



# Turning Data into Information

How to build real-world KPI dashboards

# Stria<sup>®</sup>

*HUMAN SOLUTIONS. CLOUD SOLUTIONS.*

Jim Damian

Founder / CEO

[JDamian@Stria.com](mailto:JDamian@Stria.com)

510.499.0907 (cell)

661.617.6601 x 101 (office)

How much data do you create each day?



**When did we start turning data into information?**

# Carte Figurative des pertes successives en hommes de l'Armée Française dans la campagne de Russie 1812-1813.

Dressée par M. Minard, Inspecteur Général des Ponts et Chaussées en retraite. Paris, le 20 Novembre 1869.

Les nombres d'hommes présents sont représentés par les largeurs des zones colorées à raison d'un millimètre pour dix mille hommes; ils sont de plus écrits en travers des zones. Le rouge désigne les hommes qui entrent en Russie, le noir ceux qui en sortent. — Les renseignements qui ont servi à dresser la carte ont été puisés dans les ouvrages de M.M. Chiers, de Ségur, de Fezensac, de Chambray et le journal inédit de Jacob, pharmacien de l'Armée depuis le 28 Octobre.

Pour mieux faire juger à l'œil la diminution de l'armée, j'ai supposé que les corps du Prince Jérôme et du Maréchal Davoust qui avaient été détachés sur Minsk et Mohilow et ont rejoint vers Orscha et Witebsk, avaient toujours marché avec l'armée.

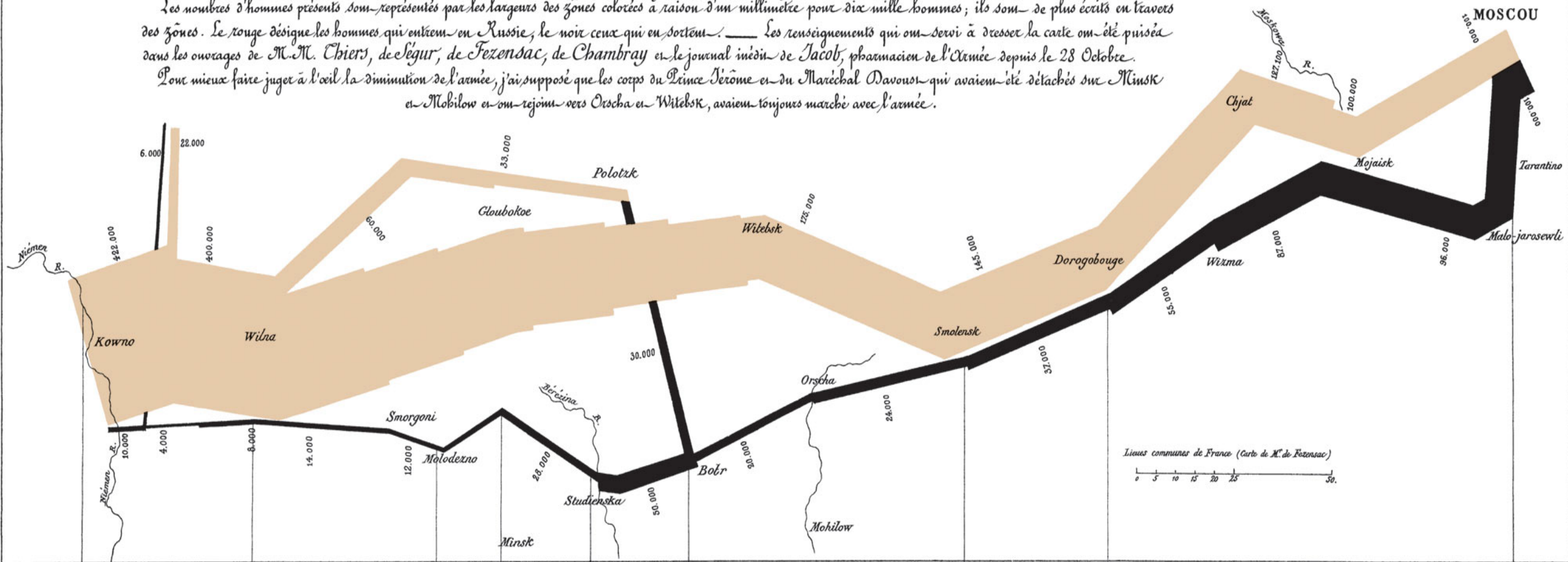
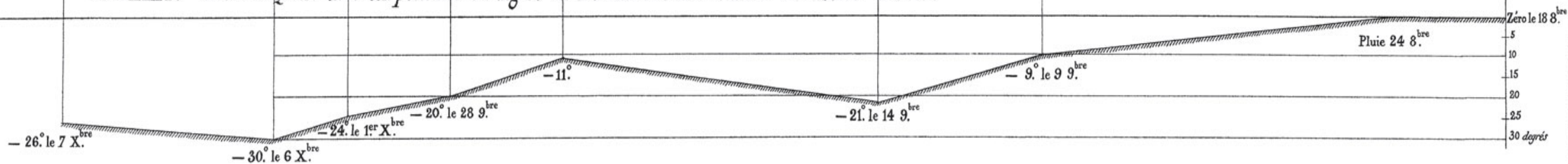


TABLEAU GRAPHIQUE de la température en degrés du thermomètre de Réaumur au dessous de zéro.



Les Cosaques passent au galop le Niémen gelé.



**KPI Dashboard: A visual display of information that supports decision making**





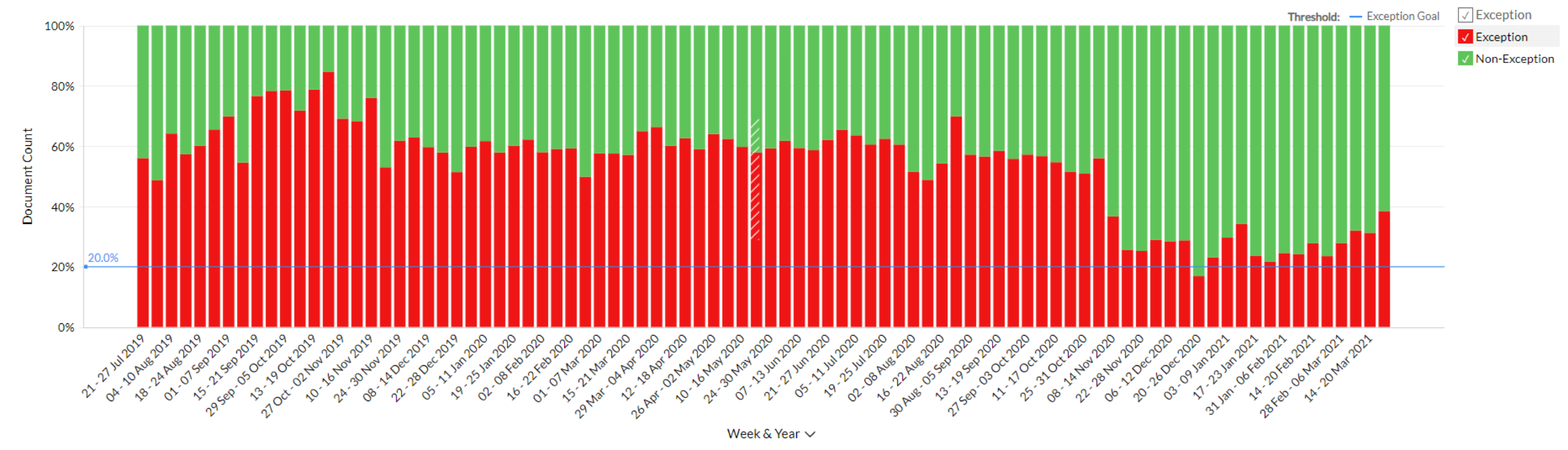
# Use Case #1: Document Processing Accuracy



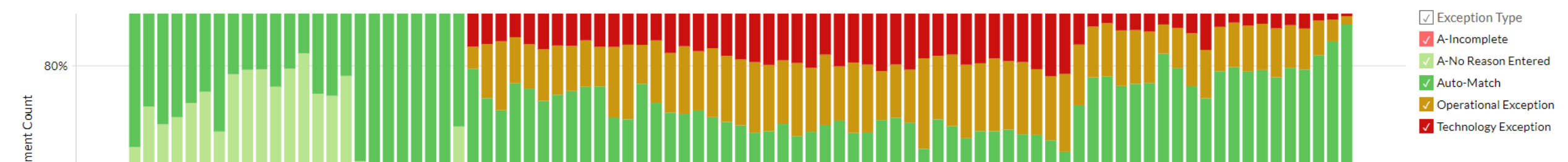
# AP Automation Scorecard

Created: --- Select ---  
 Region: All  
 Store Number: All  
 Vendor: All

## Exception Rate By Week



## Exception Type By Week





Compose



- Inbox 36,530
- Starred
- Snoozed
- Important
- Sent
- Drafts 3,057
- 2020 1
- Activities for Girls
- AI and ML Resources
- BASA
- Boomerang
- Boomerang-Outbox
- Boomerang-Returned 1
- DocuSign
- Family Reunion
- 2020 Family Reunion
- Food Notes
- GB Projects 3
- GB Reimbursements
- Greece
- IFG Email 3
- KHSD
- Online Shopping
- Play House

4 of 15

Attached you will find the scorecard for the week of 3/7 - 3/13.

Please take some time to review before our meeting tomorrow. If you have any questions, please feel free to reach out to me.

Thank you,

**AP Scanning Weekly WIG Scorecard**  
Week of 3/7 - 3/13\* Numbers accurate as of 3/13 @ 5 pm pst

Region	Delmar's				Tara				Reliance				Sun Auto
	Total	Edge	Fears	Lawetta	Laarla	Wicks	Withlan	Auto	Ramona	Tara Stop	Brookman		
Total Processed	17,790	1,380	2,861	1,901	1,928	1,096	1,463	570	1,299	1,062	1,203	3,927	
# correct	11,866	985	1,875	788	1,479	775	855	503	934	768	928	2,776	
Total # of Errors	5,923	404	1,786	213	449	321	608	67	365	294	275	1,151	
Ops Errors	1,653	254	220	61	363	-	-	44	211	72	216	210	
Technology	851	32	-	2	22	-	-	11	119	9	37	117	
No reason	211	24	3	-	30	-	-	6	9	-	4	133	
Incomplete	3,718	93	1,561	190	31	321	608	6	26	213	18	691	
Overall Error Rate	33%	29%	62%	11%	23%	29%	42%	12%	28%	28%	23%	29%	
Last weeks - Overall Error Rate	32%	28%	51%	23%	22%	19%	36%	14%	24%	24%	14%	26%	
Change	1.8%	4.8%	11.4%	-9.7%	0.9%	-4.6%	6.1%	-11.8%	-6.2%	-6.2%	8.6%	-6.2%	

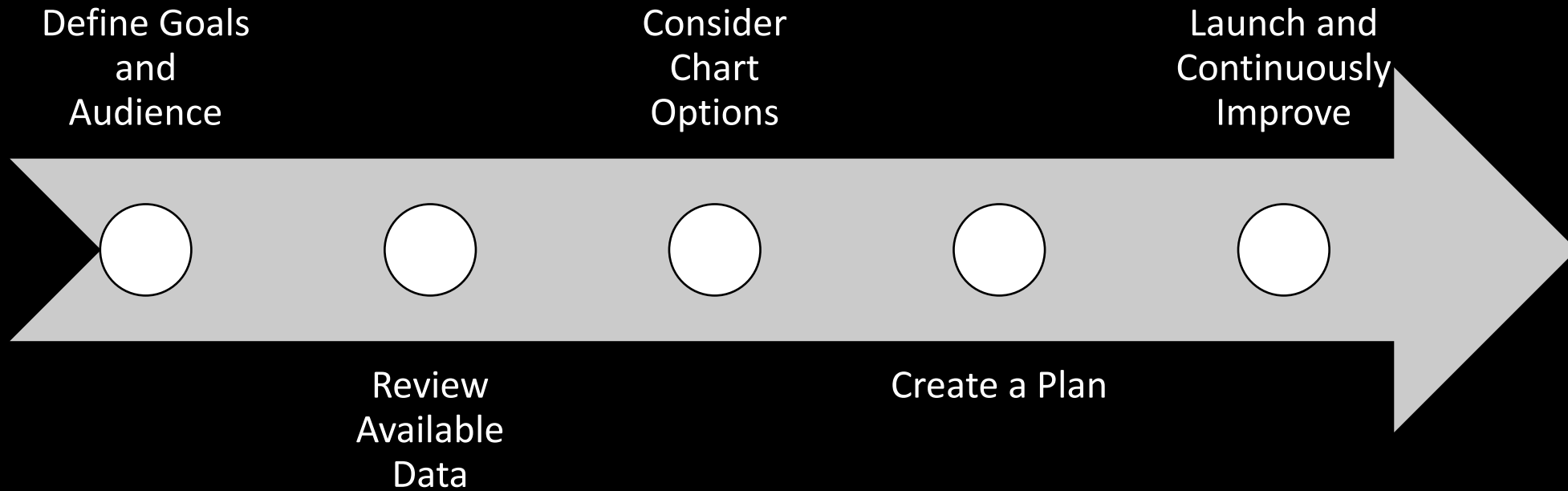
SUN AUTO ONLY

W/E	13-Mar	6-Mar	27-Feb	20-Feb	13-Feb	6-Feb	30-Jan	23-Jan	16-Jan	9-Jan
	Sun Auto	Sun Auto	Sun Auto	Sun Auto	Sun Auto	Sun Auto	Sun Auto	Sun Auto	Sun Auto	Sun Auto
Total Processed	3,927	3,625	3,219	2,653	2,762	2,987	1,918	1,859	1,377	946
# correct	2,776	2,337	2,221	1,878	2,017	2,008	1,492	1,430	932	166
Total # of Errors	1,151	1,288	998	775	745	979	426	429	445	180
Ops Errors	210	109	142	40	29	51	79	88	16	4
Technology	117	165	79	3	4	11	21	11	31	-
No reason	133	78	85	14	30	17	10	8	2	-
Incomplete	691	936	692	718	702	900	327	322	396	175
Overall Error Rate	29%	36%	31%	29%	27%	33%	22%	23%	34%	52%
Last weeks - Error Rate	36%	31%	29%	27%	33%	22%	22%	34%	52%	0%

## AP Scanning Weekly WIG Scorecard

Week of 3/7 - 3/13\* Numbers accurate as of 3/17 @5 pm pst

Region												
Total Processed	17,799	1,389	2,861	1,001	1,928	1,096	1,463	570	1,299	1,062	1,203	3,927
# correct	11,866	985	1,075	788	1,479	775	855	503	934	768	928	2,776
Total # of Errors	5,933	404	1,786	213	449	321	608	67	365	294	275	1,151
Ops Errors	1,653	254	220	61	365	-	-	44	211	72	216	210
Technology	351	33	-	2	23	-	-	11	119	9	37	117
No reason	211	24	5	-	30	-	-	6	9	-	4	133
Incomplete	3,718	93	1,561	150	31	321	608	6	26	213	18	691
Overall Error Rate	33%	29%	62%	21%	23%	29%	42%	12%	28%	28%	23%	29%
Last weeks - Overall Error Rate	32%	24%	51%	27%	22%	33%	36%	24%	28%	34%	14%	36%
Change	1.6%	4.9%	11.4%	-5.7%	0.9%	-4.0%	6.1%	-11.9%	0.2%	-6.2%	8.8%	-6.2%



# The Dashboard Planning Tool (DPT)

## A. What is the goal?

In the simplest of terms, what is the goal of the dashboard? What decision making process is being supported? Use the project sponsor's / customer's own language where possible.

## B. Who is the target audience?

Who will use the dashboard and how will they access it? List specific people as well as job functions and how they expect to receive the dashboard (Self-serve via web, daily email, etc.)

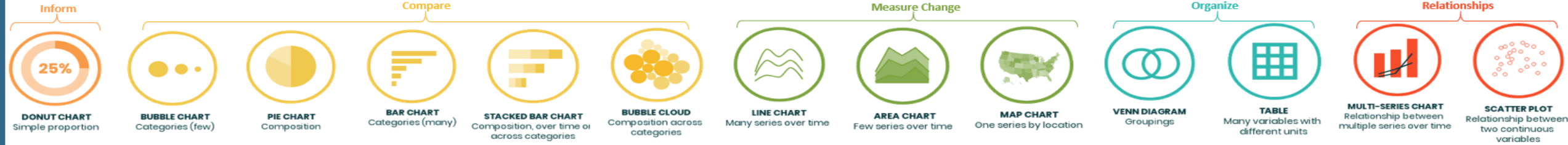
## C. What are likely data sources?

What data is available for use in the dashboard? Where does the data come from? How and with what frequency will data be updated? Use page 2 as necessary.

Data name	Data source	Data update method and frequency

## D. Types of Charts to Consider

Use this section to gain insight and inspiration about the types of charts to include.



## E. Mockups and Ideas

Use this section to mockup potential elements of the dashboard. Consider using images, text and notes to create a "vision" for what the dashboard will look like and how it will work.

## F. Launch and Continuously Improve

Use this section to detail how this planning worksheet will be expanded. How will stakeholders be engaged? How will a tool that supports decision making and is continuously improved be created. Include comments on which platform(s) will be used (Excel, ZoHo, Domo, Tableau, Spotfire, SmartSheet, etc.).



# Use Case #2: Net Profit Dashboard



### A. What is the goal?

In the simplest of terms, what is the goal of the dashboard? What decision making process is being supported? Use the project sponsor's / customer's own language where possible.

Show profitability of company.  
Be able to slice by days, weeks & months.

### B. Who is the target audience?

Who will use the dashboard and how will they access it? List specific people as well as job functions and how they expect to receive the dashboard (Self-serve via web, daily email, etc.)

John Doe - CEO  
Susie Que - CFO  
Jane Smith - VPO

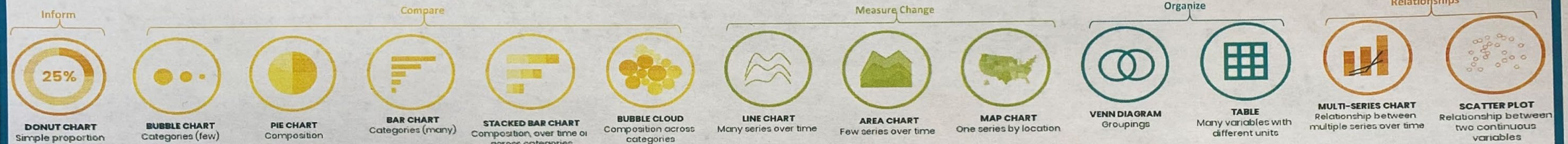
### C. What are likely data sources?

What data is available for use in the dashboard? Where does the data come from? How and with what frequency will data be updated? Use page 2 as necessary.

Data name	Data source	Data update method and frequency
Revenue	Quickbooks	Daily export
Labor	ADP	Daily export
Expenses	Quick Books	Daily export
Predicted Rev.	Forecast	Real-time sync
Gross profit	Quickbooks	Daily export

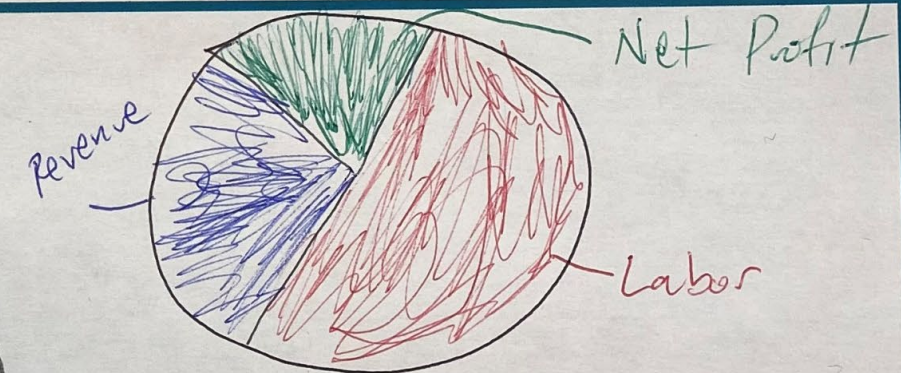
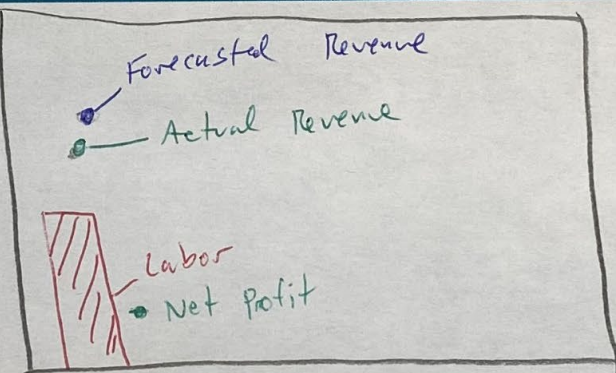
### D. Types of Charts to Consider

Use this section to gain insight and inspiration about the types of charts to include.



### E. Mockups and Ideas

Use this section to mockup potential elements of the dashboard. Consider using images, text and notes to create a "vision" for what the dashboard will look like and how it will work.



### F. Launch and Continuously Improve

Use this section to detail how this planning worksheet will be expanded. How will stakeholders be engaged? How will a tool that supports decision making and is continuously improved be created. Include comments on which platform(s) will be used (Excel, ZoHo, Domo, Tableau, Spotfire, SmartSheet, etc.).

Build Prototype by 2-1-2021  
Obtain feedback by 2-15-2021  
Test imports + refine by 3-1  
Launch - 3-15-2021

Use ZoHo for on-demand access

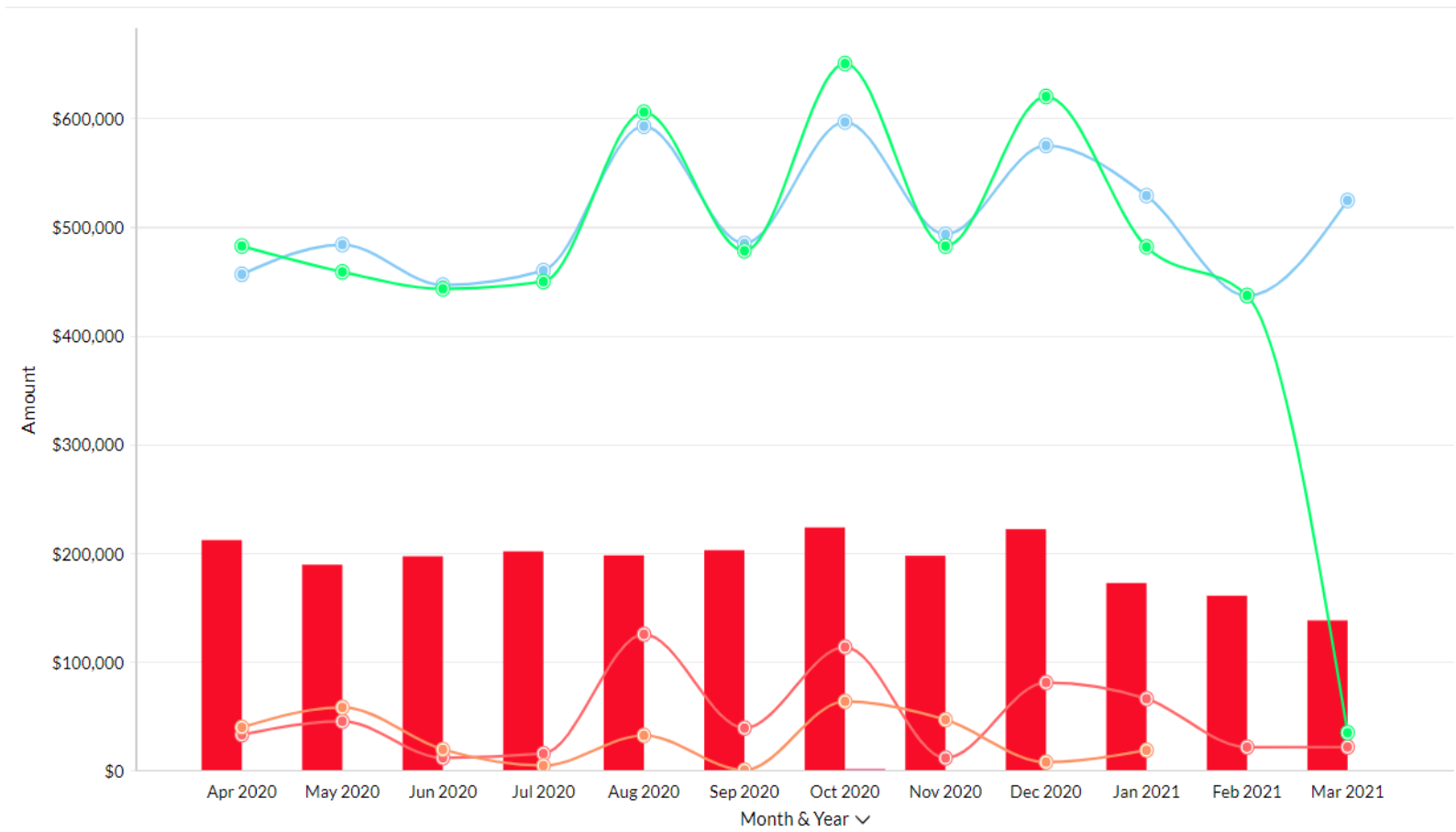
# Job Costing - Dashboard

Edit Design + Share Themes

Date: Last 12 Month(s) Customer Name: All Job ID: All Job Name: All

## Job Costing - Revenue and Expenses

### Labor as a Percent of Revenue



- Type
- Cost of Goods Sold
- Forecast
- Invoice
- Labor
- Labor ADP
- Net Income

Mar 2021  
**396.7%**  
Feb 2021: 36.8%







# Use Case #3: Logistics Dashboard



COVID-19 Memo



COVID-19 Policy



PPE Supply Log



Aera Morning Route

Route ID #: 001
Client: Aera Energy
Route Start Time: 8:00am
Route End Time: 8:45am
Stria Vehicle: 2005 Toyota Highlander
Primary Team Member: Christopher Lairson
Backup Team Member: Ian Perez

Aera Afternoon Route

Route ID #: 002
Client: Aera Energy
Route Start Time: 1:10pm
Route End Time: 4:30pm
Stria Vehicle: 2005 Toyota Highlander
Primary Team Member: Christopher Lairson
Backup Team Member: Ian Perez

CRC Morning Route

Route ID #: 003
Client: CRC
Route Start Time: 9:00am
Route End Time: 10:15am
Stria Vehicle: 2005 Toyota Highlander
Primary Team Member: Christopher Lairson
Backup Team Member: Ian Perez

Enter Fuel Purchases



UPS Tracking Sheet



Vehicle Information



Key Check In/Out



Asset List



Opening/Closing



CRC Afternoon Route

Route ID #: 004
Client: CRC
Route Start Time: 1:00pm
Route End Time: 3:15pm
Stria Vehicle: 2005 Toyota Highlander
Primary Team Member: Christopher Lairson
Backup Team Member: Ian Perez

KHS Afternoon Route

Route ID #: 005
Client: Kern Health Systems
Route Start Time: 3:00pm
Route End Time: 4:00pm
Stria Vehicle: 2019 Ford Transit
Primary Team Member: Ian Perez
Backup Team Member: Richard Ou

Thuasne USA Daily Route

Route ID #: 006
Client: Thuasne USA
Route Start Time: 10:30am
Route End Time: 11:30am
Stria Vehicle: 2019 Ford Transit
Primary Team Member: Ian Perez
Backup Team Member: Richard Ou

Project Dashboards



OnePoint



DocuSign CLM



Operations Hub





# Use Case #4: Safety Dashboard in XLS



File Home Insert Draw Page Layout Formulas Data Review View Help Acrobat

Clipboard Font Alignment Number Styles Cells Editing Analysis

Calibri 12 A A Wrap Text General Hyperlink 2 Normal 2 2 Normal 25 2 Normal Bad Good Neutral Calculation Check Cell Explanatory...

Conditional Formatting Format as Table Insert Delete Format AutoSum Fill Clear Sort & Filter Find & Select Analyze Data

E59

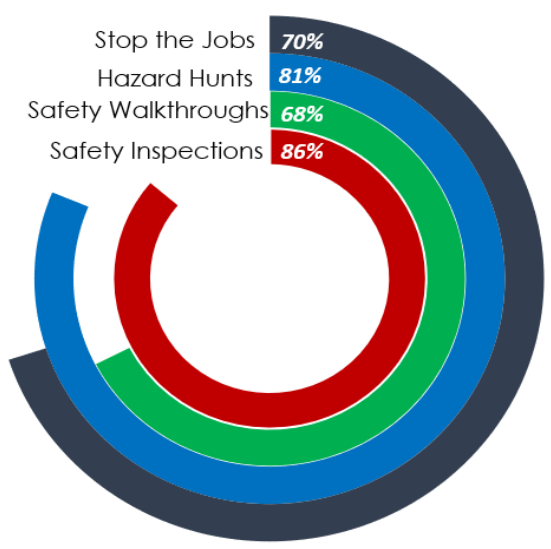
A B C D E F G H I J K L M N O P Q R S

### MONITORING KPI DASHBOARD

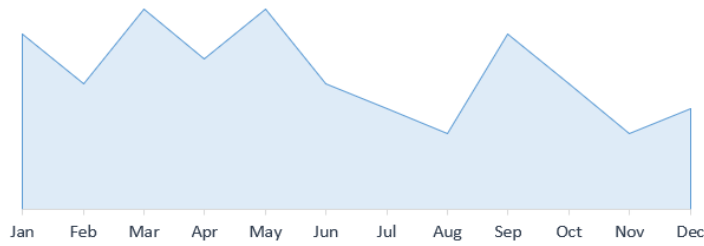
Safety Inspections



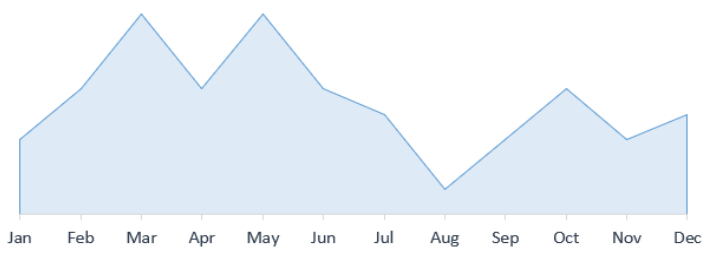
KPI Progress Chart



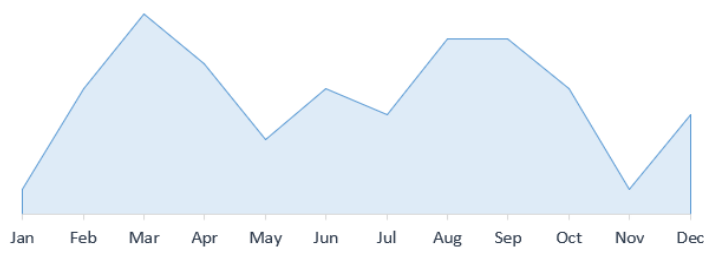
Hazard Hunts



Safety Walkthroughs



Stop the Jobs



Month

Jan	Feb
Mar	Apr
May	Jun
Jul	Aug
Sep	Oct
Nov	Dec



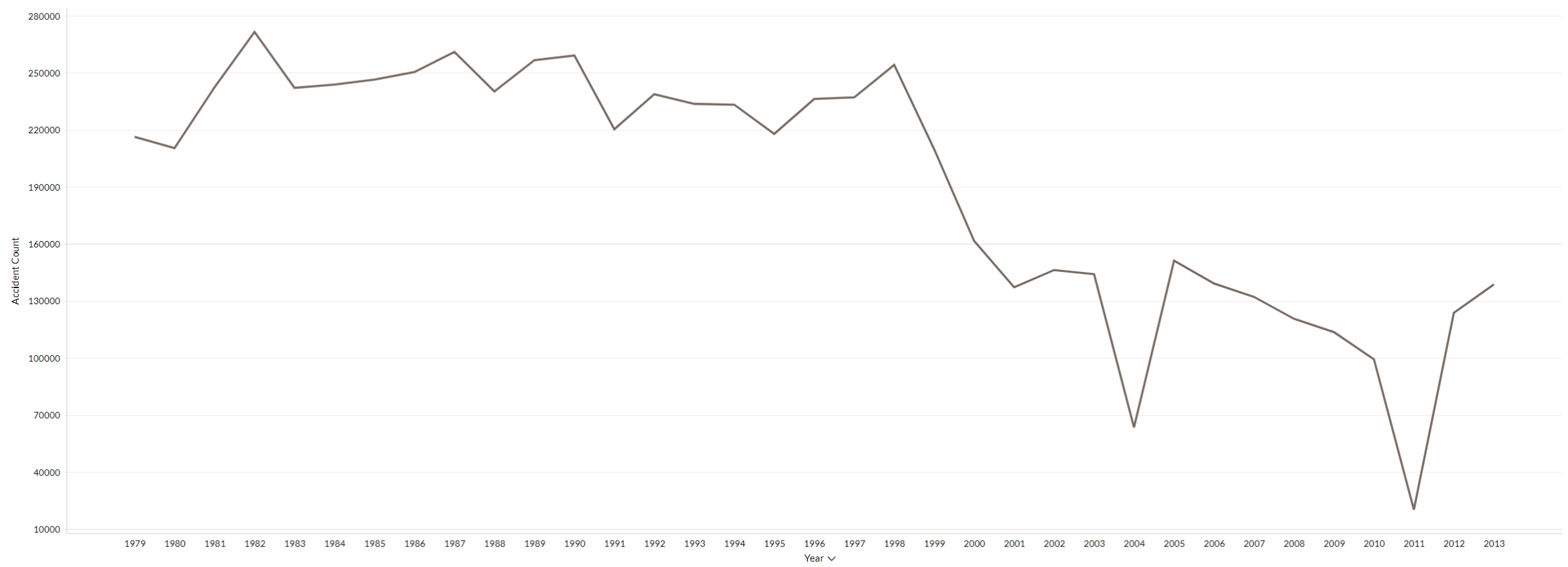
# Use Case #5: UK Accident Dashboard



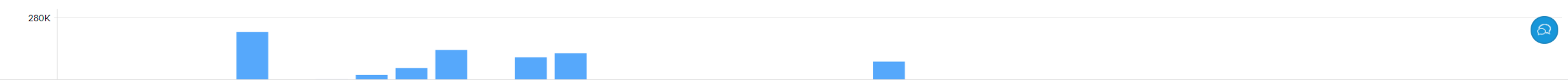
### UK Accidents Dashboard ☆ ↻

+ ↗ ✉

Year-wise Accident Count



Accident Count based on Accident Severity





# Questions and Answers



# Sources

- <https://techjury.net/blog/how-much-data-is-created-every-day/>
- <https://web-assets.domo.com/blog/wp-content/uploads/2020/08/20-data-never-sleeps-8-final-01-Resize.jpg>
- <https://venngage.com/blog/9-types-of-infographic-template/>





# Turning Data into Information

How to build real-world KPI dashboards

# Stria<sup>®</sup>

*HUMAN SOLUTIONS. CLOUD SOLUTIONS.*

Jim Damian

Founder / CEO

[JDamian@Stria.com](mailto:JDamian@Stria.com)

510.499.0907 (cell)

661.617.6601 x 101 (office)