



SharePoint 2010 Performance Point Dashboard Solution

An AVYCI Solutions White Paper

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Executive Summary

The AVYCI client/partner dashboard solution opens the Business Intelligence (BI) world to all internal information users. It aligns the user's information with corporate goals and delivers the right information to the right people in a way that is most useful for individual workers to act upon. The dashboard provides a unique and compelling opportunity for every information user within the enterprise to participate in meeting strategic and tactical business goals.

This paper describes how AVYCI and its client/partner, BECU, scoped the initial Engaged Member Dashboard project and embraced some of the major challenges, benefits, and decisions made around deploying this BI dashboard.

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SharePoint 2010 Performance Point Dashboard Solution

Success 310
Success 410

About AVYCI

We are AVYCI Solutions, a US based technology consulting company known for possessing deep industry experience and achieving high customer satisfaction. We collaborate with our client/partners to address pressing challenges ranging from strategy through execution.



We provide strategic consulting, technology based application solutions, and managed services to organizations of all sizes around the world. Our service offerings are designed to help our client/partners generate revenue, increase efficiency, manage regulatory compliance, and gain the deepest insights into how business functions are performing.

Introduction

A business decision is only as good as the information backing it. At AVYCI we believe that information is what drives business at all

A business decision is only as good as the information backing it.

levels. All decisions are made based upon the information at hand. In every company, every employee should have the

ability to perform their duties with the company's strategic and objective goals clearly in mind. They should also have ready access to the information that pertains to those goals.

The release of SharePoint 2010 which includes Performance Point Services has allowed AVYCI to provide our client/partners a powerful tool to easily share performance information with their entire staff. With this solution, each employee now has the ability to make fact-based decisions based on complete, accurate, and timely information. The user can realign, pivot, and position information in order to answer the questions that are critical to doing their job well. Additionally, and perhaps most importantly, all information users can now be aligned with the same corporate goals and metrics.



Partner and Client: BECU

BECU is among the nation's largest credit unions. It is a member-



owned, not-for-profit financial institution that members can trust and experience the best value and service.

BECU membership includes both individual members and business members. With no outside stockholders, it is the members that are the highest priority and largest stake holders. Extra earnings

are returned to the members in the form of great rates, fewer fees, and a full range of financial services – from home equity loans to IRAs with terms the member chooses, to budgeting seminars and investment planning.

Problem Statement

At BECU, like many other companies, employees are asked to contribute to meeting strategic and objective business goals but they did not have detailed visibility into key information utilized for making business decisions. It was not easy to discern which actions were, and which actions were not, contributing to achieving business goals. Employees could not view their detailed information on demand to see how their individual and team efforts contributed to achieving overall company goals.

Challenges

BECU's existing enterprise intranet was deployed as an in-house SharePoint 2007 solution. The intent was to upgrade to SharePoint 2010 within the next year. With the availability of SharePoint 2010 and its Performance Point component, we chose to build a strategic goal dashboard using Performance Point on SharePoint 2010 before it was more broadly implemented across the enterprise. Performance Point would be used to source data from one or more multi-dimensional data cubes in SQL Server Analysis Services (SSAS). Performance Point was a new tool for the organization and only one analytical cube existed prior to this effort. This delivery solution would be a totally new means of presenting corporate BI data.

Challenge 1

Introduce BECU and their 1000 information users to the new technology's design and functionality while leveraging it to connect to a cube data source from SSAS and a drill down dashboard with Performance Point.

Challenge 2

Build the solution in SharePoint 2010 while hosted on a SharePoint 2007 platform and seamlessly integrating the two environments. After considering the costs and benefits of several options we decided against mimicking the 2007 controls, look and feel in the 2010 environment, and also against displaying the 2010 environment within iframes. We chose instead to allow users to easily link from within their familiar 2007 environment to the new 2010 dashboard page. This choice would later enable a simple transition into BECU's future 2010 environment by selecting a new master page that matched BECU's standard 2010 page.

Challenge 3 Build a more robust environment for developing and testing SharePoint dashboards than SharePoint natively provides. AVCI developed two methods consistent with generally accepted best practices for promoting new dashboard functionality from development, through pre-production, to the production environment: one method for full updates, and a second method for partial updates.

Challenge 4 Design and implement a solution that non-technical personnel could maintain going forward with little or no assistance from internal or external IT resources. *No developers are needed beyond the initial setup.* This precluded the use of more complex custom web development. The AVYCI dashboard solution requires no IT support beyond the initial setup.

Challenge 5 Train all 1000+ dashboard users, regardless of their level of comfort with software tools, to use the new dashboard. Users could not be pulled away from their jobs to attend classroom training. Textbook training was not practical because dashboard graphs change dynamically in response to different data views. *The dashboard can deliver the right data to the right people in the way they want to see it*

Three approaches were used to train all levels of users to quickly become productive using their new dashboards:

Approach 1: Help Text and Navigation Tips

Help text was added to each graph to explain the purpose of the graph and how that information is beneficial. Navigation tips were added for navigating within the dashboard page utilizing the Performance Point features.

Approach 2: Video Tutorials

Two video tutorials were created and added to the dashboard page to give the user options for verbal and visual instruction. Each tutorial is a 15 minute discussion of how to use the dashboard. The first tutorial is for the basic or beginner user and describes the basics of how to use the

dashboard. The second tutorial is for the advanced user who is used to working with data and wants to dig into the details and drill down into the data cube.

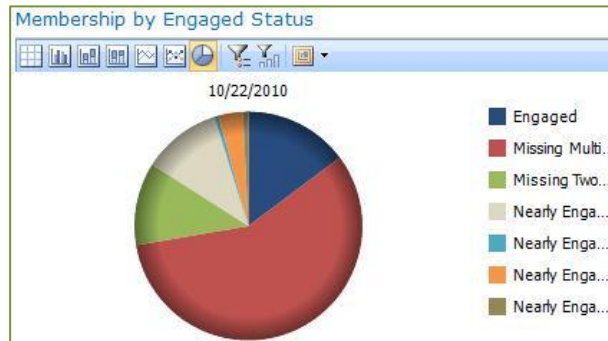
Approach 3: Train-the-Trainer

Train-the-trainer was used by introducing the dashboard to groups of users prior to implementation, who then could introduce the concepts to their team members.

Solution

The final deliverable is a fully functioning dashboard built with Performance Point in SharePoint 2010. All information users have access to the dashboard and can interact with the graphs and charts. The initial dashboard page has a set of seven reports. Each report can be opened in a larger window where the user can change the display type, data filters, data hierarchy, and time period to meet their needs and situation.

The graph or chart can be exported to Excel or Power Point to aid employees in presentations and communicating with others.



Benefit 1

Dashboard users ranging from upper management to individual team members can view information about a specific strategic goal

Engaged Members Basic Information	
Measures	As of 10/22/2010
Total Members	#####
Engaged Members	#####
Engaged % of Total	##.##%

whenever the information is required. This information aids teams in directing their actions to achieve improved results. They can see which areas are falling behind targeted goals and identify areas for improvement.

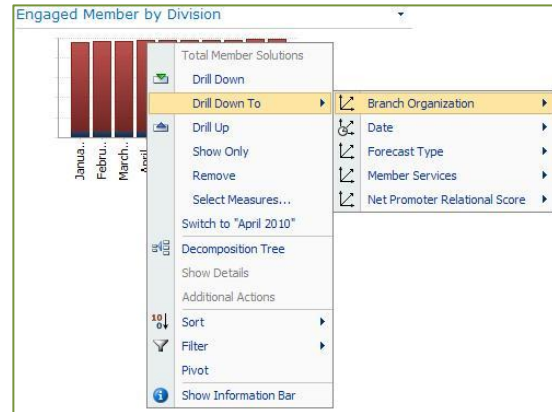
Benefit 2

The dashboard views provide all information users with a single source of truth relevant to the specific questions being addressed by the dashboard. This creates more productive communication and company-wide alignment with corporate goals.

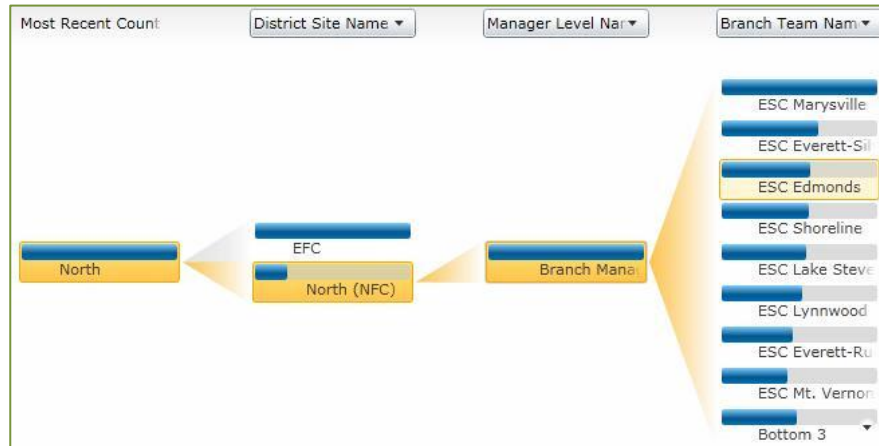


Benefit 3

All dashboard charts are dynamic and can be adjusted by the user to meet their specific needs. The type of chart or graph can be changed as well as the level of data that is being viewed. The dashboard has the



ability to drill down and through, pivot, sort, and filter data both in a graphic view and in a raw data view. Dashboard functionality also provides complex built in filtering and a decomposition tree tool for



root cause analysis. The dashboard can deliver the right data to the right people in the way they want to see it.

Benefit 4

By leveraging SharePoint 2010 and Performance Point, the dashboard was created in a user friendly environment that is easily maintained and adjusted by non-technical resources. No

*“It is easy to access the information... because everything is in one location”
-Dashboard User*

IT resources are needed beyond the initial setup. Creating new charts and editing the dashboard look and feel is only a matter of “drag and drop” and basic content editing done through web parts.

Benefit 5

By providing a variety of user training and options for self-help training, the need for costly classroom or textbook training was eliminated. A user only needs to know how to navigate an intranet page to be able to view the dashboard and then read the help text

or view a short video on how to use the information and graphs to solve business problems.

Summary

The dashboard solution that addresses the need to have business information available and visible to all information users has been successfully implemented and very well received. The

*“Love the ability to drill down into what makes up the results we are seeing”
-Dashboard Power User*

dashboard provides timely information at the fingertips of any employee in the company that is interested in seeing how the results of their efforts are benefiting the company in meeting the needs of their credit union members. The SharePoint architecture has established a solid foundation for building future cubes and dashboards for presenting the data. The method for information user access is implemented and will not require future training when additional dashboards are added to the selection.

Retrospective: One Year after Go-Live

Acceptance

Acceptance of the dashboard technology came quickly. The AVYCI led video tutorials eliminated nearly all need for additional in-person training and freed up the BI group to move on with new projects much more quickly than expected. With the dashboard(s) available to 1000+ information users there were only 4 submitted questions on functionality in the first month and only 1 submitted question after that.

The feedback continues to be positive and employees appreciate being able to gain a deeper view into the data behind the company's Key Performance Indicators (KPI's) and their goals via self-servicing.

SharePoint 2010 Migration

In mid-2011 BECU started transitioning its intranet sites from SharePoint 2007 to SharePoint 2010. Due to the strategic choice to develop in SharePoint 2010, the Engaged Member dashboard became one of the first sites to get the internal BECU look and feel treatment. The company wide master page was applied to the site and the dashboard got its new look in just a few clicks. The ease with which the dashboard was integrated with all the new SharePoint 2010 sites validated the choice to develop the dashboard in SharePoint 2010.

New Enhancements

In response to ongoing user feedback we implemented two significant enhancements to the Engaged Members Dashboard:

1. A cache warming technique was implemented to speed up displaying the graphs and charts after a data cube has been refreshed with new data.
2. The speed and reliability of deploying Performance Point Parts was increased by setting up a simple new process that leverages Performance Point Workspaces.

Observed Successes

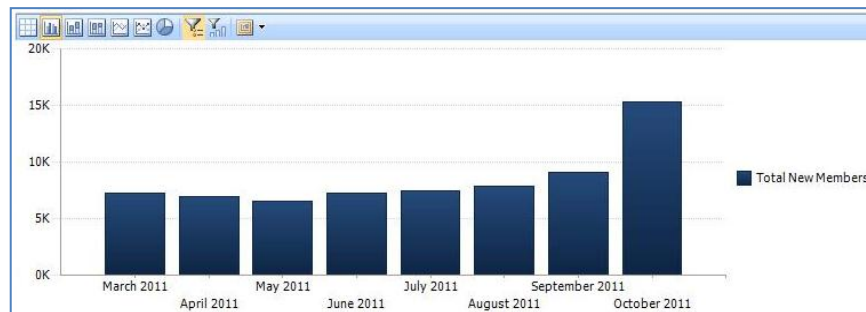
Since the dashboard project was handed over to the BECU users there have been a wide range of successes both large and small. The following are a sampling of these successes that have been observed.

Success 1

The business sees great value in the ease with which the KPI metrics and announcements can be updated. By leveraging SharePoint, BECU can modify simple lists in order to update announcements on the Dashboard as well as their KPI values. These changes can be made within minutes by the “right” business stakeholder instead of requiring a highly technical person to make web page changes.

Success 2

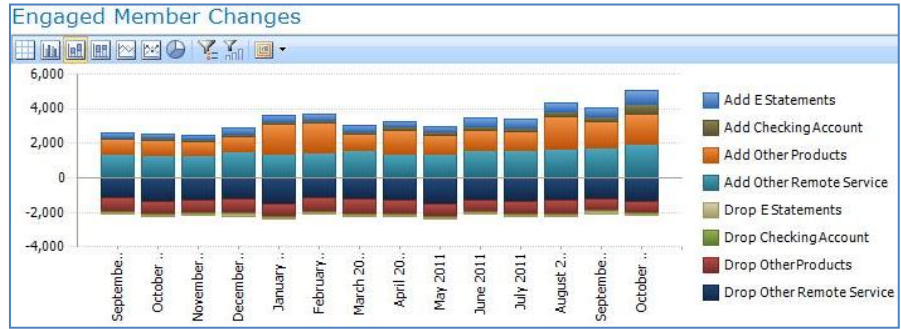
Newly imposed fees at large national banks cause an influx of new members at BECU. When analyzing the time frame in which some of the larger US banks announced and implemented new fees, an observer can see a direct correlation with “spiked” increases in new member enrollment levels. Naturally, this prompts questions around how to best serve these new members’ specific needs and how to get them engaged quickly in consuming BECU’s many offerings and services.



As a result of this project’s organization of data (i.e. architecture), BECU stakeholders determined that new members were becoming rapidly engaged. This ultimately meant that additional in-house resources were not directly required for new member onboarding. This resulted in avoiding major costs from needlessly investing in

unnecessary additional resources which were being considered to promote faster engagement by new members.

As can be seen in the chart below the 4 major categories that define an engaged member (E-Statements, Checking Accounts, Other Products, and Remote Services) have increased greatly over the same time period while those same products are dropping at the same rate as usual.



Success 3

Member Engagement percentages have reached new heights. As a result of the influx of new members and increased marketing aimed at getting members engaged, BECU has reached a new high in the percentage of engaged members confirming that BECU is on the right track with their campaigns and services. It is AVYCI's view that BECU's new deeper capability to understand member touch points is an example of BI at its best.

Measures	As of 10/30/2011
Total Members	###,###
Engaged Members	###,###
Engaged % of Total	14.90%

Success 4

BECU is meeting its lofty goals in one of the most critical KPIs related to member satisfaction and word-of-mouth promotion of the credit union. This quick KPI view allows the dashboard users to quickly see where the company is at in meeting their goals. These types of KPIs are very popular with the basic dashboard users in giving a snapshot of how the company is progressing towards its

	As of	Where We Are	Where We Should Be Now	Target by 12/11	Max by 12/11
Net Promoter Score - Relational Score	What's This? Q3/2011	## %	## % ●	## %	## %

goals.