

TECHNOLOGY TRANSFER PRESENTS

# SHAKU ATRE

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**DASHBOARD**

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**Is it the new face of  
Business Intelligence?**

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**APRIL 13-14, 2011**

VISCONTI PALACE HOTEL - VIA FEDERICO CESI, 37  
ROME (ITALY)



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## ABOUT THIS SEMINAR

In order to stay competitive, organizations need to consider Business Intelligence today more than ever. Whether in Banking, Financial Services, Healthcare, Insurance, Retail, Manufacturing, Telecommunications or Government knowing your customers, employees, partners, vendors, and competitors is crucial to your success. That is Intelligence about your Business! The main goal of Business Intelligence is: Better Decision Making at each level of an organization and improving performance at each level resulting into better value for the share holders of the organization. Casualties of organizations for not managing the performance are a plenty.

A Dashboard can be a powerful tool for, analysis, reporting and even forecasting – but the main use of a Dashboard should be **Performance Management** based on the strategic goals set for the organization; selecting, watching and acting based on the Key Performance Indicators (**KPIs**). By following a number of do's and don'ts of planning, creating, implementing, using and maintaining the Dashboards for better BI one can help an organization become the best it can be.

What is then the difference between the original Executive Information Systems (EIS) or Decision Support Systems (DSS) and today's Dashboards? Many of the original EIS and DSS systems were built as a way of putting the same information online that was previously collected in printed reports or documents. It was an IT exercise to go from paper to computer screen. It was not for changing the culture of Decision Making!

Corporate Performance Management (CPM) encompasses methodologies, metrics, Business processes and systems used to manage the Business performance of an organization. The main concept behind CPM is that everyone in the organization, at all levels, is equipped with analytics, alerts and feedback mechanisms appropriate to do their jobs better. That means "**Culture Change**" of an organization. It is not only the "Upper Echelons" making decisions but also people in the "Trenches" for a better "shareholder value" with help of Dashboards that are tracking performance of the organization at each level of the organization!

We all are inundated with data. We are not only inundated with data but also with tens if not hundreds of reports every day! An effective use of Dashboards will reduce these zillion financial and operational reports! No one is asking for more data or for more reports. For anyone who has to make decisions & either take action or delegate action for better performance for the Business it is imperative that the volumes of data and the number of reports that are thrown at them have to be synthesized into actionable information. It has to be presented in an easy to comprehend, attractive and user-friendly format."A picture is worth 1000 words becomes an understatement". Enter "Dashboards: The new face of Business Intelligence!"

In this two day seminar there are a number of workshops. The delegates can be installing the Dashboards after returning to work immediately after finishing the class.

### WHAT MAKES THIS SEMINAR UNIQUE

This seminar is a complete "how-to" instructional guide for planning, designing, implementing, using, and maintaining performance Dashboards. It shows with ample examples various Dashboard types, shows how a spreadsheet is sometimes used as a Dashboard. It discusses the various nuances of scorecards, balanced scorecards, measures, and metrics and goes in details about Key Performance Indicators (KPIs). It demonstrates performance Dashboard implementation process and displays the characteristics of well-designed Dashboards. It clarifies the various Dos and Don'ts of implementing Dashboards with numerous examples. It warns the attendees where a Dashboard implementation can go wrong. It finally explains how to identify Dashboard opportunities in your organization and where to place the Dashboards.

Dashboard software from Open Source will be used for creating, using and maintaining the Dashboards.

Throughout the seminar workshops take place with individual & group exercises with role playing of the Dashboard Planners, Designers, Implementers and Users.

## WHO SHOULD ATTEND AND WHAT YOU WILL LEARN:

There are **various levels** of **audience** for this seminar. The Dashboard audience can range from a CEO down to an individual Performer.

### • **Dashboard users, Sponsors and Business Analysts will learn:**

- How to identify which actionable data is needed by the users who are using spreadsheets day in and day out
- Identify which planning steps they need to be involved with
- How to conduct and respond to the interview process to receive the appropriate Dashboard to act upon
- How to estimate and manage time for the Dashboard project
- How to identify which data is required for Dashboards to get the best results
- How to look for the common Dashboard patterns In the organization

### • **Systems Analysts & Developers will learn:**

- Together with the Business analysts which measures, metrics and key performance indicators are crucial for display for actionable information
- About hardware and software technologies as well as database design issues
- How to prototype Dashboards
- How to design, build and load data for Dashboards
- How to design and implement “drill down” Dashboards
- How to prepare for roll-out and production

### • **Database Administrators will learn:**

- How to identify data from transactional systems and Data Warehouses
- About database security features

### • **Project Managers will learn:**

- How to write Business justifications for Dashboard projects
- How to estimate time, staffing, and costs of Dashboard projects
- How to recognize and mitigate risks on a Dashboard project
- How to perform a post-implementation project plan

### • **First Level Operational Managers will learn:**

- Understand to guide the floor operational staff to minimize “waste” in the manufacturing plants
- Run the “call centers” efficiently
- Find out which Dashboards are useful for the Warehouse, delivery personnel
- How to train the Warehouse personnel to use Dashboards

### • **Middle Management:**

- Will appreciate the “Balanced Scorecard” with its Financial, Customer, Internal Business Process and Employee perspectives and determining the KPIs to be used for performance tracking on all fronts. CFOs, CIOs, CXOs – all will benefit from knowing what to expect from the Dashboards

## 1. What is a Dashboard?

- What are the main components of a Dashboard?
- What are the differences between the Executive Information Systems of the 1980's and today's Dashboards:
  - Alert Decision Makers to take action
  - Increase the speed, ease of use and accuracy of Decision Making
  - Encourage interactivity
  - Adjust to the changing Business environment
  - Implement flexibility of setup and use
- Dashboard Types
  - Evolution of Automobile Dashboards vs Business Dashboards
  - Interactive Multidimensional Dashboards
  - Formatted Dashboards (Fixed Rows/ Columns)
  - What are the main differences between a Dashboard and a Spreadsheet?
  - Can a Spreadsheet be used as a Dashboard?
  - When should a Spreadsheet be used and when should a Dashboard be used?
- What are a Scorecard and a "Balanced" Scorecard?
  - Perspectives of a Balanced Scorecard
  - What are the differences between a Scorecard and a Dashboard?
- Measures, Metrics & Key Performance Indicators(KPIs)
  - What is a Measure?
  - What is a Metric?
  - What is a Key Performance Indicator (KPI)?
  - Similarities & Differences between Measure, Metric and KPI
- Advantages of a Dashboard
  - Multiple Measures in a single graphical View
  - Find a Root Cause (Drill down/across)
  - Build a graphical Dependency between Measures (Business flow)
  - Trend of a Measure(s) over a period of time series
  - Broadcast your Dashboards for Recipients to respond
- Typical uses of a Dashboard

## 2. How to make your Scorecard "Balanced"?

- Differences between a Dashboard and a Scorecard
- Linking Balanced Scorecard Measures to your Strategy
- How to decide on KPIs for your Dashboard?
- Examples of KPIs for a Strategic Dashboard
- Examples of KPIs for a Tactical Dashboard
- Examples of KPIs for an Operational Dashboard
- Examples of variables for a Scorecard

## 3. What is a Performance Dashboard?

- Organization's Strategy Translation into Objectives, Metrics, Initiatives, Tasks customized to each group and individuals in the organization
- Three types of Performance Dashboards
  - Operational
  - Tactical
  - Strategic
- Three layers of a Performance Dashboard
  - Summarized Graphical View
  - Multidimensional View
  - Detailed Reporting View
- Three applications of a performance Dashboard
  - Monitoring: Enables users to monitor performance against metrics aligned to corporate strategy
  - Analysis: Analyzing exceptional conditions
  - Management: Improvement of alignment coordination, collaboration and action
- Performance Management Architecture
  - Business Architecture
  - Technical Architecture

## 4. Performance Dashboard Implementation Process

- Decide on the audience of your Dashboard
  - Interview various user groups
  - Select the platform for the Dashboard delivery

- Data Architecture Design
- Implementation, Use & Maintenance of

## 5. What are the characteristics of a well-designed Dashboard?

- It is very well organized
- It addresses the needs of its audience
- It displays summaries and exceptions
- The message is conveyed in a straightforward way with concise data
- It is conducive for Decision Making and, possibly, for action for improvement of performance

## 6. Dos and Don'ts of Dashboards

### 7. Where can a Dashboard Implementation go wrong?

- Steps & rules for getting ready for the implementation of a successful Dashboard
- How to make your Dashboards actionable?
- Identifying Critical Metrics & Key Performance Indicators(KPIs)
- Challenges in developing Dashboards

### 8. How to identify Dashboard Opportunities

- Create a Dashboard opportunity Scorecard

### 9. Placement of Dashboards

- Enterprise Portal
- Broadcasting
- Distribution of Dashboards: intraday/end of day/ every week/every month/quarterly/yearly to selected number of laptops
- Distribution to everyone using laptops
- Mobile phones with Dashboards

### 10. Use of Dashboard software available as Open Source for creating, using and maintaining Dashboards

### 11. Workshops

<p><b>PARTICIPATION FEE</b></p> <p>€ 1200</p> <p>The fee includes all seminar documentation, luncheon and coffee breaks.</p> <p><b>VENUE</b></p> <p>Visconti Palace Hotel Via Federico Cesi, 37 Rome (Italy)</p> <p><b>SEMINAR TIMETABLE</b></p> <p>9.30 am - 1.00 pm 2.00 pm - 5.00 pm</p>	<p><b>HOW TO REGISTER</b></p> <p>You must send the registration form with the receipt of the payment to: TECHNOLOGY TRANSFER S.r.l. Piazza Cavour, 3 - 00193 Rome (Italy) Fax +39-06-6871102</p> <p><b>within</b> <b>March 29, 2011</b></p> <p><b>PAYMENT</b></p> <p>Wire transfer to: Technology Transfer S.r.l. Banca Intesa Sanpaolo S.p.A. Agenzia 6787 di Roma Iban Code: IT 34 Y 03069 05039 048890270110</p>	<p><b>GENERAL CONDITIONS</b></p> <p><b>GROUP DISCOUNT</b></p> <p>If a company registers 5 participants to the same seminar, it will pay only for 4. Those who benefit of this discount are not entitled to other discounts for the same seminar.</p> <p><b>EARLY REGISTRATION</b></p> <p>The participants who will register 30 days before the seminar are entitled to a 5% discount.</p> <p><b>CANCELLATION POLICY</b></p> <p>A full refund is given for any cancellation received more than 15 days before the seminar starts. Cancellations less than 15 days prior to the event are liable for 50% of the fee. Cancellations less than one week prior to the event date will be liable for the full fee.</p> <p><b>CANCELLATION LIABILITY</b></p> <p>In the case of cancellation of an event for any reason, Technology Transfer's liability is limited to the return of the registration fee only.</p>
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April 13-14, 2011  
Visconti Palace Hotel  
Via Federico Cesi, 37  
Rome (Italy)

Registration fee:  
€ 1200

*If registered participants are unable to attend, or in case of cancellation of the seminar, the general conditions mentioned before are applicable.*

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**Shaku Atre** is an Exceptional Speaker, has the reputation of capturing the attention of audiences and maintaining their interest while guiding her listeners painlessly through sophisticated material. Ms. Atre is President of Atre Group Inc. and of a leading consulting, training and publishing company, specializing in Business Intelligence. Before heading her present company, Ms. Atre was a Partner with Price Waterhouse Coopers. She also has fourteen years of experience in various fields with IBM. Ms. Atre is an acknowledged expert in the Data Warehousing and database field. She has extensive practical experience in database projects, has helped a number of clients in establishing successful Data Warehouses, Client/Server installations, and has taught at IBM's prestigious Systems Research Institute. She has lectured on the subject to professional organizations in the USA, Canada as well as in Europe, Asia and South America. Ms. Atre is frequently quoted in *Computerworld*, *Information Week*, *Information Management*, *Tech Web*, and other influential computer trade publications. She has written an award-winning outstanding book on database Management systems that has become a classic on the subject: "**Database: Structured Techniques for Design, Performance and Management**", published by John Wiley and Sons, New York. The book has sold over 250,000 copies (not including its Spanish and Russian translations) and has been selected by several book clubs and leading universities including Harvard, Columbia, Cornell, MIT, New York University, Stanford and U.C. Berkeley. Her book, "**Information Center: Strategies and Case Studies**", published by Atre International Consultants Inc., is also very well received by the industry. "**Database Management Systems**" is another successful book authored by Shaku Atre. Her fourth book, "**Distributed Databases, Cooperative Processing & Networking**", was published by McGraw-Hill. She has also authored a very well received book: "**Atre's Roadmap for Data Warehouse/Data mart Implementations**" published by Gartner Group. She is co-author of her latest BI book on "**Business Intelligence Roadmap: The Complete Project Lifecycle for Decision-Support Applications**" published by Addison Wesley.