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INFO8440

Project 1

Merge delievrables

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| AS-IS persons / roles / actors and interactions of Executive Decision Making operations./……………………..MR |

|  |  |  |  |
| --- | --- | --- | --- |
| ID.No. | Involved Persons | Role/Actors | Description |
| 1 | Billy Bob | CEO | Client/Stakeholder |
| 3 | Manufacturing VP | Vice President | Stake Holder |
| 4 | Human Resource VP | Vice President | Stake Holder |
| 5 | Finance VP | Vice President | Stake Holder |
| 6 | Facilities VP | Vice President | Stake Holder |
| 7 | Marketing VP | Vice President | Stake Holder |
| 8 | IT VP | Vice President | Stake Holder |
| 9 | Tracker’s customers | Customer | Stake Holders |
| 10 | Medical Imaging’s customer | Customer | Stake Holders |

# Assumptions…………………..MR

## Assumptions for project:

* All the funding and resources needed for the project are available.
* All the technology devices needed for creating the dashboard are accessible by the team.
* The standard quality of the project will not be compensated.
* The project will be completed before the deadline according to all the client's business needs.
* The project working environment will be positive and understanding.

## Assumption for training :

* All the VPs agreed to our training plan
* All the VPs are available for the training.
* Management has approved two weeks for the training.

# Business challenges………………..MR

1. In the recent interview with the VPs, we learned that the tracker business is not profitable on its own. It is dependent on the OHT’s other business, “Digital Imaging.” The tracker business is becoming a burden on the other business. It also uses cash from other businesses to maintain its cash flow.
2. While discussing the business process and decision-making process, we found out that they do not have a straightforward decision-making process established. Individual VP makes decision for their department, and sometimes CEO also take part in the decision, but there is no decision making process established for the tracker business.
3. They lack effective leadership. There is no one to guide them. Each VP makes their own decision, and they do not have a person who has a long-term vision. Everybody focuses on short-term goals for the company.
4. They need to improve the application for the tracker. Most of the negative reviews are for the application, and users are complaining about the application and its function, but they do not have an IT staff who can upgrade the app.
5. In our interview with the VPs, we found out that the CEO is not an effective decision-maker, he is not allowing VPs to meet with each other to make collaborative decisions. He is not willing to take part in the practical business process.
6. OHT’s top management does not have any collaborative environment where all the VPs take each other’s opinions to decide. Because of this their decision also make an unwanted effect on another department.
7. VPs have internal biases too. Some VPs suggest shutdown the tracker business. But on the other hand, it's not possible, according to the HR VP. This creates uncertain circumstances in the company.
8. One of the biggest reasons, Tracker, is that their tracker production is not profitable. They need an effective production process to cut down the cost. This is the reason they are not able to generate revenue.

# Difference between Strategic Vs analytical Dashboard………………MR

## Strategic dashboard

A strategic dashboard is used to monitor companies’ long-term financial goals while keeping critical success factors that may impact the business. They track performance metrics against time and other metrics for strategic goals. They are live. They keep on updating based on the live data. They are always associated with the long-term goal of the company. These dashboards are very helpful for executives to make decisions. They give live feedback on what is currently going on in the company.

## Analytical dashboard

The analytical dashboard contains a large set of data in them. They are much more complex, and they are essential to the executive. They are based on historical data. The analytical team, most of the time, performs the calculation on the data and shows the data in the dashboard. This dashboard identifies patterns that arise in the market and presents them to the executive to plan strategy.

## Difference between executive dashboard and analytical dashbord

|  |  |
| --- | --- |
| Strategic Dashboard | Analytical Dashboard |
| The strategic dashboard is based upon the live data. | The analytical dashboard is based on historical data. |
| A strategic dashboard gives a high-level picture to denote the companies’ current picture. | Analytical dashboards perform analysis on the past data and give future projections. |
| These dashboards contain key success metrics for future projections. | This dashboard contains the analytical figures, patterns, and trends identified in the analysis. |
| These dashboards are associated with the long-term strategy of the company. | These dashboards are associated with short-term trends and patterns to navigate the company to long-term goals. |

# Entity Relationship Diagram………..MR

Diagram

Description automatically generated

# Data:

Date range for the tracker gen data : 02-01-2017 to 18-07-2021

Number of records in Daily summary of invoices table: 1003

Number of records in Competitors sales by competitor 7644w

Number of records in Customer Feedback Table 30093

Number of records in Product returns table 75

# Executive Dashboard Metric Format………MR

## 1.Metric:

Yearly revenue: Number of unit sold multiply with average price

## 2.Interpretation(definition):

Yearly revenue is a widely used term in businesses. Yearly revenue gives us the indication of the sales that happened in the year. Moreover, it can also give us a brief idea about its cash flow..

## 3. Purpose of the metric:

The purpose of the metric is to show the company's growth in the particular year to show whether they increased the sales and if there are other factors that we need to consider to increase the profit and where they can improve the profit.

## 4.Value added to decision makers:

This metric will allow decision-makers to compare the revenue to the previous year, and they will be able to get the difference between the two. They can pivot their decision-making by examining the factors responsible for the change. This metric will trigger their thought to have a general idea of whether they are doing right or wrong.

## 5.Tables used for the data and their relationship

We will use the invoice table for this metric. We will segregate all the invoice amounts by the year, giving us the yearly revenue.

Table : invoices table

## 6.Graph type to display the metric.

Graph type will be used for the metric is bar chart

# Training plan for the VPs…….MR

For the training, we are planning to implement the training program in the 6 phases; in these phases, we will try to understand them and educate them about the dashboard and the new decision-making environment. All the six phases are listed down here:

## **Gather training VPs needs**

We will meet all the VPs in person for a brief meeting to get the general idea of what part of the executive dashboard they needed the most training as well as we will also gauge the familiarity with the dashboard.

## **Understand the needs**

Based on the response from the VPs, we will keep some specific focus points for each VPs. We will create a training plan for them.

## **Provide them material**

In this, we will give them all the resources that we have prepared for the VPs. We will give them training videos to explain to them the dashboard and How to use them. We will also give them all the written content for the dashboard..]

## **Training**

We are planning to give them three days of training on the dashboard. We are trying to give them hands-on experience on the dashboard. We will also observe what part of the dashboard is much more helpful and where they are having trouble. There will be constant guidance provided for each VPs.

## **Monitor progress**

In the monitoring phase, We will be back seats and give them all the control on their own. We will monitor their progress and observe their questions and how they use the dashboard. In this phase, we will work on the feedback.

## **Give feedback**

We will give them the feedback we observe during the training in the last phase. We will give them coaching if they need any part of the dashboard. We end our training..

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