

Moving From Data to Decisions

Making Sales Information Actionable with Dashboard Analytics

Presented by:

Cliff Alper & Rick Montgomery

Analysis Factory

calper@analysisfactory.com

ramontgomery@analysisfactory.com

October 17 - 19, Atlanta

SMA Conference 2011



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So - What is a Dashboard?

Definition:

A single screen presenting relevant information to a specific audience to aid in making a decision.

Characteristics:

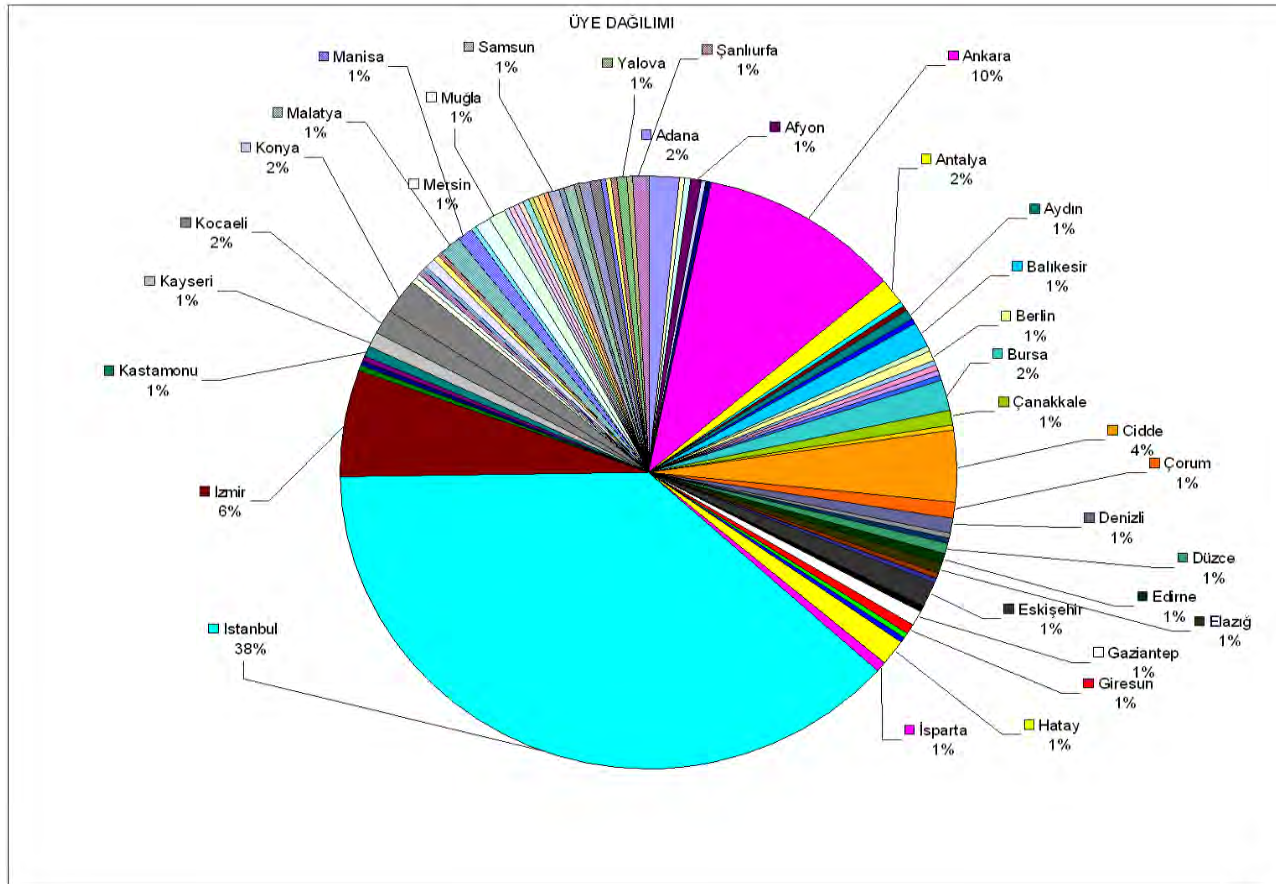
Communicates what it needs to clearly at a glance

Answers “how” and “what” questions well

“Why” questions can be a challenge

Leads to Action

It's Easy to Make a Bad Dashboard



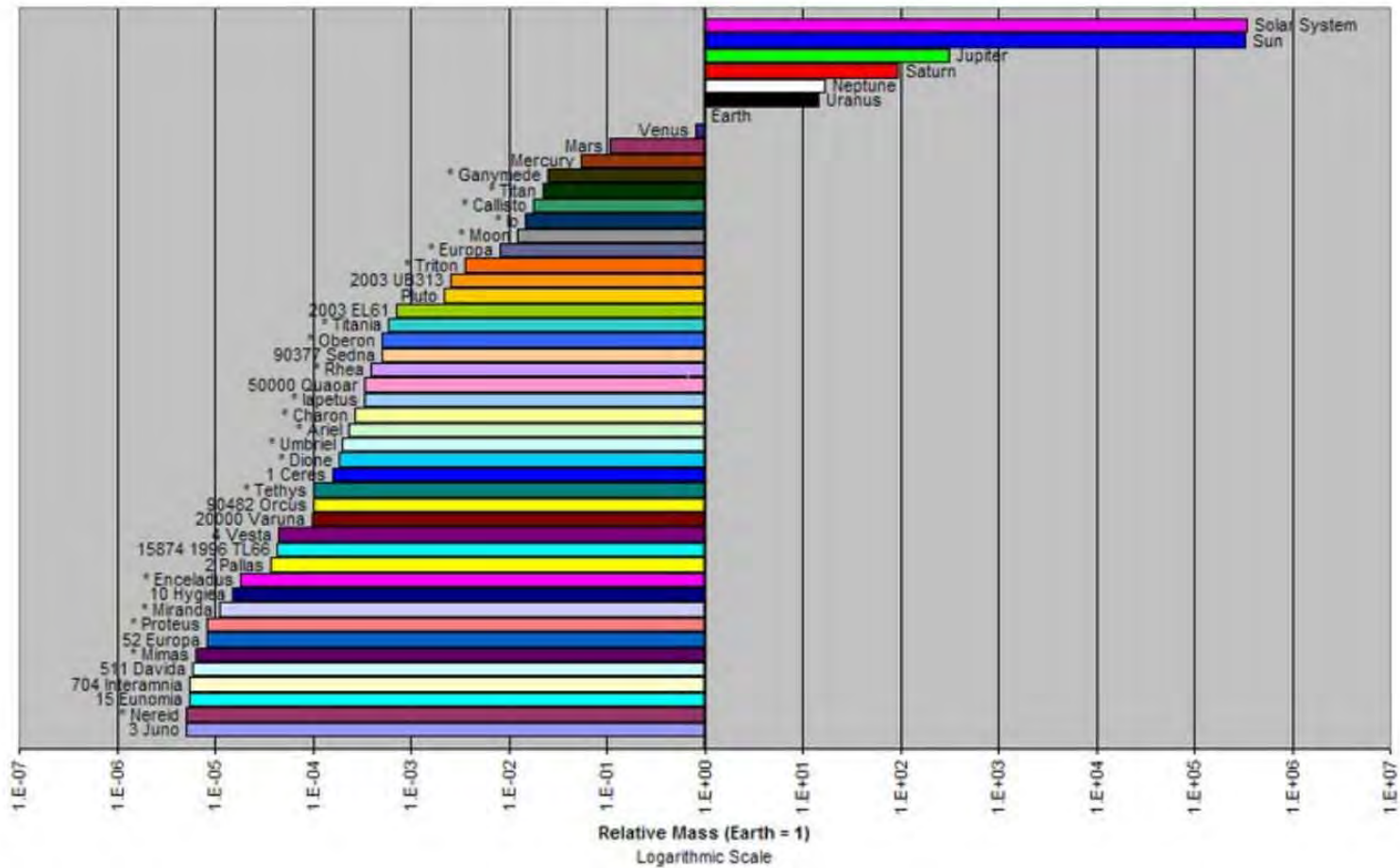
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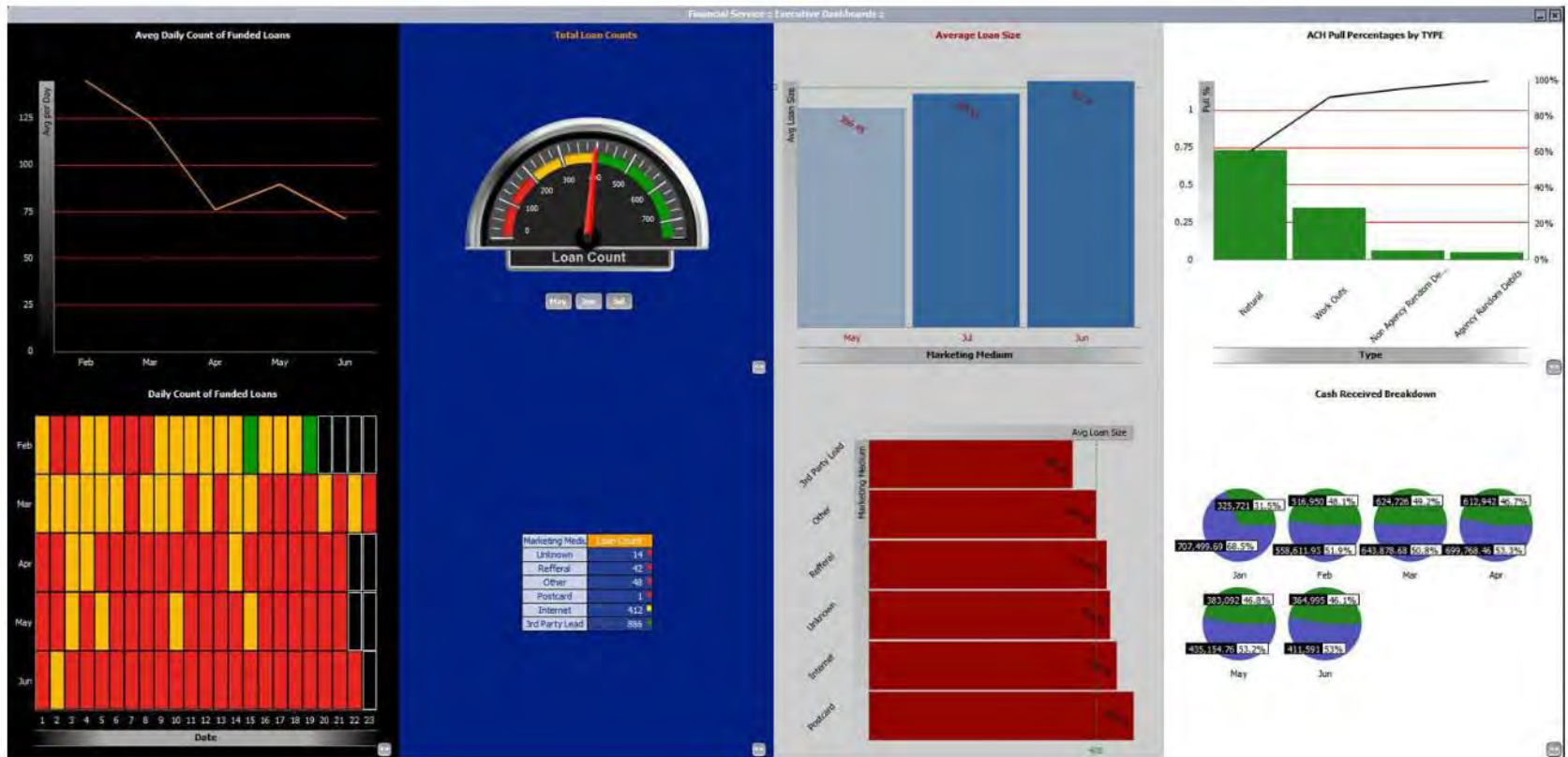
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Really Easy

Relative Masses of the Heaviest Solar System Objects



Really Really Easy



What do we want from a Dashboard?

Relevant Information to Our Situation – Not Just Data

Guided Views – Help to see What Matters to Us

Clarity – Not Confusion

Accessibility – We need it where we are

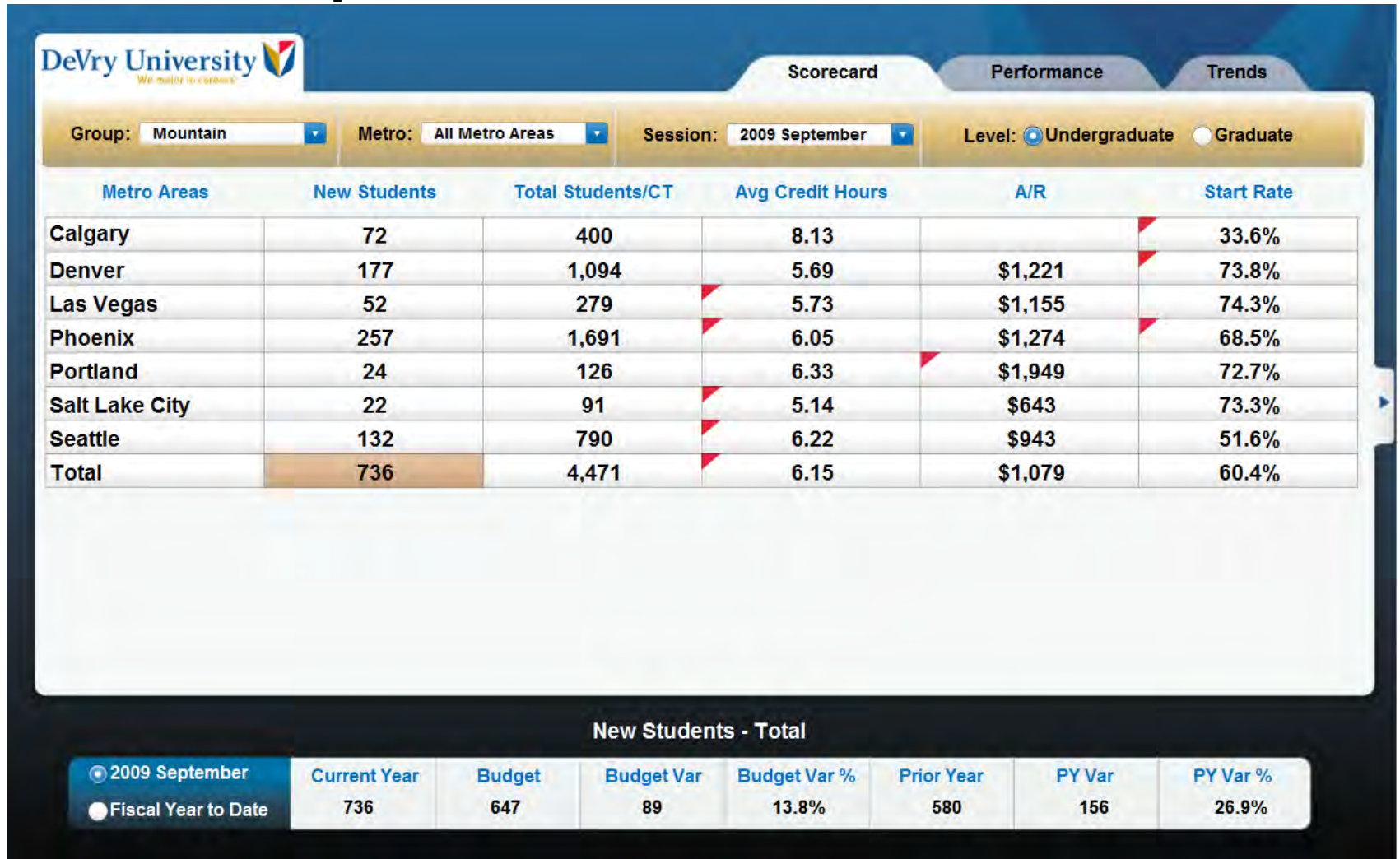
Simplicity – Not Complexity

Bonus Points:

Help us plan the future - Not just describe the past




Some Examples



Some Examples



Some Examples



SUPPORT GROUP(S):

MRO RevPro MS gSOC

NOTIFICATION TYPE(S):

Alarm Alert Notification

All Categories

All Subcategories

All Descriptions

Indiana Michigan Power

All Regions

All Districts

EVENTS BY LEVEL:

- Events with no orders:
- Order(s) exist for meter but not event:
- Order(s) exist for both meter and event:
- Event has been reviewed & cleared:
- Event has been ignored:

SMART METER EVENTS DASHBOARD

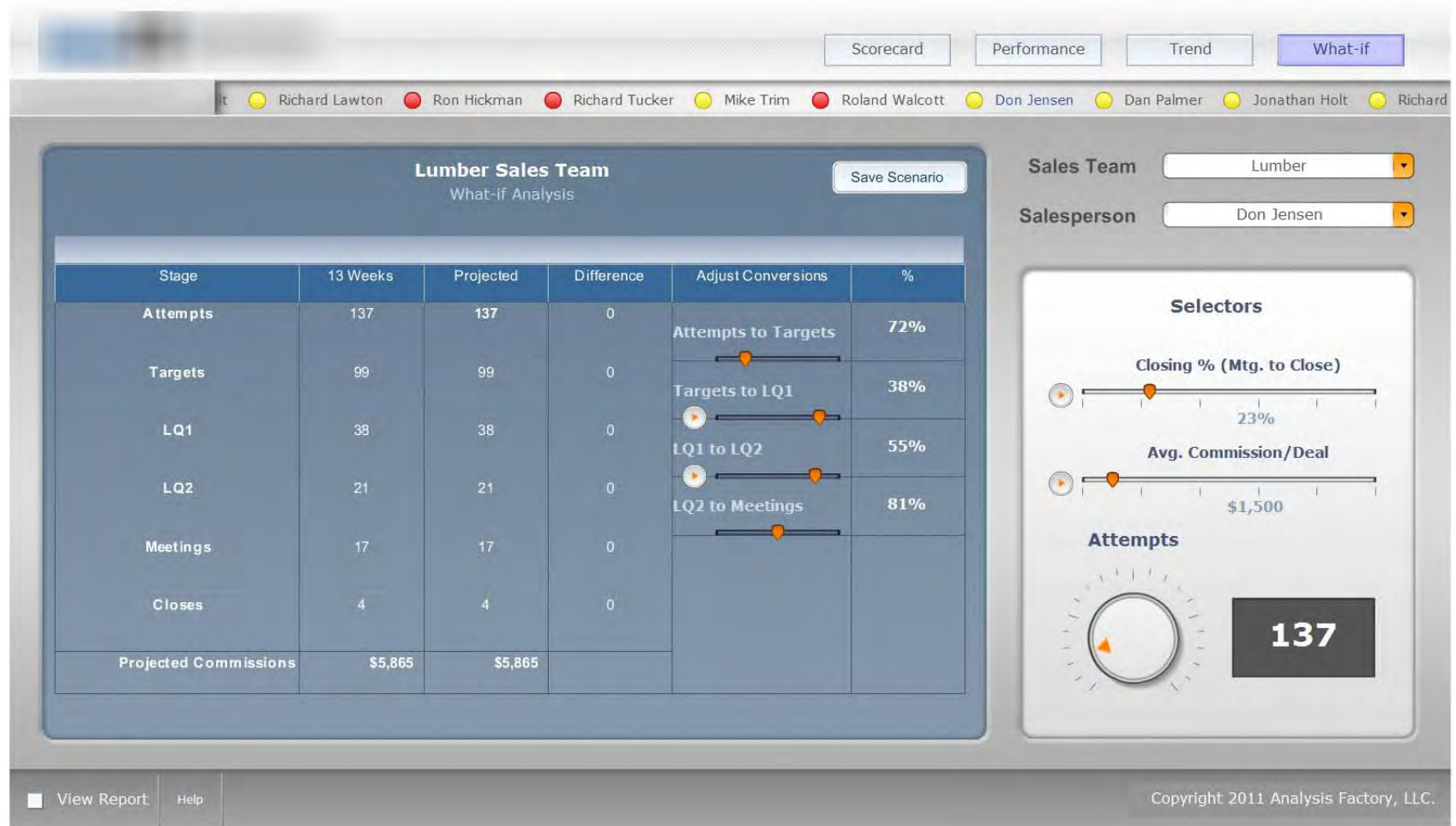
OPERATIONS
DEVICE LOOKUP
SCORECARD
TRENDS
FORECAST
PREFERENCES

Run 24 Hour Timeline

SHOW DETAIL
CREATE ORDER(S)
IGNORE EVENT
REVIEW/CLEAR
RESTORE
MAP EVENT(S)
ADD COMMENT



Some Examples



Q: How do you make a Good Dashboard?

A: User Centered Design



Not User Centered Design



User Centered Design

User Centered Design – What's Our Role?

- If the user is at the center of the design, and we're the user, that means we're going to have to be active participants – not passive recipients
- We have to take a very central role
- We'll have to take joint ownership of the project
- The good news is you'll get to ask for what you want to have impact (Be careful what you ask for!)
- The bad news is that you'll have to figure out how to express what you want



User Centered Design – Don't Panic!

- This presentation is aimed at explaining how to get what a sales organization wants from a dashboard
- The good news is that a lot of it is familiar to you – it's very similar to the sales process
- The bad news is that you're coming at it from the customer's side, for a change!
- Take a deep breath, and jump in – after all – you'd rather have a say in what you're going to get



User Centered Design – Step 1 - Audience

- We need to state who's going to use it, specifically, and why, generally
 - “Everyone in Sales to do Everything” is Probably Not The Answer
 - “This Dashboard is used by Sales Representatives to help Manage Their Territories & That Dashboard is used by Sales Management to help Manage the Sales Force” is a lot better starting point



User Centered Design – Step 2 - Talk The Talk

The message and the language we use need to be aligned with its intended audience:

Senior Management

Sales Management

Sales Representatives

Just Give Me High Level Views
(Unless I Want to Drill Down)

Show Me How My Team Is Doing

What Will Help Me Make My Number



User Centered Design – Step 3 - Ask A Question

- By Default, start with a placeholder question like “How Am I/We Doing?” – and then see if you can get a more precise question asked by a specific person/role:
 - How Am I Doing Against Plan? (Sales Rep)
 - How Well Are We Executing The Sales Plan? (Sales Manager)
 - How Well Are We Satisfying Our Clients? (Customer Management)
 - Are We Getting the Right Mix of Products? (Product Manager)
 - Is the Sales Force Executing Everything I Promised? (Head of Sales)



User Centered Design – Step 4 - How To Answer

- How Am I Doing Against Plan (Sales Rep)
 - Am I On Track to Make Quota?
 - How Am I Doing Compared to the Rest of the Team?
 - What's the Typical Deal Size (and is that what I'm expecting)?
 - What's Driving My Numbers (By Customer/By Product)?



User Centered Design – Step 4 - How To Answer

- How Well Are We Executing The Sales Plan (Sales Manager)
 - Who is Leading and Who is Lagging:
 - By Revenue
 - By Product Mix
 - By Customer Growth/Retention/New Customers
 - By Customer Satisfaction
 - By Agreed-Upon Activities (Calls/Follow ups/Proposals)



User Centered Design – Step 5 - Create Context

Data alone is like half a sports score, we've got to draw the eye to items of interest:

- Numbers Below Expectations (What can we do about that?)
- Activities That Are Late (If they didn't happen, what does that do to our numbers – now and in the future?)
- Numbers Well Above Expectations or Historical Norms (What happened there?)
- Unexpected Relationships (The Overall Revenue is OK, but the Deal Size is Not – what does that mean?)



User Centered Design – Step 6 - What's Next

We now need to know what they're going to do with the information

Sales Rep: Once I know which deals didn't close and why, I can target which sales calls to make

Sales Management: Once I know who's leading and who's lagging, I can figure out who needs help (with training/coaching/more qualifying from our pre-sales, etc)

Customer Management: Once I know the problem customers, I can start to figure out if we have a problem with:

Quality / Execution / Message



User Centered Design – Step 7 – Show Me

“We’ll know it when we see it” – without the tears

How?

Build/Rebuild Quick Prototypes with Plausible Data

Rapid Feedback (keeping on topic, with some “aha” moments)

Expand the Circle and Repeat 3-4 times



Our Recipe For Turning Data Into Decisions

1. Identify the audience, know why we're talking to them
2. Have an idea of how to talk to them (language, place, time, device)
3. Agree on answering a meaningful question (one that we want answered, and one we can answer)
4. Agree on how we should answer the question
5. Create context by identifying what matters
6. Get to action by anticipating the next step
7. Get Feedback from a visual prototype
8. Add more people and repeat steps 4-7 a few times until done (Within reason)



What's Next - the Road Ahead

We have new challenges in the dashboarding space:

Big Data

Social Networks

The Mobile Revolution

Predictive Analytics



Case Study – Part 1 – How it's NOT done

The client was a large multinational firm in the Pharma space.

They wanted dashboards to help their sales force in Latin America.

They knew what they wanted, had all kinds of I/T help, and just needed some “design” help from us.

This is their story



Case Study – Part 1 – How it's NOT done

The client spent 8 months having their I/T team write up a requirements document.

I/T brought us in for design help.

We had no access to anyone who was going to use the dashboard.

There was no real or even plausible sample data. We were told it didn't matter and just make up numbers.

No one could make a coherent narrative from the fragmented data-speak documents.

The Business Sponsor told us to go away with I/T and deliver what was in the requirements document, and it didn't matter that it made no sense to us (or anyone else)



Case Study – Part 1 – The Ugly Results

In a period of nearly 10 months, the I/T team built several versions of dashboards (over our objections), which were ACTUALLY accepted by the Business Sponsors.

When it got to User Acceptance, the sample users from the Sales Force simply rejected every version – they didn't know what they were looking at, there was no way to tell if the results presented made any sense, and it took forever for anything to work.

The I/T group decided that there was a problem with the Requirements Document, and a need for extensive user training.

And restarted the project on the same terms



Case Study – Part 1 – The Ugly Results Again

This time it took almost a year, but the results were the same:

The documentation was incomprehensible.

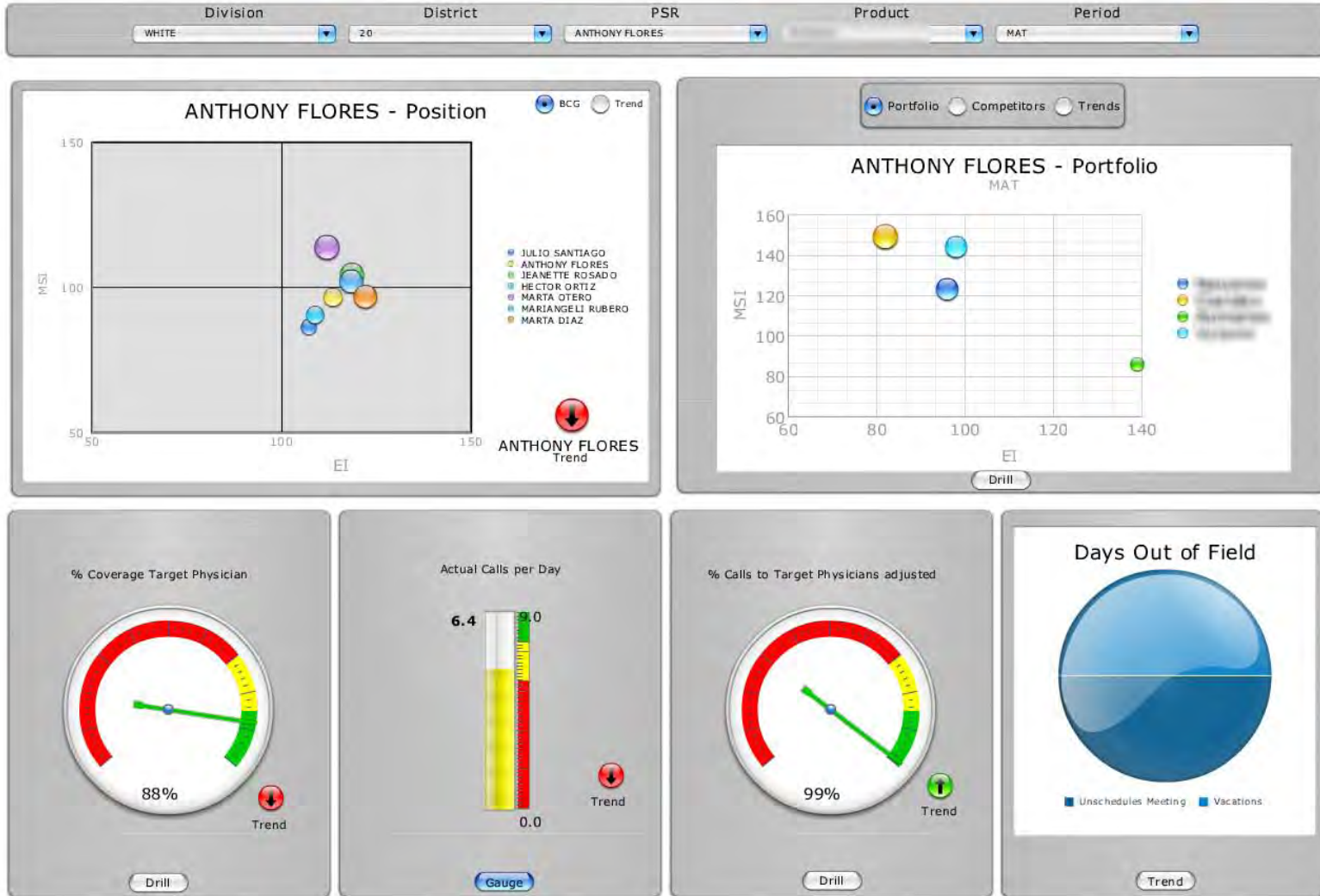
Performance was unacceptable.

The Sales Force was getting annoyed with wasting all this time.

The Finance Office was wondering what they were getting for all of this time and money. (4X the original budget, almost 3 years with nothing to show for it)

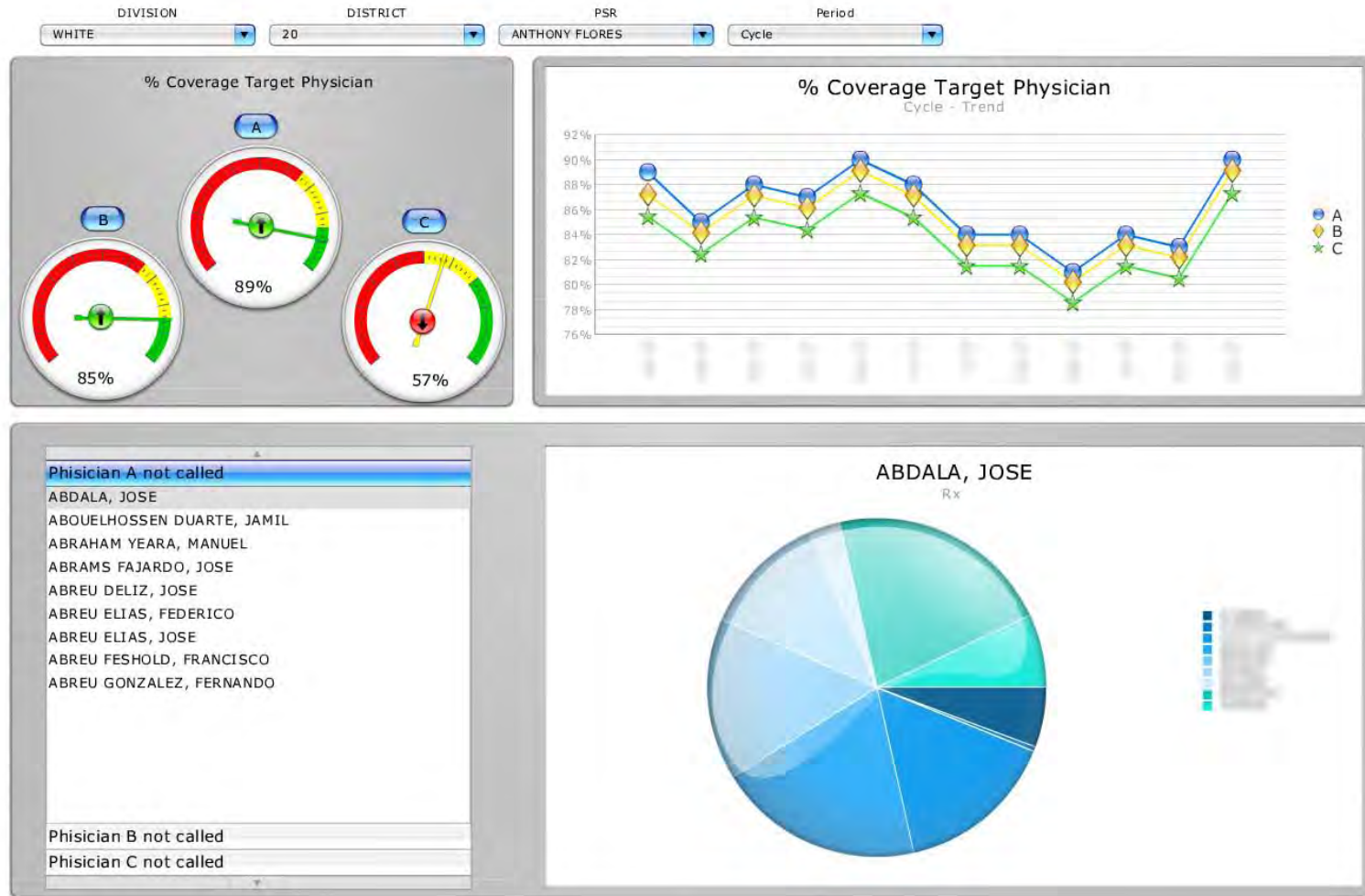
And did we mention it was ugly?

Case Study – Part 1 – The Ugly Results Again



Case Study – Part 1 – The Ugly Results Again

% Coverage Target Physician



Case Study – Part 2 – We were told to fix it

We were brought back in to restart the project – to see what could be done

We convened via teleconference with Senior Management, I/T, and Real Live Sales People who were expected to use it. We met 3 days a week for 3 weeks, building prototypes every week.

After the first 2 meetings, it was clear that we had 2 different audiences asking 2 different questions – we'd need 4 dashboards, not 2. In the previous 2-3 years, no one else figured that out – by having real live people participate, we solved one of the most intractable problems in 2 meetings!



Case Study – Part 2 – So we fixed it

Over a span of 3 weeks, we had built prototypes for all 4 dashboards.

We spent 1 month getting the data for the first country, and prepared to with a pilot.

We showed it to the #2 Officer in the company – who not only got it on the first pass, but added one change to a chart that made a huge difference.

There was a 1 page help sheet for each dashboard (which listed who the dashboard was for, what question was being asked, and how we were answering the questions) – no training took place.

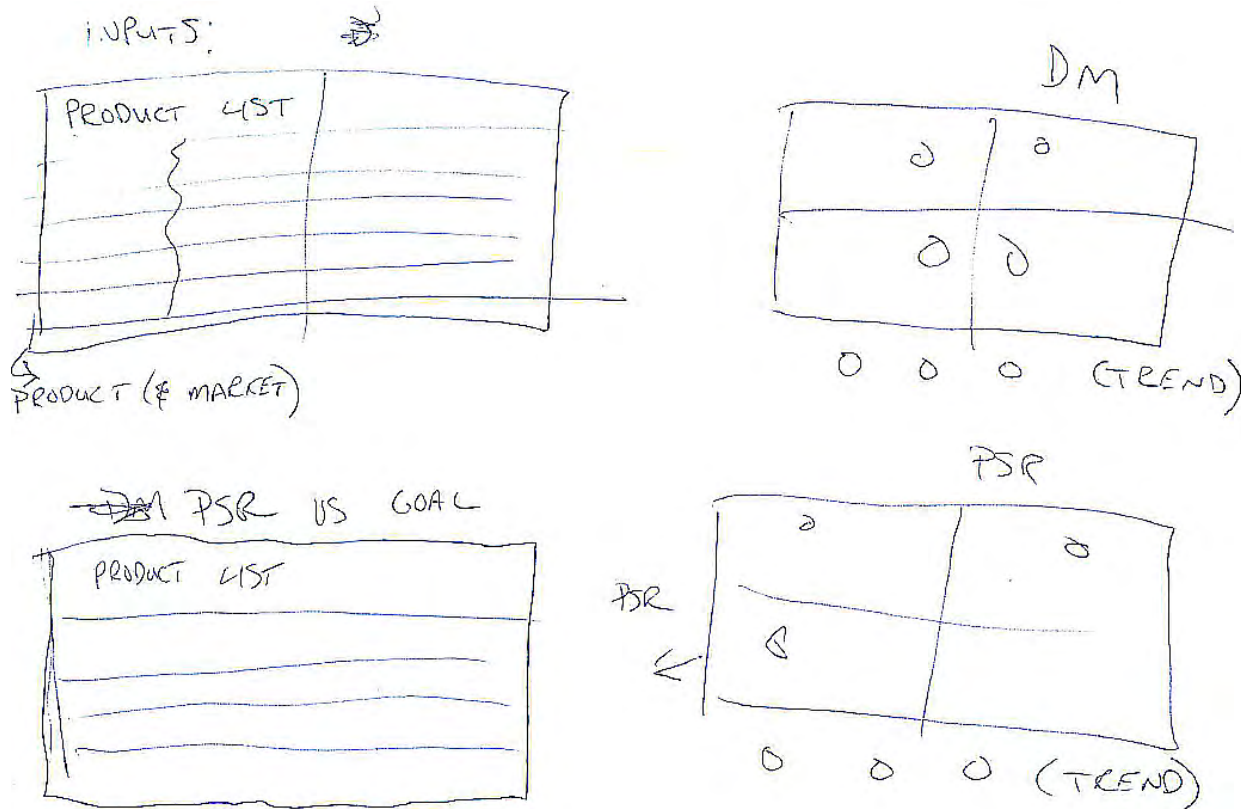
It was a complete success.

We repeated the process over 6 more times over the course of a year – with no training, and no changes to the design



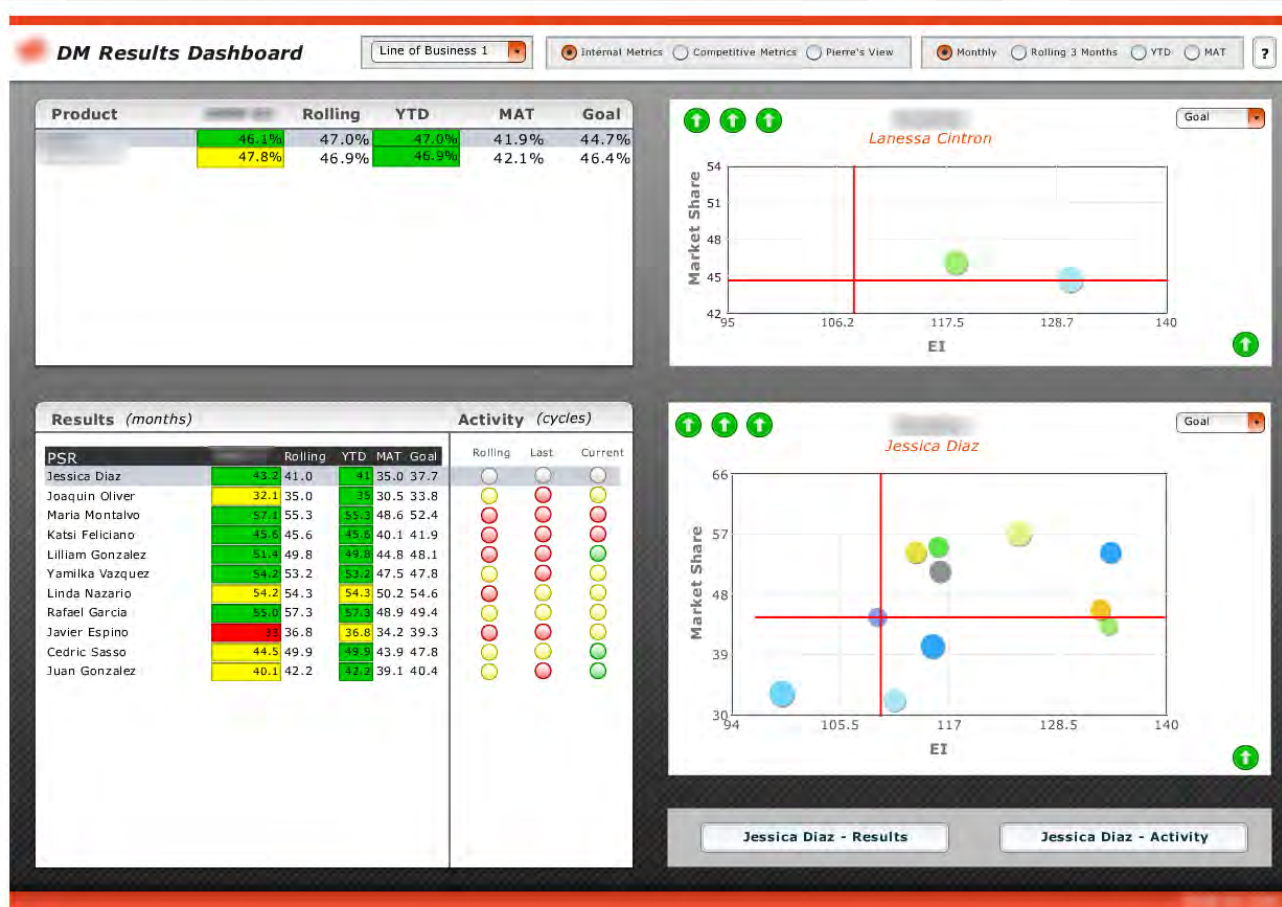
Case Study – Part 2 – When things started to move

At the end of the 2nd day, we drew out a layout on a sheet of paper



Case Study – Part 2 – What we delivered

Look familiar?



Our Big Take Aways

You need to be able to fill out this statement:

“This dashboard helps <this party> answer <this question>. We do that by answering it <this way>. Once they know what is going on, they will make <these decisions>”

Don't worry about the data – if it exists, someone knows how to get it. If it doesn't and the problem is important enough, it can be fixed.

Most people can't tell you what they want – they will usually tell what they don't like about what they have. We have to find their pain point (the question that needs answering), and then paint a picture of what the future looks like and get them to react to it (sounds a little like the selling process?)



Our Big Take Aways – the Road Ahead

A dashboard is the answer to a question asked by a specific audience. Our constraints on what we can show are:

What relevant data can we get our hands on reliably?

How well do we understand the original question?

Any particular answer or data is a snapshot of those issues in time

As time goes on:

The data we can get changes dramatically (See Big Data)

Our ability to pose and answer sub-questions improve (Business Process and Analytical Capabilities)



The Most Important Thing

Our ability to collect and store data is constantly doubling

Our analytical abilities improve all the time

The ability to frame the right question is the key to any insight – so

The Question You're Asking is FAR MORE IMPORTANT than any particular answer you can offer at any point in time



So this seems like a good time for

Questions?



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