bIzToRy

Customisable Executive KPI Scorecard

Industry
Any

Technical
Version: 2022.3

Audience
C-Suite Executive
Team Lead

Supported Layout
Desktop

Contact us!
https://www.biztory.com/about/contact-us

Select the icon below to watch a video on 'How to use' this Accelerator.

Select the icon below to navigate to the 'How to use' information.

Synopsis

The Customisable Executive KPI Scorecard is intended to **enable data from all across your business to be drawn together** and displayed in a bespoke way for each intended audience.

When **used in conjunction with Tableau Cloud or Server's Custom View features**, you are able to use the same dashboard to create a bespoke set of scorecards, cherry-picking from the data sources you make available to build a bespoke combination of KPI cards.

The report can be set up to **include any number of KPI cards from 1 to 18** and each of those cards you are able to pick from one of the available 8 demo business data sources.

Whether you would like to see your company's Sales and Profit performance alongside HR attrition rates, along with Employee Survey Satisfaction data. It is all possible.   The world is your oyster, just decide the business pillars you want to include and off you go!

Key Business Question/s

What is the health of my company / department looking like when analysing data from all different departments?

Data Source Information

Two sources are included in this workbook.

A unioned source, of 8 different individual sources originating from different business pillar data tables.
A simple data model, that facilitates the selection of unioned sources above.

* Refer to the 'How to use' sheet for all information on how to adopt this workbook and what your data structures should look like.

Everything you need to know about the data, connections,calculations & set up.

This page aims to help de-mystify the build behind the report and highlight what you will need to do to adopt this Accelerator for your own purposes.

Where does this data come from?
The data used to demo in this workbook has been sourced from the Tableau Community project, **Real World Fake Data**, and is used with the permission of the project owner, Mark Bradbourne.

How is the data set up in this workbook?
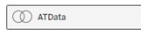There are two data sources used within this workbook.

* Click on one of the Data Source Screen shots to learn more about that source.

1. Accelerator Data
This source contains the actual data to be visualised in the Scorecard.
* Select the image to learn more
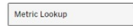
⊟· ATData+ (Accelerator Data)

ⓘ ATData

2. Metric List
This source contains the data that is used to drive the user selection controls on the scorecard.
* Select the image to learn more

⊟· Metric Lookup (Metric List)

Metric Lookup

What do you need to do?
How can you adopt this workbook for your own purposes?
We have written a guide that details the steps you need to go through for adoption,
and also the guide will also provide important details about the workbook set up and calculations.

* Select on the icon below to open up the guide .

The Adoption Guide
* Select the image to open it

Customisable Executive KPI Scorecard

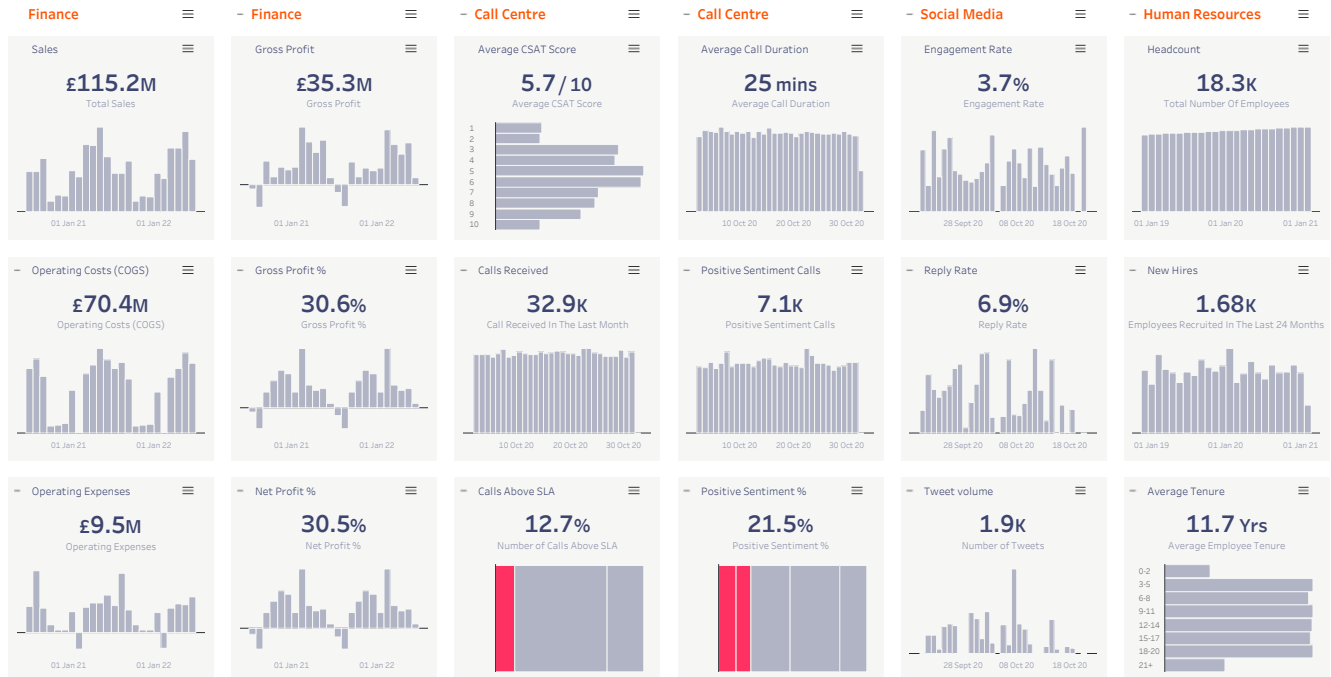*** Navigate to the dashboard by selecting the image below.**
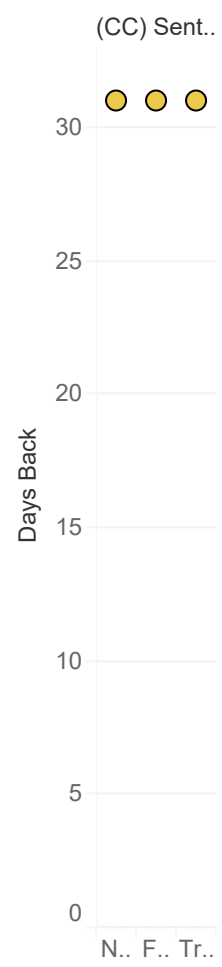
Customisable Executive KPI Scorecard

This Exec KPI Scorecard is designed to be used in conjunction with Tableau Cloud / Server Custom Views feature

Data | Refreshed: June 2022   Latest: 25-05-22

Finance

Sales
£115.2M
Total Sales

01 Jan 21   01 Jan 22

Operating Costs (COGS)
£70.4M
Operating Costs (COGS)

01 Jan 21   01 Jan 22

Operating Expenses
£9.5M
Operating Expenses

01 Jan 21   01 Jan 22

Finance

Gross Profit
£35.3M
Gross Profit

01 Jan 21   01 Jan 22

Gross Profit %
30.6%
Gross Profit %

01 Jan 21   01 Jan 22

Net Profit %
30.5%
Net Profit %

01 Jan 21   01 Jan 22

Call Centre

Average CSAT Score
5.7 / 10
Average CSAT Score

1
2
3
4
5
6
7
8
9
10

Calls Received
32.9K
Call Received In The Last Month

10 Oct 20   20 Oct 20   30 Oct 20

Calls Above SLA
12.7%
Number of Calls Above SLA

Call Centre

Average Call Duration
25 mins
Average Call Duration

10 Oct 20   20 Oct 20   30 Oct 20

Positive Sentiment Calls
7.1K
Positive Sentiment Calls

10 Oct 20   20 Oct 20   30 Oct 20

Positive Sentiment %
21.5%
Positive Sentiment %

Social Media

Engagement Rate
3.7%
Engagement Rate

28 Sept 20   08 Oct 20   18 Oct 20

Reply Rate
6.9%
Reply Rate

28 Sept 20   08 Oct 20   18 Oct 20

Tweet volume
1.9K
Number of Tweets

28 Sept 20   08 Oct 20   18 Oct 20

Human Resources

Headcount
18.3K
Total Number Of Employees

01 Jan 19   01 Jan 20   01 Jan 21

New Hires
1.68K
Employees Recruited In The Last 24 Months

01 Jan 19   01 Jan 20   01 Jan 21

Average Tenure
11.7 Yrs
Average Employee Tenure

0-2
3-5
6-8
9-11
12-14
15-17
18-20
21+

Sentiment Colour Vs Days Back

(CC) Sent..

Days Back

30

25

20

15

10

5

0

N.. F.. Tr..

Days Back
(Parameters) for
each (CC)
Sentiment Colour.

Satisfaction Colour Vs Pillar

(HD) Sati..

p.Pillar3

1.0	
0.9	
0.8	
0.7	
0.6	
0.5	
0.4	
0.3	
0.2	
0.1	
0.0	

N.. F.. Tr..
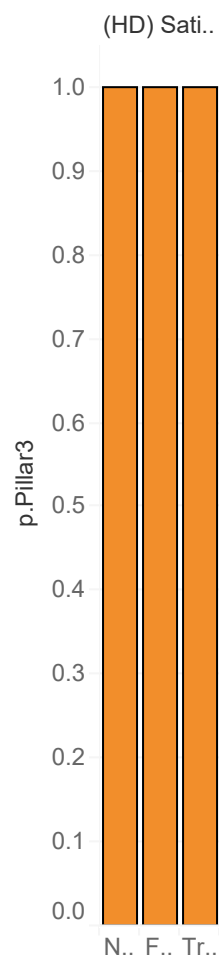
P.Pillar3
(Parameters) for
each (HD)
Satisfaction Colour.

Reponse Colour Vs Pillar

(CC) Res..

p.Pillar4

1.0 — 🟢🟢🟢
0.9
0.8
0.7
0.6
0.5
0.4
0.3
0.2
0.1
0.0

N.. F.. Tr..
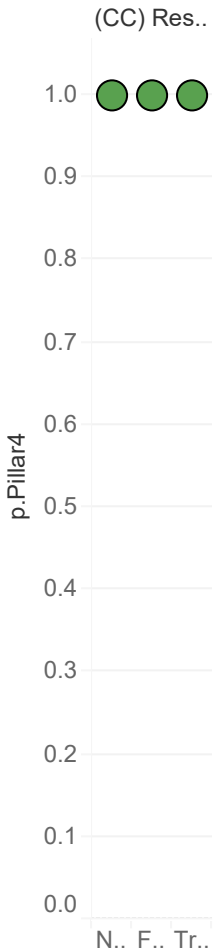
P.Pillar4
(Parameters) for
each (CC)
Response Colour.

Severity Colour Vs Pillar

(HD) Sev..

5

4

3

p.Pillar6

2

1

0

N.. F.. Tr..

P.Pillar6
(Parameters) for
each (HD) Severity
Colour.

Satisfacti on Score Vs Pillar

Statisfaction Score

p.Pillar5

P.Pillar5 (Parameters) for each Statisfaction Score.

Subscribers Galore Exploring World's Top Youtube

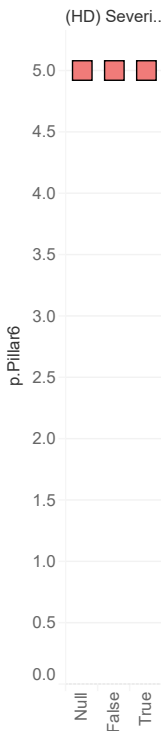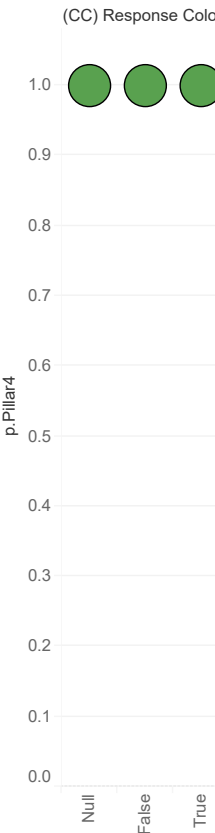## Satisfaction Colour Vs Pillar

(HD) Satisfaction ..

Satisfaction Score Vs Pillar

Statisfactio..

Severity Colour Vs Pillar

(HD) Severi..

Reponse Colour Vs Pillar

(CC) Response Colo..

Sentiment Colour Vs Days Back

(CC) Sentiment Colour