



Operational BI Dashboards: Metrics Beyond the Boardroom

To maximize performance and productivity, keep key metrics “top of mind” throughout your organization – in all roles, at every level

A Klipfolio White Paper

Contents

- Business Intelligence vs. Operational Business Intelligence..... 2
 - Why not make the most of BI? 2
 - BI beyond the boardroom..... 3
 - The challenge for OBI 3
- Business Dashboards and Operational BI 4
 - Problems with today's dashboards 5
 - Advantages of desktop dashboards..... 6
 - Seven things to look for in a desktop dashboard..... 9
- Klipfolio: The Desktop Dashboard for Business..... 11
 - Klipfolio Dashboard for Sales 13
 - Klipfolio Dashboard for Marketing..... 14
 - Klipfolio Dashboard for Help Desk 15
 - Klipfolio Dashboard for Internal Communications..... 16
 - Klipfolio Dashboard for your department, your metrics 17
 - The desktop dashboard for business 17
- About Klipfolio Inc. 17

Business Intelligence vs. Operational Business Intelligence

There was a time when business intelligence (BI) was confined to the executive suite, where it was used almost exclusively for high-level analysis and strategic planning, typically as part of a month-end or quarter-end process.

But BI analysts and thought leaders have pointed out two critical problems with this. First, confining BI to the analytical level fails to make the best use of the large amounts of data that BI systems accumulate and process. Why gather all of that data and then use it for analysis at only the highest level?

Second, using BI at discrete time intervals isn't effective. Why confine its value to widely separated points in time when business decisions, problems, and opportunities happen in real time with no respect for the quarterly review process?

Why not make the most of BI?

Why restrict the insights that BI can provide to just a few analysts and executives who are two or three degrees removed from the functional activities that produce the numbers?

The time and energy your organization has invested in hiring the right talent means that there are people in every corner of the business working to optimize their own departmental performance on a daily basis. Putting the right performance metrics in their hands empowers all your people to gain and act on insights into their activities on a weekly, daily, or even hourly basis rather than waiting for monthly or quarterly reports from the boardroom.

BI beyond the boardroom

In response to these questions and observations, leading organizations are leveraging their significant investments in BI and moving toward OBI – Operational Business Intelligence.

A 2008 study by Ventana, for example, found that, of 314 organizations surveyed, “68% report that they have already deployed operational BI in some manner or have at least begun a deployment project. Nearly two-thirds, 66%, said extending BI capabilities to operational-level workers is ‘very important,’ while another 30% judged it ‘somewhat important.’”¹

Unlike traditional BI, OBI extends beyond the upper echelons to help people throughout an organization perform better. Its goal is to provide personnel in Sales and Marketing, at the Help Desk, on the loading dock, in every role and function, with high-quality, real-time operational

business intelligence that enables them to make better, faster decisions. Also unlike traditional BI, those using OBI depend on it throughout their work day, to let them know in real time when key performance metrics change and action is needed.

By linking real-time operational activities with corporate strategies and goals, OBI aligns an entire organization, increasing accountability and transparency, and putting everyone on the same page when it comes to goal-related performance. It is a critical key to building a high-performance organization.

The challenge for OBI

With the move to OBI comes a wide range of new performance metrics, and an equally wide range of users with differing capabilities and ways of interacting with technology. When moving from BI to OBI, the challenge becomes ensuring that the right key metrics are shown to the right people in ways they can immediately understand and act on. When deploying OBI across an entire workforce, simplicity and role specificity are essential.

Business Dashboards and Operational BI

The component of traditional BI that comes closest to meeting the needs of operational BI, and the logical focal point when extending a traditional solution to all operations, is the business dashboard. Just as an automobile dashboard organizes information from key automotive

systems, so that drivers know how fast they are going, how far they've traveled, when it's time to fuel up, and whether the engine is dangerously overheated, a business dashboard gathers data from business databases and systems and displays it in ways that are accessible and make sense to front-line decision makers.

Dashboards are designed to communicate information quickly and visually, using gauges, maps, charts, and other graphical elements. They aim to enable fast, intuitive understanding of results that would otherwise be very complex. And they strive – or at least they should – to deliver the minimum amount of information needed to know what is happening and what to do about it.

With a high quality dashboard, Sales can monitor pipelines; Marketing stay on top of campaigns and conversation ratios; and Help Desk professionals know how systems are performing, SLAs are being met, and trouble tickets close - in sort, decision makers in all areas of an organization have the knowledge they need to make good, fast decisions and perform more productively.

Problems with today's dashboards

Business dashboards are an important facilitator for the transition from BI to OBI. But they are not without shortcomings. They fall short of being a complete solution.

Today's dashboards are often hidden

Users have to open traditional dashboards, and might have to navigate pages of information to find what they need. Out of sight is out of mind, and that doesn't translate into immediate knowledge of changes in key metrics. An out-of-the-way dashboard is better suited to the monthly or quarterly review process than it is to improving daily decision making. A business dashboard, like a vehicle's, needs to be located where it is impossible to ignore. Your vehicle's dashboard isn't under the hood – your business dashboard shouldn't be either.

Today's dashboards can be distracting

Often, dashboards offer so many options for analysis that users end up plumbing the depths of their databases in an attempt to learn more about the opportunity or problem they have been alerted to – in other words, they are not purely operational. Comprehensive analysis capabilities can be good for BI analysts and power users, but no one benefits from these investigations if they lead the user away from what's really important and delay the real solution, which is a fast, sure decision.

Just as a vehicle's dashboard doesn't include a barometer or other irrelevant metrics that would distract a driver's attention from what matters, a business dashboard should not contain metrics that don't bear directly on better decision making for their intended user. The dashboard, like the business, shouldn't bother to measure and report on any metric that is not being used to make decisions. When it comes to dashboards for departments or roles, less is usually more.

Today's dashboards are often complex to learn and use

The business users that can benefit from operational BI typically don't have time, or the inclination, to learn how to use complex programs. So traditional dashboards, like a host of enterprise systems before them, often aren't adopted, or are used in ways that don't contribute to real business goals. No matter how great an application's potential, it only adds value if you use it.

Traditional dashboards were designed to report on the sea of data within complex enterprise information systems. As a result, they often reflect that complexity rather than finding elegant ways to report just the right data in the right ways, so that a user can understand it at a glance. Instead of exposing an organization's wealth of data, an OBI dashboard's job is to distill that data down to the key information that decision makers need. The "K" in KPI is there for a reason.

Today's dashboards aren't always "real time"

With many dashboards, data must be loaded or imported before information about what is happening with key metrics can be displayed or reported. Even if the loading or importing process is automated, it typically happens only periodically – at best several times a day, more typically every night, every week, or, worst of all, sporadically.

Advantages of desktop dashboards

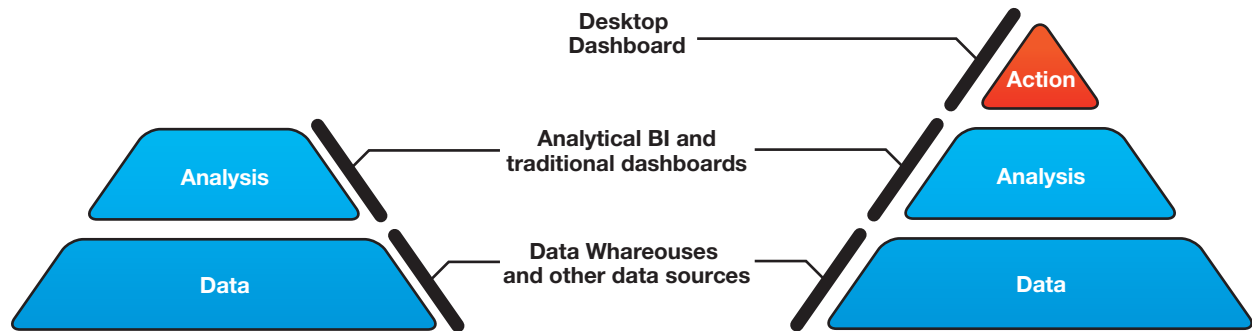
Desktop dashboards leverage the benefits of traditional dashboards and take the extra step needed to overcome their limitations. These "always on," always visible, small-footprint dashboards typically display as sidebars on users' desktops, where they report real-time changes in key performance metrics. In environments where critical data is fast-changing, frequently hard to reach, and can be widely dispersed across the enterprise, desktop dashboards are the key to operational business intelligence.



Only desktop dashboards provide decision-making capabilities throughout an organization – to people in all roles at all levels.

Desktop dashboards force users to focus on priorities

By placing key performance metrics on users' desktops, desktop dashboards ensure that information about changes in key performance metrics – changes requiring immediate understanding and attention – are “top of mind” all the time. You don't need to go looking for a desktop dashboard – it comes to you.



By providing targeted users with just the information they need, desktop dashboards sharpen the decision point, so it's easier to make the consistently faster, better decisions that are the key to a high-performance organization.

Desktop dashboards are simple and clear

To work, a desktop dashboard must be small, simple, and clear. If it demands too much real estate, users quickly treat it like just one more open window of information hidden among a variety of applications and messages, and will close and stop using it.

A small dashboard must work harder to report KPIs in ways that are clear and unambiguous. As a result, with a good desktop dashboard you get immediate, precise knowledge of what is happening and what needs your attention.

Desktop dashboards are popular and readily adopted

Too many IT departments are familiar with the stress of realizing that the expensive enterprise software they struggled to deploy is rarely launched by its intended users.

Because desktop dashboards make life easier for workers of all types, and because they are so simple to use, they are typically adopted eagerly. As a result, they can actually secure the ROI and protect the existing investment in important but complex underlying systems that aren't so readily adopted, including many of today's dashboards and BI reporting deployments.

Desktop dashboards consolidate key data sources

Properly done, a desktop dashboard takes advantage of data from all key business systems, including traditional analytical dashboards and existing BI implementations, to provide a single, combined look at different performance indicators.

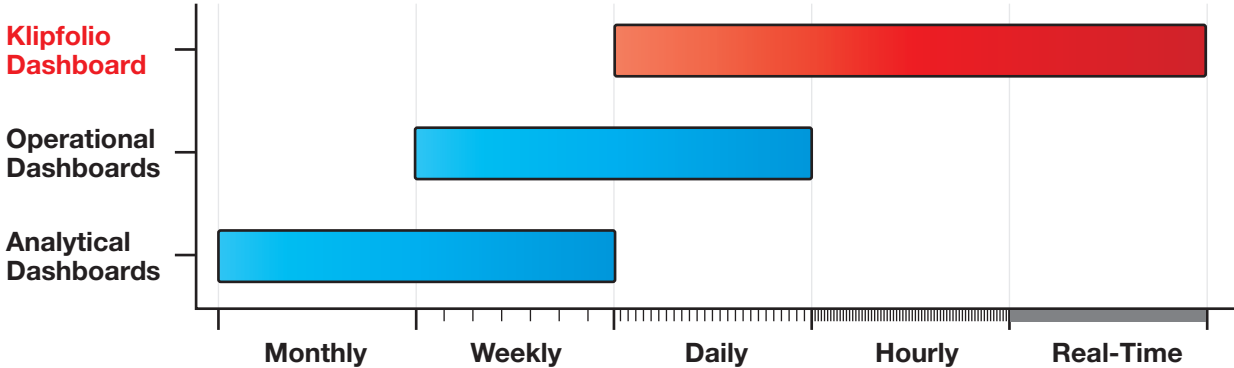
A desktop dashboard is a must when ...

Data changes often. You need to know right away when something happens, so you can respond quickly in a fast-changing environment.

Data is critical. Not knowing about a change in the status of a performance metric has serious consequences for your business.

Data is hard to reach. The data you depend on for decision making is not always readily available.

Data is distributed. Sales, finance, and other critical data is widely dispersed in the organization.



Only a desktop dashboard provides the real-time information needed to perform productively in a fastchanging environment.

Desktop dashboards provide live snapshots of your KPIs

In high-activity departments, such as sales, marketing, help desk, and supply chain, operational data is critical. By providing “snapshots” of what is happening with that data at any time, desktop dashboards provide simple, always visible information about what matters most to users.

With a desktop dashboard, there is no need to open an application, to run a report every morning, to update a spreadsheet, or to load data for analysis. Your KPIs are in front of you and up to date. There’s no guessing how your key metrics have altered since you ran a report hours ago. A well-crafted desktop dashboard makes sure that the information you need is where you need it – in front of you at all times, so you can’t miss it. And that means faster, more confident decisions that drive better performance, higher productivity, and greater profitability.

Seven things to look for in a desktop dashboard

When organizations realize that an operational BI solution demands a desktop component, they look to add that critical piece to their performance management solutions. But desktop dashboards are not all equal. When deciding on one, there are key criteria to keep in mind.

A desktop dashboard must be always visible

A desktop dashboard must be visible on the desktop, where it updates key performance metrics for real-time understanding. Depending on the context, this means that the dashboard must be easily customizable by the user, or locked down to prevent changes to the user’s “must see” metrics, or some combination that permits only useful customization. And it might mean that the dashboard is presented as a sidebar or “topbar,” or docked to the edge of the user’s desktop. In either case, the user must not have to activate or open it, and it must be clearly visible. You shouldn’t have to go looking for it. It should always just be there.

Different users, different needs

A desktop dashboard must meet the needs of different types of users, including ...

The cooperative user. *Knows technology, values its benefits, adopts solutions readily, uses them to the max. Can easily customize the dashboard. Will take advantage of its advanced features.*

The indifferent user. *Accepts technology, but doesn’t go looking for ways to use it. Must customize the dashboard to suit their needs, and then provide limited additional customization options.*

The reluctant user. *Not inclined to use technology. Might actively resist it. Lock the dashboard down on their desktop, so they can’t lose sight of what they need to know. Possibly restrict permissions and functionality to simplify use, and so they can’t get themselves into trouble.*

A desktop dashboard must be role-appropriate

Different users need different metrics. A highquality desktop dashboard shows only the metrics that matter to you. And it displays those metrics in ways that let you understand immediately what action to take.

A desktop dashboard must be clear and concise

There must be no mistaking what it is telling you. There is no room for ambiguity or extraneous data in a desktop dashboard. So it should leverage the latest best-practices in data visualization and communication. Less is more.

A desktop dashboard must be easy to use

To ensure it is adopted by everyone who needs it, a desktop dashboard must be extremely easy to use. The last thing the worker suffering from information overload needs is a “solution” that requires training before it helps solve problems.

A desktop dashboard must draw on all the essential data

A desktop dashboard must fit comfortably into an existing information infrastructure, without being a burden on IT. It must be capable of leveraging all existing data sources and business intelligence solutions – including many of today’s dashboards and other enterprise applications and BI solutions.

A desktop dashboard must include real-time notification and alerts

To ensure timely understanding and decision making, a desktop dashboard must display real-time information. And it must include audio and visual alerts that can’t be missed, so that users always know about important changes in key performance metrics in real time – even if they’re not looking at their desktop.

A desktop dashboard must be flexible

Today’s key performance metric might not be tomorrow’s. And the needs of the loading dock manager aren’t the same as those of the VP of Finance. A good desktop dashboard adapts to meet the requirements of different types of users throughout the enterprise, in all departments, at all levels. And it evolves quickly and easily as the organization grows and key metrics change.

Klipfolio: The Desktop Dashboard for Business

Klipfolio Dashboard meets and exceeds the criteria for an effective operational dashboard solution. Designed and built for the enterprise, Klipfolio Dashboard leverages information infrastructures to turn all relevant data, no matter where it's from and what its format, into performance metrics required by employees in any role at any level. And it displays those metrics in real time where they're needed – front and center, on users' desktops.

The Klipfolio advantage

Your Klipfolio dashboard isn't like the one they use down the street. It may not be like the one down the hall. It's not another out-of-the-box solution. When you choose Klipfolio, you get a build that is unique to your organization, has your branding, and is carefully crafted to meet the daily needs of your users, no matter what their department or role.

A custom solution for your unique needs

Klipfolio Inc. works with you to determine your key roles, metrics, and ways to display those metrics. Years of experience as a leading-edge provider of desktop dashboard solutions mean that Klipfolio can provide advice on the best ways to add context and meaning to actionable data. The result is a desktop dashboard solution that delivers the metrics you need to the people in your organization who need them, complete with alerts that ensure important changes or performance exceptions get noticed right away, every time.

Performance metrics for every role

With Klipfolio dashboards, people throughout an organization – in Sales, in Marketing, at the Help Desk, in any department and role throughout the enterprise – can perform to their potential. And that's the key to a high-performance organization that maximizes productivity and profitability.

Klipfolio Dashboard meets and exceeds the criteria for an effective operational dashboard solution. It is ...

- *Always visible*
- *Role-appropriate*
- *Clear and concise*
- *Easy to use*
- *Based on all the relevant data*
- *Capable of alerting the user to real-time changes in key performance metrics*
- *Flexible, to address users' exact needs and easily accommodate organizational change*

See for yourself what Klipfolio can do

Want to get a feel for how Klipfolio Dashboard does this? The pages that follow provide examples of how Klipfolio provides decision makers in a range of organizations and departments with the metrics they need to be productive and help drive their organization's performance.

Klipfolio Dashboard for Sales

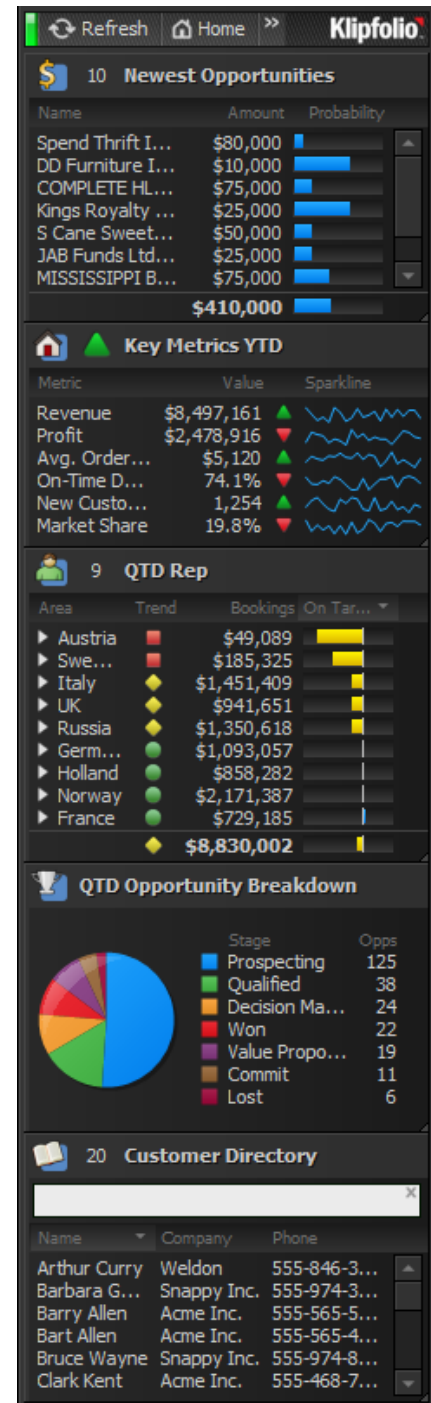
A Klipfolio Dashboard on the desk of every sales manager and rep keeps them on top of key sales metrics at all times. They know immediately when leads emerge. They are up-to-date with changing forecasts. And they are alerted to a sales win or loss right away.

Empowering the sales team

Increasing the visibility of key metrics with a Klipfolio desktop dashboard for sales puts the entire sales team on the same page. It can leverage databases, BI dashboards, and other applications, as well as sales automation tools such as Salesforce CRM, ACT, and Goldmine, to provide the key metrics that matter to every member of the sales team, whatever their location or role.

Shared understanding for coordinated action

Klipfolio Dashboard scorecard indicators, bar charts, sorting options, and other components provide the flexibility to make visible the metrics that matter to sales people in ways that make them easily understood. The result is a fully coordinated sales team that takes fast, decisive, action based on current information to drive consistently higher sales.



Try a free Sales Dashboard demo now:

klipfolio.com/sales

“With Klipfolio Dashboard we make faster, better decisions based on what’s happening now, not what’s already happened. Our KPIs are based on data from all our systems, so we’re leveraging our technology for maximum benefit.”

Richard Woodruff, PNC

Klipfolio Dashboard for Marketing

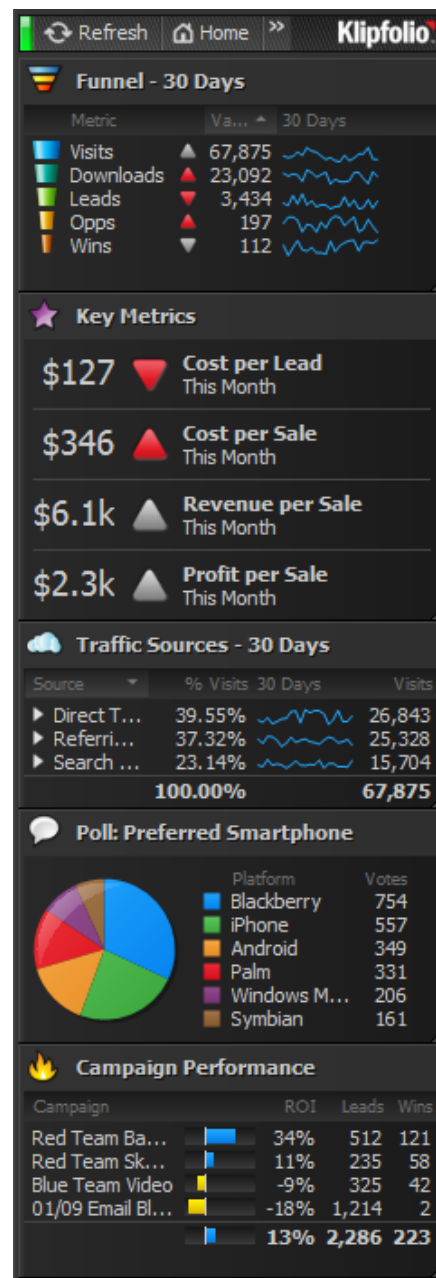
Often viewed as just another cost center, marketing departments make some of the most important investments for a business. A Klipfolio desktop dashboard ensures that those investments are based on a solid understanding of rapidly changing trends, so that marketing realizes the maximum return on their investment.

Real-time marketing performance metrics

With a Klipfolio dashboard, marketing can:

- Monitor web site traffic and engagement, and react faster to changes in focus and demand
- Know which brands and initiatives are effective and which aren't, and focus valuable resources on what works
- Track the progress of campaign goals, to quickly perfect successful strategies
- Consolidate data from multiple sources, including common marketing applications, for a complete understanding of trends and anomalies

With metrics like these front and center, the marketing team makes better, more informed decisions based on real-time information and all the facts.



"During a hectic day, just needing to log in again or launch a browser is enough to stop you from looking at your web metrics as often as you should. But placing your metrics right in front of you makes them impossible to ignore."

Oliver Novak, Senior Digital Campaign

Manager, **MRM Worldwide**

Try a free Marketing Dashboard demo now:

klipfolio.com/marketing

Klipfolio Dashboard for Help Desk

A Klipfolio desktop dashboard for the Help Desk keeps priorities front and center to cut response times and increase customer satisfaction.

Immediate knowledge means faster results

A Klipfolio dashboard maximizes Help Desk efficiency by keeping metrics like these on the desktop:

- Help Desk status, including open tickets and resolution rates, so you can quickly adjust resources to meet demand
- Real-time alerts when critical issues demand immediate action
- Search capabilities, to find the information needed to solve issues faster

Put priorities front and center

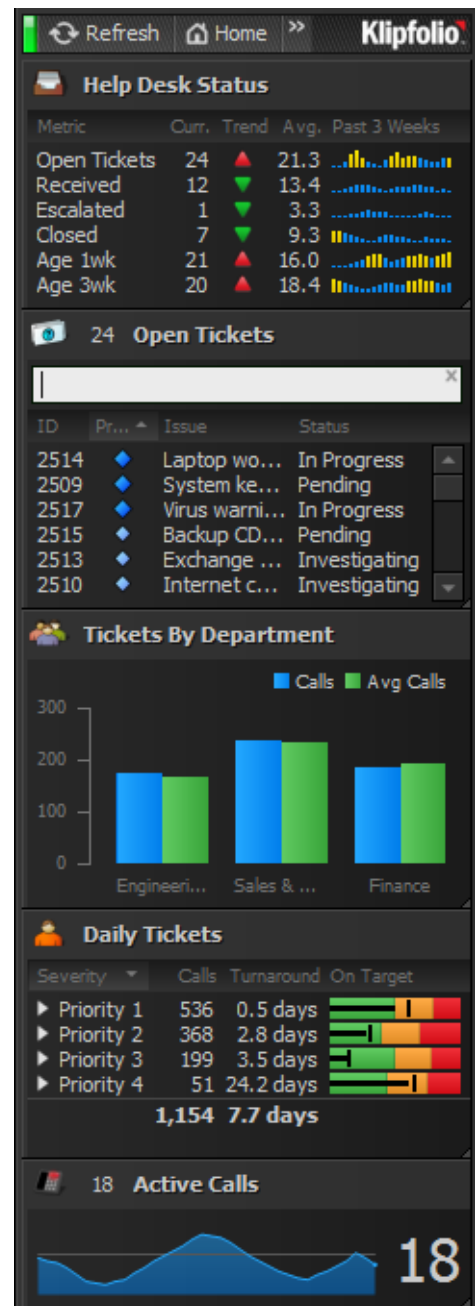
With Klipfolio, metrics are tailored to meet the needs of the user, whether they are Help Desk managers or front-line workers.

Integration with leading help desk applications – everything from Heat to Remedy to Parature to Excel – and support for common formats like CSV, XML, and ODBC (SQL) ensures that all relevant data is used to provide a complete picture of activities.

Lockdown capabilities mean that key metrics can never be ignored. And color-coded scorecard indicators and bar charting ensures that help desk workers spot issues at a glance and can manage them effectively.

Try a free Help Desk Dashboard demo now:

klipfolio.com/helpdesk



“Klipfolio helps us share key information within our ICT support organization.”

*Ron Blijleven, **DHV Services BV***

Klipfolio Dashboard for Internal Communications

Effective corporate communications keeps your workforce informed, aligned, and focused. But with the amount of information bombarding today's knowledge worker, it's no wonder they so often go unnoticed. A Klipfolio dashboard for internal communications ensures that key corporate messages can't be missed.

Need-to-know information on the desktop

By putting internal communications on employees' desktops with dashboards that take little real estate, are easy and fun to use, and include visual and audio alerts, Klipfolio ensures that important announcements never go unnoticed.

The many benefits of a communications desktop dashboard include:

- Better-connected managers and employees
- Consolidation of communications from a variety of departments and sources in a single location
- The ability to reach 10's of thousands of employees at the same time, with no central data bottleneck and very low bandwidth usage

Refresh Home Klipfolio

News and Events

- Renovations now under way in atrium. Please use the Gloucester St. Entrance for the next few
- Snappy softball team looking for a few players, men and women. You in?

Messages from the CEO

Let's talk about the next version of Snappy Desktop

We have some new competition, and it is us.

Quick Poll

Do you ever access the intranet from home?

Do you ever look at the lunch menu health information?

Employee Directory

| Name | Ext. | Location |
|----------------|-------|-----------|
| Allen, Barry | x5644 | Ottawa |
| Allen, Bart | x4864 | Ottawa |
| Curry, Arthur | x3154 | Ottawa |
| Danvers, Linda | x1518 | Hong Kong |

Network Status

- Ottawa Internal Network OK
- Ottawa Internet Access Offline
- New York Internal Network OK
- New York Internet Access Slow
- File Servers OK
- Web Server OK
- Email Server Slow

Forms and Documents

- Expense Form
- Timesheets
- Vacation Policy
- Employee Handbook
- Brand Guidelines
- MS Word Template
- Powerpoint Template

"Klipfolio is one of the most intriguing information delivery systems we've seen for a while ... it could well be the corporate information delivery vehicle you've been looking for."

Mark Gibbs, **Network World**

Try a free Internal Communications Dashboard demo now:

klipfolio.com/internalcommunications

Klipfolio Dashboard for your department, your metrics

One of the greatest assets of Klipfolio Dashboard is its flexibility. You can use it to leverage data from any source to provide real-time information of any kind to all types of users, in any role in an organization. Whether it's ERP or CRM data, and whether it's related to Sales, Marketing, a Help desk, or another functional area, a Klipfolio desktop dashboard can use that data to help real people make faster, smarter decisions that contribute to corporate success.

The desktop dashboard for business

Designed and built for business, Klipfolio Dashboard moves key metrics beyond the boardroom. It helps organizations leverage investments in Business Intelligence to build Operational Business Intelligence solutions that provide employees across the organization with the real-time information they need to perform better.

About Klipfolio Inc.

Klipfolio Inc. develops Klipfolio Dashboard — the desktop dashboard for business — to help the Fortune 1000 increase the visibility of business information for faster, informed decisions that improve performance and profitability. Klipfolio Dashboard is the only enterprise dashboard that presents information directly on the desktop where it's always visible, accessible, and actionable. Founded in 2001, Klipfolio Inc. is privately held and headquartered in Ottawa, Canada. Clients include Intel, Staples, EMC, and Lufthansa. For more information, visit <http://www.klipfolio.com>.

*1 Operational business intelligence making its way in the enterprise. Jeff Kelly, News Editor, SearchDataManagement.com, January, 2008.
http://searchdatamanagement.techtarget.com/news/article/0,289142,sid91_gci1286218,00.html*

