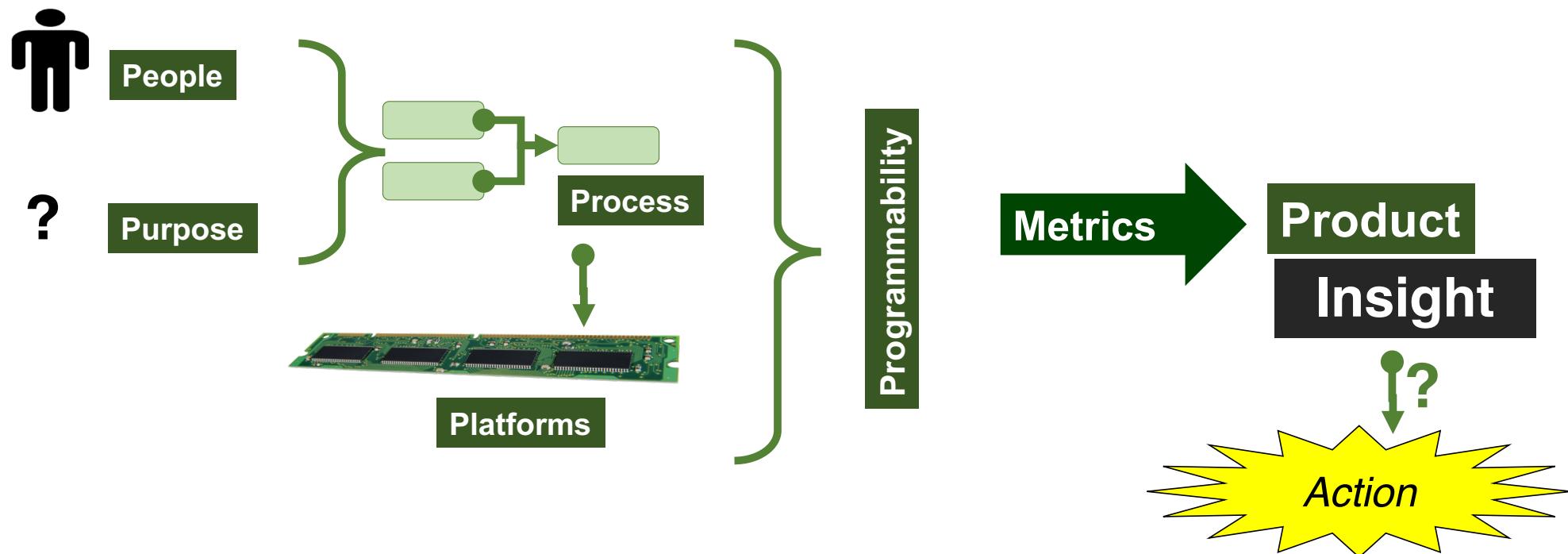


*Timeline*<sup>JS</sup>

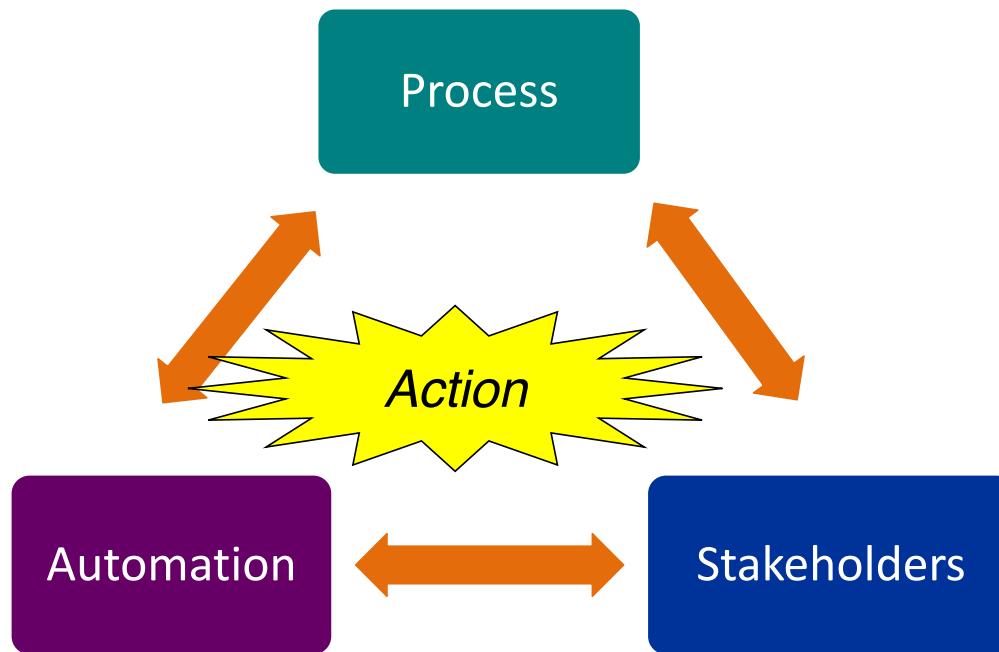
Beautifully crafted timelines that are easy  
and intuitive to use.

# Operationalizing the Project

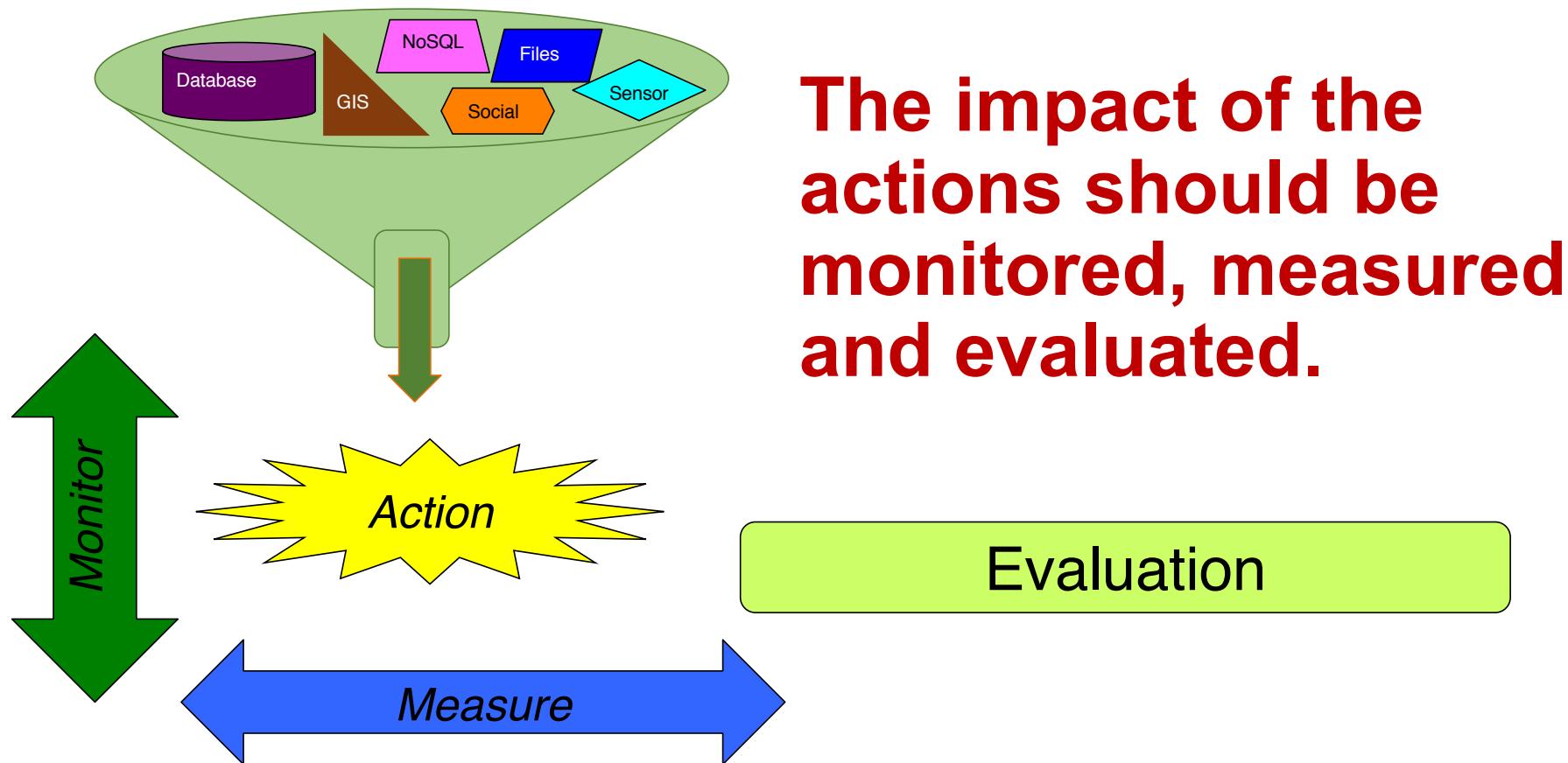
# The insights need to be evaluated to turn them into action.



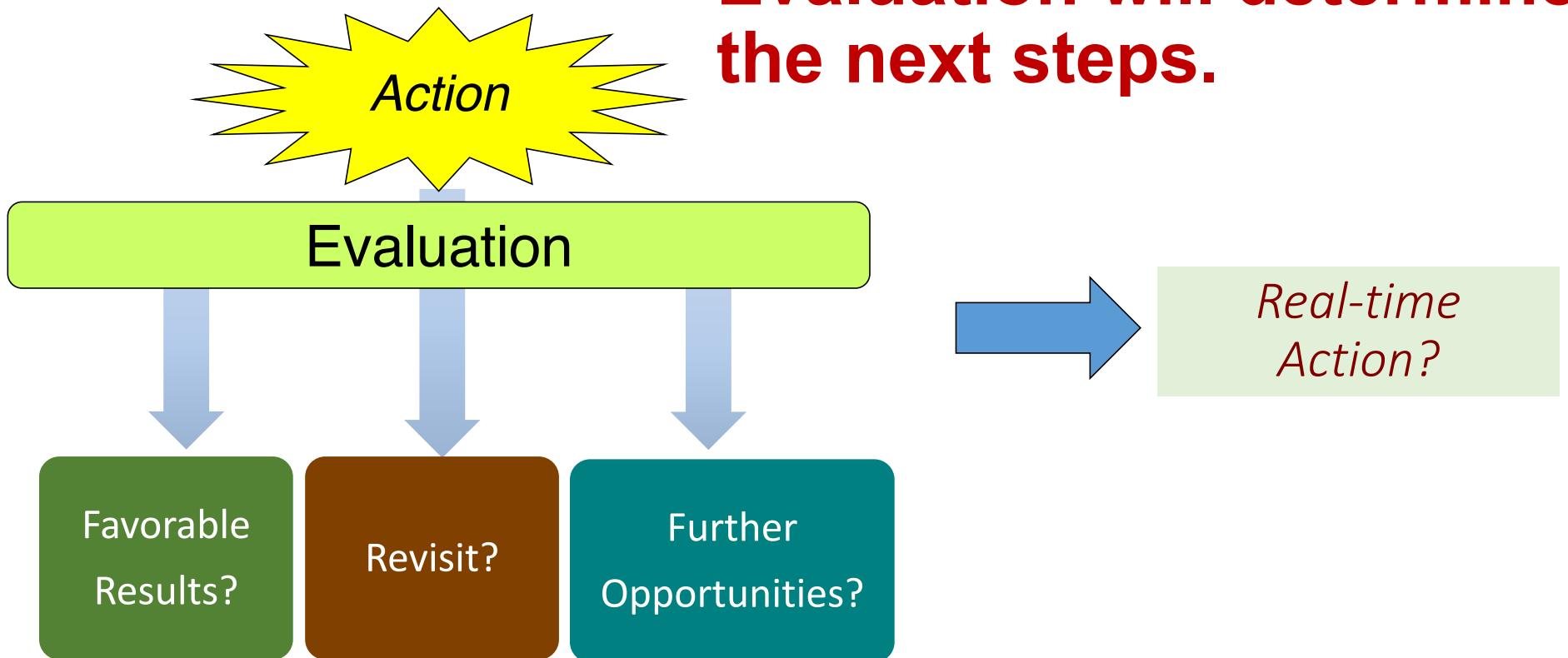
# Implementation of the actions needs many things working together.



# Big Data



**Evaluation will determine  
the next steps.**



# Step IX Report Guidelines

- Title, team members and advisor(s)
- Findings and Reporting
  - What are the findings? Who are the audience for these findings?
  - How did you determine what to present in reporting your findings?
  - What techniques and tools did you use to communicate your results?
  - Visualizations and other reportable products of your findings, e.g., reporting dashboard.
- Any major updates to Steps 1 through 8 as a result of Step 9
- Keep it to 4-8 pages
- Due date: 5/25/2018 midnight

# Final Presentations and Report

- Guidelines

[https://docs.google.com/document/d/14vjwirCi\\_G\\_syCUSHiJ5OOMBaeHKRrV23jJYpIJP7TI/edit?usp=sharing](https://docs.google.com/document/d/14vjwirCi_G_syCUSHiJ5OOMBaeHKRrV23jJYpIJP7TI/edit?usp=sharing)

- Feedback from today's presentations

- Findings -- Focus more on the insights
  - Time – Almost everyone went over today!
  - Fun -- Have fun making the final presentation.

- Posters

- Use a portrait format, e.g., 36x48
  - Have four main sections
    - Problem Statement
    - Data Science Pipeline: Acquire, Prepare, Analyze, Scale, Report
    - Final Solution Architecture
    - Key Insights
  - Don't forget team, advisors, acknowledgements, etc.

# Questions?

*Ilkay Altintas, Ph.D.*

Email: [ialtintas@ucsd.edu](mailto:ialtintas@ucsd.edu)