

OPERATIONAL DASHBOARDS



EDUCATION GOALS

- Design and implement a system of dashboards adapted to the specific needs of the business
- Use, analyse and update your dashboards
- Identify the relevant indicators for the different types of dashboard (sales, financial, HR, etc.)
- Monitor your business using an operational dashboard

WORD FROM THE AUTHOR – Gilles BARJHOUX

« A dashboard is not only a performance measurement tool. It is first and foremost a management instrument that helps the manager, and all of his or her team members, to make decisions and to manage risk in times of uncertainty.

I have developed this course to unlock the secrets of the dashboard: from its methodology to its use, not forgetting how to build the dashboard and keep it up to date.

Because "By planning we make better decisions, and by measuring we make better leaders." »

Level

Initiation

4
Modules

2 H



M141 – OPERATIONAL FUNDAMENTALS

Objectives education

- Be able to define and implement a dashboard
- Know how to anticipate, manage and adjust your company's business activity using dashboards

Word from the author

« Every business needs to balance its books to survive in the long run. This objective concerns everyone in the business. However, forecasts may not be realistic (if sales growth is slower than planned, or expenses mount up, for example). Businesses therefore need to prepare new forecasts taking into account their actual data in order to avoid unwelcome surprises, particularly in terms of cash flow. Companies need to prepare weekly or monthly dashboards. These documents provide valuable indicators about the company's business activities. They also help the company to anticipate and manage high-risk situations. »

Chapters

- Why do we forecast the company's financial situation?
- Role of the dashboard

Quiz

M142 – CONSTRUCTING A DASHBOARD

Objectives education

- Know how to build an operational dashboard
- Identify the relevant indicators according to the type of dashboard (financial, sales or HR etc.)
- Know where to find the information needed to prepare a dashboard
- Know how to update a dashboard

Word from the author

« An operational dashboard is based on setting relevant, quantified objectives. To do this, we need to find indicators adapted to the business. But how? In this module, find out how to prepare a relevant and operational dashboard. »

Chapters

- Choosing relevant indicators
- Different types of indicator
- Qualities of a good dashboard
- Data sources for the dashboard

Quiz

M143 – DASHBOARDS AND COMPANY STRATEGY

Objectives education

- Understand the methodology required to design operational dashboards
- Know the errors to avoid.
- Understand the link between the dashboard and the company's strategy

Word from the author

« If you design your dashboard without using appropriate methodology, it can be difficult to understand, too heavy or misaligned with the strategy of the company or department concerned.

In this module I suggest several best practices and, most importantly, the errors to avoid when preparing your dashboards. »

Chapters

- Methodology
- Errors to avoid
- Dashboards and strategy

Quiz

M144 – ANALYSING AND USING A DASHBOARD: BUSINESS EXAMPLE (ACCESS'MODE)

Objectives education

- Implement relevant dashboards
- Know how to analyse and use dashboards

Word from the author

« We will implement financial, sales and HR dashboards using a case study.

We will also learn how to analyse and use dashboards to monitor the company's business activities. »

Chapters

- Financial dashboard
- Sales dashboard
- HR dashboard

Quiz