

# Implementing a Performance Dashboard To Save Managers Time

Managers were spending hours doing tedious manual importing of data into spreadsheets in order to produce the reports they needed to run the business. We streamlined the data gathering methods and implemented an online Performance Dashboard for hundreds of managers and executives.

## CLIENT CHALLENGE

Leadership was not getting timely information because data sources used different indexes so managers and operations teams spent many hours a week manually inserting data into spreadsheets.

- Directors and VPs had little time to develop strategy or to adjust sales territories
- Account teams did not maximize or leverage high-impact channels
- Adjustments to territory reports hampered by data variations



## HOW WE SOLVED IT

Our consultants stepped in to support the manual reporting efforts. We systemized the entire sales reporting process and streamlined the data gathering methodology and implemented a performance dashboard

- Reviewed and applied enhancement requests with the Controllers and Directors
- Designed and implemented a US performance dashboard
- Managed the cadence of reporting
- Communicated reporting updates to all sales stakeholders
- Reviewed and applied enhancement requests from sales leaders

## BUSINESS IMPACT

The Performance Dashboard is now a core reporting tool for the US management teams. Sales leaders have access to insights needed to manage the sales force, territory alignment, and team resourcing



Dashboard implemented as a best practice for the US analysis team.



Client US sales reporting streamlined and systemized.



Ongoing management of Performance Dashboard for several hundred national managers and executives.