



# Building Effective Scorecards

**Data Value Management Series**

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- ✓ **THE FINAL (GOOD) PRODUCT**
- ✓ **RECAP**

## PRESENTATION OBJECTIVES

- ✓ **UNDERSTANDING WHERE TO BEGIN**
- ✓ **HOW TO DISTINGUISH A SCORECARD FROM A DASHBOARD**
- ✓ **IDENTIFY WHAT SHOULD BE INCLUDED IN A GOOD SCORECARD**
- ✓ **DESIGN BASICS**
- ✓ **SHOW WHAT DOES A GOOD SCORECARD LOOK LIKE**

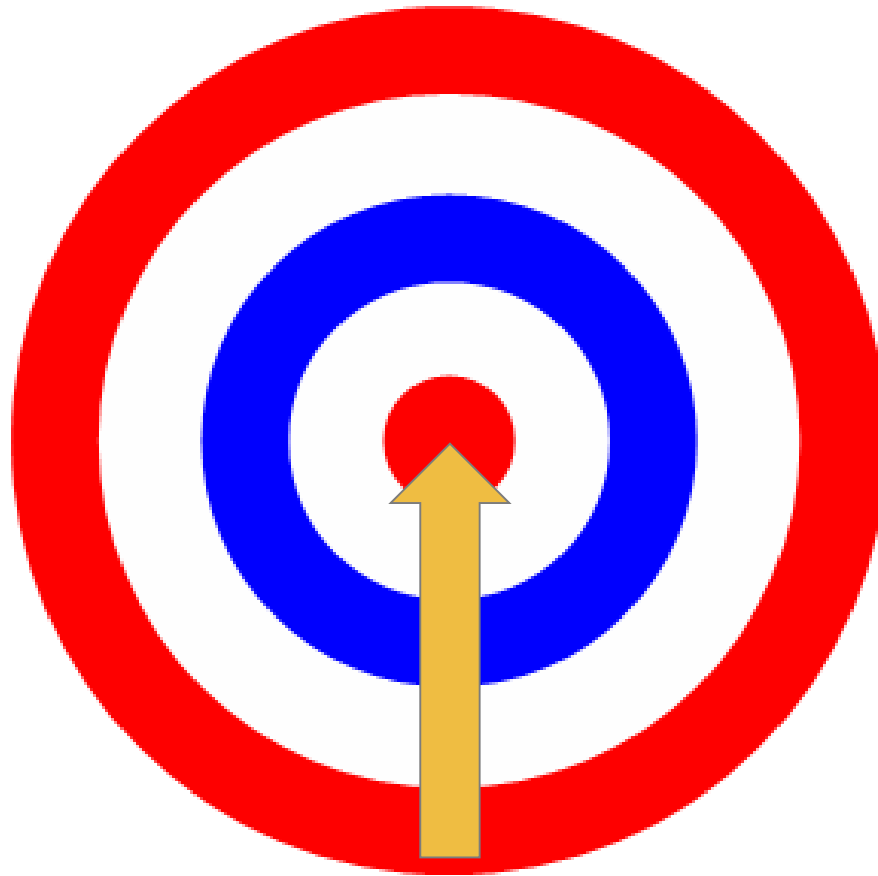
## BEGIN AT THE BEGINNING – QUESTIONS!

When architecting a quality scorecard, one must consider purpose and outcomes. To understand where to begin and what to deliver, first ask some questions:

- ✓ Why - what purpose will the scorecard serve?
- ✓ Who - who is the recipient?
- ✓ What - what is being tracked or measured?
- ✓ When - how often will this be viewed?
- ✓ How - in what format should the scorecard appear?

Once these questions have been answered, one final question remains!

**BEGIN AT THE BEGINNING – QUESTIONS!**



What is/are the target(s)?

## WHAT IS A SCORECARD?

A scorecard is a visual or graphic representation of performance against objectives.

The difference between a dashboard and a scorecard in general, is that a dashboard presents current information on your operational performance while a scorecard shows your performance against a plan or set of objectives.

## SCORECARD TYPES

Objective	Sponsor	How	Measurement	Target
<b>Master Data Management</b>				
To obtain a single version of the truth	CIO	To enforce a master set of business rules for each key data subject area	For any subject area that is stored in more than a single system a quarterly comparison of value and volume metrics are run	Results within 5% across systems
<b>Data Quality</b>				
Data quality to be made part of everyday activity	CTO/CIO/CMO/COO	Develop a set of data quality processes that are run and monitored for the next 6 months	At least 10% of activity recorded against DQ timesheet codes	10%of team activity
Improve quality of data entering the data warehouse	CTO/CIO/CMO/COO	Develop a set of data quality processes that are run and continually monitored	Monitor the improvement of address accuracy	5% improvement year on year
<b>Legislation &amp; Data Protection</b>				
Reduce the number of customer complaints associated with customer communication processes	CEO/CMO	Define and enforce new complaint management processes and monitoring	Number of complaints as a % of total customer communications	10% reduction in customer complaint volumes

## SCORECARD DESIGN BASICS

- ✓ Remember that simplicity works best
- ✓ Do not be too flashy (avoid the wild colors)
- ✓ Use graphics where useful
- ✓ Do not use abundant text
- ✓ Highlight the objectives
- ✓ Focus on the Measureables
- ✓ Make the targets easily identifiable

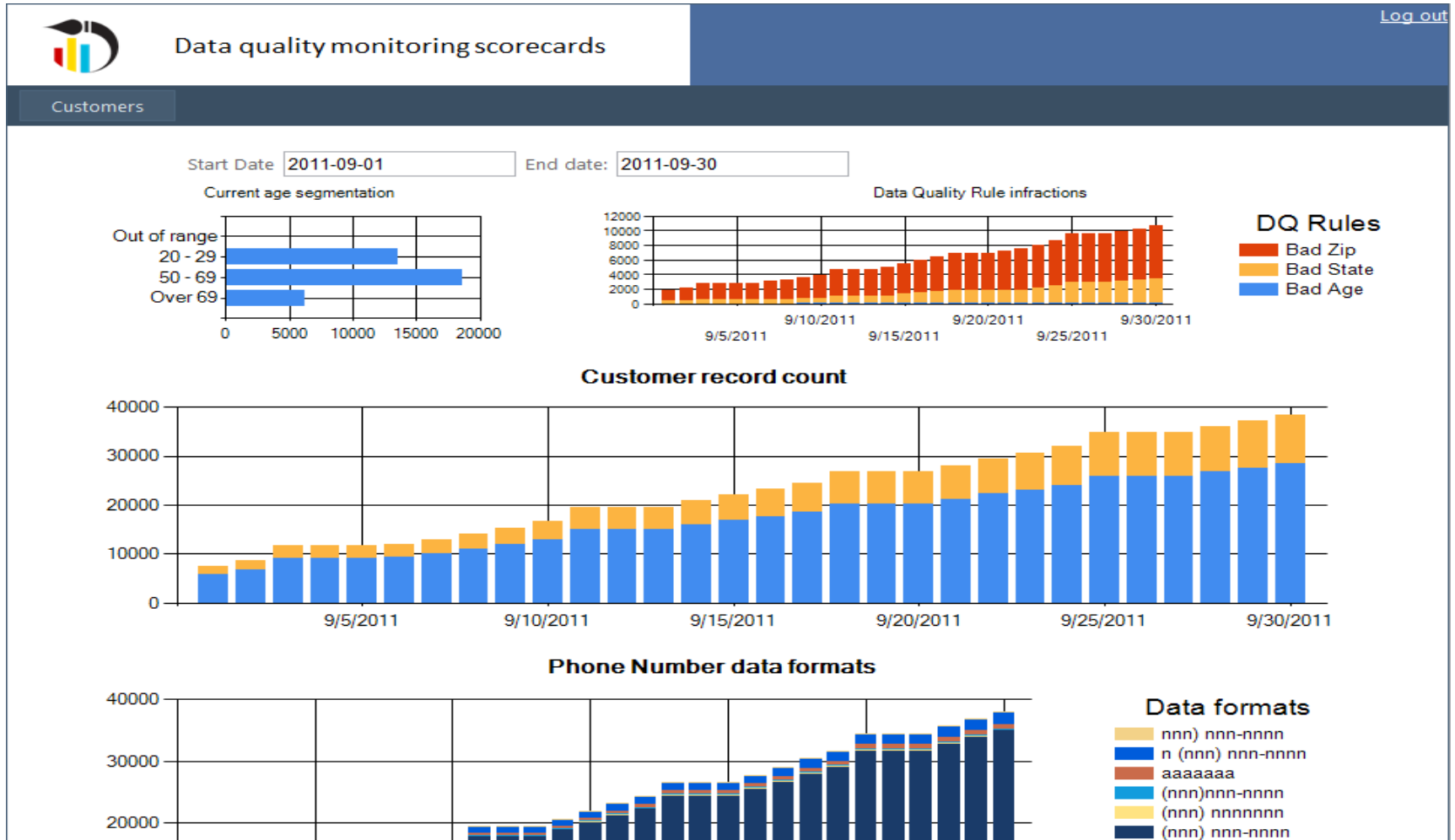


# SCORECARD EXAMPLES

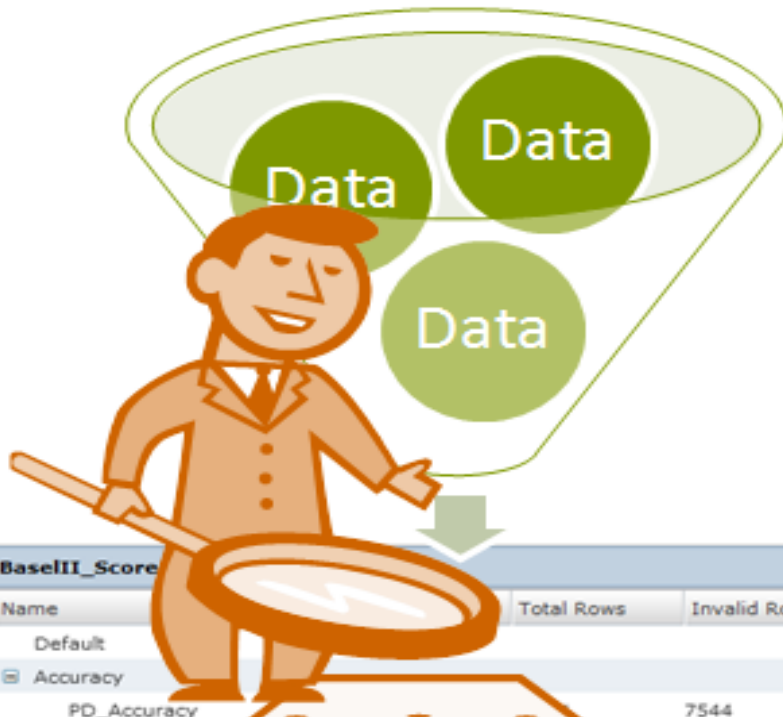
## WHAT AM I LOOKING FOR?

<b>Competitive Analysis Data Context</b>	<b>YTD Data</b>	<b>Last Year</b>	<b>Entire Data Set</b>
<b>% Records competitor data present for</b>	80% (Of Total)	60% (Of Total)	20% (Of Total)
<b>% of data with data usable for</b>	70% (Of Total)	55% (Of Total)	10% (Of Total)
<b>% Data needs cleaning</b>	10% (20K Records)	5% (44K Records)	10% (400K Records)
<b>Region with highest % of usable Data</b>	Western US (95% Of Total)	Eastern US (80% Of Total)	Western US (48% of Total)
<b>Product with highest % of usable Data</b>	Sensors (90% Of Total)	Recorders (89% Of Total)	Printers (55% Of Total)
<b>Vertical with highest % of usable data</b>	High-Tech (98% Of Total)	High-Tech (85% Of Total)	Health Care (49% of Total)

## WHAT'S MISSING?



## GETTING BETTER



“How far along is your organization in the data quality process?”

BaselII_Score						
Name	Total Rows	Invalid Rows	Score		Score Trend	
Default			-			-
<input checked="" type="checkbox"/> Accuracy			0	<div style="width: 10px; height: 10px; background-color: red;"></div>		→
PD_Accuracy		7544	63.47	<div style="width: 75%; height: 10px; background-color: red;"></div>		→
LGD_Accuracy	20651	43	99.79	<div style="width: 99%; height: 10px; background-color: green;"></div>		→
EAD_Accuracy	20651	22	99.89	<div style="width: 99%; height: 10px; background-color: green;"></div>		→
Currency_Accuracy	20651	653	96.84	<div style="width: 96%; height: 10px; background-color: green;"></div>		→
<input checked="" type="checkbox"/> Completeness			98.64	<div style="width: 98%; height: 10px; background-color: yellow;"></div>		→
cust_completeness	20651	22	99.89	<div style="width: 99%; height: 10px; background-color: yellow;"></div>		→
currency_completeness	20651	541	97.38	<div style="width: 97%; height: 10px; background-color: yellow;"></div>		→
<input checked="" type="checkbox"/> Consistency			0	<div style="width: 10px; height: 10px; background-color: red;"></div>		→
Country_Consistency	20651	0	100	<div style="width: 100%; height: 10px; background-color: green;"></div>		→

# Building Effective Scorecards

## ALMOST THERE

B & B Systems

Welcome Back, John | Your last Dashboard update - Today 3:15 PM

All Four Perspectives
Financial
Customer
Process
Learning & Growth

MY BALANCED SCORECARD

Financial			Customer		
KPI	Value	State	KPI	Value	State
Revenue (Quarter, K\$)	1316	<span style="color: green;">■</span>	New \$1M+ Accounts (#/Q)	27	<span style="color: green;">■</span>
Profit Margin (%)	7.3	<span style="color: green;">■</span>	Satisfaction (Score)	4.6	<span style="color: green;">■</span>
EVN (%)	4.2	<span style="color: green;">■</span>	Retention (%)	64	<span style="color: orange;">■</span>
DSO (days)	124	<span style="color: yellow;">■</span>	Platinum Customer (%)	23	<span style="color: red;">■</span>

Internal Process			Learning & Growth		
KPI	Value	State	KPI	Value	State
On-Time Delivery (%)	87	<span style="color: yellow;">■</span>	Employee Retention (%)	87	<span style="color: green;">■</span>
Quality (First Pass Through)	92	<span style="color: green;">■</span>	Employee Satisfaction (Sc)	4.7	<span style="color: yellow;">■</span>
eProcurement \$ (%)	23	<span style="color: green;">■</span>	Days of Training (Days)	2	<span style="color: red;">■</span>
Field Service Response	8	<span style="color: green;">■</span>	My Dashboard Deployment (%)	37	<span style="color: yellow;">■</span>
Supplier On-Time (%)	96	<span style="color: green;">■</span>			
Inventory Turnover (Days)	32	<span style="color: yellow;">■</span>			

Days Sales Outstanding: East



Project Firestorm



- Strategy Map**  
 View and modify strategic goals and dependencies
- Regulatory Compliance**  
 Monitor FTC compliance status by area
- Sales**  
 Simulate sales scenarios by region and product category
- Employee Remuneration**  
 Study remuneration in relation to goal and industry average
- Project X**  
 View Status

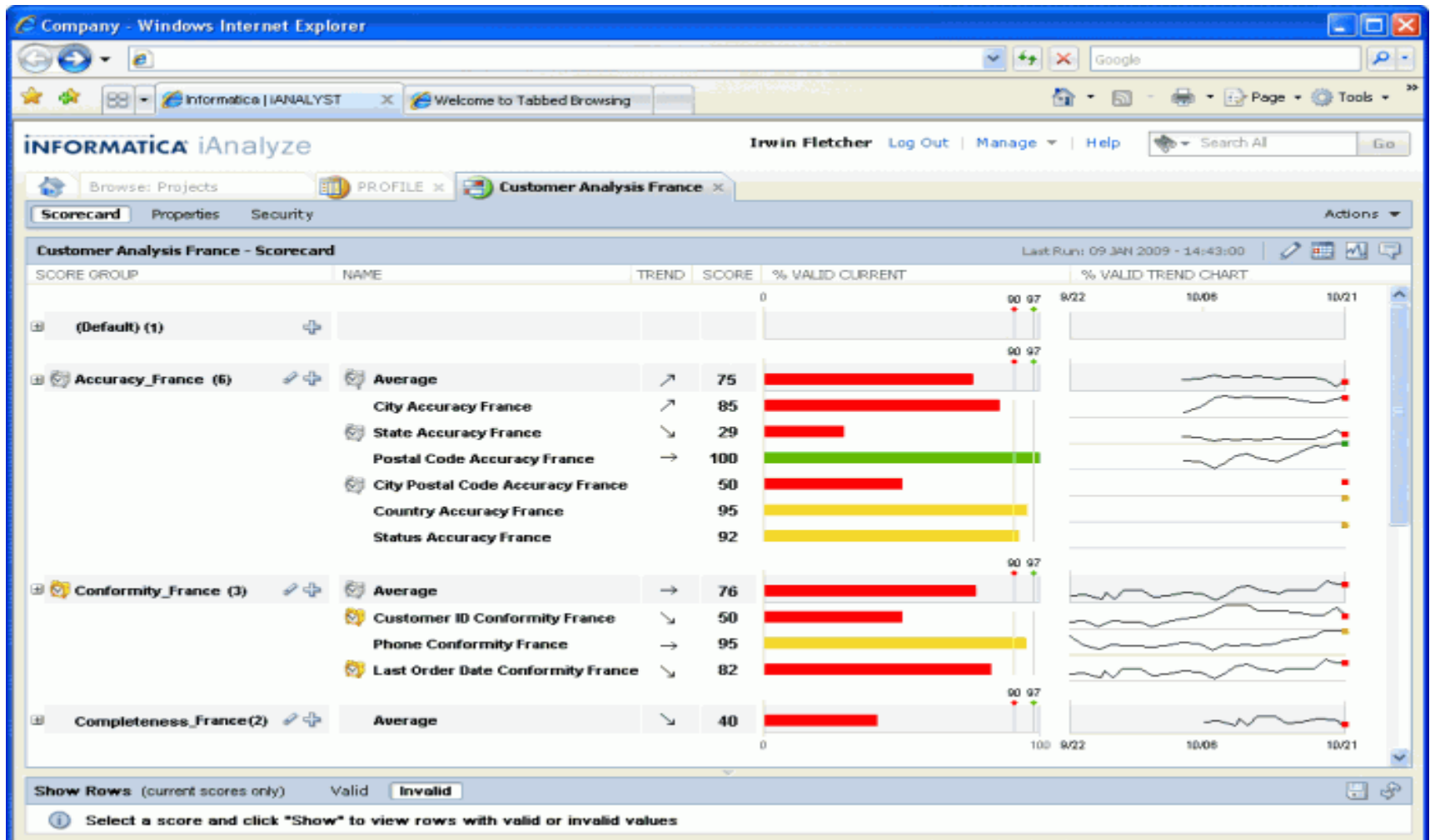
Alerts

Title	Date	delete
Sales estimate for product line Evital 25% below target	01-Nov-02	
Abnormal (cashflow/revenue increase) ratio for District West	12-Dec-02	
Self-service usage 20% below estimate	08-Dec-02	

Novell.  
 Secure Enterprise Dashboard Solution

# Building Effective Scorecards

BINGO!!!!!!!



## TIP AND TECHNIQUE REMINDERS

- ✓ Understand the why
- ✓ Remember your audience
- ✓ Define your objectives
- ✓ Keep the design simple
- ✓ Focus the scorecard on measurement
- ✓ Measure to the objectives to the Targets

## QUESTIONS?



# THANK YOU!

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