



un dashboard es menos transversal, mas focalizado!!!!

Unit 3 – Data exploitation. Query languages and visualization S3-3 – SCORECARDS & DASHBOARDS











V S O T







KEY CONCEPTS: importante para el examen !!!!!

- **Vision**: Vision provides a shared mental framework for everyone in the organization, defining a clear picture of the desired future state and long-term aspirations.
- Strategy: the set of priorities and plans an organization adopts to pursue its mission, considering the operating environment.
- **Objective**: a concise statement describing the <u>specific</u> things organization must do well in order to execute a strategy.

 **especificos pero no mucho, eso son los target*
- **Target:** A target is the specific, desired value or outcome associated with a performance measure, indicating success in achieving objectives.





OUTLINE:

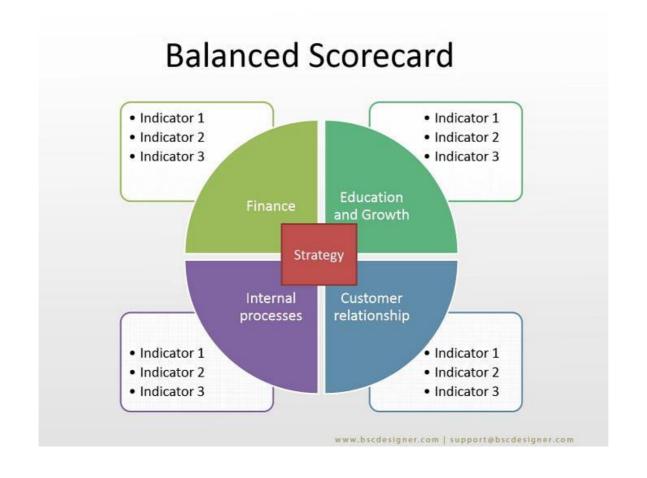
- 1. Balanced Scorecards (BSC)
- 2. Strategy Maps
- 3. Example: BSC in Healthcare
- 4. Dashboards Essentials
- 5. Scorecards vs. Dashboards
- 6. Examples of Dashboards: IT company and ICU.





perspectivas que implementaremos en nuestro cuadro de mando integral

1. BALANCED SCORECARDS (BSC)







- BALANCED SCORECARDS (BSC)
 - TOP-DOWN methodology in organizations to align organizational objectives and activities with strategy.
 - Tool to manage and monitor long-term strategy.
 - It is NOT: tool to design a strategy.
 - It is: tool to move strategy into actionable objectives.



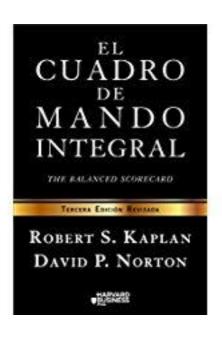




BALANCED SCORECARDS (BSC) englobar todos los elementos en uno

"A carefully selected set of quantifiable measures derived from an organization's strategy".

By Robert Kaplan (Harvard Univ.) & David Norton (consultant Boston area) BOOK: The Balanced Scorecard (in 1996)







- BALANCED SCORECARDS (BSC)
- Scorecard can be used as:
 - measurement system. Monitoring KPIS aligned with strategic goals.
 - strategic management system. Aligning organization vision and strategy and operations.
 - communication tool across all levels of the organization.





HOW TO DESIGN A BALANCED SCORECARD:

Know guiding principles: objectives & strategy.

Split the strategy objectives into **actions**.

Strategy Objective Actions from 4 perspectives:



Financial



Customer



Internal-Business-Processes



Learning & Growth.





HOW TO DESIGN A BALANCED SCORECARD:

- Strategy **Scores**: measure progress towards achieving each strategy. "If you cannot measure something, you cannot manage it".
- Target: the score value that we expect to reach.
- Program actions: specific short-term actions that must be done to reach a target. Tactics.





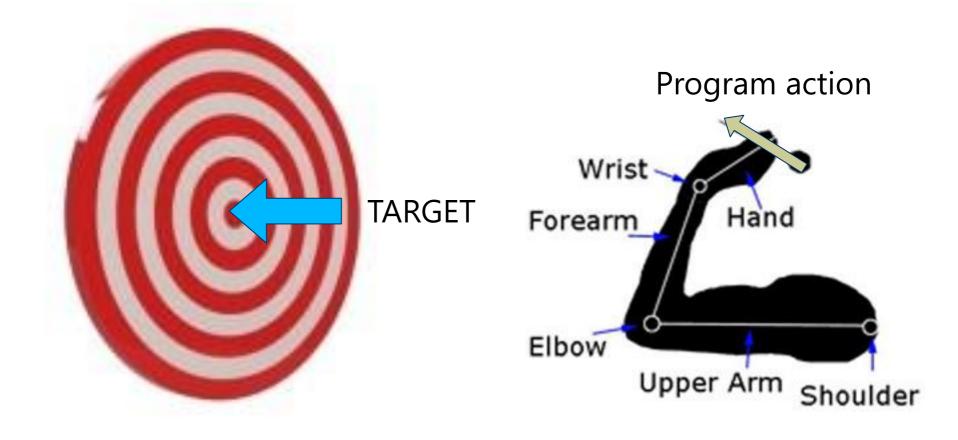
HOW TO DESIGN A BALANCED SCORECARD:







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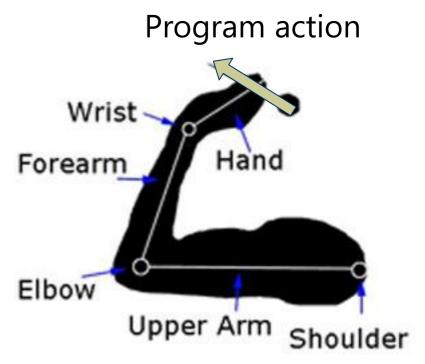






HOW TO DESIGN A BALANCED SCORECARD:









HOW TO DESIGN A BALANCED SCORECARD:

- 1. Know guiding principles: objectives & strategy.
- 2. Split the strategy objectives into actions.
- 3. Strategy Objective Actions from 4 perspectives:















HOW TO DESIGN A BALANCED SCORECARD:

- Strategy Objective Actions from 4 perspectives:
 - FINANCIAL DIMENSION:





- A scorecard must encourage including the financial goal in the organization strategy.
- The financial goals matches to the phases of the organization life-cycle:
 - Grow, Maintenance, Production.





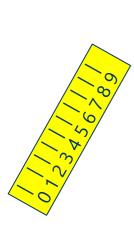
HOW TO DESIGN A BALANCED SCORECARD:

Strategy Objective Actions from 4 perspectives:



CUSTOMER DIMENSION:

- Identify those **segments of clients and markets** they want to compete.
- **Key scores** of clients:
 - Market and Account Share (ES: Cuota Mercado).
 - Customer Retention: maintain and increase the market based on customer segments.
 - Customer Acquisition: increase customer base in targeted segments.
 - Customer satisfaction.
 - Customer profitability (ES: rentabilidad)



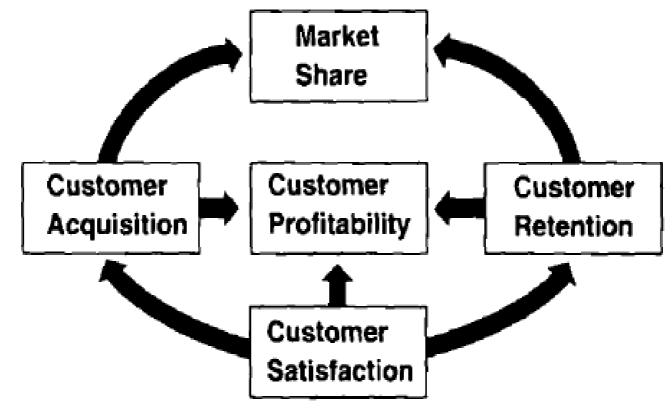




HOW TO DESIGN A BALANCED SCORECARD:

- Strategy Objective Actions from 4 perspectives:
 - **CUSTOMER DIMENSION:**









HOW TO DESIGN A BALANCED SCORECARD:

- Strategy Objective Actions from 4 perspectives:
 - CUSTOMER DIMENSION: Customer Satisfaction:
 - Time: major competitive weapon: respond rapidly and reliably to customer requests (TOYOTA Japanese manufacturers).
 - Quality.
 - Price: whether customers care about current price.





HOW TO DESIGN A BALANCED SCORECARD:

Strategy Objective Actions from 4 perspectives:



INTERNAL BUSINESS-PROCESS DIMENSION:

- Once the financial and customer goals have been developed
- The main internal processes are:
 - 1. Innovation processes
 - 2. Operations processes
 - 3. Post-sale process







INTERNAL BUSINESS-PROCESS DIMENSION





25





6

We offer three kinds of service GOOD-CHEAP-FAST







HOW TO DESIGN A BALANCED SCORECARD:

Strategy Objective Actions from 4 perspectives:



Learning & Growth DIMENSION:

Goals to follow in order to induct new infrastructures to improve aspects of previous dimensions.

- Invest in the future.
- Key scores:
 - 1. Employee capacities.
 - 2. Information system capacities.
 - 3. Motivation, power, delegation and objective coherency.







HOW TO DESIGN A BALANCED SCORECARD:

- EXAMPLE 1: 'Kenyon Stores'
 - Financial: aggressive growth, maintain overall margins.
 - Customer: customer loyalty, complete product-line offering.
 - Internal Business Process: Build the brand, fashion leader, quality product, superior shopping experience.
 - Learning and Growth: strategic skills, personal growth.

Dimensions	Guiding principles	Scores	Target	Program actions
Financial				
Client				
Internal Proc.				
Learn&Grow				





Your Logo Here

Scorecard

Click on any item of interest to reveal the menu

Financial Perspective		Customer Perspective						
F1.Maintain Business Growth		C1. Improve Customer Satisfaction	Y.o.Y.					
Revenue (USD thousands)	\bigcirc	Customer Satisfaction Index	7					
2. Optimum Return		C2. Maintain Market Share in Mining Sector						
Net Income (USD thousands)		Market Share of EM Tire						
3. Improve Cost Efficiency			YOY Trend					
Total OPEX to Revenue Ratio								
Learning and Growth Perspective		Internal Process Perspective						
L1. Enhance Employee Competence & Productivity		I1. Improve New Businesses	Y.o.Y.					
Talent Retention Rate	A	Contribution of New Businesses to Total Revenue	7					
Employee Productivity		I2. Optimize Working Capital						
.2. Reliable Information System		AR Days	7					
Implementation ICT Road Map	*	AR Overdue > 30 days of Total AR	1					
3. Enforce Conducive Working Environment		Free Cash Flow from Operation						
EOS Index		13. Excellent Inventory Management						
		Inventory Days	7					





2. STRATEGY MAPS

The Balanced Scorecard is a step in a continuum that describes what value is and how it is created









STRATEGY MAPS:

- Measures must be chosen more "strategically".
- Relate specific high level objectives
- Causal relationship between objectives indicated in the "Strategy Map".





STRATEGY MAPS:

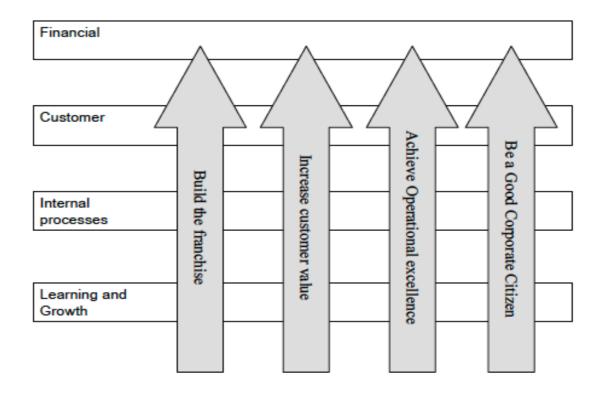


Figure 2.1: Architecture of a Strategy Map (Source: Kaplan and Norton 2001, p. 79)





STRATEGY MAPS:

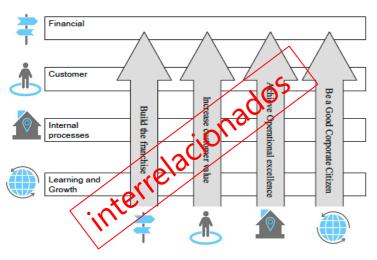
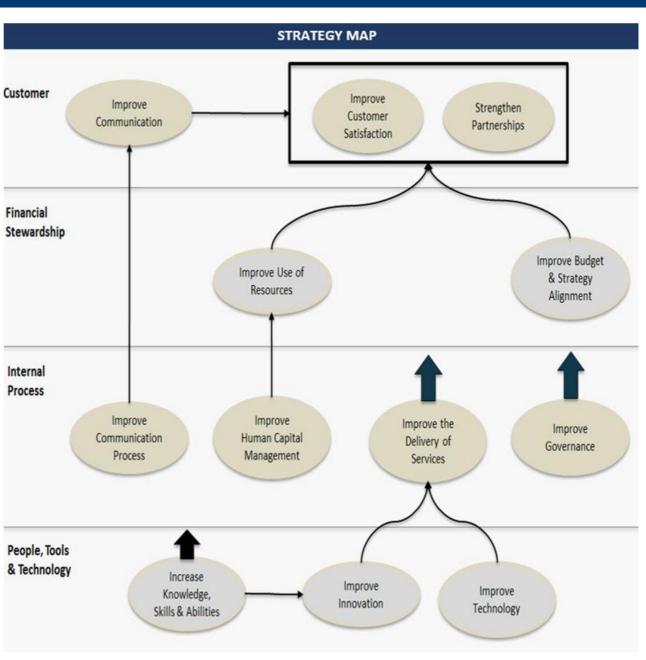


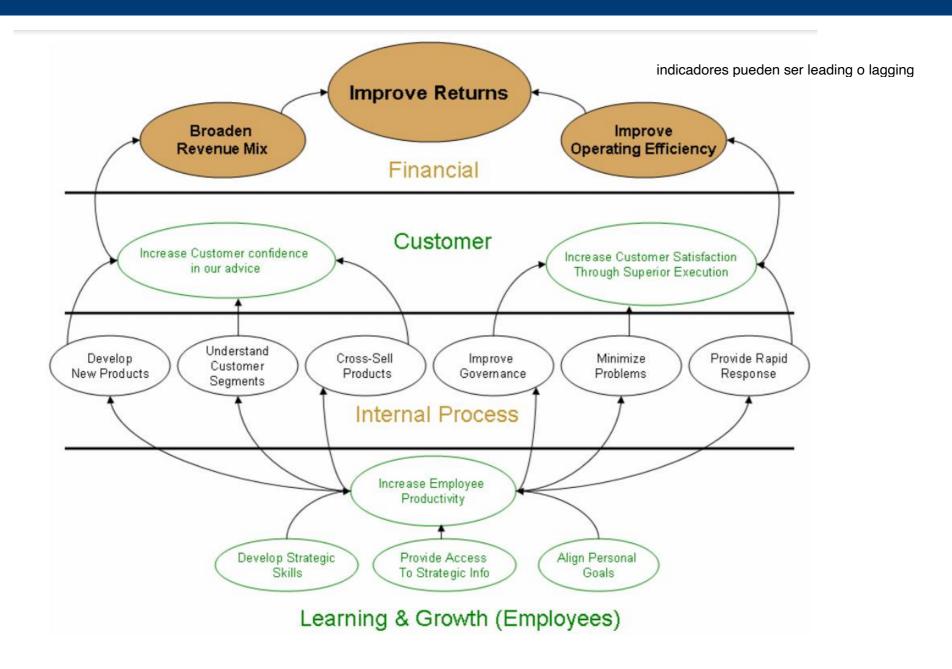
Figure 2.1: Architecture of a Strategy Map (Source: Kaplan and Norton 2001, p. 79)



Source: fdic.gov







Source: usaid.gov





3. EXAMPLE: BSC IN HEALTHCARE





BSC in Healthcare

To what extent has the BSC been introduced to healthcare:

Hospitals, Healthcare Systems, University medical depts., long-term care, mental health centers, pharmaceutical care, health insurance companies.

BSC is the most adopted model to measure performance.





BSC in Healthcare

Reasons to use BSC in healthcare (diversity):

- 1. To ensure to be a **high performing** healthcare provider (Northumbria Healthcare Foundation, United Kindgom).
- 2. How can we demonstrate to the community that they are getting value for our tax payer funded services? (>AUS\$ 1 billion). (Hunter New England Health District, Australia).
- 3. To take a more strategic approach to differentiate their services and **attract more business** (Mackay Memorial Hospital, Taiwan).
- 4. To achieve **better outcomes** for patients and staff (St Vicent's Private Hospital, Australia).
- 5. To combine **financial control** with quality improvement (Högland Hospital, Sweden).





Financial	Grant money Affilations	Broadened revenue mix	Financial stability/self- supporting
Customer	Market share High quality of care	Customer satisfaction Provided a broad scope of service	Seamless care
Internal	Innovative Processes	Seamless care	Work as a team
Learning & Growth	Support top cor	rofessional nferences & seminars	Educational, teambuilding & training programes for employees





ejemplo de BSC

Waypoint Strategic Balanced Scorecard 2020-25 (Year 4 - 2023-24)

	Waypoint Strategic Balanced Scorecard 2020-25 (Year 4 - 2023-24)										
MISSION	We are a Catholic hospital committed to providing excellence in specialized ment	al health and addictions services grounded in rese	arch and educa	tion and guided	by faith-bo	sed values.					
VISION	As an inspired organization, we will change lives by leading the advancement and delivery of compassionate care.										
STRATEGIC DIRECTIONS	SERVE © DISCOVER					C LEAD					
STRATEGIC RESULTS	We will include patients and families as partners in all we do, fostering a healing culture where staff, physicians, and volunteers are inspired to provide exceptional service and care. We will embrace education, advance research, and seek, generate, and apply best practice and new knowledge to create the best possible outcomes for patients.				and new	We will be a leader and trusted partner who embraces technology to support better overall health, collaborating with our partners to make it happen.					
	OBJECTIVES & STRATEGY MAP (read from bottom to top)	MEASURE *Quality Improvement Plan indicator	BASELINE Q3 2022-23	TARGET 2023-24	Q1	Q2 D unless indicat	Q3 ed with ^	Q4	TARGET 2020-25	2023-24 INITIATIVES** Initiatives not directly responsible for the measure listed to the left	
FIDUCIARY PERSPECTIVE: If we succeed, how will we look to funders or donors?		Increase % eligible programs demonstrating improvements in patient health outcomes through the use of standardized measures (e.g. Composite Index) ^	55 %	■ 63-65%	■ 64%	6 4%	18 %		■ 80-85%	■ the Central Ontario Specialized Health Networks for adult depression and anxiety	
Support Better Overall Health Care		Decrease repeat Emergency Department visits (30 days return visit) for mental health and addictions ^	21.4% (Q2 2022-23)	1 9.8%	22.0%	22.5%	22.1%	-	■ 18.5%	Implement coordinated access: Central Waitlist Management Service	
		 Decrease Alternate Level of Care (ALC) Days for regional programs (NEW) 	■ 27.8%	■ 25.1%	18.0%	18.0%	1 8.8%	-	22.4%	Continue work on new 20 bed acute mental health unit on Toanche Level 3	
PATIENTS, FAMILIES, PARTNERS PERSPECTIVE: To achieve our vision, how must we look to our patient, families, and partners? What do they want? How will we satisfy them? How will we serve them?		*Maintain total margin ~	■ 2.99%	■ >0	(1.87%)	(0.20%)	(3.38%)	ŀ	■ >0	Advance urgent and emergent mental health services regionally	
		*Increase overall inpatient satisfaction	7 0%	75 %	■ n/a	■ n/a	■ n/a	•	■ 84%		
	de Exceptional Be a Trusted Partner	Decrease reported patient incidents per 1000 patient days (Severity 2-4)	■ 12.54	■ 9.87	11.10	■ 12.23	12.46	ŀ	■ 8.98	■ Implement Model of Care	
Person	n Centred Care	Number of clients enrolled in Ontario Structured Psychotherapy (@Waypoint) (NEW)	■ 1184 (93% YTD)	■ 2537	440	1013	1583		■ 2537	Implement Six Core Strategies to prevent restraint & seclusion	
	ERSPECTIVE: To satisfy our patients, families, partners, funders, donors, and our mission, what lat? What are the few things we need to do better, from amongst our many processes, that will nce?	Reduce levels of medium to high staff burnout	■ 89%	■ 74%	■ n/a	■ n/a	■ n/a		■ 70%	Participate in Pursuing Equity Learning Network	
		*Decrease workplace violence frequency (lost time claims per 100 full time equivalents)	■ 2.8	1.5	2.7	3.6	■ 3.9	-	= 1.2	(Institute for Healthcare Improvement)	
Health	ngthen Our y Workplace Tractices Oriented Research	*Decrease workplace violence severity (lost time claims per 100 full time equivalents)	■ 19.2	■ 25	8.4	56.7	■ 59.2		■ 22	Develop Human Capital Management System	
	Trictices	Increase research projects with patient involvement^ (cumulative since 2019-20)	3	■ 3	5	5	5	•	5	(phase 1)	
grow, communicate and	PERSPECTIVE: To achieve our vision, how will we build capability for our people to learn and work together? What skills, knowledge, culture, behaviours, values technology, capability or grow or learn as an organization?	Increase annual peer reviewed publications (cumulative) (NEW)	■ 76	■ 98-101	9 2	■ 98	1 112	•	120 - 126	Develop regional integrated care pathway for schizophrenia: Health Quality Ontario quality standards in the hospital and community	
Establish a Centre of		Increase number of quality statements implemented (cumulative) (NEW)	5	1 4	. 5	9	9		■ 30	Expand research training	
Excellence in For Mental Heal Research1	Seek Generate & Adopt Digital/Data- rensic Apply New Driven & Physical th	Increase % of Electronic Medical Record Analytics Maturity (EMRAM) standards met	86 %	1 00%	■ 99%	■ 99%	■ 99%		100%	Refresh Long Term Master Plan Implement patient portal	
		Measures relate to Strategic Plan, Service Accountability Agreements, Quality Improvement Plan		Within 5% of Target		Between 5 & 10%		>10% from Target		~ Total Margin target parameters differ	
■ VALUES	● Caring ● Respect			Innovation Accountability					bility		





4. DASHBOARDS ESSENTIALS

















- DASHBOARDS
 - WHAT IS A DASHBOARD?
 - Something called a dashboard :
 - Includes **graphical display mechanisms**: traffic lights, gauges, meters...etc.
 - Overviews something going on in the business.





- DASHBOARDS
 - WHAT IS A DASHBOARD?
 - DEFINITION:

'It is a **visual display** of the most **important information** needed to achieve one or more **objectives**; arranged on a single screen so the information can be **monitored at a glance**'

Stephen Few, "Dashboard Confusion," Intelligent Enterprise, March 20, 2004



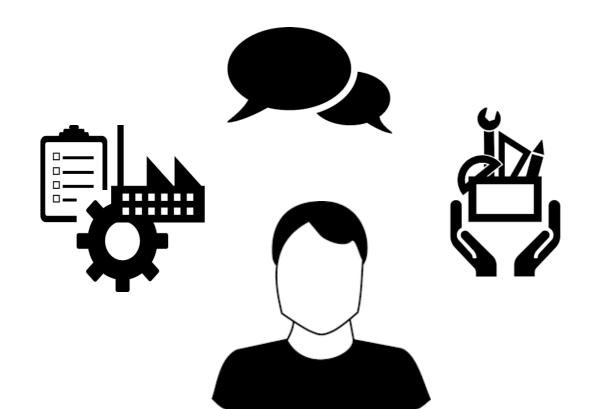


- DASHBOARDS
 - According to this definition:
 - 1. Dashboards display the information **to achieve an objective**.
 - 2. Dashboards **fits** on a single computer **screen**.
 - 3. Dashboards used to **monitor** information **at a glance**.





- DASHBOARDS
 - So... a Dashboard: communication tool, good understanding, good design.







- Some (obvious) Dashboard principles:
 - 1. Display right data to the right audience
 - 2. Right dashboard: adapt the dashboard model to the context
 - 3. Easy to find: keep the dashboard tidy
 - 4. Only essentials
 - 5. Perfection in DB design can never be achieved





- Categorization of dashboards:
 - By ROLE: Strategic, Analytical or Operational.
 - By TYPE OF DATA: Quantitative, Qualitative
 - By DOMAIN: Sales, Finance, Marketing, Manufacturing
 - By TYPE OF MEASURE: **BSC**, Six Sigma, ...
 - By MECHANISMS OF DISPLAY: Graphical, text, integrated
 - ...etc.





- Aspects to consider
 - More KPIs don't mean a better dashboard.
 - Functionality has higher priority than aesthetics.
 - Data Quality is usually lower than expected.
 - Align it with business processes.
 - Take into account the data context.
 - Update!
 - Train and communicate with your intended users.
 - Now, it is easy to incorporate interactivity.
 - Always define the purpose of the dashboard.





5. SCORECARDS vs. DASHBOARDS





- SCORECARDS vs. DASHBOARDS
- BOTH:
 - Tools for supporting management in companies
 - Support data-driven decision making
 - Can display **KPI** (key performance indicators)
- KEY DIFFERENCES:
 - Methodology, users, level of details, timing





- KEY DIFFERENCES:
 - CAR METAPHOR

el gps seria el bsc (a largo plazo, me permite llegar a mi destino) y el caudro de mando del salpicadero seria el dashboard

GPS





- SCORECARDS vs. DASHBOARDS
- SCORECARDS:
 - Controlling the progress towards the strategy
 - Formal business methodology (holistic approach)
 - Focus on long-term strategic performance.
 - Periodic snapshots (e.g. quarterly, annually) to evaluate progress
 - Present summaries, not particular data
 - Can be graphically displayed





- SCORECARDS vs. DASHBOARDS
- DASHBOARDS:
 - No specific for business environments.
 - Usually focus on an specific problem (no holistic approach)
 - Measuring general performance AND its specific aspects.
 - Used by executives / specialists and other employees
 - Provide updates in real time or in right-time.
 - Concerning data, including summaries.
 - Data visualized nicely (raw data also available through drilldown features)

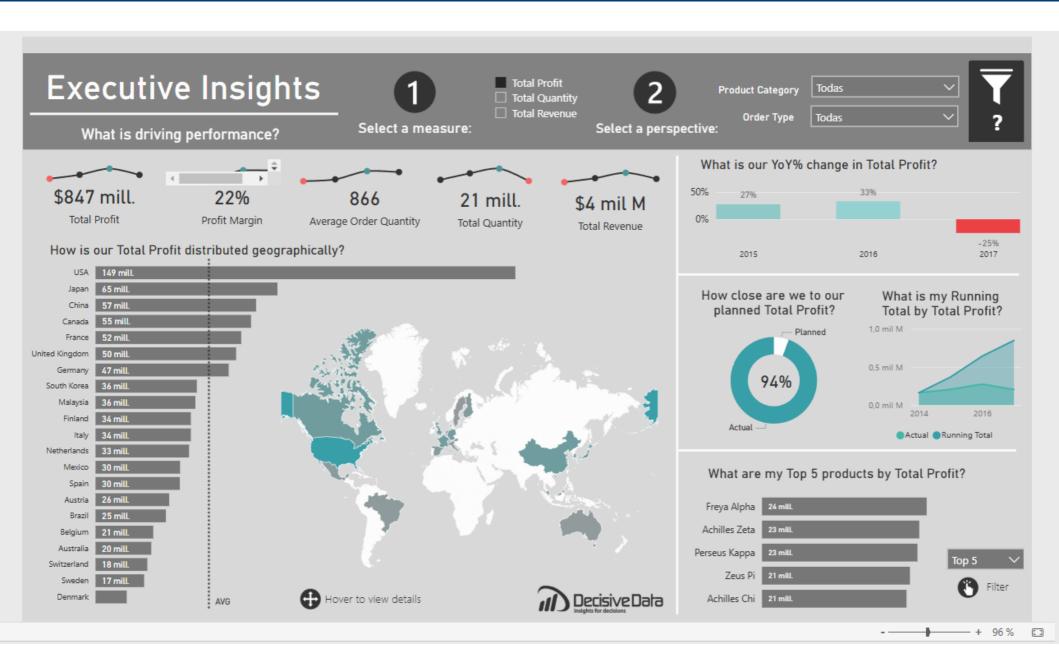




6. EXAMPLES OF DASHBOARDS

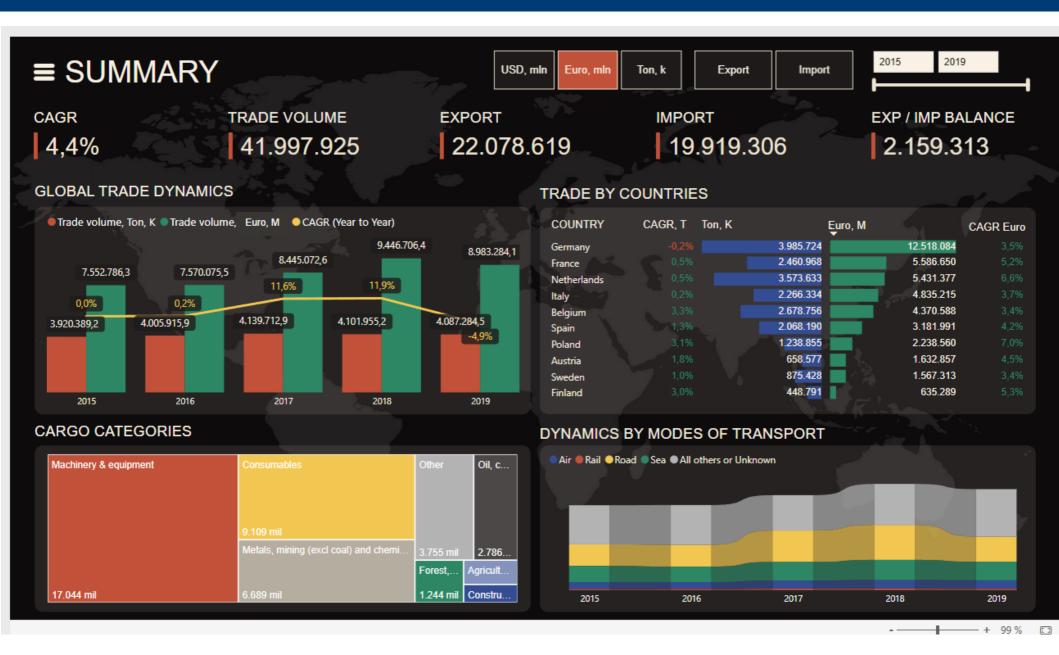
















- DASHBOARDS IN HEALTHCARE
 - Focused on clinical performance indicators.
 - Performance Indicator: "a statistic or other unit of information which reflects, directly or indirectly, the performance of a health or welfare intervention, facility, service or system in maintaining or increasing the well being of its target population". (Armstrong, 1994)





- DASHBOARDS IN HEALTHCARE
 - Focused on clinical performance indicators.
 - Performance Indicator Properties:
 - Definable
 - Clear intent
 - Accessible
 - Reliable
 - Useful





DASHBOARDS IN HEALTHCARE

Types of performance indicators.

(by ACHS Performance Indicators)

- Continuity of care: medical record, assessment system, consent, care evaluation, discharge, etc.
- Access: information about services, access to the needs.
- Effectiveness: evidence-based, process effective.
- Patient safety: medication, infection control, blood management, etc.





DASHBOARDS IN HEALTHCARE

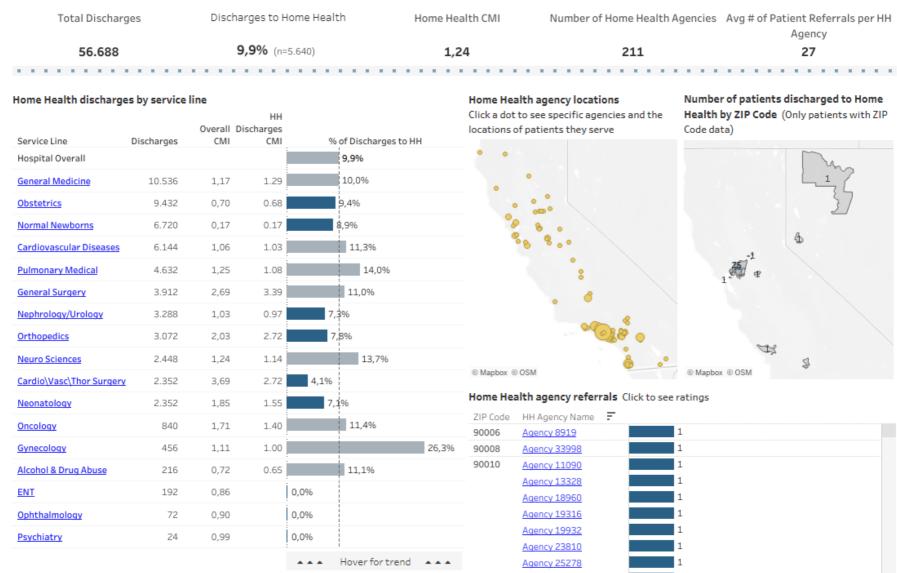
- Examples of performance indicators.
 - Regarding Medical Records:
 - Percentage of medical records where illegible writing resulted in an adverse event.
 - Percentage of medical records where care plans are not documented.
 - Regarding Blood Management:
 - Percentage of inappropriate storage
 - No. of patients transfused with Hb>100g/L





Overview Hospital 248, Years: Todo, Service: Todo









- DASHBOARDS IN HEALTHCARE
 - ICU Dashboard Example.
 - Fluid balance
 - Severity Score:
 - APACHE III:
 - [0..299]
 - Initial risk classification of severely ill hospitalized patients.
 - 20 physiologic variables

		Limites all	os anómaios		Normal		Limites to	ajos enomalos	
Variables fisiológicas	+4	+3	+2	*1		*1	+2	+3	+4
Temperatura, rectal (°C)	≥41°	39-40,9°		38,5-38,9°	36-38,4°	34-34,5°	32-33,9°	30-31,9°	≤29,9°
Presión arterial media (mmHg)	≥160	130-159	110-129	223	70-109	9201	50-69	923	≤49
Frecuencia cardíaca (latidos/minuto)	≥180	140-179	110-139	555	70-109	555	55-69	40-54	≤39
Frecuencia respiratoria (resp/minuto)	≥50	33-49		25-34	12-24	10-11	6-9	***)	≤5
Oxigenación: AaDO ₂ o PaO ₂ (mmHg)									
a. FiO ₂ ≥0,5, registrar AaDO ₂	≥500	350-499	200-349	9000	<200	9338	222	222	222
b. FiO ₂ <0,5, registrar sólo PaO ₂	577	555	5753	5550	PO ₂ >70	PO ₂ 61-70		PO ₂ 55-60	PO ₂ <55
pH arterial	≥7,7	7,6-7,69	***	7,5-7,59	7,33-7,49		7,25-7,32	7,15-7,24	<7,15
Sodio sérico (mmol/l)	≥180	160-179	155-159	150-154	130-149		120-129	111-119	≤110
Potasio sérico (mmol/l)	≥7	6-6,9	2.2	5,5-5,9	3,5-5,4	3-3,4	2,5-2,9	22	<2,5
Creatinina sérica (mg/dl) (puntuación doble para l Renal Aguda)	≥3,5	2-3,4	1,5-1,9	200	0,6-1,4		<0,6	5550	5555
Hematocrito (%)	≥60	222	50-50,9	46-49,9	30-45,9	2227	20-20,9	220	<20
Recuento de leucocitos (total/mm³)	≥40	930	20-39,9	15-19,9	3-14,9	000	1-2,9	222	<1
Puntuación GLASGOW COMA SCORE	= 15 - Punti	uación GCS re	al						
A PUNTUACIÓN FISIOLÓGICA AGUDA	(PFA) total	= Sumar los p	ountos de las	12 variables					
HCO ₃ sérico (venoso, mmol/l) (no es de elección, usar si no hay GSA	≥52	41-51,9	000	32-40,9	22-31,9	000	18-21,9	15-17,9	<15
ue eleccion, usar si no nay GSA									





DASHBOARD IN HEALTHCARE







- REFERENCES & RESOURCES:
 - Robert S. Kaplan, David P. Norton The Balanced Scorecard Translating Strategy into Action.1996.
 - Stephen Few. Information Dashboard Design: the effective visual communication of data. O'Reilly. 2006.
 - Harold Kerzner. Project Management Metrics, KPIs, and Dashboards: a guide to measuring and monitoring project performance. Wiley.2 ed. 2013
- ADDITIONAL READINGS:
 - Beata Kollberg. Exploring the use of balanced scorecards in a Swedish health care organization
 - Casos de éxito con BSC: https://balancedscorecard.org/Resources/Examples-Success-Stories