Business Intelligence Dashboard (Looker Studio)

Category: Reporting and dashboards

Problem: Excel-based reporting became heavy, manual, and difficult to scale.

What I Built: Rebuilt the reporting system in Looker Studio with live data connections, interactive filtering, and fiscal year tracking.

Tools Used: Looker Studio, Google Sheets

Output: Interactive live business intelligence dashboard

Business Intelligence Dashboard

Looker Studio Reporting System

Short Back Story

The original business reports were built in Microsoft Excel.

At the beginning, Excel was practical and quick to implement. But as the clinic expanded, more data sources, more service categories, and more reporting requirements were added.

Over time, the spreadsheets became heavier, more complex, and harder to maintain.

Instead of continuing to layer formulas and manual updates on top of each other, I transitioned the reporting system into Looker Studio to create a live, interactive business intelligence environment.

The Problem

While the data existed, reporting relied heavily on Excel.

Leadership needed:

• Real-time visibility of financial performance
 • A clearer view of therapist efficiency and productivity
 • Structured fiscal year tracking
 • Monthly revenue and profit comparison
 • A more scalable reporting system

With Excel:

• Reports required manual preparation
 • Updates were time-consuming
 • Files became large and harder to manage
 • Drill-down analysis was limited
 • Version control became a risk

The reporting process was functional, but not optimized for growth.

The System I Built

I rebuilt the reporting system inside Looker Studio and connected it directly to structured Google Sheets data sources.

The dashboard environment includes:

1. Financial Overview

• FYR Income
 • FYR Expenses
 • FYR Profit
 • Fiscal year selector
 • Monthly income, expense, and profit breakdown
 • Revenue source distribution

This section gives leadership a real-time snapshot of financial health.

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2. Operational & Service Breakdown

• NDIS Written Reports
 • NDIS Face to Face
 • Non Face to Face
 • Home Care Packages
 • Private Patients
 • Quarterly and monthly comparison

This area shows service distribution and volume across time.

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3. Performance & Efficiency

• Therapist performance rate
 • Position-based filtering
 • Monthly efficiency tracking
 • Patient satisfaction breakdown (NPS: Detractors, Passive, Promoters)
 • Treatment category trends

This section connects team performance with client outcomes and service delivery.

Each page is interactive, allowing filtering by fiscal year, therapist, position, and service type.

Instead of static files, leadership can now explore the data dynamically.

The Tools Used

• Looker Studio
 • Google Sheets (structured as live data sources)
 • Calculated fields inside Looker Studio
 • Data modeling inside Sheets
 • Interactive filters and parameter controls

The system pulls live data directly from operational sheets. No manual copy-paste is required.

The Measurable Result

Before:

• 3 to 5 hours spent preparing monthly reports
 • Manual reconciliation between sheets
 • Static Excel files shared via email
 • Limited filtering capability

After:

• Automatic data refresh
 • Reporting preparation reduced to 15 to 20 minutes
 • Real-time fiscal year comparisons
 • Interactive filtering by therapist, month, and service type
 • Clear executive-level visibility

Estimated time saved: 3 to 4 hours per month
 Equivalent to 36 to 48 hours per year returned to operations.

More importantly, reporting shifted from preparation to decision-making.