

# Executive Dashboard Walkthrough

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## THE LAYOUT

The Bird Eye View

## INDIVIDUAL COMPONENT

The Metric, Demographic, Drill-Down

## KEY INSIGHTS

How can we grow? Better Scale? Stronger Reach

01

02

03

# TABLE OF CONTENT

Feel the Flow, Follow the Flow

THE METRICS

1.

2. Demographic

THE LAYOUT

The Dash is made up of 3 parts aiming to give the Executives a bird eyes on

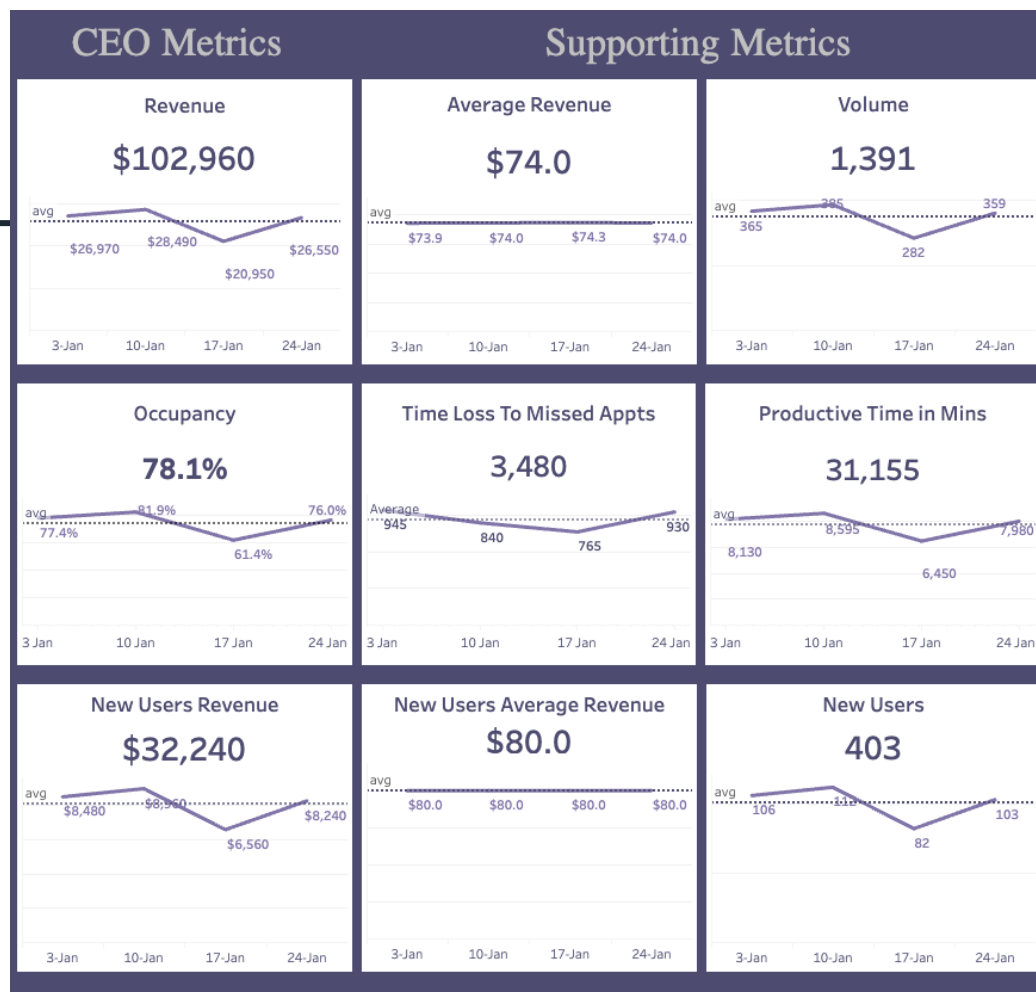
- 1. Metrics Performance
- 2. Patient's Demographic
- 3. Drill Down should need arises to drill down further

3. Drill Down



Revenue are typically the prime concern of CEO.

We can see a sharp dip on the 3<sup>rd</sup> week. By referring to Supporting Metrics, we can see that Average Revenue remains constant and the dip is drive by a fall in Volume.



Occupancy quantifies efficiency for the COO.

Rise and fall in Occupancy are due to 2 factors, time loss due to non-completed appointments & clinic productivity.

By looking at New Users Revenue, it ensure not only the acquisition of New User but also let the Head of Marketing know the quality in of new users.

are made up of 2 parts : CEO Metrics & Supporting Metrics

CEO Metrics [Revenue, Occupancy, New Users Revenue] gives the CEO a high level view how company is performing. Supporting Metrics are the drivers for the CEO metrics.

# THE METRICS

# THE DEMOGRAPHIC

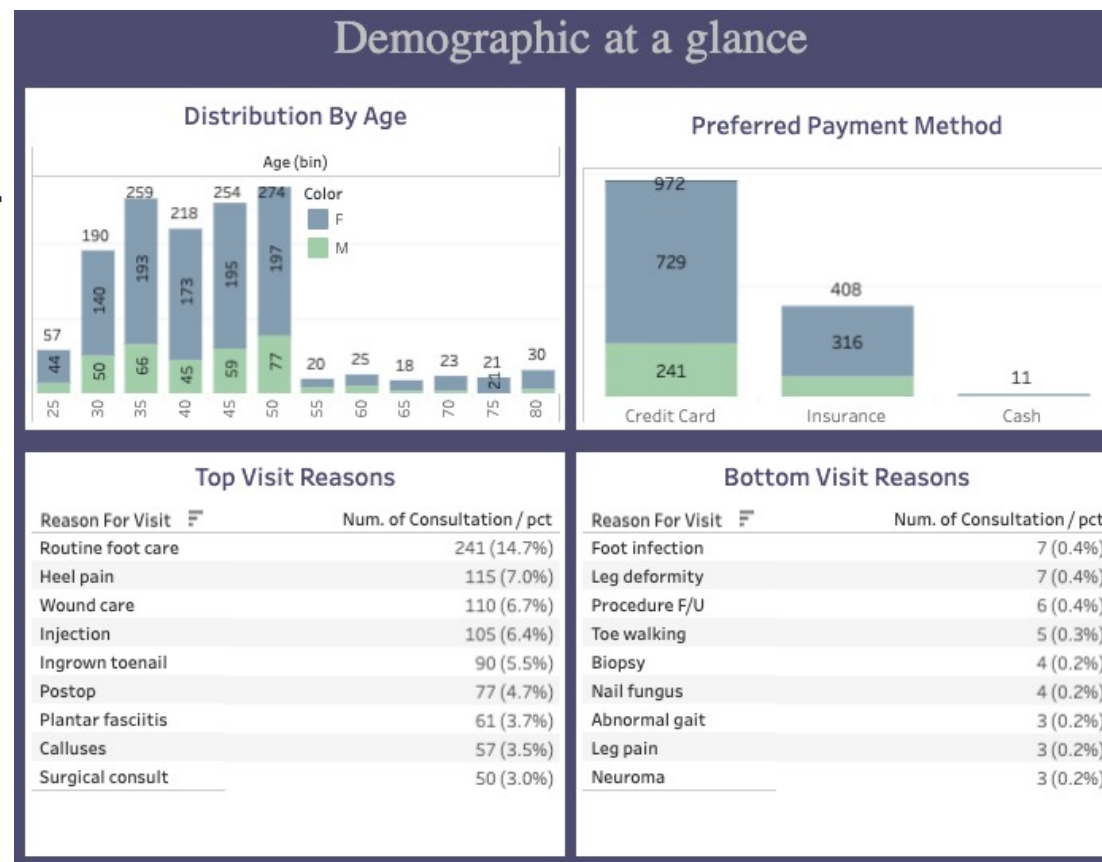
Demographic data aids CEO in strategic planning

Assists COO in operational decisions.

Empowers Head of Marketing to tailor campaigns for target segments, optimizing customer engagement and business outcomes

Quick look at the age distribution, you can tell that our primary audience are  $\geq 30$  age  $\leq 50$ .

If you toggle the parameter to Gender, you would discover our patient base are predominantly female



Preferred Payment Method gives crucial information to The executives.

COO may consider to abolish Cash payment to scale efficiency.

Head of Marketing can rely on this to decide how we want to reach to this group of users : Is it through Insurers or Credit Card Provider?

Top and Bottom Visit Reasons informs us what people love and not-so-excited about us.

Top Reasons serve as a hint to Head of Marketing what service to emphasize during a campaign

Bottom Reasons provide food-for-thought for CEO & COO to ponder if there's any reasons for these service to be under-utilized and if there's a need to deprecate them for cost saving.

				Index C							
Index A	Index B	Week of ..	Day of Appt Date	8	9	10	11	Vol. 12	13	14	15
Monday	All	3-Jan	3-Jan	12	12	11	10	7	15	14	10
			Total	12	12	11	10	7	15	14	10
		10-Jan	10-Jan	12	12	12	10	7	15	14	11
			Total	12	12	12	10	7	15	14	11
		24-Jan	24-Jan	10	10	7	10	7	12	14	10
			Total	10	10	7	10	7	12	14	10
		Total			10	10	7	10	7	12	14

Use of Parameters enables the chart to act like a pivot table giving you the granularity you need to deep dive

Drill Down

Parameters :

Index A

All

Index B

All

Index C

All

Filters :

Appointment DOW

All

Clinic Location

All

Doctor ID

All

Reason For Visit

All

				Index C									
Index A	Index B	Week of ..	Day of Appt Date	Revenue	Avg. Revenue	Vol.	Occupancy	Avg. Appt Length	Time Loss	Productive Time	Avg Revenue/min	New Users Revenue	New Users Cnt
All	All	3-Jan	4-Jan	\$6,710	\$72.9	92	92.1%	21	180	1,935	\$3.47	\$1,680	21
			5-Jan	\$4,770	\$74.5	64	71.4%	23	135	1,500	\$3.18	\$1,600	20
			6-Jan	\$5,370	\$74.6	72	78.6%	23	195	1,650	\$3.25	\$1,920	24
			7-Jan	\$5,590	\$74.5	75	83.6%	23	210	1,755	\$3.19	\$1,760	22
			Total	\$4,530	\$73.1	62	61.4%	21	225	1,290	\$3.51	\$1,520	19
		10-Jan	10-Jan	\$26,970	\$73.9	365	77.4%	22	945	8,130	\$3.32	\$8,480	106
			11-Jan	\$6,860	\$73.0	94	94.3%	21	150	1,980	\$3.46	\$1,760	22
			12-Jan	\$6,200	\$74.7	83	92.1%	23	135	1,935	\$3.20	\$1,920	24
			13-Jan	\$4,410	\$74.7	59	65.0%	23	180	1,365	\$3.23	\$1,520	19
			14-Jan	\$5,730	\$74.4	77	85.7%	23	150	1,800	\$3.18	\$1,760	22
			Total	\$5,290	\$73.5	72	72.1%	21	225	1,515	\$3.49	\$2,000	25
		Total			\$28,490	\$74.0	385	81.9%	22	840	\$3.31	\$8,960	112

# THE DRILLDOWN

When the Executives want a quick drilldown to more granularity of what may cause the metric to fluctuate.

It also help analysis to do quick investigation without having to spend time crafting queries.

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# KEY INSIGHTS

Focus On Impact

## Revenue

- ❖ **Need for Weekend / Evening Clinic**  
Patient coming in at night opens up a conversation with the clinic leading to discovery of untapped market for weekend or evening clinic.
- ❖ **Routine foot care**  
This is our most popular service generating most revenue with high per minutes price point.
- **Partner with Insurers**  
Most patients paid with Insurance, we can consider to partner with insurers to be their preferred/exclusive clinic for their policy holders.
- **Seek out the community more concern with foot health**  
Alternatively, we can also seek out individuals who might be more concerned with foot care (i.e. diabetic patient) by conducting free educational workshop in various institution for better reach.

## Operations

- ❖ **Missed Appts are impacting occupancy**  
In Jan, this have costed of **estimated loss of revenue of \$11,727/-** (estimated via \$3.37/min rates).
  - **No Show**  
Recommend to introduce a small monetary penalty to discourage **No show**.
  - **Reschedule / Cancelled**  
Clinic now calls patient 1 day before appointment to confirm appointment. Recommend to update to 2 calls, once 3 before and again on the day before.  
  
This give clinic more led time to fill up the freed up slots should patient request to reschedule or cancelled. Cancellation within 3 days will result in the small penalty as No show.
- ❖ **Please hire more doctors**  
We can't run 5 clinics with just 5 doctors. In Jan, we have **estimated loss of \$4,246/-** due to doctor on MC (881452 on 4&25Jan, 871346 on 26Jan).
- ❖ **Doctors Moving Around Clinic**  
Data shows doctor moving to other clinic, we need to understand better why this is happening and from a policy point to discourage this practice as it has a negative impact occupancy.

## Marketing

- ❖ **South Clinic need the same Set up**  
Only 18 new patients were acquired in Jan at South Clinic. Deep dive and speaking with Clinic Staffs led to discovery that they do have a lot of new patient enquiries but they were unable to accept the appointment as the clinic lacks the equipment to perform the procedural.

# Hello Everyone!



**Colin Lim** can keep  
**Watch and re-  
watch “The Big  
Bang Theory”  
without getting  
bored**

**INspiration :**  
“To improve is to change.  
To be perfect, is to change  
often”

**FACTS**  
“If I’ve money, I’ll buy  
books and when I’ve more  
I travel and spent it on  
awesome food”

**Where you might find me :**  
Strolling in a park  
Japan  
Book shop  
At a corner minding my own business

**Working with Colin :**  
Appreciate **constructive feedback** on better  
collaboration

Tend to overanalyze, so **direct communication**  
rather than indirect

**Focus on IMpact** – “now where’s the cheese?”

**Blameless Culture** – We all make mistakes, when  
it happens with me, let’s focus on how we can  
learn from it and grow together!

**Love asking questions.** Oftentimes, I may ask  
loads of questions, I do this to understand your  
thought process, logic guiding you to decision  
blah blah blah

**I work best with TIMELINE**, let’s always come to  
term on a realistic timeline, this help me to triage  
priority too!

**What I’m reading now :**

Machine Learning with Spark and  
Python

Trying Not To Try

**I ran out of things to  
type, so here’s the lyric of  
A Taylor Swift song**

So it's gonna be forever  
Or it's gonna go down in flames  
You can tell me when it's over,  
If the high was worth the pain

Got a long list of ex-lovers  
They'll tell you I'm insane

'Cause you know I love the  
players  
And you love the game