Operational Enablement & Insights Framework

Purpose

Provide a repeatable approach for visualizing performance, pipeline health, and workflow readiness in a way that supports faster decision-making and transparency.

Framework Approach

- **Metrics Definition** – Identify KPIs (value, pipeline progress, risk, workload distribution).
- **Dashboard Design** – Use Looker Studio to build user-friendly visualizations.
- **Operational Readiness** – Link visuals back to workflows and enablement processes.
- **Continuous Iteration** – Refine based on stakeholder input.

Sample Dashboard Metrics

- **Total Value ($)** – overall account or program value

- **Value at Risk ($)** – flagged at-risk accounts/pipeline segments

- **Average Health Score (%) –** operational quality measure

- **Pipeline Progress (%) –** % of items moving through onboarding/workflow

- **Outstanding Actions –** backlog or open issues requiring attention

Artifacts

- **Operational Insights Dashboard (Looker Studio) –** [Demo Link](#)
- **Blueprint Document** – This PDF is a sample playbook for how workflows + dashboards drive enablement

Operational Insights Dashboard

Example only: Account Health | Value at Risk | Onboarding Progress | Performance Metrics

Total Value ($)	Value at Risk ($)	Average Health Score %	% in Active Pipeline
$1,349,237	$1,092,132	74	59

AccountName	Health Score	Value	Target Date	Pipeline Progress %
Beta Systems	79	$171,033	Jul 23, 2026	57
Ionix Group	94	$64,620	Jun 27, 2026	95
Delta Dynamics	62	$191,087	Apr 19, 2026	30
Juno Labs	80	$192,485	Apr 6, 2026	63
Gamma Global	68	$103,786	Mar 12, 2026	55
Acme Corp	78	$152,254	Jan 28, 2026	73
Foxtrot Tech	80	$75,088	Jan 15, 2026	53
Total	**74**	**$1,349,237**	**Jul 23, 2026**	**59**

Pipeline by Owner

- CSM B
- CSM C
- CSM A

70% / 20% / 10%

CSM Owner	Outstanding Actions ▾
CSM B	35
CSM C	14
CSM A	6

Note: This blueprint is high-level and would be refined with live data, other tools, team input, workflow optimization, dashboards, and enablement in complex environments.