CASE STUDY: DASHBOARDS

Simpleview Account Services

At Simpleview, we don't just stand behind our products, we use them, so we know firsthand how important it is that every tool we develop meets the needs and goals of our busy clients as efficiently as possible. In this case, our own hard-working Account Services team needed more targeted, visual reports from their Simpleview CRM, so they turned to our Destination Dashboards team. In turn, going through the process of implementing these helpful dashboard tools let our Account Services directors see firsthand, from start to finish the details and teamwork that go into successful results for our clients every day. Here's a snapshot of that process.

SCOTT AND TIM CAME TO THE SIMPLEVIEW DASHBOARDS TEAM WITH TWO GOALS:

1. **A dashboard where all Account Managers could go to see their individual statistics and goals, for greater transparency.**
2. **One big-picture dashboard for the department, to view all mission critical data to make oversight and reporting easier.**

SITUATION

The Simpleview Account Services team holds the primary responsibility for managing all client relationships for the company. With every additional client, this responsibility grows in size and scope. The directors of Account Services, Tim Thurein and Scott Stanislav, oversee a team of Account Managers while also making sure no relationship, project, or initiative falls through the cracks. This is no small task.

The Account Services team is asked on a regular basis to make sure all clients are being provided the proper level of service, and to provide information to senior leadership. Daily Account Services activity was being entered into our CRM, which allows the managers to track client interactions on a case-by-case basis. However, it would take running multiple reports to get a full picture of all activity completed by the team, which would take quite a bit of time. In addition, reports would only provide a data table for that particular moment in time, and they combined several businesses together. The Account Services team wanted to see their impact overall, which was hard to piece together from the various CRM reports, and some formats were just not practical for quick reference. They needed an internal tool that allowed them to review data more quickly and displayed only the information they truly needed.

SOLUTION

By using our Dashboard Tool, we built two specific dashboards for the team to allow them to manage their processes and goals more effectively.

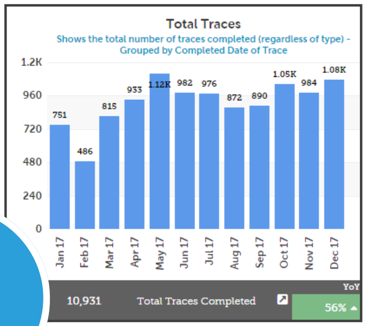
The first step in this process, as with any dashboard build, required some homework. They were asked to define their business objectives:

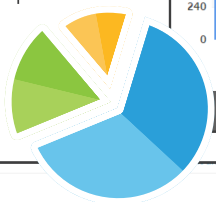
1. **"What are the top five pieces of information you want to see on a dashboard?"**
2. **"What reports do you find yourself viewing often, and what do you find interesting about those reports?"**

From those questions, Scott and Tim came up with a bulleted list of items by job role that they wanted to see on their dashboards. This meant different job roles would see different data views. That list was divided into two parts: A KPI dashboard focused on top level sales- and department-related goals, and an individual activity dashboard.

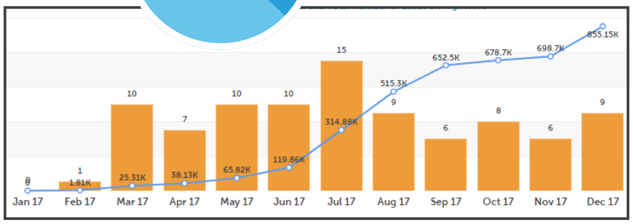
SOLUTION CONT.

Tim, Scott, and Simpleview Business Intelligence Analyst, Aaron Pickering then met to discuss the specific measurements being requested, how the measures were currently entered into the CRM, and how the Directors wanted to see them reported. This is a critical phase of any dashboard build – determining the specific requirements of each metric. We often find that there are some measures that currently don't have enough data, and can come up with plans to track this data into the future to provide additional insights to the team. Some other measures turn out to not provide as much value as once determined, so we can halt tracking on these.





After the ideation phase, work began on building out the dashboards. At each step in the process, the dashboard team would check in with Account Services to make sure the correct numbers were being pulled. Tim and Scott were asked more than once to re-evaluate the requested metrics. "It all comes back to measuring KPIs," said Tim. After seeing initial results, clients may want more metrics or to see numbers in another way. At the same time, the dashboard team will suggest new visualizations which are currently not being utilized and help guide clients toward their business objectives. Clear communication helps us ensure all the clients' needs are met with the finished product. Dashboard builds are definitely a team project throughout the process.



RESULTS

After two months of teamwork, the final dashboards were completed. The KPI dashboards show Account Services goals for the entire department as well as goals for each Account Manager. The Activity dashboard uses traces to show activity by Account Manager and by each team member. The visual nature of the dashboards allows the Account Services team to identify trends and holes. Since the data can be visualized across years or months, they are able to quickly see patterns, spikes, and trouble spots. This is useful for identifying new opportunities and seeing where unneeded effort is being spent. The dashboards have lead to greater department transparency and accountability, and easier access to regularly needed information.

3 KEYS TO A SUCCESSFUL DASHBOARD
FROM TIM THUREIN

1. **KNOW YOUR KPIS UP FRONT.** Then Simpleview can guide you toward meeting your business directives by tracking the right information and suggesting useful visual representations.
2. **COMMUNICATION IS VITAL.** You're essentially building a dashboard around concepts, then expanding those concepts to tell the complete story, said Tim. For instance, if meeting sales professionals want to track open traces and closed leads to show ROI, those are the goals. Then illustrate those goals with visual graphs, defining a consistent measurement for when a sale is considered closed, and considering time frames you'd like to show. Monthly results? Quarterly?
3. **IS WHAT YOU WANT TO REPORT ACTUALLY BEING TRACKED?** If you want to show traces still open, closed leads, or trips taken for meeting sales, for example, your sales team or a designated sales manager has to have a consistent way to enter that information into the system for tracking. Keep in mind that this should save you time, rather than creating more manual data entry.