Higher Education Provider

Assisting an Education Provider with KPI Reporting against strategic goals

exposé
Data Exposed

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PROBLEM

Our client produced a monthly KPI and Executive Summary report for their IT Leadership which showed how they were tracking against their strategic goals.

Data was collated in Excel from a number of contributors and visualised in PowerPoint using PowerPoint shapes and symbols.

Not only was this process time-consuming and labour-intensive, the visuals did not show trend over time or comparison to benchmarks and as such it was difficult to tell whether the figures presented were good or bad in context.

The client also utilised a project portfolio roadmap and summary report, in which they desired to reduce effort and improve visualisations in this report and iteratively automate the collation of the data.

The report was to be integrated with their existing reporting solutions with interactivity and drill-through capability for operational users, whilst also designed for PowerPoint export for senior leadership.

SOLUTION

Power BI was used to connect to existing staging data in Excel and then to our client's Project Portfolio Management solution.

KPIs were visualised succinctly showing status indicators, performance over time against benchmarks or targets.

A Portfolio Roadmap was created in Power BI detailing projects within a planning horizon and their associated RAG Status and baseline figures.

Commentary was captured in the report so that the entire report could be refreshed and printed each month without additional modification.

BUSINESS BENEFITS

Immediate business benefits seen were:

- The reduction in administration time of manually updating KPI visuals in PowerPoint.

- Elimination of the need to export data from the client's PPM solution and manual update of the Roadmap visual.

- The ability to greater understand KPIs in context and see trends in performance. This results in the ability to make faster business decisions based on actionable insights.