**JULIA**

Hello?

**YOU**

Hi Julia, how are you?

**JULIA**

Hi! Great, thank you!

How are you?

**YOU**

I’m just calling to find out if you’ve had the time to look at the dashboard I shared with you three days ago through Power BI Service?

**JULIA**

Yes! And actually, I wanted to say that I liked having the chance to take a look at it on my own first of all – it gave me a chance to familiarize myself with the tool. And I think it’s great!

**YOU**

I’m so happy you like it!

If you compare the borrower store and the past data from the sample, you can see that mortgage applications have been approved even though they didn’t meet the decision-making criteria.

**JULIA**

I’m not surprised. Without having a tool to help us, some decisions are being made at the moment without all of the stages being followed correctly. That’s another reason why we’re doing this project. When can I share the dashboard?

**YOU**

Well, before sharing it, we need to connect directly to the data sources rather than working with extractions. That way data will be automatically updated – we can set the frequency for the updates.

If you’re happy for me to go ahead, perhaps I should discuss this with your technical director.

**JULIA**

Oh yes, of course, I’d have no idea how to do that! I’ll send an email with Oliver in copy as soon as I’m off the phone to you. But if we connect the table to our databases, will it update in real time? Every day?

**YOU**

Yes, exactly!

**JULIA**

Amazing!

So, once the table is connected to the databases we’ll be operational?

**YOU**

Almost. Before sharing it, we need to put together the instructions for using the dashboard and its features.

This is going to be a change for branch advisors: they need to be trained so that they can use the tool independently. But don’t worry – I’ll be here to guide you through this important stage.

**JULIA**

You’re right – it’s true that we’ve been thinking more about the dashboards than the advisors and their experience. I’m actually worried that some advisors might feel that we’re taking away their autonomy when dealing with customers.

(thinking…)

Also, some of them aren’t that comfortable with IT so we do need to give them enough support.

**YOU**

Yes, but don’t worry – this is completely normal and I’m used to it. In general, it’s not just a tool I deliver but also the training in how to use it, otherwise you’d just be on the phone with me every day!

(you and Julia laugh)

**JULIA**

While we’re on the subject, the project is almost over. What do I do if I have questions about the dashboard once you’ve finished – I don’t have the skills to keep the tool operational over the long term, so what do you recommend?

**YOU**

Ideally, I’d like to get a representative from your IT department on board for this project. That way we can be sure there’s someone able to maintain the dashboard, but also to adapt it later down the line. That’s what I usually do.

**JULIA**

Yes, you’re right! I’d also like to stay connected to the project. I started it, so I’d like to make sure that all of the branch advisors get comfortable with it and that it makes their lives easier, rather than the other way around.

**YOU**

Yes, absolutely!

**JULIA**

Okay! I’ll see who can support us on the technical aspects – probably Oliver – and I’ll work with him on making the instructions available.

I could send you an email to keep you in the loop while we’re creating the documentation? I’m sure you’ll be a great help!

**YOU**

Yes of course, that’s what I’d imagined you’d do. Great – I’m really pleased you’re happy with everything.

**JULIA**

Just to recap, I’ll get in touch with Oliver in the IT department and we’ll work on instructions and a user training program. Thanks again for all your hard work and speak soon!

**YOU**

Great! Speak soon, Julia.