POWER BUSINESS INTELLIGENCE

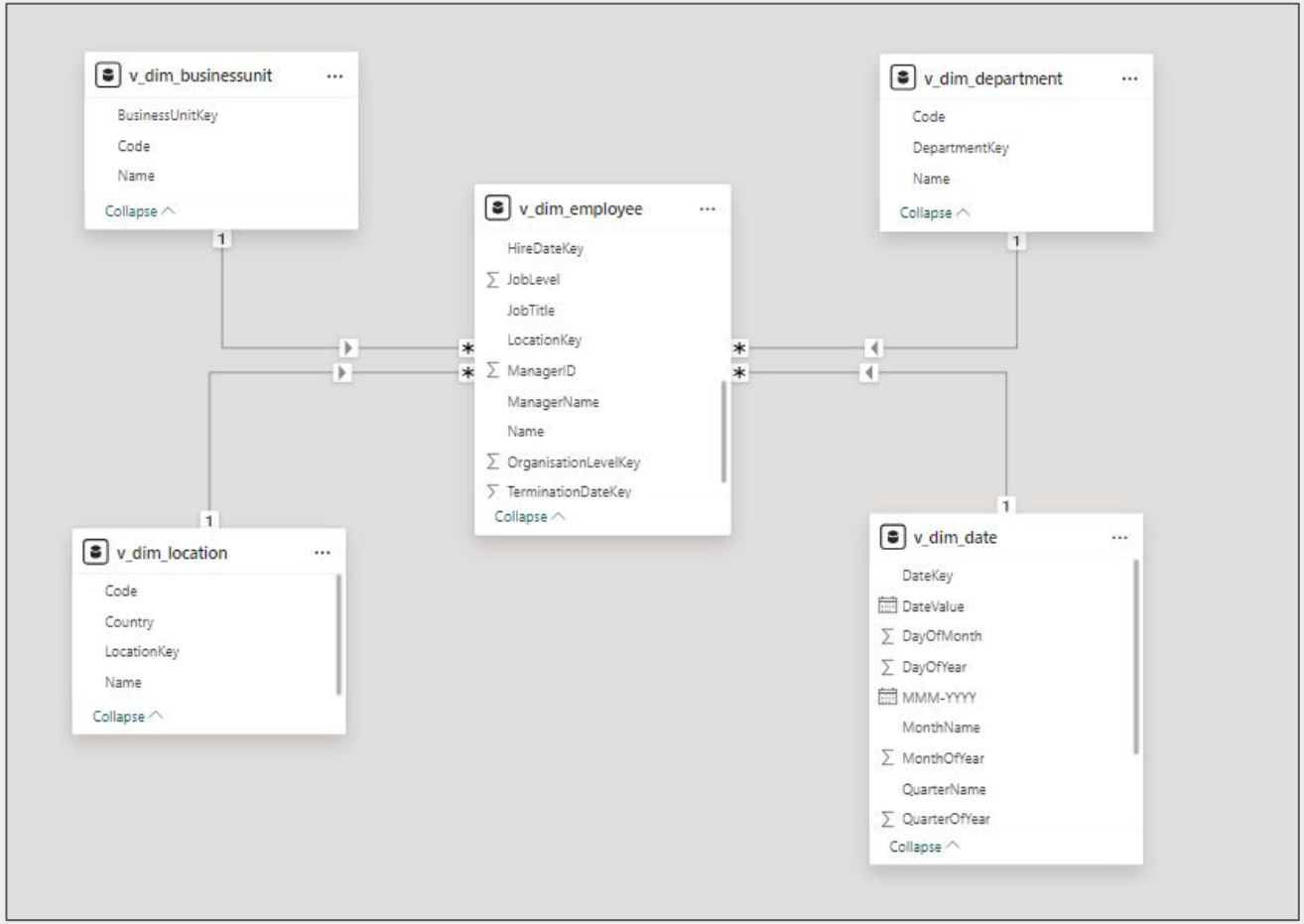
Tran Anh Tuan

POWER BI

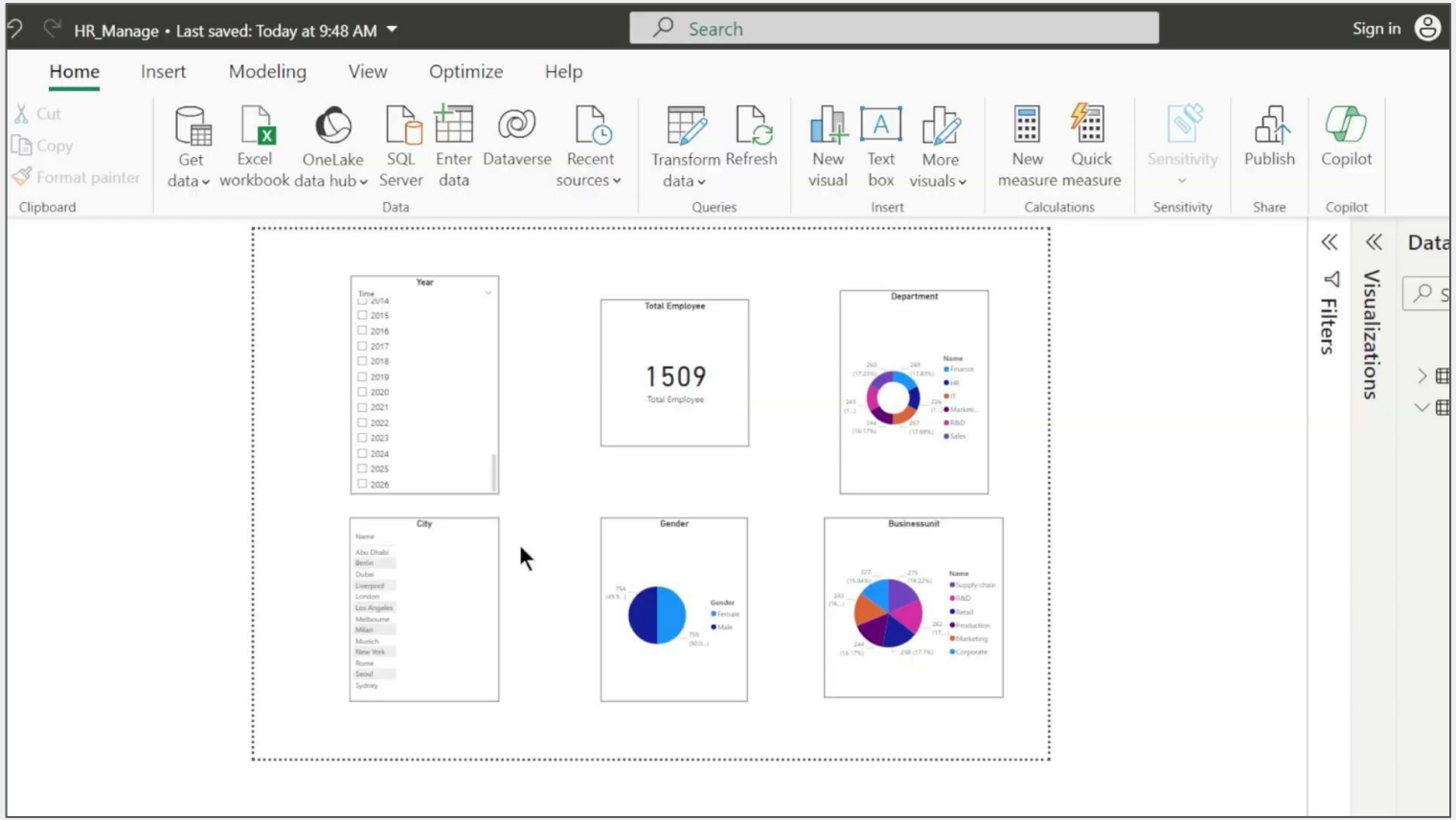
- **Who?**
  Hearing Research
- **What?**
  Data Employee
- **Power PI**
  Relationship - Video Demo

POWER BI - What?

POWER BI - Relationship



POWER BI - Video Demo



[Link Video]

DashBoard - Director - Strategic Alignment

Projects | Pmo

Scorecard | Strategy | Ranking | Demand Analysis | Roadmap

Alignment | Dashboard

Clear | Select Bookmark | Select Report | More | Close

Strategy Execution Map

Strategy

Status

Feasibility

Financial

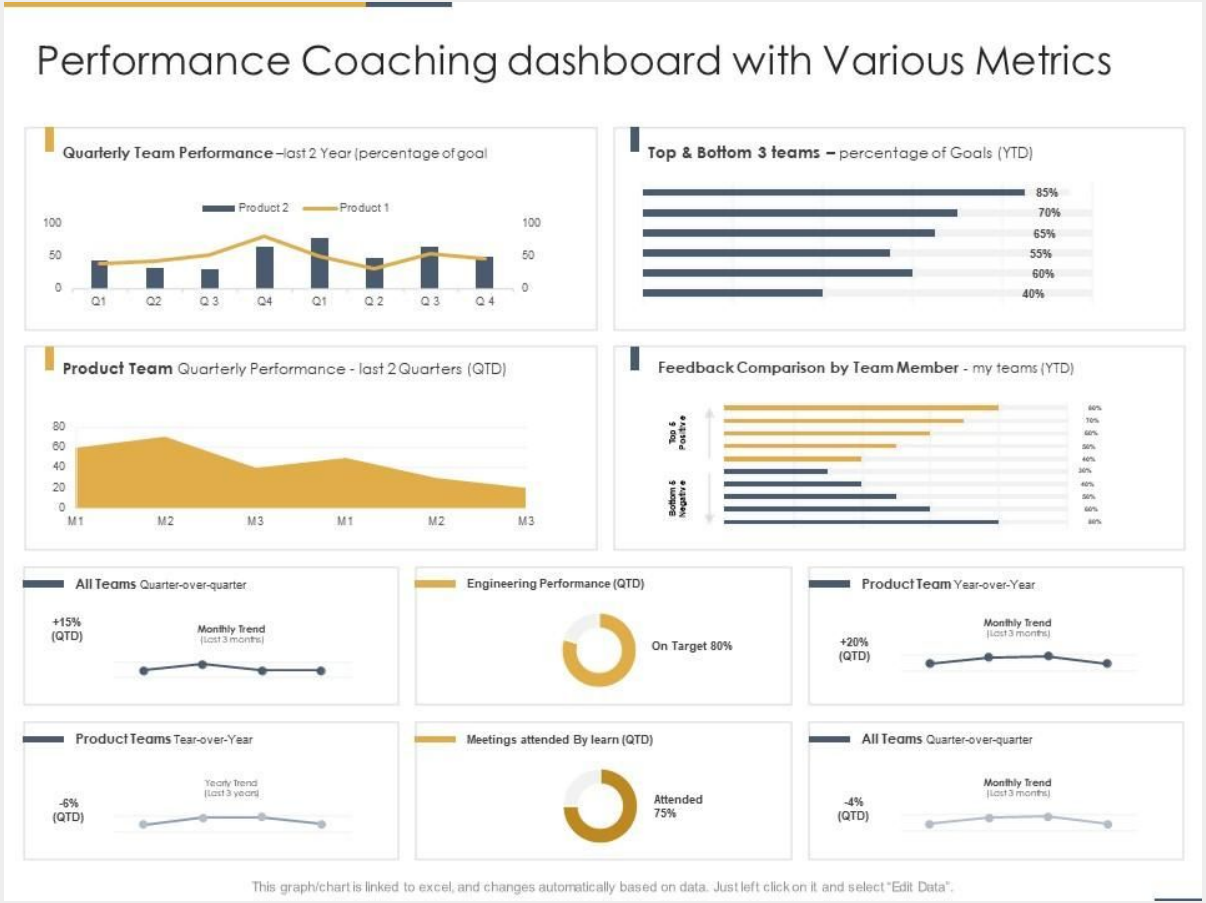
Risk

Risks

Risk Detail

Category	Investment	Risk	Description	Assigned To	Impact	Probability	Score
Infrastructure	Dominican Republic	Customer data incomplete		Wolf, Phil	1	2	2
Infrastructure	Dominican Republic	Future of product line is uknown		-	3	2	6
Infrastructure	Trinidad and Tobago	Resource issues		Wolf, Phil	1	-	2
Personnel	Aruba	New Risk		-	1	1	1
Technology	Antigua 8	New Issue		-	1	-	2
Technology	Aruba	faslkdjf asjfalskjf alsjkfa	dasfasfa	-	1	-	2
Technology	Aruba	Project Status Report late	Qlik report needs to be updated before executive meeting.	Samarel, Paul	1	-	2
Technology	Cayman Islands	New Risk	-	-	3	3	9
Technology	Cayman Islands	Program Spec Alignment	-	-	1	2	2
Technology	Dominican Republic	New Risk		-	1	1	1
Technology	Guadeloupe	New Issue		-	1	-	2
Technology	Puerto Rico	Dependenies unknown	-	-	3	2	6
Weather	Dominican Republic	Funding source unknown		Brophy, Bill	2	3	6
Weather	Dominican Republic	Shipping options limited		-	1	3	3
-	A1001 Project	No PM		Brophy, Bill	1	-	2
-	A1001 Project	Year end MBO		-	3	2	6
-	A1002 Project	Delivery of raw materials		Fred	1	-	2

DashBoard - Color Main In DashBoard

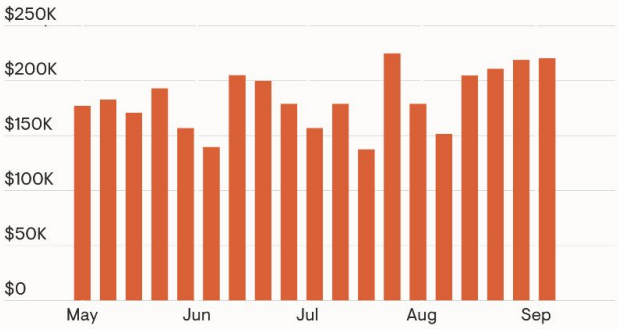


DashBoard - Director

$3.5M
Revenue this FY

28% $12.1M

Weekly revenue



Cash position

$2.5M
in bank

2.4mth
Runway

Headcount

Sales	21
Marketing	8
Warehouse	6
Installation	40
CS	5
Ops / Back office	10
Finance	2
Total	92

Marketing Team

45K MQL this FY

12.5K MQL this month

$19 Cost per MQL

$29 Cost per SQL

Sales Team

29K SQL this year

2.5K Open

2.1K Closed

8.0% Close rate

$1.63K
Avg. revenue per sale

65%
MQL > SQL

Installation team

75%
Warehouse capacity

12d
Avg. installation time

CS team

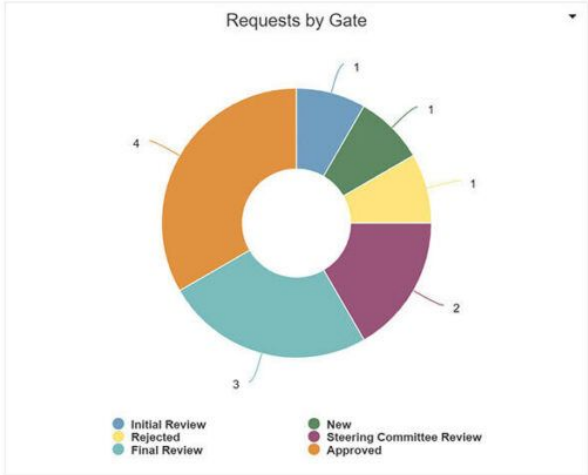
12m
FRT

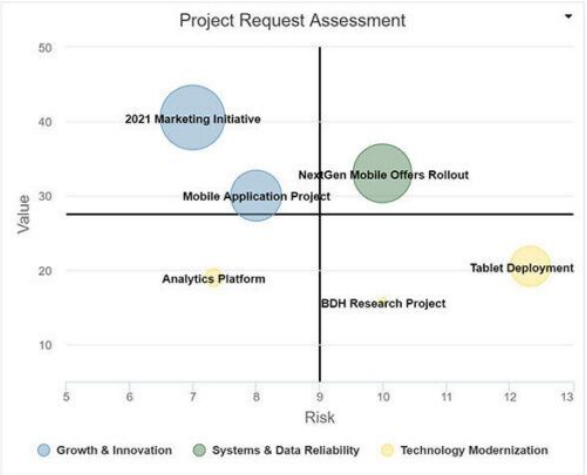
96%
CSAT

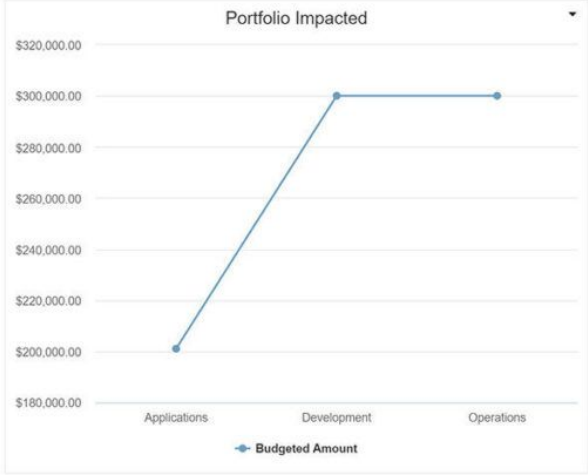
SURGE CEO executive summary

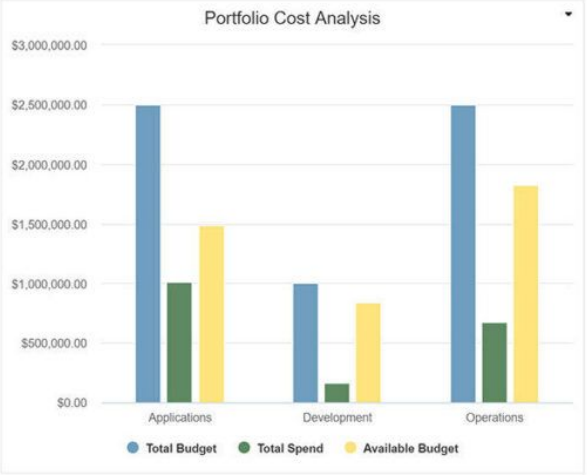
12:05

DashBoard – Director – Strategic Alignment

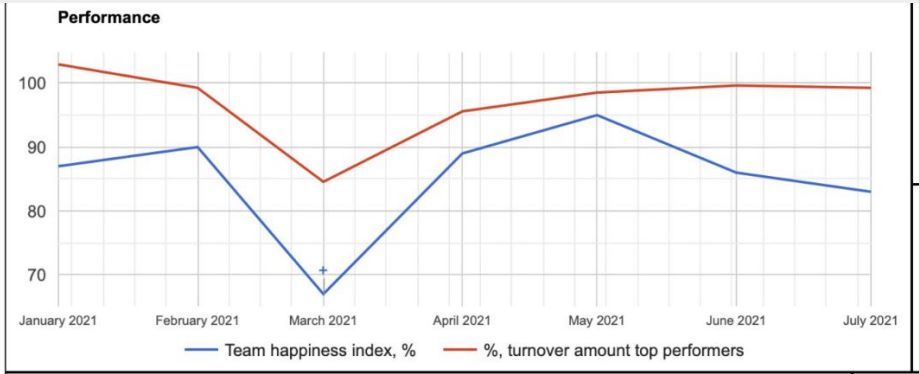


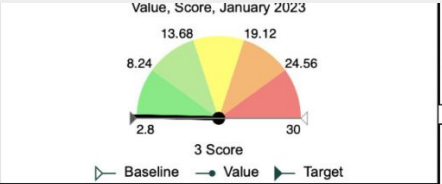






DashBoard - Director - Strategic Alignment





83 (-3%)
Score
83%

Strategy attributes were defined
Yes (0%)
Yes/no
100%

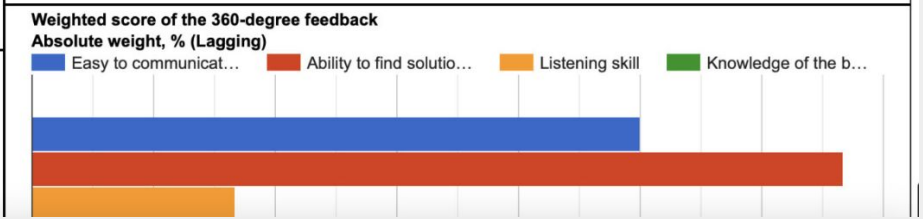
Strategy is formally described
Yes (0%)
Yes/no
100%

Initiatives

Name	Context	Status	Budget
Test strategy for unambiguous goal	Formulate unambiguous goals	Analysis	
Link this indicator to the HR scorecard	%, turnover amount top performers	Analysis	43.2K$
Link this indicator to the diversity and inclusion scorecard	% employee inclusion index	In Progress	
Link this indicator to the Innovations scorecard	%, innovation pipeline index	Done	3.2K$

Risks

Name	Context
Migration of legacy KPIs from spreadsheets	Ensure stakeholders know and understand strategy
Vanity metrics; manipulation of KPIs	360-degree feedback



DashBoard - Director - Strategic Alignment

Projects | Pmo

Scorecard | Strategy | Ranking | Demand Analysis | Roadmap

Alignment | Dashboard

Clear | Select Bookmark | Select Report | More | Close

Strategy Execution Map

Strategy

Status

Feasibility

Financial

Risk

Risks

Risk Detail

Category	Investment	Risk	Description	Assigned To	Impact	Probability	Score
Infrastructure	Dominican Republic	Customer data incomplete		Wolf, Phil	1	2	2
Infrastructure	Dominican Republic	Future of product line is uknown		-	3	2	6
Infrastructure	Trinidad and Tobago	Resource issues		Wolf, Phil	1	-	2
Personnel	Aruba	New Risk		-	1	1	1
Technology	Antigua 8	New Issue		-	1	-	2
Technology	Aruba	faslkdjf asjfalskjf alsjkfa	dasfasfa	-	1	-	2
Technology	Aruba	Project Status Report late	Qlik report needs to be updated before executive meeting.	Samarel, Paul	1	-	2
Technology	Cayman Islands	New Risk	-	-	3	3	9
Technology	Cayman Islands	Program Spec Alignment	-	-	1	2	2
Technology	Dominican Republic	New Risk		-	1	1	1
Technology	Guadeloupe	New Issue		-	1	-	2
Technology	Puerto Rico	Dependenies unknown	-	-	3	2	6
Weather	Dominican Republic	Funding source unknown		Brophy, Bill	2	3	6
Weather	Dominican Republic	Shipping options limited		-	1	3	3
-	A1001 Project	No PM		Brophy, Bill	1	-	2
-	A1001 Project	Year end MBO		-	3	2	6
-	A1002 Project	Delivery of raw materials		Fred	1	-	2

DashBoar

Biz Infograph
1. Indicators
2. Enter Data
3. Monthly Dashboard
4. YTD Dashboard
4. YTD Dashboard
Select YTD Month
JUN
Sales
108,325
Target Achievement 101%
Change Over Last Year 1%
Gross Profit
31,020
Target Achievement 108%
Change Over Last Year 6%
Sales (Amount) by Product/Category
Above Target
Below Target
Target
Product 1
Product 2
Product 3
Product 4
Product 5
Actual Sales vs Target
Actual >=100% of Target
Actual <100% and >=90% of Target
Actual <90% of Target
Target
JUL AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN
Operating Profit
17,513
Target Achievement 110%
Change Over Last Year 8%
Net Profit
13,968
Target Achievement 114%
Change Over Last Year 9%
Income Statement
Total Revenue
Cost of Goods Sold
Total Operating Expenses
Non-Opr. Income (Expense)
Finance Expense
Net Profit Before Tax
Net Operating Cash Flow
Monthly Sales Growth
Employee Cost vs Sales
Sales
Employee Cost
Employee Cost %
Headcount
126
Change vs Last Year 1%
Male
Female
Days Receivable Outstanding
Receivable Aging
Total Receivable 1,350
<30 Days
<60 Days
<90 Days
>90 Days
Days Inventory Outstanding
Inventory Trend

DashBoard - Director

BIO Demo

Financial Reporting | Project Analytics | Sales and Customer Analytics | Inventory Analytics | Purchase Analytics | Enterprise Analytics | Dashboards

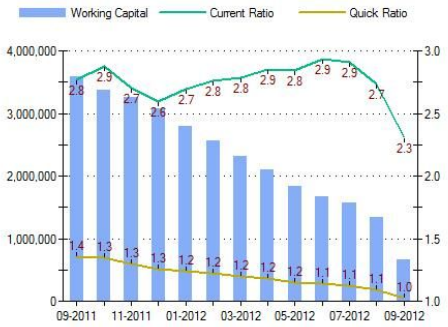
Executive Dashboard

Company : **All**

Period Post By Fiscal Year : **10-2012**

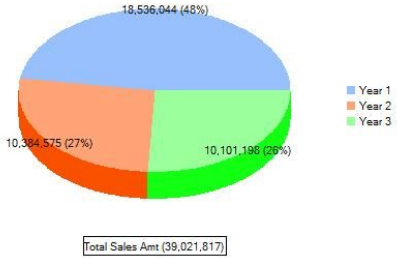
Cash	A/R Trade (Net)	Inventory
1,563,149	14,694,052	21,990,996

Working Capital Current Ratio Trend



	Sales Amt	Gross Margin %	On Time Shipping Performance	Avg Amt Per Sales Document	Nbr Of Sales Documents
Current Period	4,438,755	44.9%	▼ 32.8%	6,736	659
Prior Year Current Period	3,475,004	41.0%	100.0%	14,787	235
Period % Change	▲ 127.7%	▲ 109.7%	▼ 32.8%	▼ 45.5%	▲ 280.4%
Year To Date	31,330,417	43.2%	▼ 36.3%	9,821	3,190
Prior Year To Date	26,038,097	41.6%	100.0%	11,766	2,213
YTD % Change	▲ 120.3%	103.8%	▼ 36.3%	▼ 83.5%	▲ 144.1%
Total Prior Year	33,779,467	41.7%	100.0%	12,548	2,692
% of Total Prior Year	▼ 92.7%	103.4%	▼ 36.3%	▼ 78.3%	▲ 118.5%

Customer Retention By Year of Acquisition



Customers By Customer Class : **All**

Top Ten Customers

	Year To Date	% of Total	Change In % of Total
Roger Super Store	1,321,149	4.2%	158%
Transnational Foods Inc.	1,095,937	3.5%	143%
Safeway Food & Drug	1,009,962	3.2%	119%
Hubers Market	942,790	3.0%	116%
University of Killington	860,042	2.7%	▼ 62%
Japan Sage Market	817,653	2.6%	101%
Save-A-Lot	792,190	2.5%	127%
Stop & Shop	775,030	2.5%	
Pit Stop Market	743,345	2.4%	▼ 82%
Minit Mart Quick Shop	721,789	2.3%	▼ 90%
Total Top 10	9,079,887	29.0%	117%
Total All	31,330,417	100.0%	100%

Subaccounts Product Line Segment : **All**

Year Over Year Sales and Margin Comparison

Customers By Customer Class : **All**

DashBoard - Director

Customer Relationship Management Dashboard 1/2

This slide covers the customer relationship management dashboard which includes in progress and completed activities, lead target details, etc.

1256 Contact — 75%

350 Deals — 50%

234 Campaign — 25%

$9000 worth — 15%

Activity

Lead Target

Remaining 70

My Lead

Name	Lead Stage	Last Contact	Owner	Company Name	Work
Dylan Erickson	30	06:17PM	IVA McCarty	High	(368) 491-2368
Jorge Byrd	35	09:36PM	Adelaide Marshal	net grow	(263)495-2367
Seáns Pearson	75	03.57AM	Emily bush	Designer dude	(468)499-2366

This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

Customer Relationship Management Dashboard 2/2

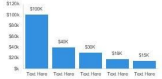
This slide covers the customer relationship management dashboard which includes company goals, revenue by deal source, new deals, etc.

Revenue this Quarter >

$131.3K

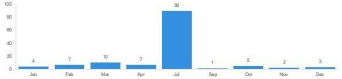
Revenue Goal Attainment this year >

Revenue by deal source this year >



Forecast this Year >

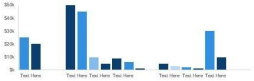
New deals by month This year >



Pipeline Coverage this year >

Pipeline Value Nerdified
$6.03M

Revenue by deal source by owner this year >



This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

DashBoard - Director

Business Revenue Dashboard

This slide highlights business dashboard with multiple statistics to estimate the revenue and profitability of company as a result of new customer intimacy strategy.

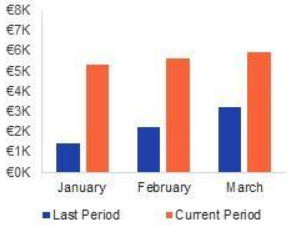
Average Revenue Per Customer

$ 8000 : Actual Revenue

$ 6000 : Target Revenue

X% : Target Achievement

Compared to previous Year



Customer Acquisition Cost (CAC)

$ 4000 : Actual CAC

$ 2.230 : Target CAC

X% : Target Achievement

CAC VS Customer Lifetime Value (CLV)

Revenue

$ 567.7816: Actual Revenue

$ 567.7816: Target Revenue

119% : Target Achievement

Revenue : Compared to previous Year

of New Customers

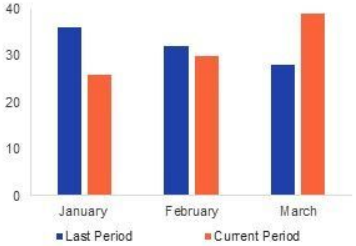
122 : New Customers

120 : Target

125% : Target Achievement

New Customer : Compared to Previous Year

2022



This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

DashBoard - Director

Scoro | Calendar | Tasks | Companies | Planner | Quotes | Projects | Invoices | Pipeline | Reports | ...

Paul Smith
Sunrise Ltd

CEO

+ Add to dashboard | Settings | Help

Revenue YoY
+193.5% Sum (Excl tax) 1.07 M EUR

Profit YoY
+126.7% Profit 823 K EUR

Quoted > Confirmed this year
266.3 K 40.9% 108.9 K

Quoted MoM
-45.78% Sum (Excl tax) 94.03 K EUR

Bills this month vs last year
+∞% Sum (Excl tax) 16.1 K EUR

2020 budgeted vs actual
1.44 M 74% 1.07 M

Revenue this month vs last year
+266.9% Sum (Excl tax) 183.5 K EUR

Profit this month vs last year
+234.7% Profit 167.4 K EUR

Revenue forecast this month
Sum (Excl tax) 199.4 K EUR

Outstanding invoices
255% Excl tax 11 invoices 255.1 K EUR

Outstanding bills
69% Sum 62.13 K EUR

All hours vs non-project hours
469:35 31% 145:30

My calendar today

Tuesday, 08/12

02:00 pm – 03:00 pm | BN MA PS SM | **Weekly marketing meeting** | Purple room | Meeting - team

Thursday, 10/12

01:00 pm – 02:00 pm | CR EP OB PS | **Weekly product catchup** | Green room | Meeting - team

Revenue 2020 vs 2019

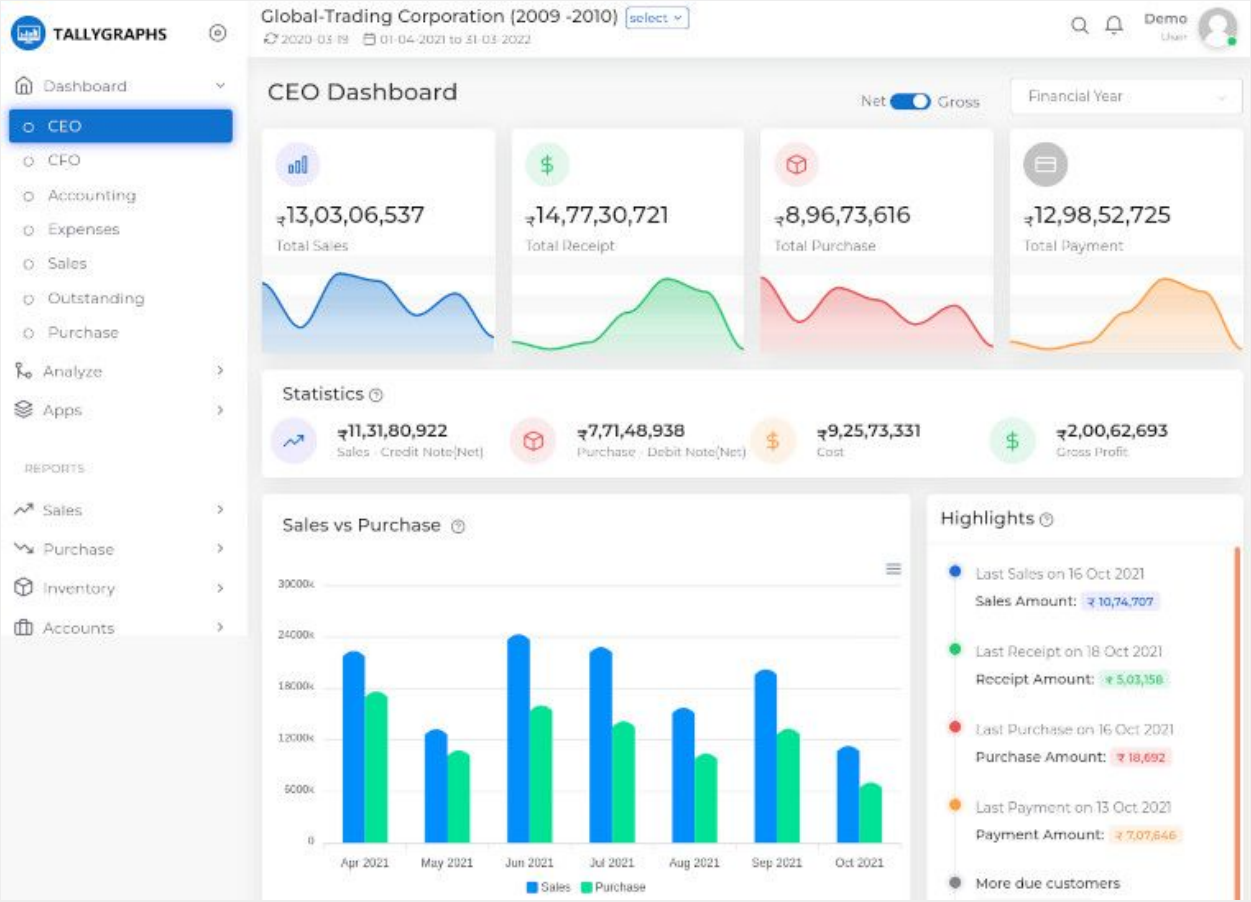
Budgeted income

Period	Actual	Budget	Status	Difference
Dec	183 456	165 000	111%	+18 456
Q 4	387 016	475 000	81%	-87 984
2020	1 065 241	1 440 000	74%	-374 759

Deals closing this month

No.	Author	Client | Project	Status	Sum EUR	Margin EUR	Cost EUR
78	PS	Playtime LLC	Negotiation	17,831.82	6,569.62	11,262.20

DashBoard - Director



Link

Dashboard - Department Head

DashBoard - Department Head

DashBoard - Director

Profit Center

Net Profit

Sale

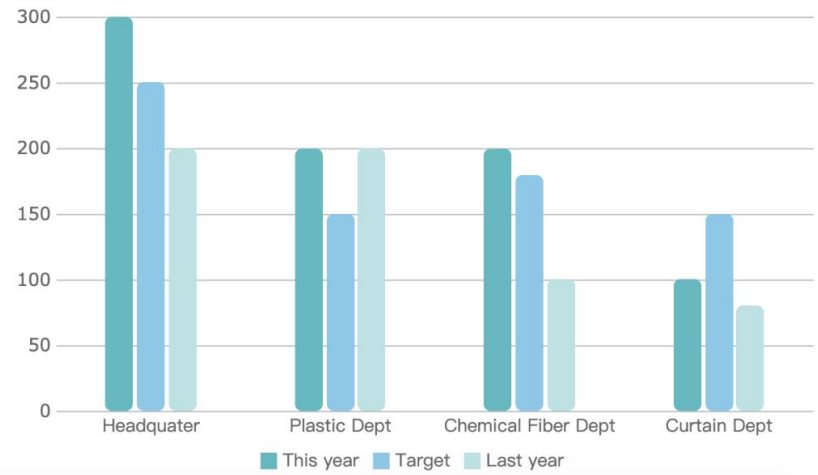
Receivables

Stock

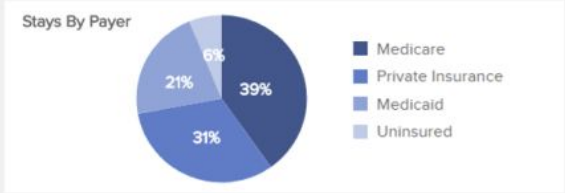
Profit List(10k RMB)

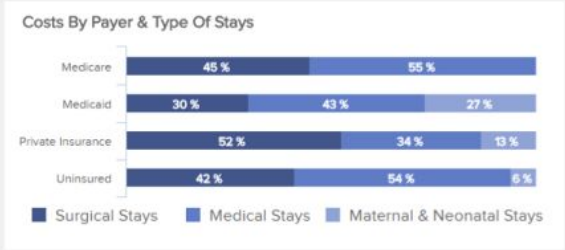
Department	Gross Profit			Net Profit		
	Actual	Index	Completion Rate	Actual	Index	Completion Rate
Plastic Dept	435.88	674.11	64.66%	265.88	374.11	71.07%
Chemical Fiber Dept	996.30	811.76	122.73%	546.30	611.76	89.30%
Curtain Dept	855.99	945.88	90.50%	656.30	458.33	143.19%
Headquater	811.25	658.33	123.23%	671.25	858.33	78.20%
Total	3099.42	3090.08	100.30%	2139.73	2302.53	92.93%

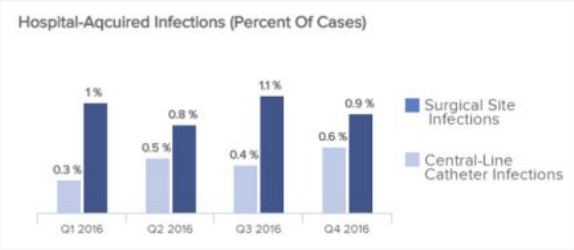
Comparison of Departments' Annual Gross Profit (10k RMB)



DashBoard - Department Head







DashBoard - Operational Efficiency

Operations Dashboard

DashBoard - Operational Efficiency

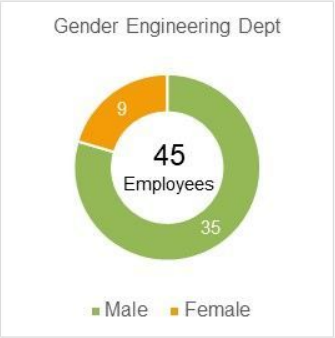
DashBoard - Operational Efficiency

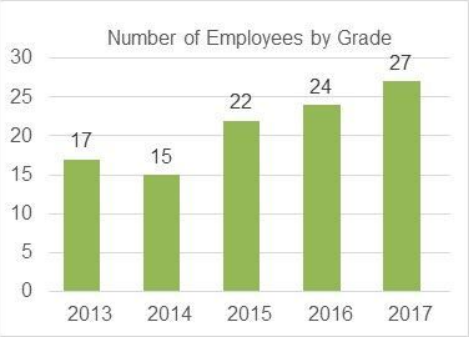
DashBoard - Department Head

DashBoard - Department Head

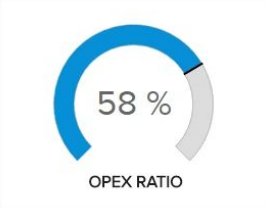
Employee Headcount Dashboard by Departments

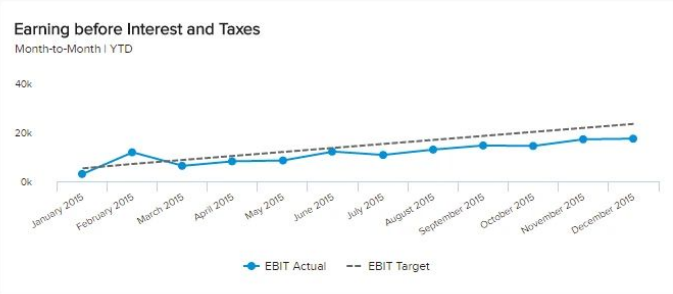
This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".





DashBoard - Department Head





INCOME STATEMENT

Revenue	567.304	$
COGS	119.129	$
GROSS PROFIT	**448.170**	**$**
OPEX	**326.519**	**$**
Sales	193.760	$
Marketing	66.382	$
General & Admin	66.358	$
Other Income	1.448	$
Other Expenses	6.823	$
OPERATING PROFIT (EBIT)	**116.257**	**$**
Interest and Tax	25.015	$
NET PROFIT	**91.264**	**$**

DashBoard - Department Head

DashBoard - Manage - Team Performance

Determine Team Performance Tracking Dashboard

This slide provides information about team performance management dashboard by tracking customer concern resolution rate, top people involved, etc.

Top Performing Team Members

Tanner Hodge
Open: 109
Solved: 3,206
75% Satisfaction

Lynda Shames
Open: 93
Solved: 2,786
85% Satisfaction

Kai Gaines
Open: 64
Solved: 3.237
76% Satisfaction

Sophie Mortimer
Open: 75
Solved: 1,256
70% Satisfaction

Kenzie Fields
Open: 78
Solved: 2,678
95% Satisfaction

Avg First Contact Resolution Rate

Sales Enquiry	2
Feature Request	3
Setup Request	4
Bug	4.5

Net Promoter Score

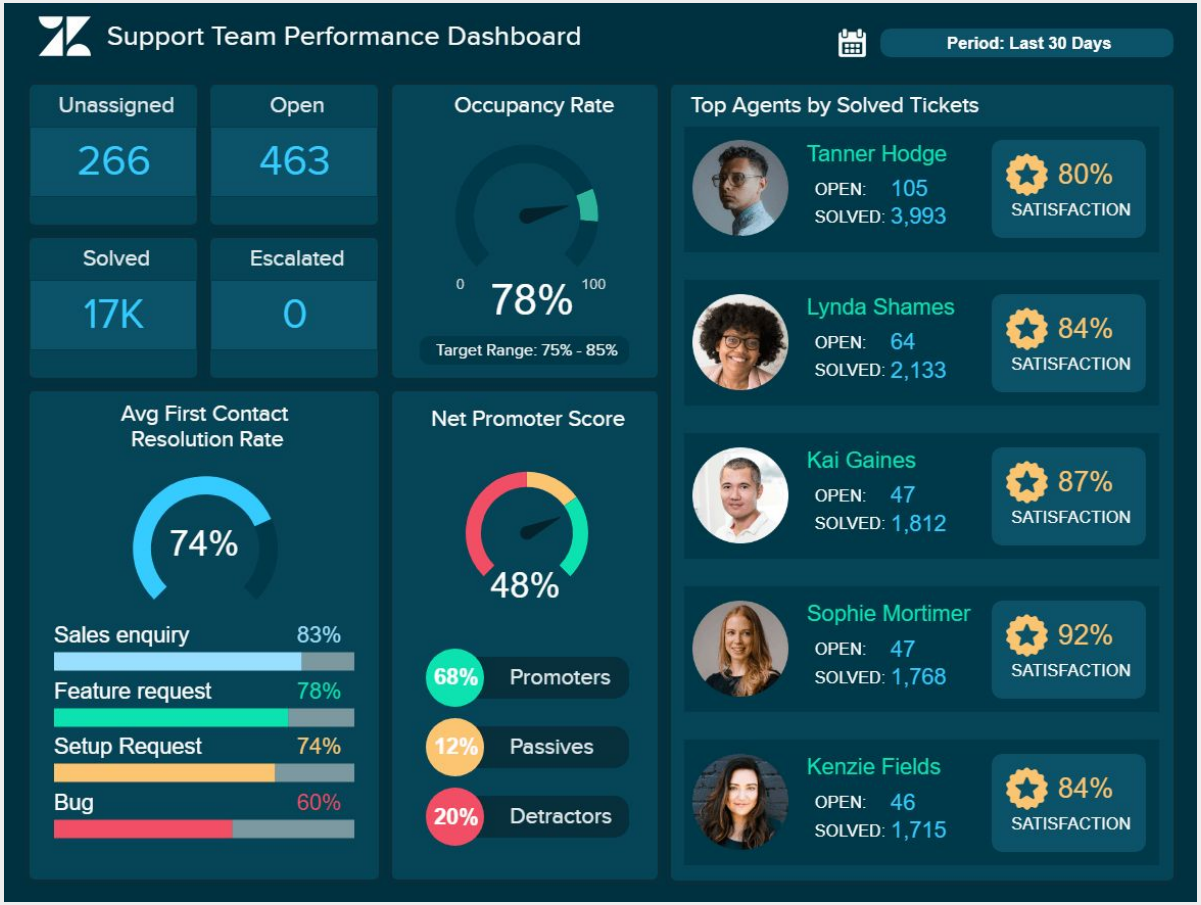
32%	Promoters
16%	Passives
28%	Detractors

Occupancy Rate

Target Range: 54% - 65%

Unassigned	Open
267	457
Solved	**Escalated**
55k	3

DashBoard - Manage - Team Performance



DashBoard - Manage - Team Performance

Sales Team Performance Management Dashboard

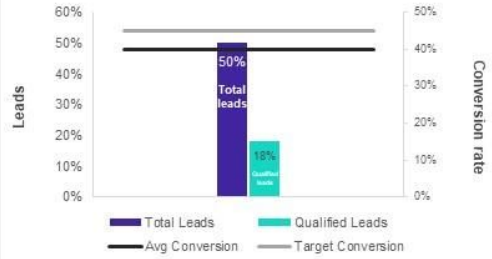
This slide shows sales team performance management dashboard. It provides information about leads, conversion rate, average response time, revenue, team performance, etc.

Revenue

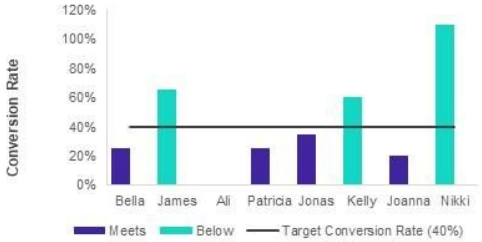
Team Performance / Monthly Target

Team Performance		Monthly Target	
Bella	$86.06k	$200k	Edit
James	$106.43k	$50k	Edit
Ali	$65.08k	$600k	Edit
Patricia	$82.28K	$100k	Edit
Jonas	$247.81k	$100k	Edit
Kelly	$48.69k	$100k	Edit
Joanna	$67.31k	$100k	Edit
Nikki	$91.34k	$100k	Edit

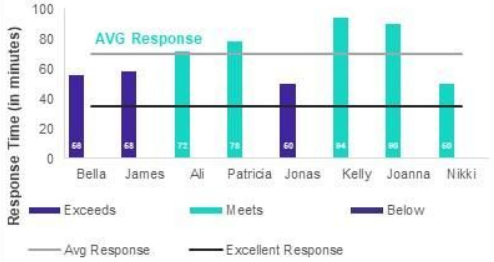
Leads



Conversion Rate

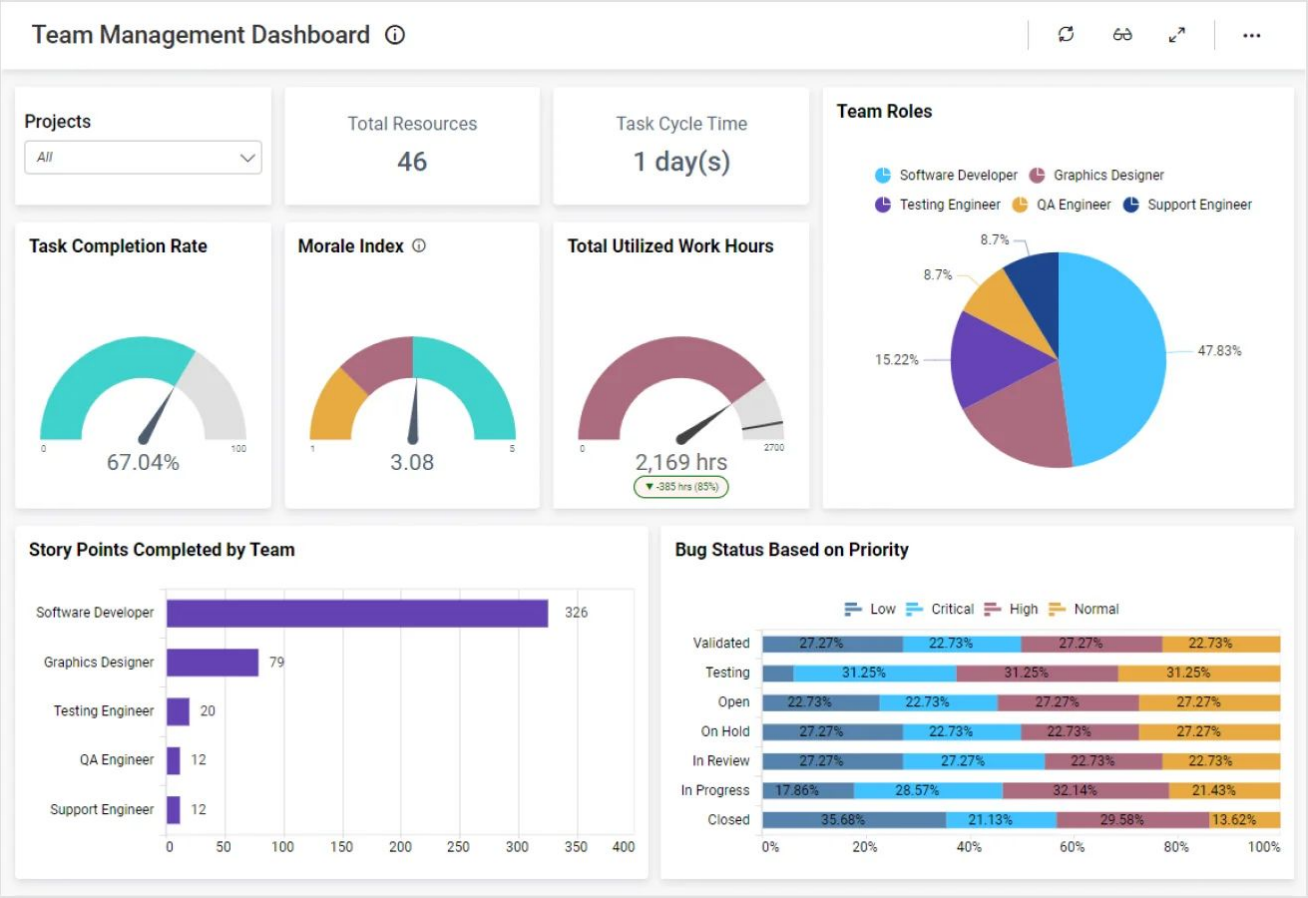


Average Response Time



This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

DashBoard - Manage - Team Performance



DashBoard - Manage - Team Performance

Determine Team Performance Tracking Dashboard

This slide provides information about team performance management dashboard by tracking customer concern resolution rate, top people involved, etc.

Top Performing Team Members

Tanner Hodge
Open: 109
Solved: 3,206
75% Satisfaction

Lynda Shames
Open: 93
Solved: 2,786
85% Satisfaction

Kai Gaines
Open: 64
Solved: 3.237
76% Satisfaction

Sophie Mortimer
Open: 75
Solved: 1,256
70% Satisfaction

Kenzie Fields
Open: 78
Solved: 2,678
95% Satisfaction

Avg First Contact Resolution Rate

Sales Enquiry	2
Feature Request	3
Setup Request	4
Bug	4.5

Net Promoter Score

32%	Promoters
16%	Passives
28%	Detractors

Occupancy Rate

Target Range: 54% - 65%

Unassigned	Open
267	457
Solved	**Escalated**
55k	3

DashBoard - Project Element

DashBoard - Project

DashBoard - Project

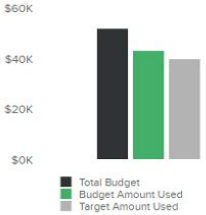
Planning	Design	Development	Testing
Completed	Completed	67% In Progress	Waiting

Projected Launch Date

107 Days

Friday, December 15

Project Budget

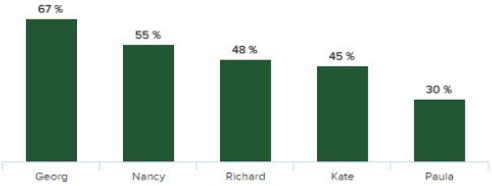


Total Budget	$52,000
Remaining	$8,770
Currently	8.1% Over Target

Overdue Tasks

Overdue	Task	Deadline	Employee
1 Day	Update facebook profile	2017-08-15	Paula
4 Days	Update testing plan	2017-08-06	Kate
10 Days	Configure desktop	2017-08-01	Nancy
24 Days	Set up new database	2017-07-18	Georg

Workload

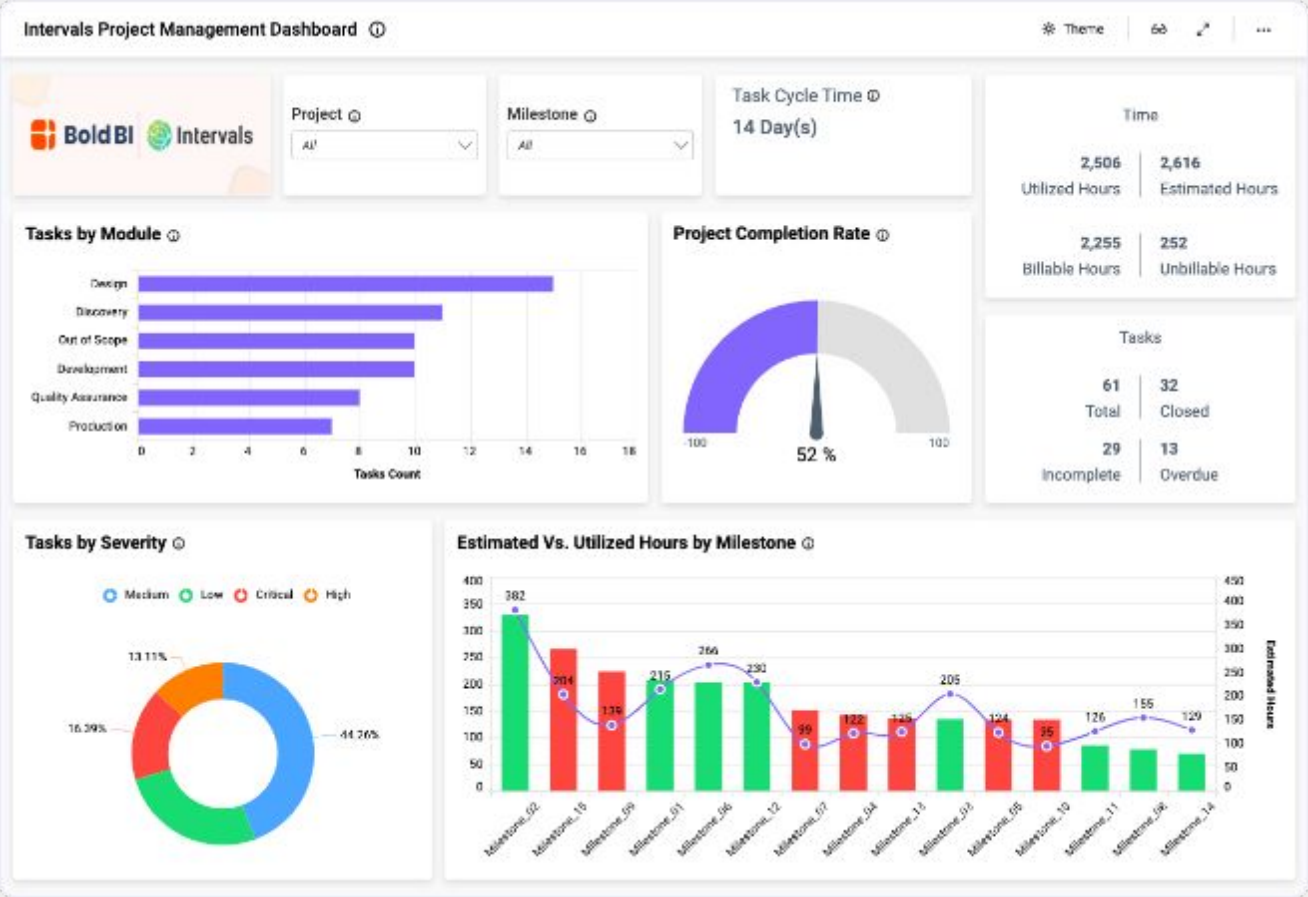


Upcoming Deadlines

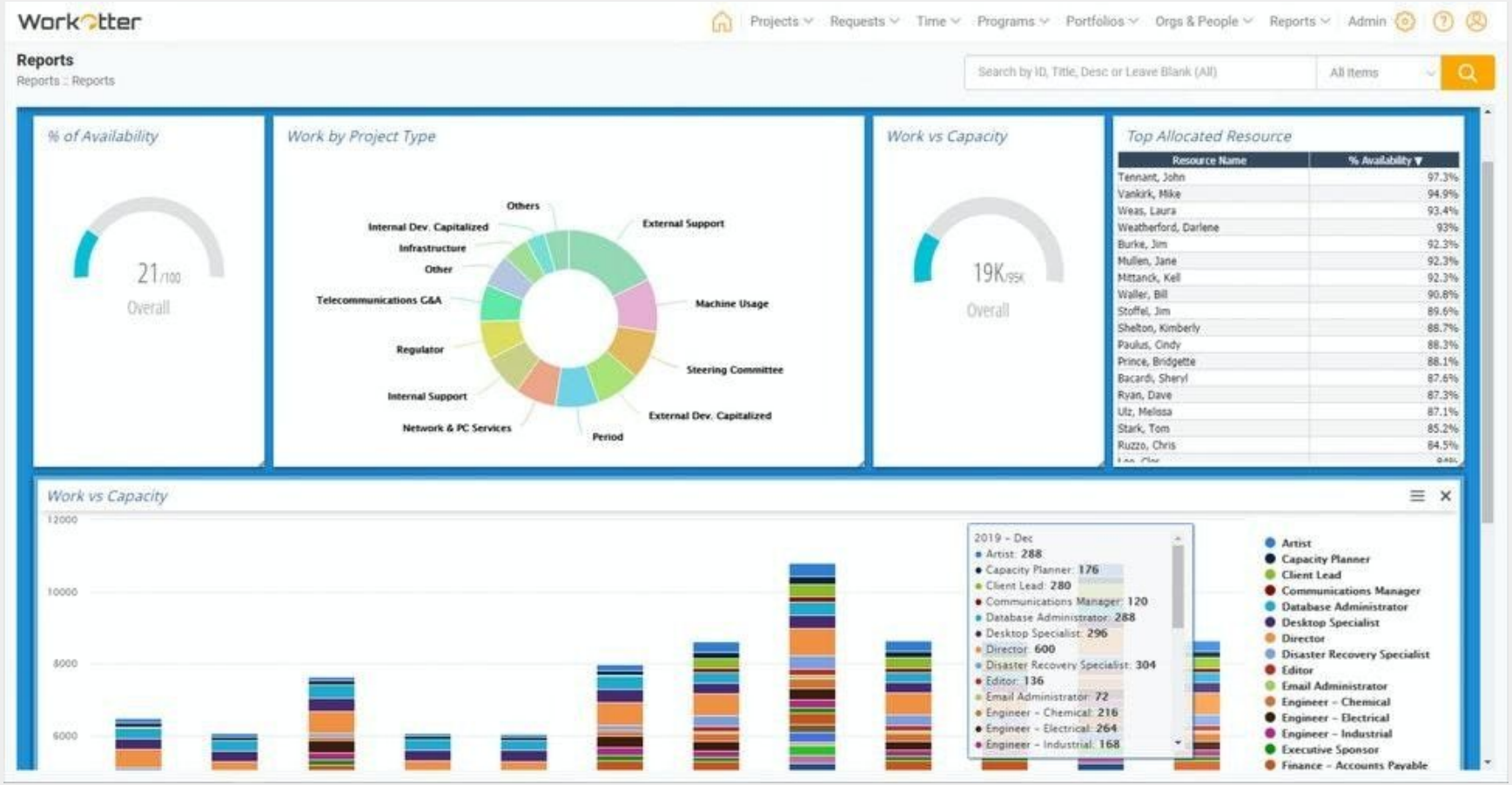
Employee	Task	Deadline	Workload
Kate	Update twitter profile	2017-08-15	34%
Georg	E-Commerce Dashboard	2017-08-06	56%
Nancy	Set up dev environment	2017-08-01	15%
Paula	Hire Data Scientist	2017-07-18	11%

DashBoard - Project

DashBoard - Project



DashBoard - Project



DashBoard - Project

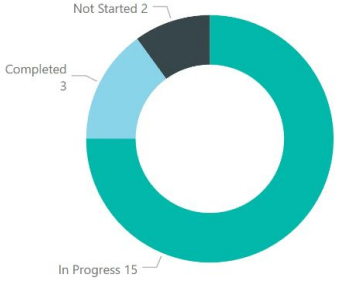
Portfolio Dashboard

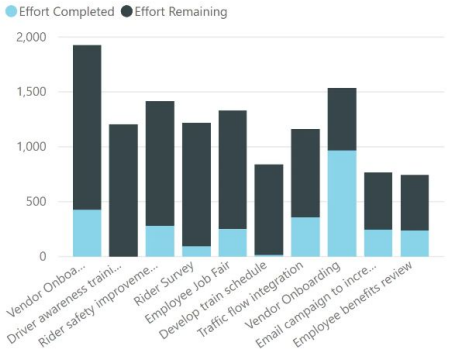
Project Progress: All

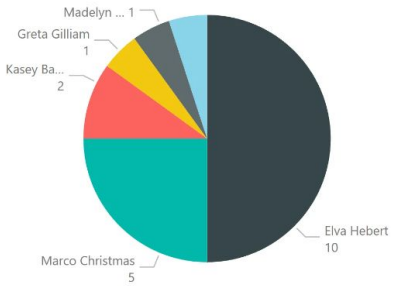
Project Manager: All

Filters

Projects	Effort	Effort Completed	Effort Remaining
20	18K Hours	6,596 Hours	11K Hours



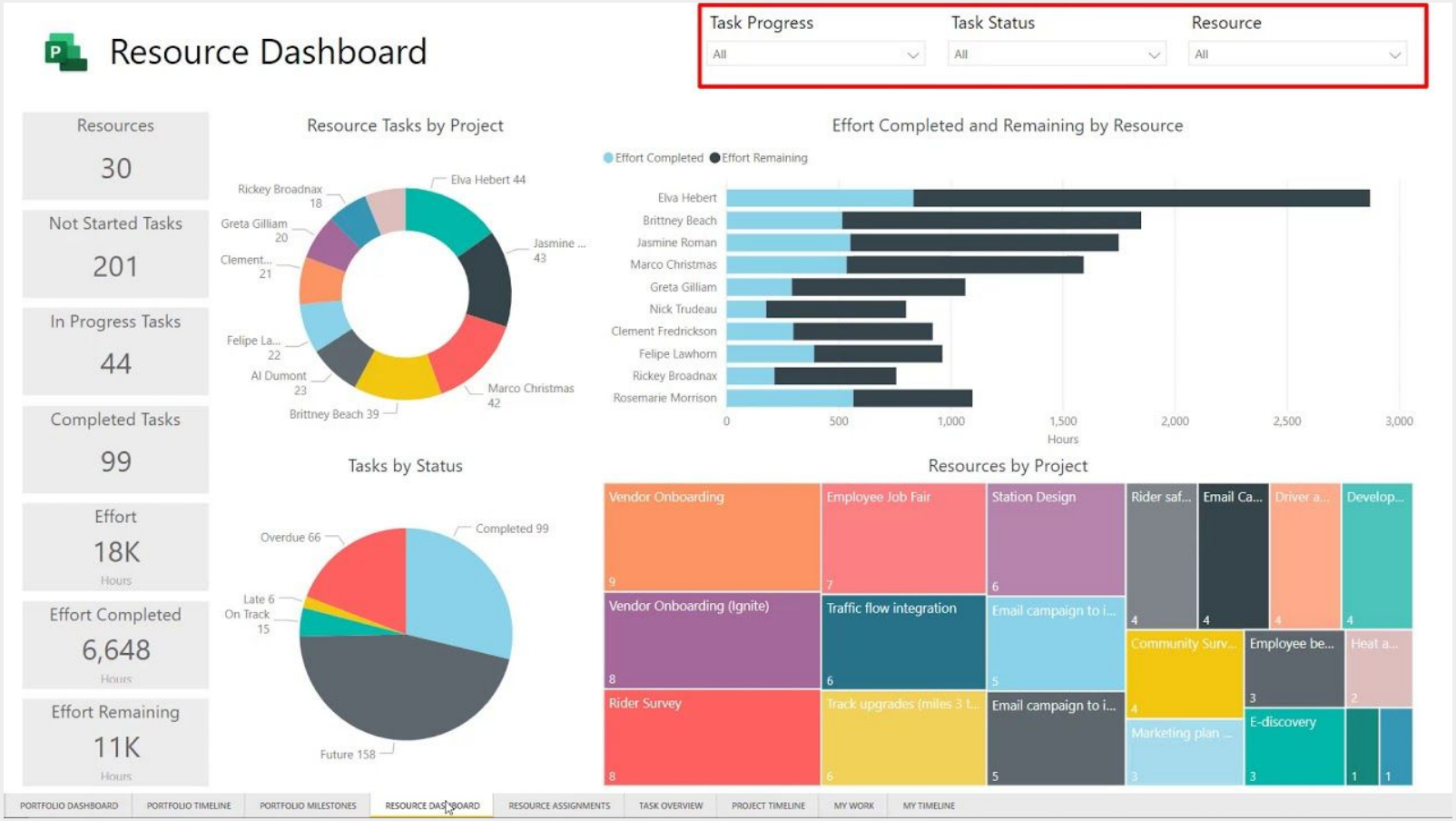




Project	Link	Project Manager	Start	Finish	Progress	Effort (Hours)	Task Count	Overdue Tasks	Late Tasks	On Track Tasks	Future Tasks	Completed Tasks
Community Survey - Light Rail P2		Elva Hebert	07-Nov-19	20-Dec-19	0%	440	24				24	
Email Campaign - Wave 1		Elva Hebert	18-Sep-19	22-Oct-19	100%	208	25					25
Rider Survey		Elva Hebert	02-Sep-19	31-Oct-19	10%	1,217	25	17	2		5	1
Support mobile account inquiry		Elva Hebert	25-Oct-19	25-Oct-19	75%	0	3	2				1
Track upgrades (miles 3 thru 6)		Elva Hebert	29-Aug-19	25-Nov-19	93%	2,608	7				2	5
Email campaign to increase rider's awaren...		Elva Hebert	07-Oct-19	04-Nov-19	29%	764	22	9		3	5	5
Marketing plan FY2020		Elva Hebert	21-Oct-19	14-Nov-19	36%	224	7	1		1	4	1
Email campaign to increase rider's awaren...		Elva Hebert	21-Oct-19	25-Nov-19	34%	536	21			2	16	3
Employee Job Fair		Elva Hebert	10-Oct-19	07-Feb-20	28%	1,328	7				6	1
Station Design		Elva Hebert	30-Sep-19	28-Nov-19	58%	680	4			1	2	1
Rider safety improvements		Greta Gilliam	04-Oct-19	27-Dec-19	27%	1,416	6				5	1
Total						17,533	269	45	2	18	125	79

PORTFOLIO DASHBOARD | PORTFOLIO TIMELINE | PORTFOLIO MILESTONES | RESOURCE DASHBOARD | RESOURCE ASSIGNMENTS | TASK OVERVIEW | PROJECT TIMELINE | MY WORK | MY TIMELINE

DashBoard - Project



DashBoard - Project

Stakeholders Assessment and Project Management Dashboard

This slide covers the project management dashboards related to stakeholder assessment details such as task name, owner, start date, milestones, task meter, etc.

Key Stakeholders | **Add Names Here**

ID	Task Name	Owner	Start Date	End Date	Annual	Forecast	Duration	Status
1	Analysis	Neel	2 Oct	29 Oct	35			
2	Add Text Here	Kam	10 Oct	20 Oct	20	25	12	
3	Build	Kam	12 Oct	15 Oct	78	75	4	
4	Add Text Here	Zam	11 Oct	25 Oct	0	16	19	
5	Add Text Here	Sjum	15 Oct	6 Nov	0	0	17	
6	Add Text Here	Sum	9 Nov	11 Nov	0	0	3	
7	Add Text Here	Kum	22 Nov	1 Dec	0	0	8	
8	Add Text Here	Zam	2 Dec	7 Dec	0	0	4	
9	Add Text Here	Neel	10 Dec	23 Dec	0	0	10	
10	Add Text Here	Neel	5 Oct	23 Oct	0	53	15	
11	Execute	Rum	6 Oct	27 Oct	0	44	16	
12	Close Project	Rum	25 Oct	25 Dec	1	0	1	

Top 5 Concerns (Risk or Issues)

1	The business requirement have not been signed off.	Shum	On Track
2	The servers for the project have no been commissioned.	Support	Concern
3	Add text here	Sammer	Delayed
4	Add text here	QA Lead	Concern
5			

Open Actions and Change Requests

1	Pending change request for new login screen.	Neel	On Track
2	Tech Architecture needs alignment need to be confirmed.	Architect	Concern
3	Add text here	SME	Delayed
4	Add text here	Manager	Concern
5			

Milestones and key Dates

1	Development Complete	On Track	15-Dec
2	Testing Complete	Concern	25-Dec
3	Planning for Change	Delayed	23 Dec
4			
5			

Task Meter

Resource Work Load (days)

Nobs & To Do List

1	Submit Papers	12-Feb
2	Add Text Here	12-Oct
3	Add Text Here	12-Nov
4	Update Sponsor On Budget Changes.	11-Dec

This slide is 100% editable. Adapt it to your needs and capture your audience's attention.

DashBoard - Stakeholder

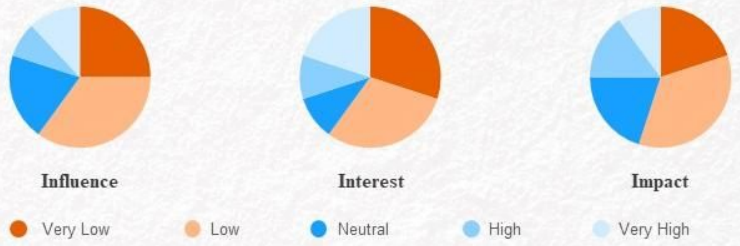
Stakeholders management plan with engagement dashboard

The following slide displays key parameters to map involvement of stakeholders in the business by analyzing them on the basis of influence, interest and impact to monitor and improve overall communication strategies of organization.

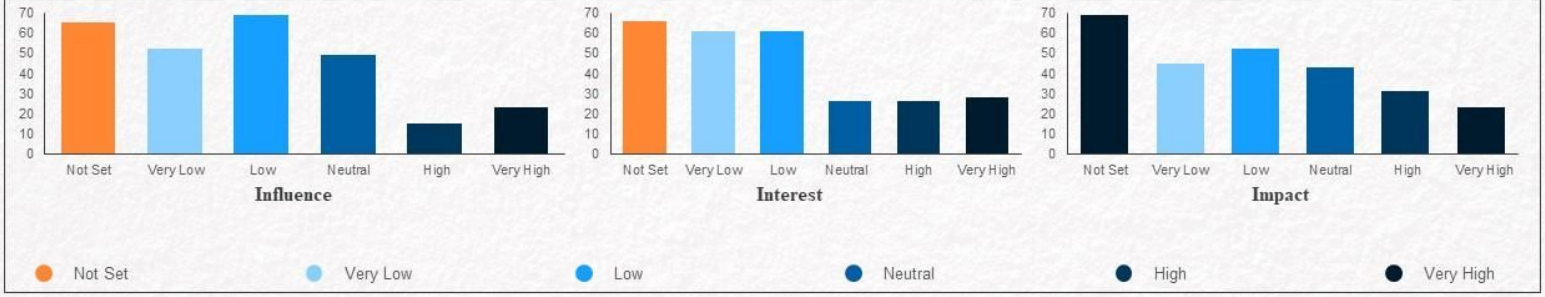
Stakeholders with Activity for Date Range

ID	Name	Organisation/Position
001	Brian	Sponsor
002	Stella	PM
003	Liam	HR
004	Alison	Client
Add text	Add text	Add text
Add text	Add text	Add text

Stakeholder Mapping



Stakeholders Engagement for Date Range by Mapping Values



This graph/chart is linked to excel, and change automatically based on data. Just left click on it and select "Edit Data".

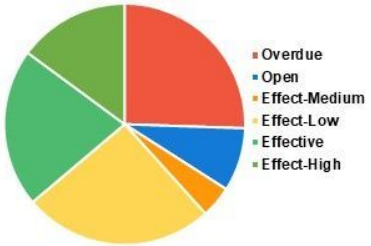
DashBoard - Risk

Risk Management KPI Dashboard Showing Open Issues…

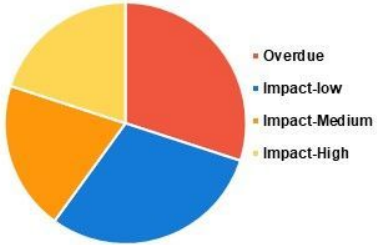
Corporate Risk

Risk Name	Score	Trend
Regulation and Compliance	High	↗
Cost Cutting	High	▬
Impact Of Currency Volatility	High	↘
Missing Growth Opportunities	High	↗
Inappropriate Systems	High	▬
Organization Change	Medium	▬
Emerging Technologies	Medium	↘
Taxation Risk	Medium	↗
Shifting Demographics	Low	▬
Emerging Markets	Low	↗

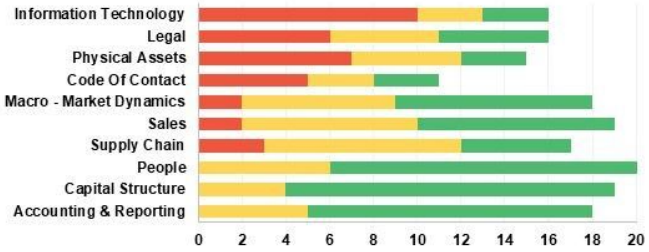
Control Performance



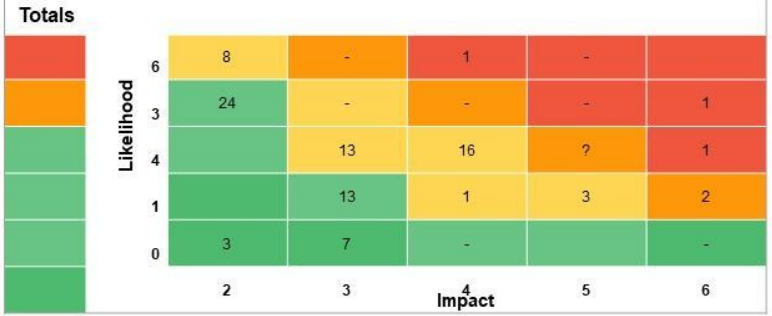
Open Issues



Risk by Category



Risk Map



This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

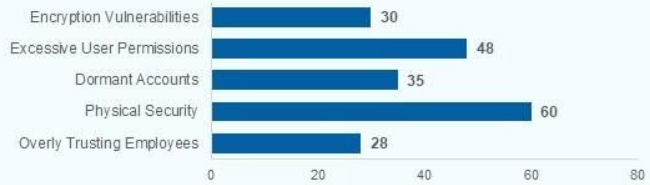
DashBoard - Risk

Risk Management Dashboard for Information Security

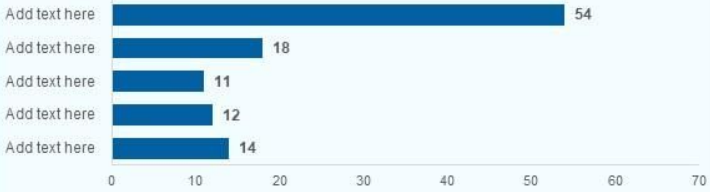
This slide showcases dashboard that can help organization to track the major information security risks and resolve them in timely manner. Its key components are risk rating breakdown, heat map, action plan and top 5 vulnerabilities

% Risks	%of Risks	Risk Analysis Progress	Response Progress for Risks
37.5%	391 Average risk 12.3	87.5%	56.2%

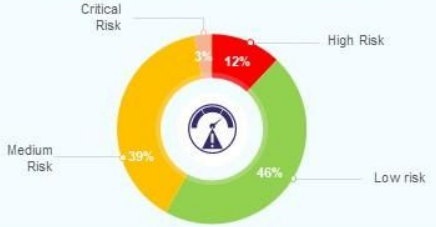
Top 5 Vulnerabilities



Top 5 Risks



Risk Rating Breakdown



Risk Heat Map

Total of Risk Rating

	Rare	Unlikely	Moderate	Likely	Almost Certain
Severe	40	50	40	2	3
Major	60	40	50	50	3
Moderate	50	108	150	160	104
Minor	140	207	101	90	80
Insignificant	200	404	106	102	20

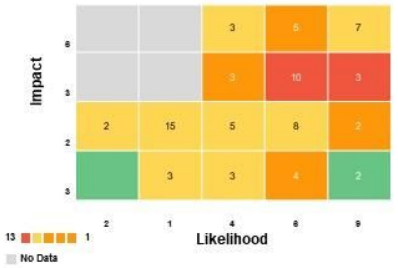
Action Plan Breakdown

This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "edit data".

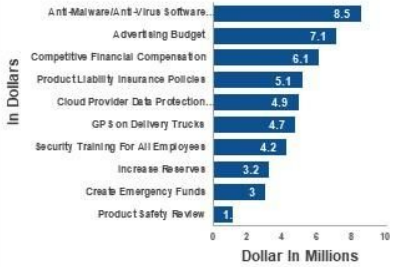
DashBoard - Risk

Risk Management KPI Dashboard Showing Cost…

Risk Heat Map

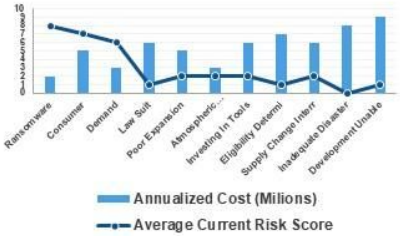


Annualized Cost Of Controls

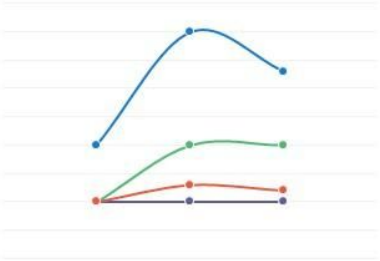


Risk Score-Current

Risk Compared To Cost Of Controls



GRC-Risk History



This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

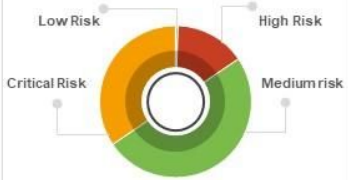
DashBoard - Risk

Project Risk Management and Monitoring Dashboard Introduction

The following slide highlights the project risk management and monitoring dashboard introduction by depicting risk rating, risk heatmap, risk management, top risk and entities exposed to risk

% Increased Risk	Number of Increased Risk	Resolved Risk	Risk Management Progress
23.5%	462 Average Risk : 332	89.43%	62.56%

Risk Rating

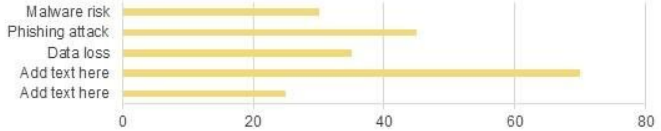


Risk Heat Map

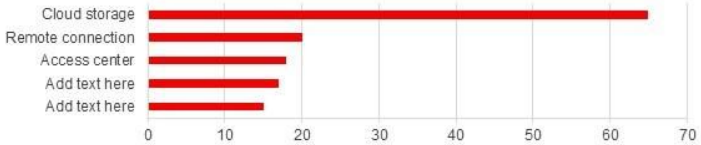
	Risk Rating				
Servere	40	50	40	2	3
Major	60	40	50	50	3
Moderat	50	108	150	160	104
Minor	140	207	101	90	80
Insignifican	200	404	106	102	20
	Rare	Unlikely	Moderat	Unlikely	Almost Certain

Risk Management

Top Risk



Entities Exposed to Risk



This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

DashBoard - Risk

Project risk management progress dashboard

This slide depicts project risk management progress dashboard. It provides information about key performance indicators, risks, issues, planned and actual hours spent, etc.

Projects ▸	Project A	Project B	Project C	Project D
KPI ▾	Start 6-Jan-21	Start 2-Jan-21	Start 2-Jan-21	Start 6-Apr-21
	End 24-Sep-22	End 24-Mar-22	End 24-Sep-22	End 24-Sep-22
Current Progress	44%	35%	50%	15%
	2/13 in Progress	5/11 in Progress	2/13 in Progress	1/7 in Progress
Planned vs. Actual Time taken (hours)	Planned 32.4, Actual 25.4	Planned 28.4, Actual 19.4	Planned 32.4, Actual 25.4	Planned 20, Actual 7
Risk & Issues	Highest, High 2, Medium 2, Low 3	Highest, High 2, Medium 2, Low 3	Highest, High 2, Medium, Low 3	Highest, High 2, Medium 3, Low 2

This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "edit data".

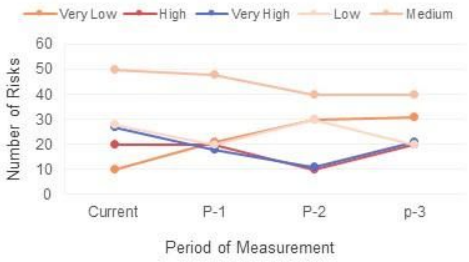
DashBoard - Risk

Dashboard of Project Risk Assessment with Risk Rating

The slide highlights the dashboard of project risk assessment with risk rating illustrating total risks, open risk, improving, closed risk, mitigated risk, residual risk, risk rating, inherent risk, control risk and impact probability matrix

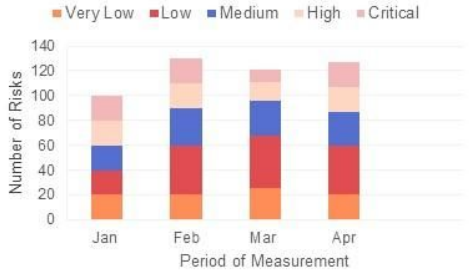
Total Risks XX	Open XX	Improving XX	Closed XX	Mitigated 00%
Extreme	Extreme	Extreme	Extreme	Mitigated Extremes
xx	xx	xx	xx	00%
High	High	High	High	Mitigated High
xx	xx	xx	xx	00%
Medium	Medium	Medium	Medium	Mitigated Medium
xx	xx	xx	xx	00%
Low	Low	Low	Low	Mitigated Low
xx	xx	xx	xx	00%

Residual Risk (by Period)

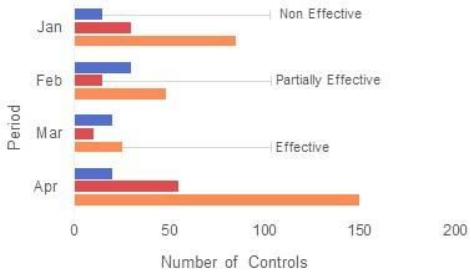


Risk Rating (by Category)

Inherent Risk (by Period)



Control Risk (by Period)



Catastrophic	XX	XX	XX	XX	XX
Major	XX	XX	XX	XX	XX
Moderate	XX	XX	XX	XX	XX
Minor	XX	XX	XX	XX	XX
Insignificant	XX	XX	XX	XX	XX
	Remote	Unlikely	Possible	probable	Highly Probable

This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

DashBoard - Risk

Multiple Project Management Dashboard with Risks and Issues Status

This slide illustrates project management dashboard that can be used by manager to track risks and issues status of multiple projects at a time and plan accordingly to mitigate them.

Project ▸ / KPI ▾	Project A	Project B	Project C	Project D	Project 1	Project 2
	Start 6-Jan-22 End 24-sep-22	Start 2-Jan-22 End 24-Mar-22	Start 2-Jan-22 End 24-Sep-22	Start 3-Apr-22 End 24-Sep-22	Start 19-Jan-22 End 17-Aug-22	Start 21-Jan-22 End 11-Aug-22
Progress	40% 2/13 in Progress	25% 5/11 in Progress	40% 2/13 in Progress	12% 1/7 in Progress	55% 3/9 in Progress	22% 4/11 in Progress
Planned Vs **Actual** Hours	Planned 30.5 Actual 25.1	Planned 25.8 Actual 20.6	Planned 31.8 Actual 24.6	Planned 25 Actual 10	Planned 15.2 Actual 20.5	Planned 26.5 Actual 25.5
Risks & Issues	Extreem 2 High 2 Medium 4 Low	Extreem High 2 Medium 2 Low 4	Extreem High 1 Medium Low 2	Extreem High 2 Medium 3 Low 2	Extreem High Medium Low	Extreem High Medium Low

DashBoard - Skill Development

Performance Coaching Dashboard with Various Metrics

All Teams Quarter-over-quarter

+15% (QTD)

Monthly Trend (Last 3 months)

Engineering Performance (QTD)

On Target 80%

Product Team Year-over-Year

+20% (QTD)

Monthly Trend (Last 3 months)

Product Teams Year-over-Year

-6% (QTD)

Yearly Trend (Last 3 years)

Meetings attended By team (QTD)

Attended 75%

All Teams Quarter-over-quarter

-4% (QTD)

Monthly Trend (Last 3 months)

Product Team Quarterly Performance - last 2 Quarters (QTD)

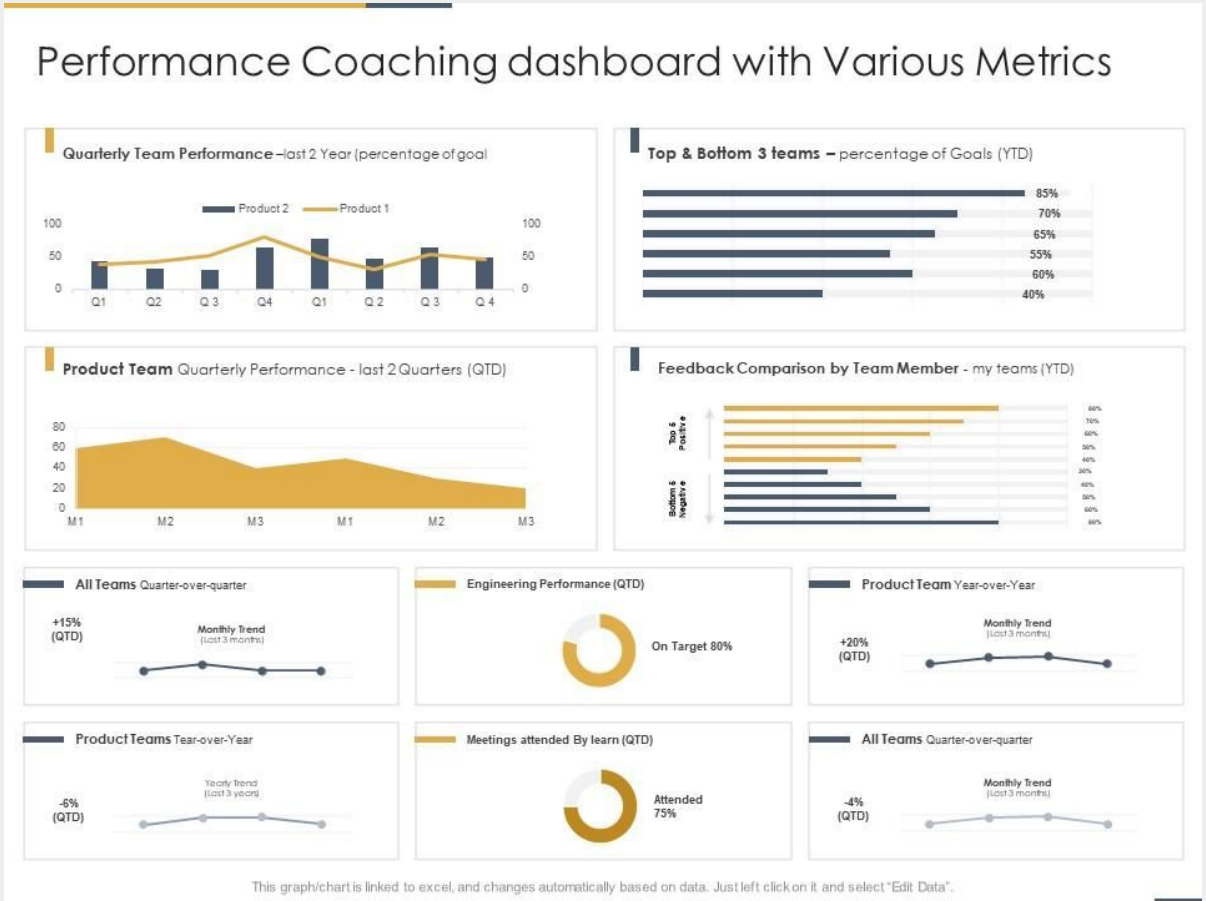
Feedback Comparison by Team Member - my teams (YTD)

Quarterly Team Performance –last 2 Year (percentage of goal

Top & Bottom 3 teams – percentage of Goals (YTD)

This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

DashBoard - Skill Development



DashBoard - Skill Development

Dashboard for training program evaluation

This slide showcases dashboard that can help organization to evaluate the training program implemented in organization. Its key components are training cost, number of participants, hours of training, cost per participant and occupancy rate.

Training cost (actual)
92,182
-11.1%
Vs. last period

Training cost (budget)
96,336
-1.4%
Vs. last period

Cost per participant
315
- 13.2%
Vs. last period

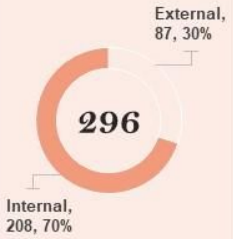
Cost per hour
53
- 4.1%
Vs. last period

House of training Vs. Target

Actual cost Vs. Budget

Training by Subject matter

Participant by Training type



Hours of training

Number of participants

Total completed training
86
-13.4%
Vs. last period

Total hours of training
1,762
- 1.7%
Vs. last period

Total participant
294
- 20.6%
Vs. last period

Occupancy rate
92%
- 0.4%
Vs. last period

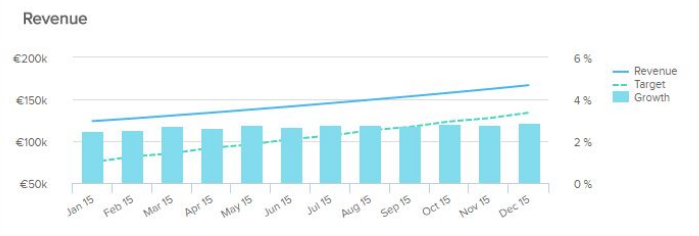
This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

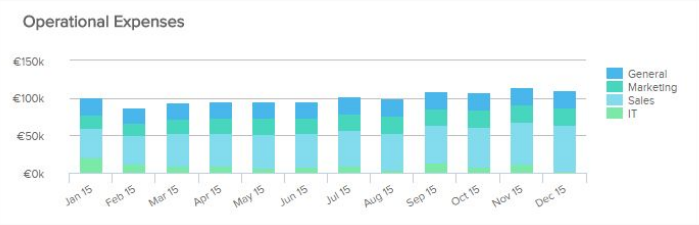
DashBoard - Skill Development

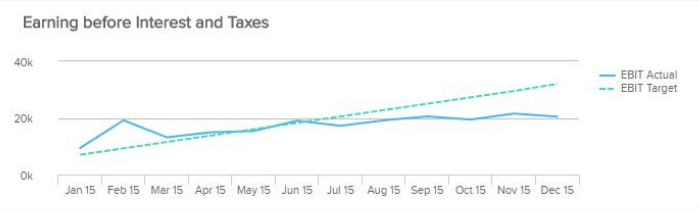
DashBoard - Stakeholder

DashBoard - Manager

GROSS PROFIT MARGIN	OPEX RATIO	EBIT MARGIN	NET PROFIT MARGIN
84 %	62 %	18 %	12 %





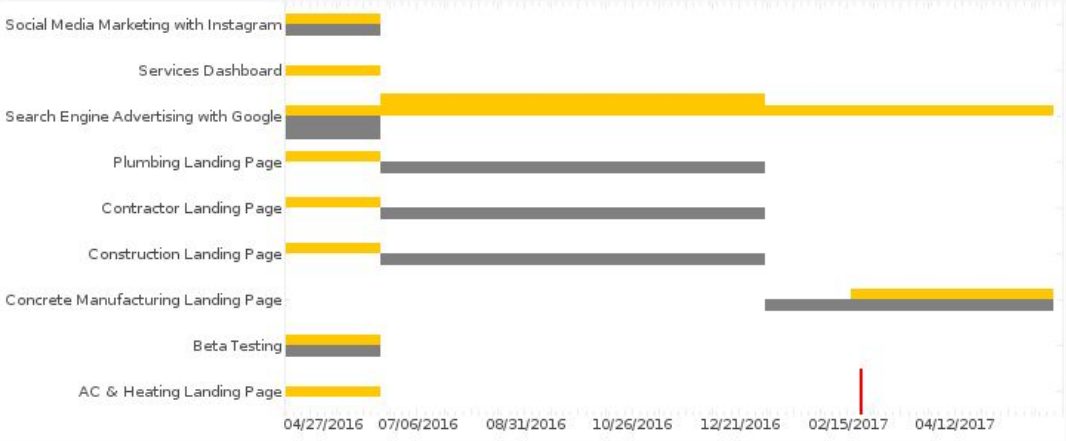


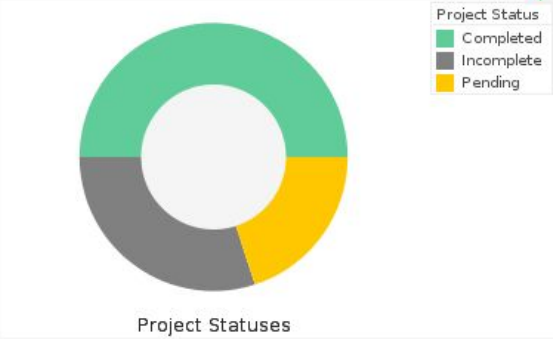
INCOME STATEMENT

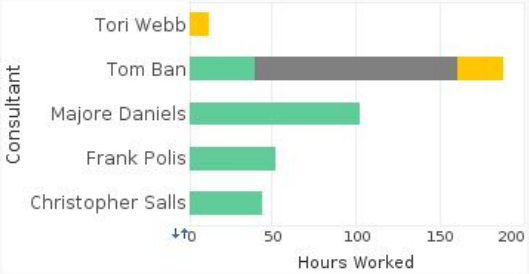
Revenue	1.305.507 €
COGS	208.453 €
GROSS PROFIT	1.097.054 €
OPEX	815.306 €
Sales	279.886 €
Marketing	192.710 €
IT	150.054 €
General & Admin	192.656 €
OTHER INCOME	2.131 €
OTHER EXPENSES	51.195 €
EBIT	232.684 €
Interest and Tax	38.244 €
NET PROFIT	194.440 €

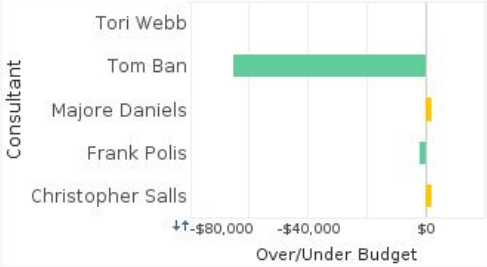
DashBoard - Manager

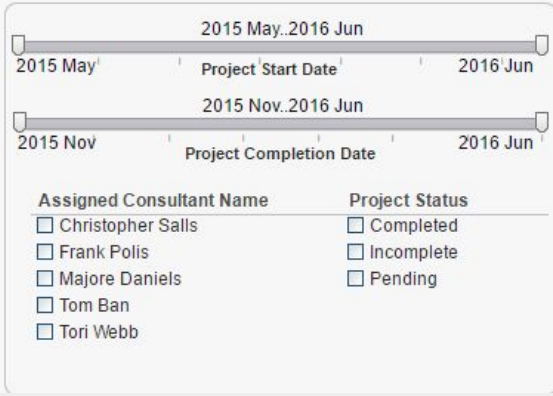
Digital Marketing Project











DashBoard - Manager

Profit Center

Net Profit

Sale

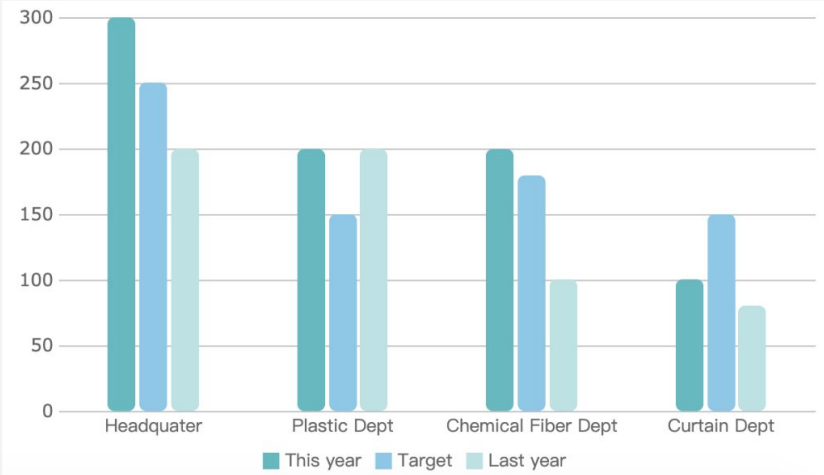
Receivables

Stock

Profit List(10k RMB)

Department	Gross Profit			Net Profit		
	Actual	Index	Completion Rate	Actual	Index	Completion Rate
Plastic Dept	435.88	674.11	64.66%	265.88	374.11	71.07%
Chemical Fiber Dept	996.30	811.76	122.73%	546.30	611.76	89.30%
Curtain Dept	855.99	945.88	90.50%	656.30	458.33	143.19%
Headquater	811.25	658.33	123.23%	671.25	858.33	78.20%
Total	3099.42	3090.08	100.30%	2139.73	2302.53	92.93%

Comparison of Departments' Annual Gross Profit (10k RMB)



DashBoard - Manager

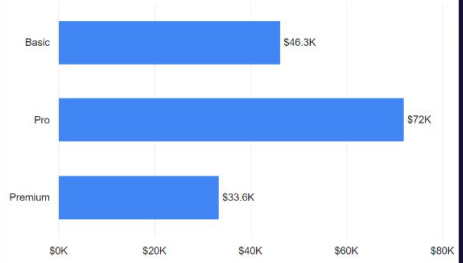
Totals (last 30 days)

MRR

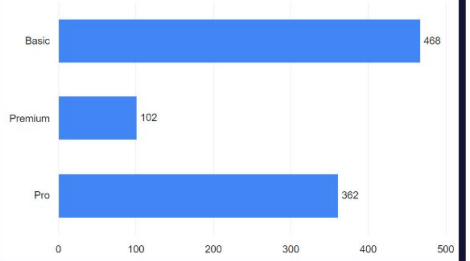
$151.9K

▲ 7.74K

MRR by plan



No. of account

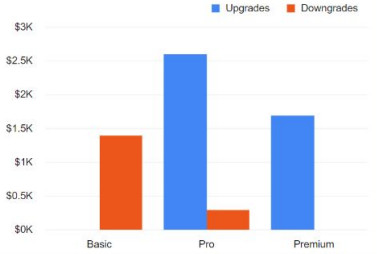


Change (last 30 days)

MRR

Accounts

Plan change



Onboarding (last 30 days)

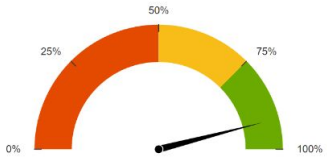
New accounts

45

Avg. days until onboarded

3

CSAT of new accounts



Low scores

Newhaven	1
Arcane Logistics	1
Blox	2
Oslen Sellers	2
Brook plc	2

Low engagement (>45 days)

Accounts at risk

103

MRR at risk

$15.5K

Most valuable accounts at risk

Account / Plan

Atlas / Premium	67
Monroes / Premium	58
Airtalk / Premium	57
Brunswick / Premium	55
Newport S. / Premium	56
Rocksy / Premium	49
HNP / Premium	47
Baltic / Premium	47
PwC / Premium	45
Roasted / Pro	62
Munich A. / Pro	59

DashBoard - Manager

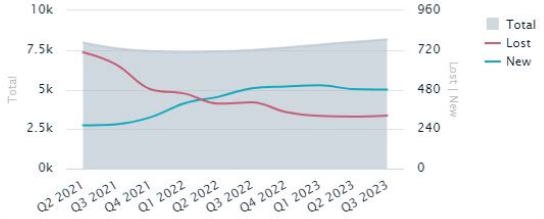
Human Resources | Executive Dashboard

Selected Period: This Quarter

Growth

Headcount	New Hires	Vacancy Rate
8,171 (+2%)	480 (-1%)	19% (-2)

Headcount Development
last 10 quarters



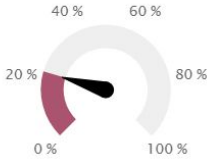
Satisfaction

Employee Satisfaction	Manager Feedback Score
66 (+1)	58 (-3)

Employee Satisfaction and Manager Feedback Score
by department and country

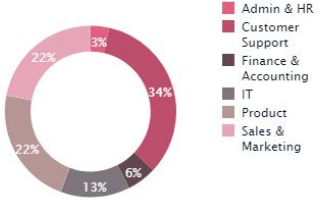
Costs

Salary Cost to Gross Revenue
23% (+1)

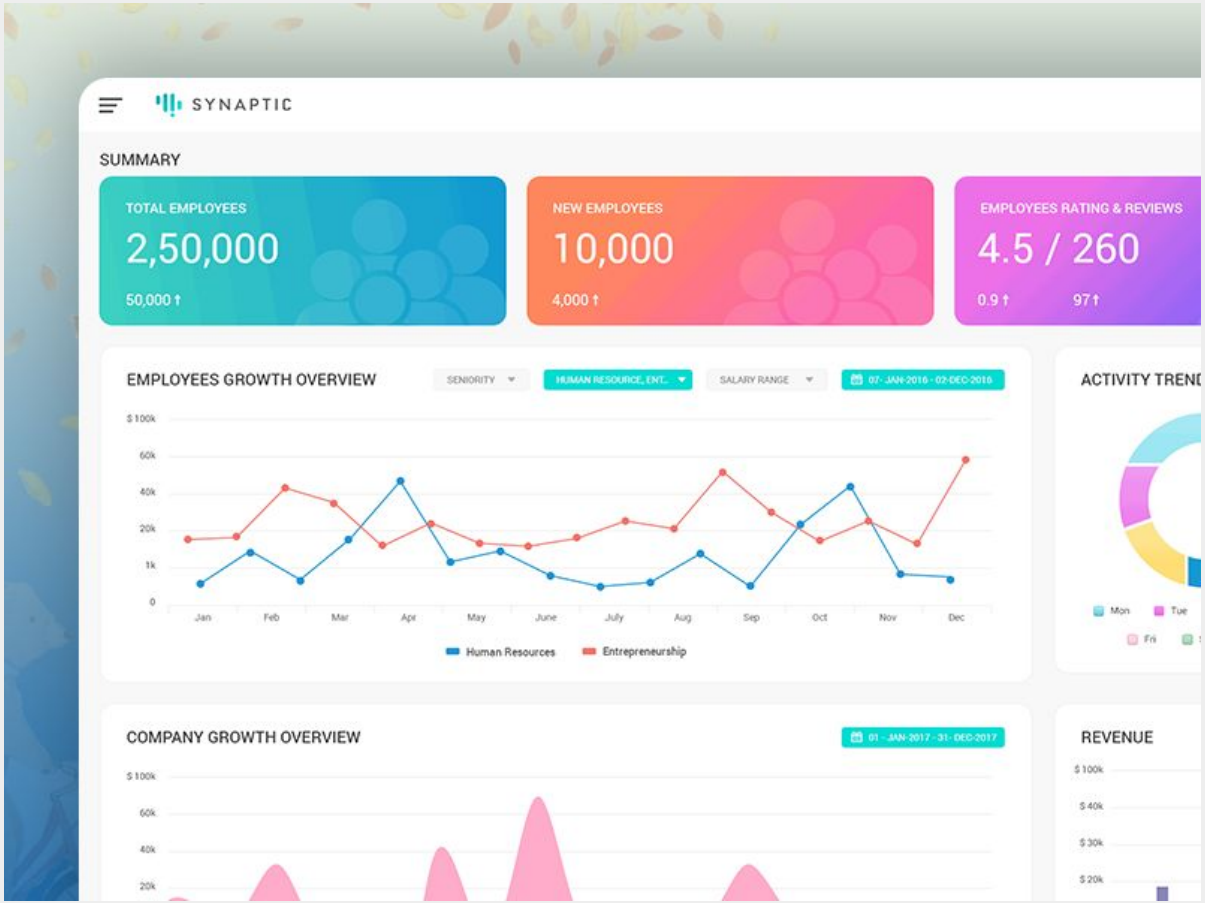


Salary Cost Development
by country, last 10 quarters

Salary Cost
by department



DashBoard - Manager



DashBoard - HR Manager

HR ATTRITION DASHBOARD

SHOW ONLY ATTRITION

● RETENTION ● ATTRITION

OVERVIEW (27 May, 2021 to 8 May, 2022)

16.1%	237	1,233
ATTRITION RATE	TOTAL ATTRITION	CURRENT EMPLOYEES

DEPARTMENT

R & D	828	133
Sales	354	92
HR	51	12

JOB ROLE

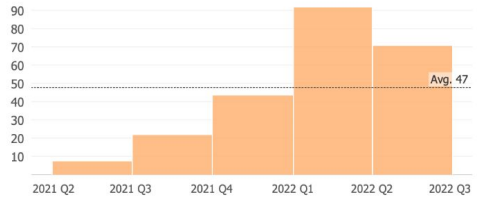
Top 5

1	Laboratory Technician	62	197
2	Sales Executive	57	269
3	Research Scientist	47	245
4	Sales Representative	33	50
5	Human Resources	12	40

ATTRITION TREND

SELECT PERIOD: W M Q Y

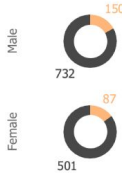
▼ 22.8% vs. previous quarter



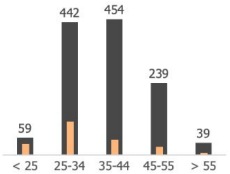
DEMOGRAPHICS

Click data point(s) to filter dashboard.

GENDER



AGE GROUP



EDUCATION FIELD

Life Sciences	517	89
Medical	401	63
Marketing	124	35
Technical Degree	100	32
Other	71	11
Human Resources	20	7

SURVEY SCORE

Score >>	1	2	3	4
Environment Satisfaction	72	43	62	60
	212	244	391	386
Job Satisfaction	66	46	73	52
	223	234	369	407
Job Involvement	28	71	125	13
	55	304	743	131
Relationship Satisfaction	57	45	71	64
	219	258	388	368
Work Life Balance	25	58	127	27
	55	286	766	126

RECENT ATTRITION

EMP ID: (All) ATTR. DATE: (All)

E_780
Research Scientist
R & D
Attrition date: 8 May, 2022
Avg. Satisfaction Score: 3.2
Performance Rating: 3
Monthly Income: $2,686
Salary Hike: 13%

E_45
Research Scientist
R & D
Attrition date: 6 May, 2022
Avg. Satisfaction Score: 2.4
Performance Rating: 3
Monthly Income: $2,293
Salary Hike: 16%

E_896
Sales Representative
Sales
Attrition date: 6 May, 2022
Avg. Satisfaction Score: 2.6
Performance Rating: 3
Monthly Income: $2,800
Salary Hike: 19%

DashBoard - HR Manager

DashBoard - HR Manager

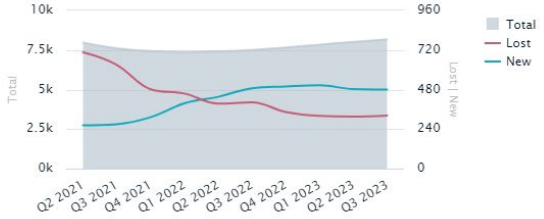
Human Resources | Executive Dashboard

Selected Period: This Quarter

Growth

Headcount	New Hires	Vacancy Rate
8,171 (+2%)	480 (-1%)	19% (-2)

Headcount Development
last 10 quarters



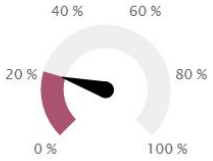
Satisfaction

Employee Satisfaction	Manager Feedback Score
66 (+1)	58 (-3)

Employee Satisfaction and Manager Feedback Score
by department and country

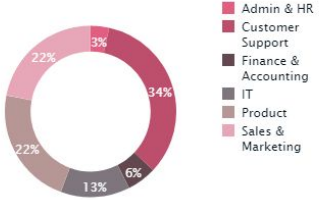
Costs

Salary Cost to Gross Revenue
23% (+1)

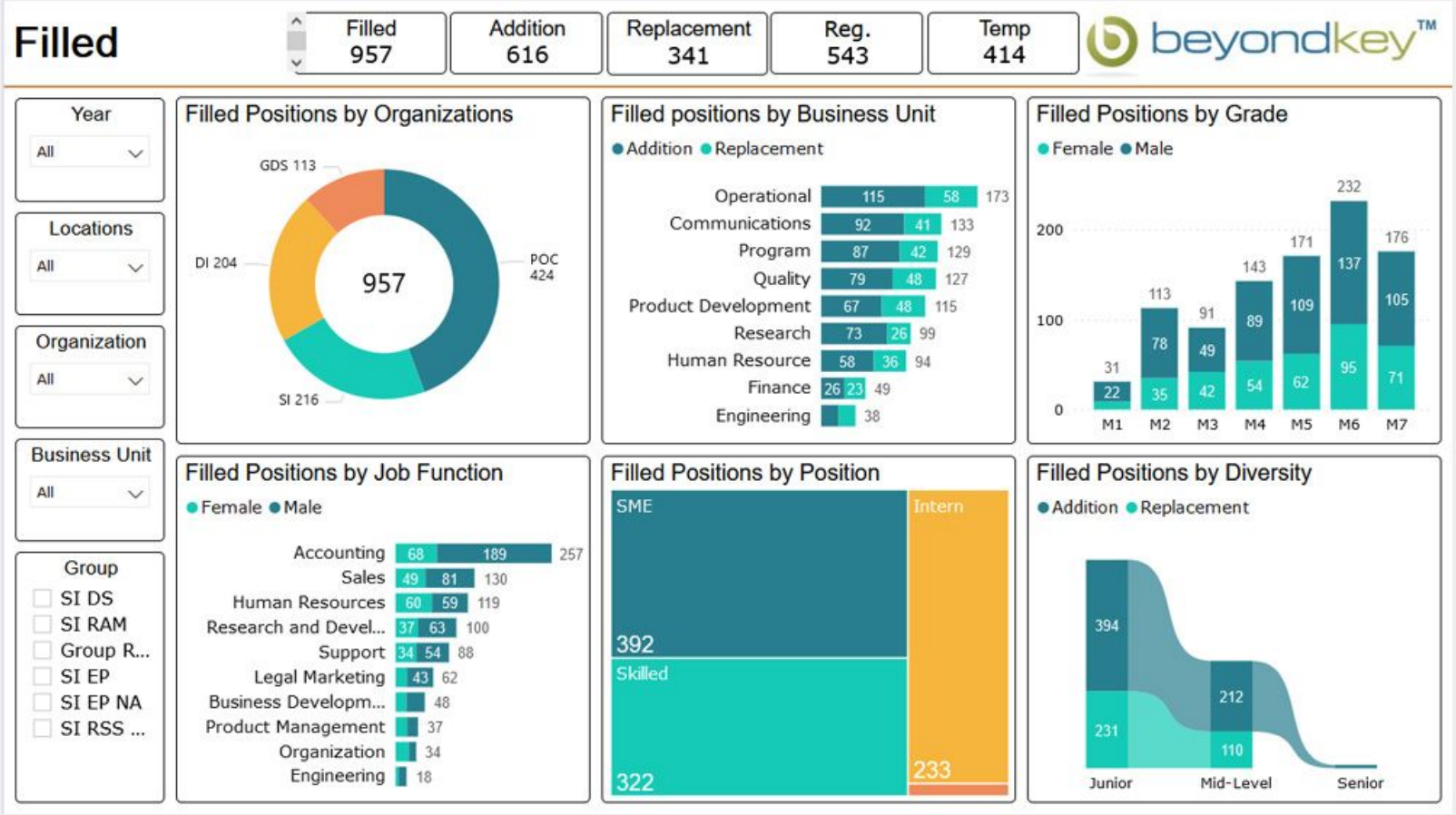


Salary Cost Development
by country, last 10 quarters

Salary Cost
by department



DashBoard - HR Manager



DashBoard - HR Manager

L&D Satisfaction survey - latest

US office

UK office

Australia office

L&D Satisfaction survey - over time

Latest sessions

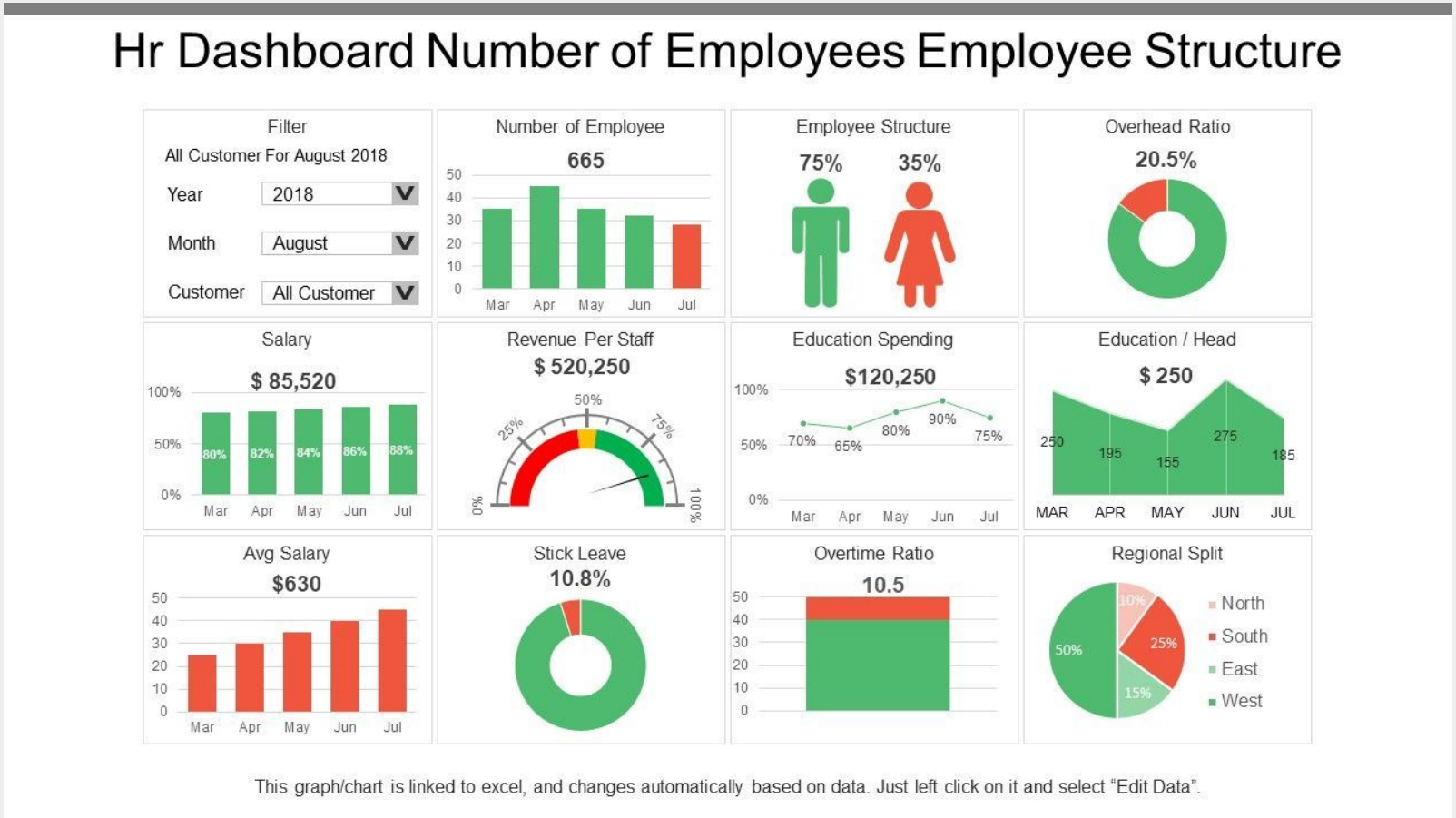
Session	Date	Office	Atten...	Score
Line Management	1 Apr 2022	All	98	92%
Sales 101	28 Mar 2022	US	49	100%
Partnership building	22 Mar 2022	AU	29	59%
NextGen	15 Mar 2022	All	32	100%
Budget process	2 Mar 2022	UK	13	91%
Advanced Sales	1 Mar 2022	US	19	100%
Wellbeing	23 Feb 2022	US	84	84%
Growth Mindset	18 Feb 2022	AU	12	42%
Growth Mindset	17 Feb 2022	US	75	79%
Growth Mindset	16 Feb 2022	UK	24	94%
Line Management	27 Jan 2022	US	92	84%
Wellbeing	17 Jan 2022	UK	75	84%
NextGen	7 Jan 2022	All	32	100%

Learning & Development Plan Powered by Geckoboard

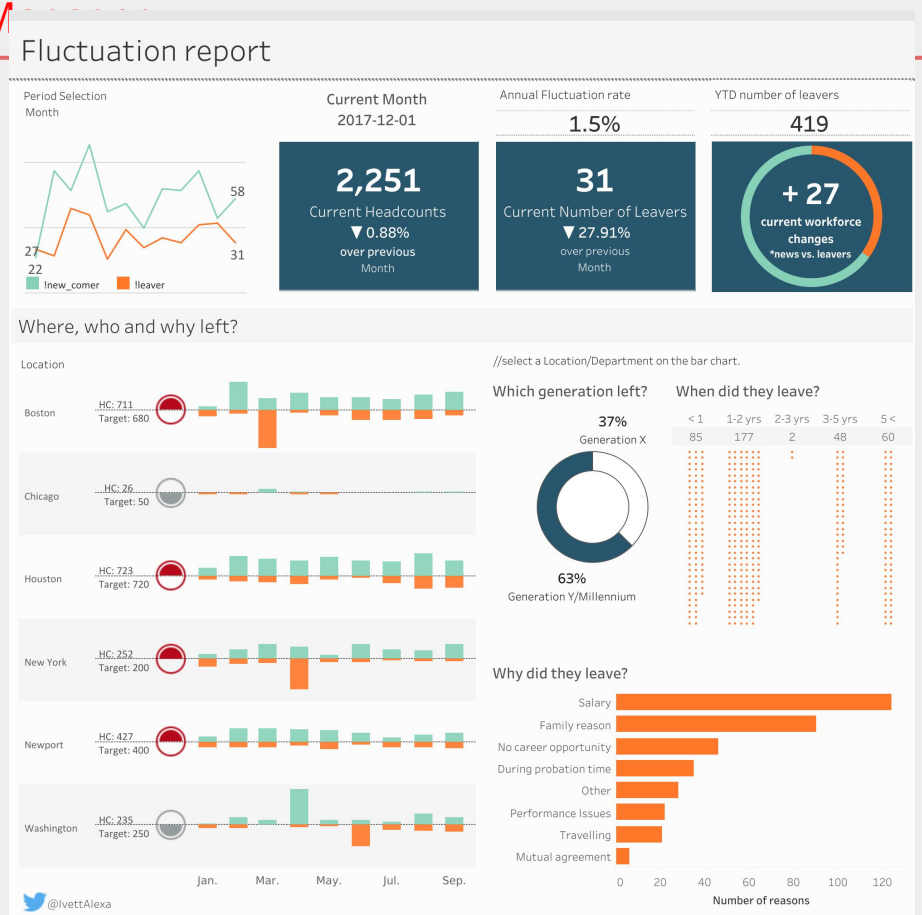
13:54

DashBoard - HR Manager

DashBoard - HR Manager



DashBoard - HR M



DashBoard - HR Manager

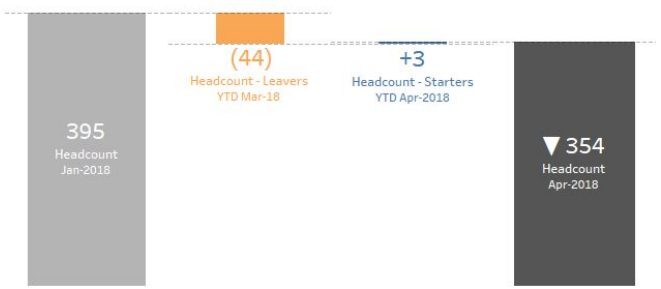
HR Workforce Dashboard

Executive Summary

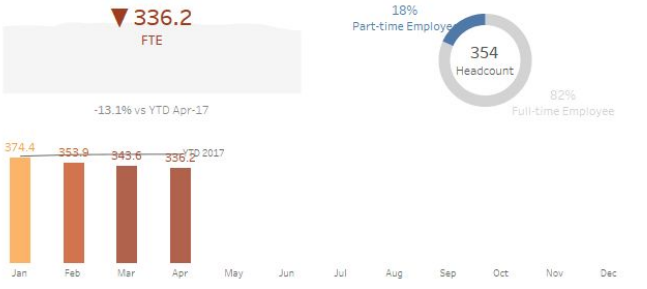
Current Month: Apr
Current Year: 2018
Department: (All)
Nationality: (All)
Current Period vs Reference Period *defines color coding*: Year-to-Date: Current Year vs Previous Year
Gender: (All)
Organization: (All)

YTD Apr-18 compared to YTD Apr-17

What is our current Headcount ?



How many FTE do we have ?



What is the seniority of our staff?

▲ 7.1 yr
Year(s) of service
+12.3% vs YTD Apr-17

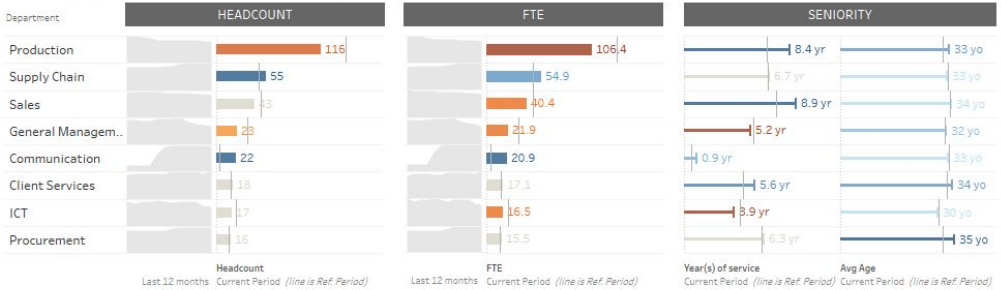
▲ 33 yo
Avg Age
+2.0% vs YTD Apr-17

What is our Employee Churn for the last 12 months?

27.2%	389.2	+59	(106)
Employee Churn Rate	Avg Headcount	Starters	Leavers

Top Organizations	CHURN RATE	AVG HEADCOUNT	LEAVERS
CH Subsidiary	109.1%	1.8	(2)
SP Subsidiary	71.5%	12.6	(9)
Holding	39.0%	87.3	(34)
Top Departments			
Research & Develo..	128.6%	2.3	(3)
Human Resources	115.1%	6.1	(7)
Finance	79.0%	13.9	(11)

How our employees are distributed in the different Departments ?



DashBoard - Employee

Technical Hiring

18 Days to Hire

54 Days to Fill

98% Acceptance Rate

4.8% Withdrawal Rate (after CC)

Non-technical Hiring

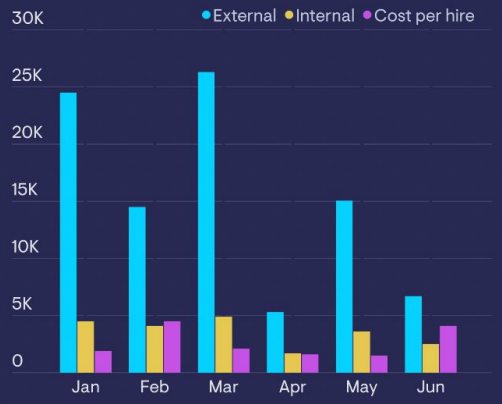
23 Days to Hire

37 Days to Fill

100% Acceptance Rate

4% Withdrawal Rate (after CC)

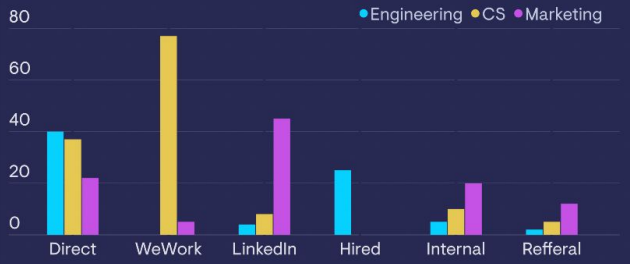
Recruitment Costs YTD



Current Hiring Pipeline

Role	Lead	Applicant	1st int.	2nd int.	Final	Offer
Snr Backend Engineer	3	0	2	2	1	1
Frontend Engineer	4	7	5	1	0	0
Marketing Manager	0	23	9	0	0	0
CS Champion	2	35	7	14	3	0

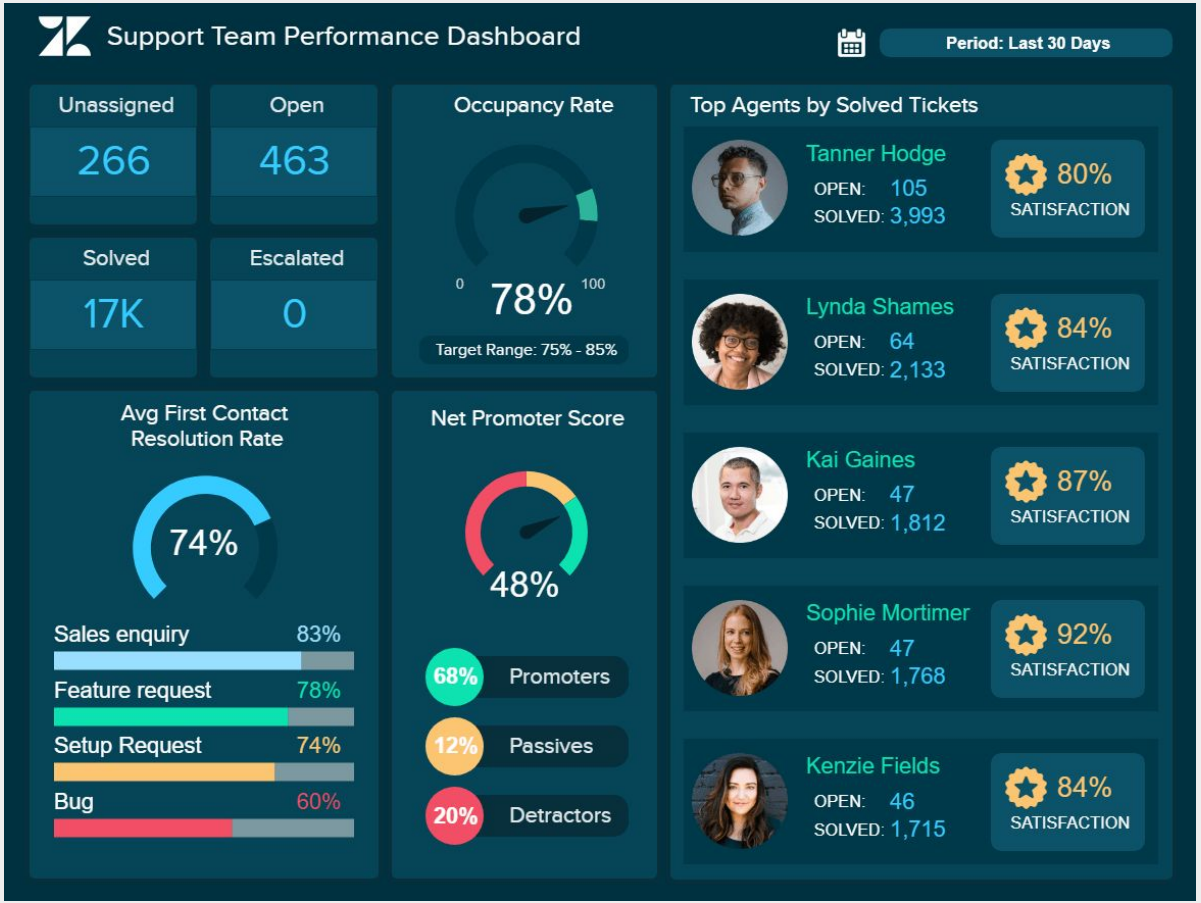
Top Hiring Sources Q2



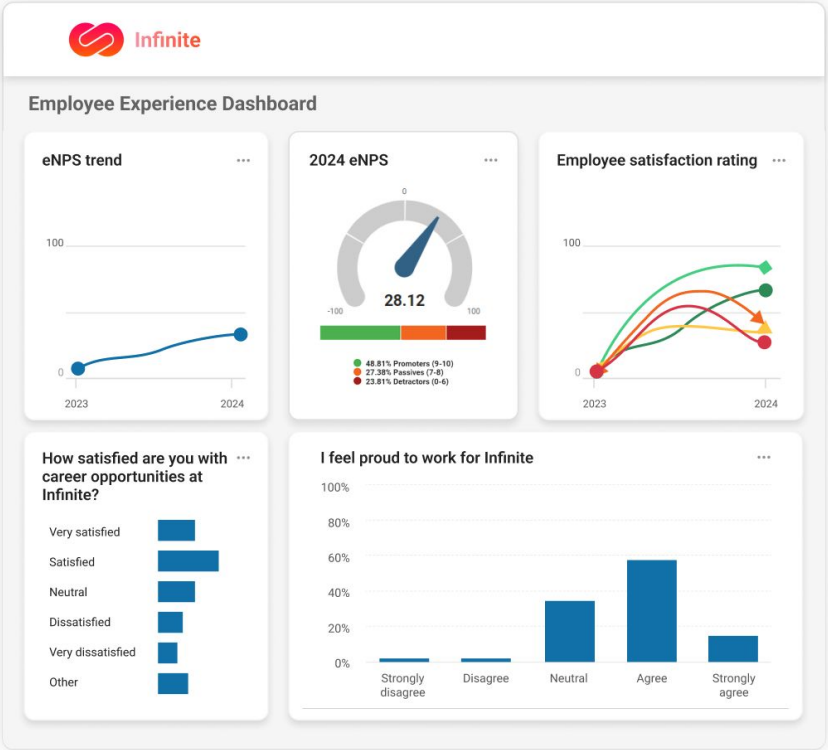
Recruitment dashboard Powered by Geckoboard

13:53

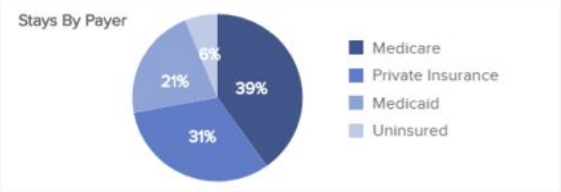
DashBoard - Employee

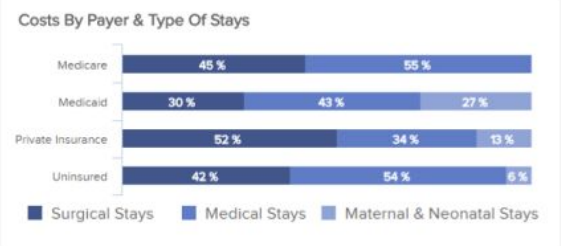


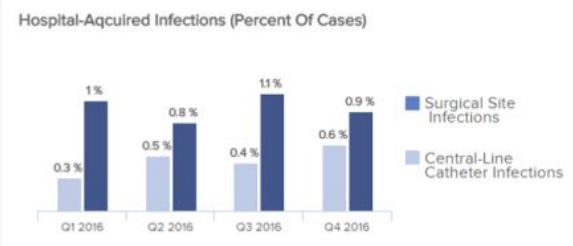
DashBoard - Employee



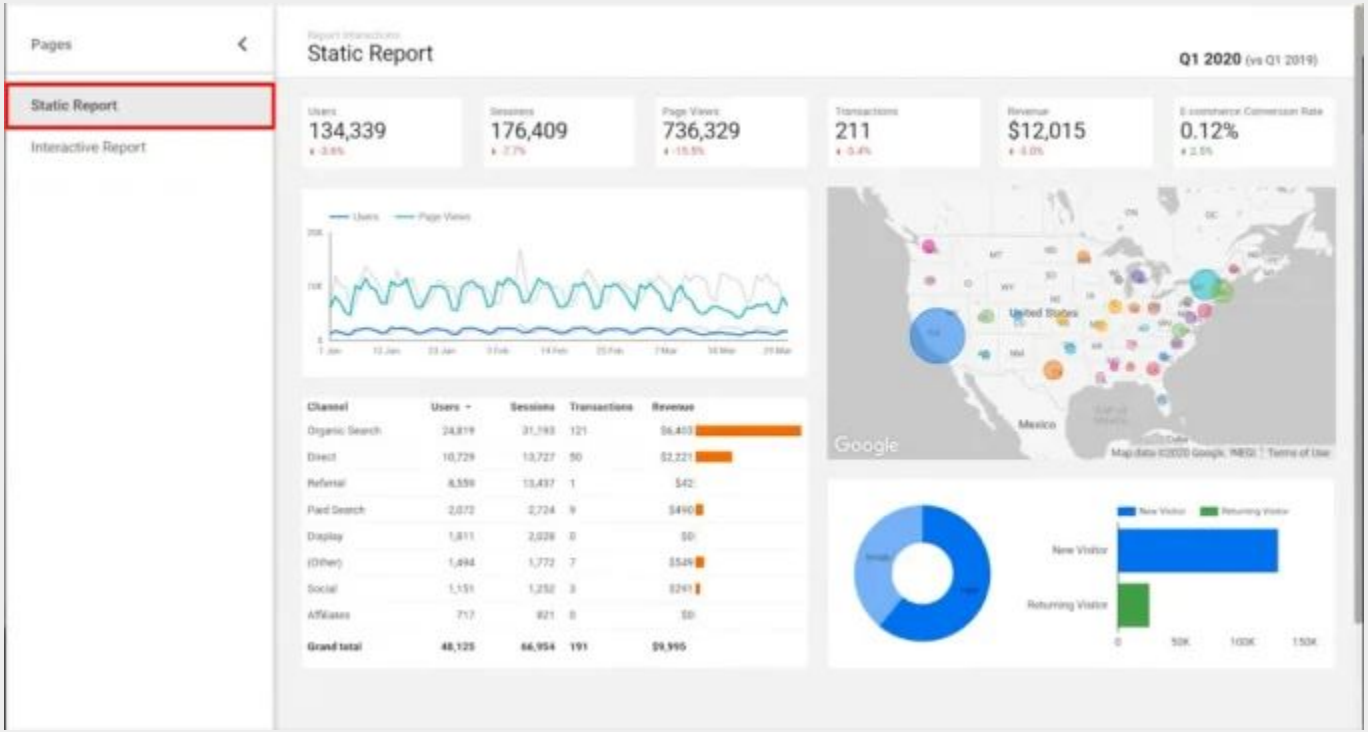
DashBoard - Employee



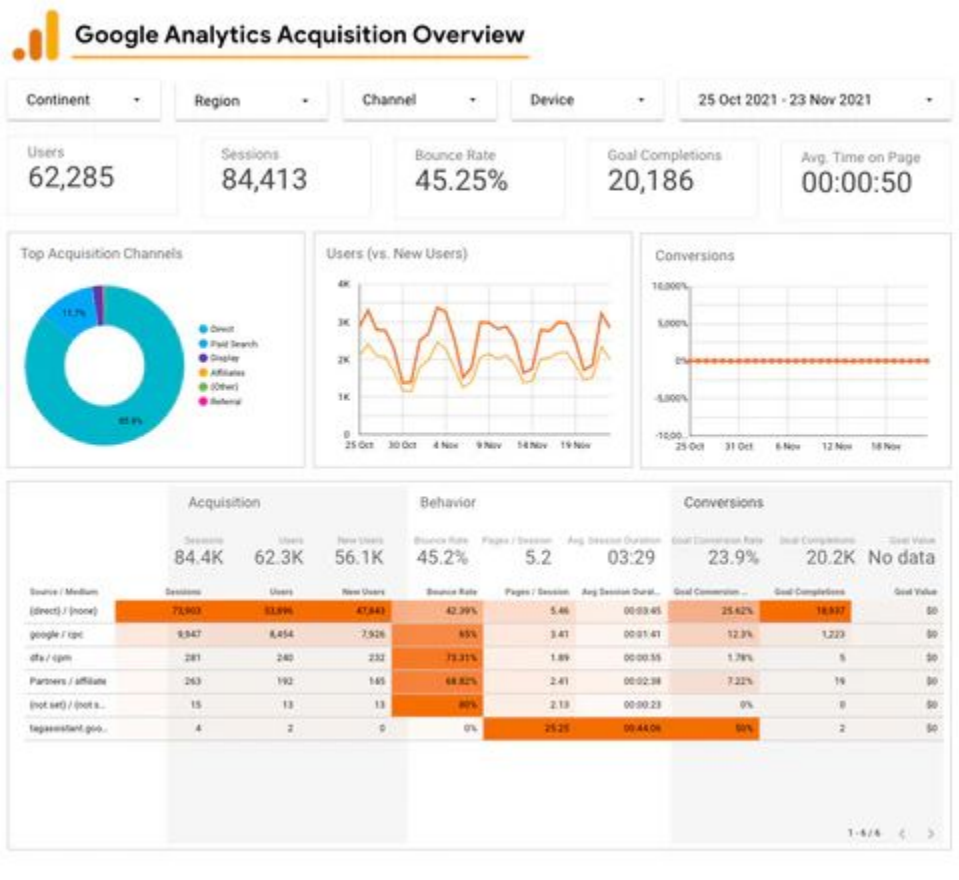




DashBoard - Employee



DashBoard - Employee



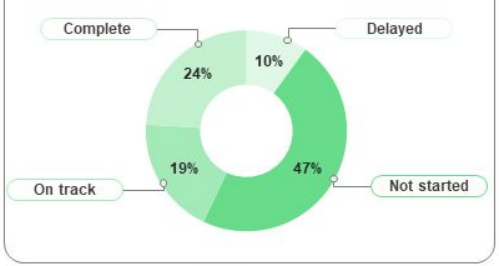
DashBoard - Employee

DashBoard - Management Project

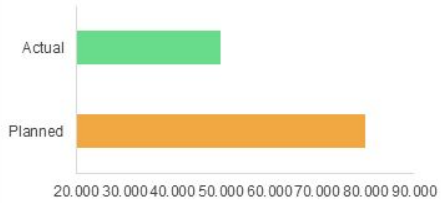
Strategic PMO dashboard for managing project status

The following slide exhibits dashboard providing program and portfolio managers with high level view of multiple projects status. It presents information related to overall budget, pending items, etc.

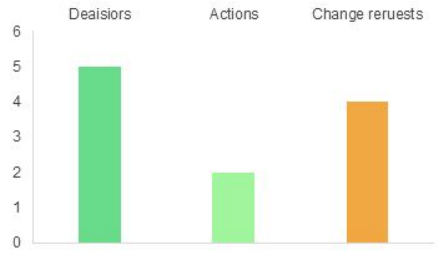
Project progress - Overall



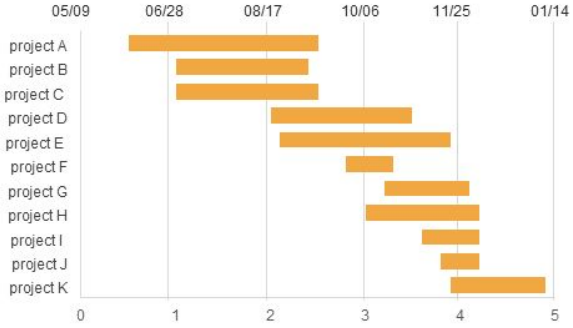
Project budget (in $)



Pending Items



Project name	Project lead	priority	Status
Project A	Alex B.	Low	Complete
Project B	Frank C.	Medium	Complete
Project C	Jacob S.	High	Complete
Project D	Jacob S.	Low	Delayed
Project E	Jacob S.	Medium	On track
Add text here	Add text here	High	On track
Add text here	Add text here	Medium	Not started
Add text here	Add text here	Medium	Not started
Add text here	Add text here	Medium	Not started
Add text here	Add text here	Medium	Not started
Add text here	Add text here	Medium	Not started



This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "Edit Data".

DashBoard - Training and Development

4. YTD - Dashboard

Select YTD Month	JUN

Training Cost (Actual)
93,183
-10.1%
vs. Last Period

Training Cost (Budget)
95,337
1.5%
vs. Last Period

Cost Per Participant
316
13.3%
vs. Last Period

Cost Per Hour
52
-5.1%
vs. Last Period

Number of Participants

Hours of Training

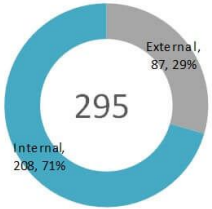
Total Completed Training
87
14.5%
vs. Last Period

Total Hours of Training
1,763
-1.6%
vs. Last Period

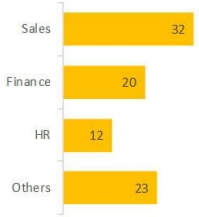
Total Participants
295
-20.7%
vs. Last Period

Occupancy Rate
93%
0.3%
vs. Last Period

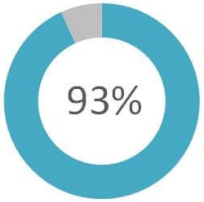
Participant by Training Type



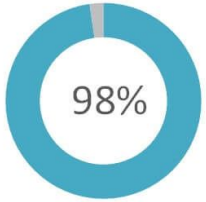
Training by Subject Matter



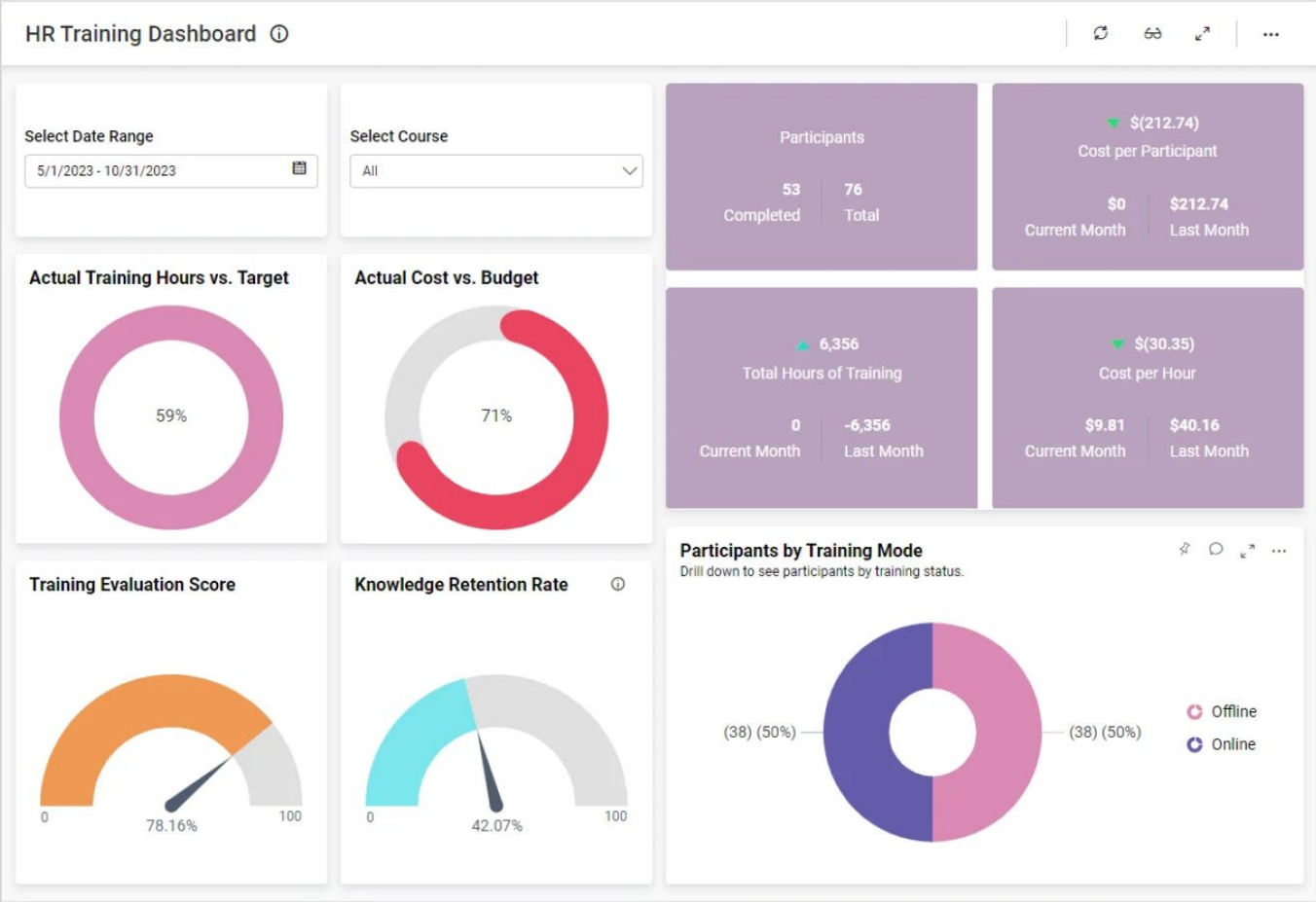
Hours of Training vs. Target



Actual Cost vs. Budget



DashBoard - Training and Development



DashBoard - Training and Development

Dashboard for training program evaluation

This slide showcases dashboard that can help organization to evaluate the training program implemented in organization. Its key components are training cost, number of participants, hours of training, cost per participant and occupancy rate

Training Cost (Actual)

92,182
-11.1%
Vs. Last period

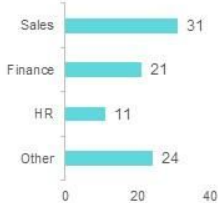
Total Completed Training

86
-13.4%
Vs. Last period

House of Training Vs. Target

Actual Cost Vs. Budget

Training by Subject Matter



Participant by Training Type

Training Cost (Budget)

96,336
-1.4%
Vs. Last period

Total Hours of Training

1,762
- 1.7%
Vs. Last period

Cost Per Participant

315
- 13.2%
Vs. Last period

Total Participant

294
- 20.6%
Vs. Last period

Cost Per Hour

53
- 4.1%
Vs. Last period

Occupancy Rate

92%
- 0.4%
Vs. Last period

Hours Of Training

Number Of Participants

This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "edit data".

DashBoard - Training and Development

HR Recruitment Dashboard

Department

All

Total Applicants
100

Shortlisted Candidates
35

Hired Candidates
8

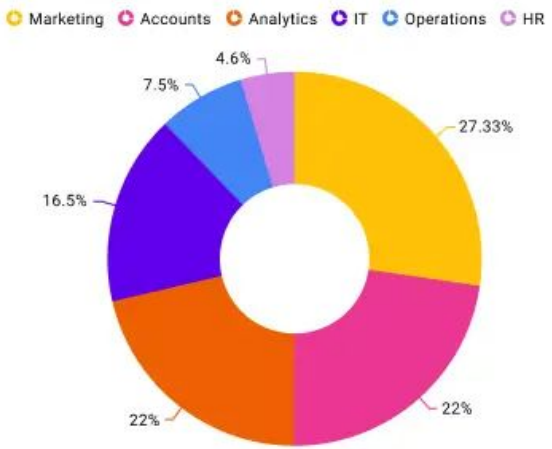
Rejected Candidates
65

Cost per Hire
$17K

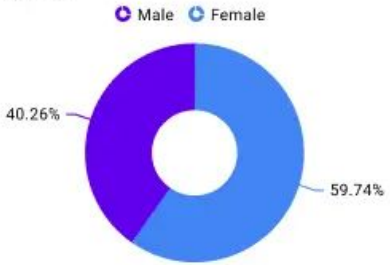
Time to Hire (Days)
15

Time to Fill (Days)
26

Open Position by Department



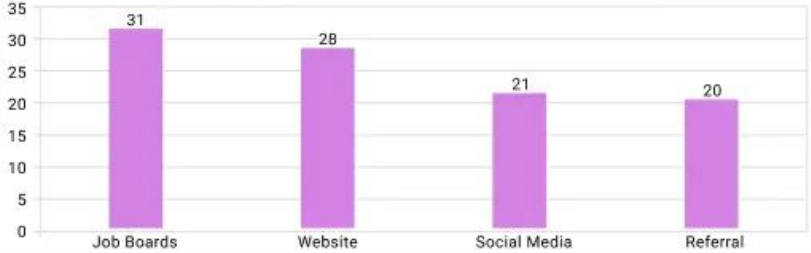
Gender Ratio



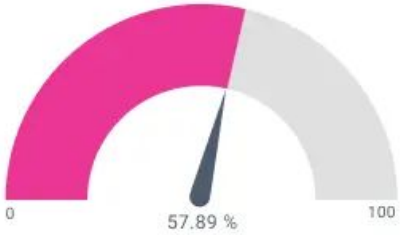
72.73%
Offer Acceptance Ratio

Offers Accepted **8**
Offers Provided **11**

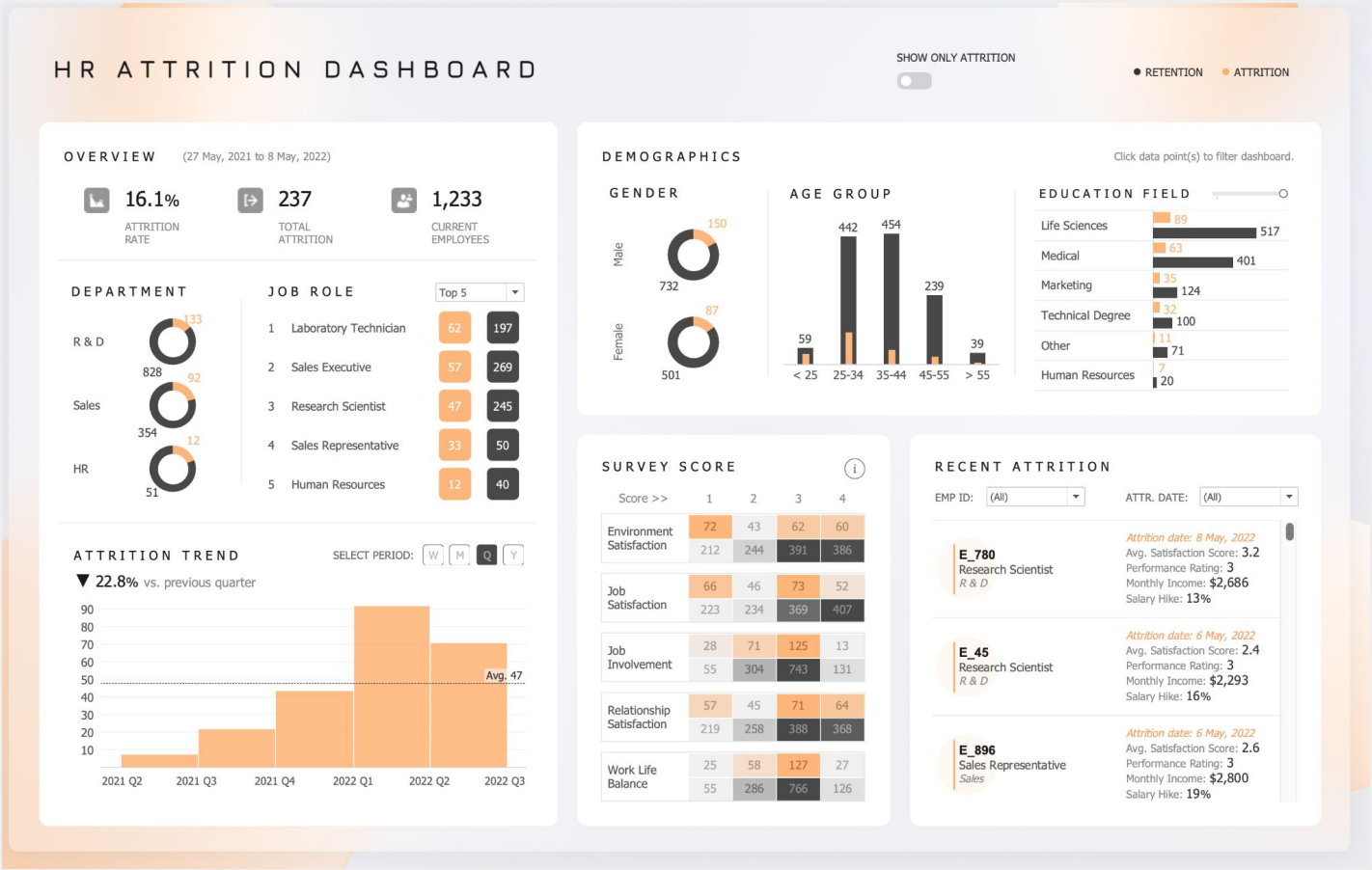
Application Received by Source



Candidate Withdrawal Rate



DashBoard - Training and Development



DashBoard - Employee

Compliance Management Dashboard with Open Issues and Risk Assessment

- 28 High Risk
- 15 Medium Risk
- 11 Low Risk

- 66 High
- 40 Medium
- 18 Low

Risk Assessments

Open Issues by Source and Organization

Metric Breaches

This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "edit data".

DashBoard - Employee

Compliance Dashboard with Issues by Regulations and Priority

30
Open Issues

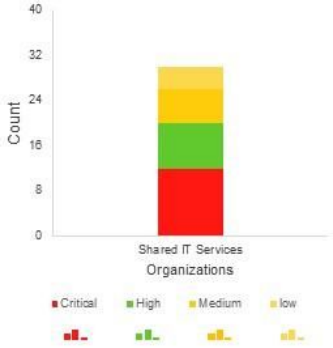
10 High
5 Medium
3 Low

6
Open Actions

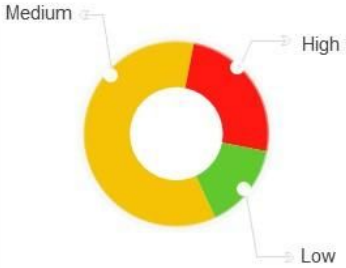
4 High
1 Medium
1 Low

Issue by Regulations

Open Issues by Rating and Organization



Issue by Priority



This graph/chart is linked to excel, and changes automatically based on data. Just left click on it and select "edit data".

DashBoard - Employee