

## Session 3.12 Dashboards 101

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### White Paper Title: Are Facility Professionals Using Dashboards?

*This white paper is intended to be a background supplement to the presentation Dashboards 101 and does not include much of the content to be presented.*

Dashboards are *decisions support system* tools that have been used in the business community since the 1960's. The objective of a Dashboard is to create a platform for sharing and utilizing data. Making the data smart and allowing decision-makers to make smarter choices.

In the industry, the newest generation of **Dashboard tools**, are described as pure Business Intelligence (BI) (Fuchs, 2007). These systems have come to play a pivotal role in how data is interpreted and utilized to make intelligent business decisions.

In the Facility Management community, the value add of Dashboards are just beginning to be realized. If your organization collects data (and we know facilities departments typically collect a lot of information) then funneling that data into a clear and concise Dashboard format can create an effective tool for communicating business objectives to senior management. Dashboards often speak the language of senior management; FMs who adopt these tools may be more effective in communicating with senior management.

Dashboard tools come in many shapes and sizes and often need to be customized to an organization's mission and goal. They can be exceptionally comprehensive or focus on defined objectives. Dashboards can be created using simple spreadsheet software or developed in specialty Dashboard or customized software (Figures 1 and 2).

Company Names Dashboard							
Perspective	Goal/Objective	Status	Key Metrics	Current Month	2007 YTD	Prior Year 2006	Comments
<b>PRODUCT</b>							
1. Provide highest value. Breakdown of product costs on a quarterly/annual basis.		🟢	\$ spent on product			\$ 805,000	
		🟢	\$ spent on Attic stock			\$ 235,000	Equates to 29% of Total Product
		🟢	\$ spent on shop work			\$ 11,855	
		🟢	\$ spent on shipping			\$ 4,745	
		🟢	Value of product shipped			\$ 99,300	Into PA
		🟢	Value of product shopped			TBD	
		🟢	\$ cost to manage installed furniture base per crew member annually			\$ 66	
2. Evaluate trends in product		🟢				Professional - 43%	includes IT, SECT
		🟢				Associate - 41%	includes associate plus
		🟢				Private Office - 3%	
		🟢	Work space types (by size)			Supervisor - 4%	includes manager, full size secy
		🟡				Contractor Work Zone - 8%	Increase 62% (633 spaces) since 1/2005
		🟡				Other - 1%	includes woodtronic, 455 DPD
		🟡	Top products ordered			Seating \$219K; WK Accessories \$60K; Private Office \$49K	Seating in 2005 was \$410K, consider evaluating future needs

Figure 1 Excel Dashboard



Figure 2. iDashboard Software

## FMs ARE USING DASHBOARDS

AFD Facility Planning conducted a 10-question survey of facility professionals to get a pulse on who in our FM community is using Dashboards, what they are using them for and the technology they are using to create them. A total of 89 FM professionals completed the survey, representing over 15 different industries throughout the United States.

## RESULTS

The results of the survey tell a logical story. FM professionals are collecting a lot of data -but may not be utilizing the data to its full advantage.

Several years ago the FM community was talking about the need to do a better job of tracking and measuring Key Performance Indicators (KPI) and Metrics. The good news is we are overwhelmingly doing that now– 89% said ‘Yes’, they are tracking KPI/metrics (Figure 3.).

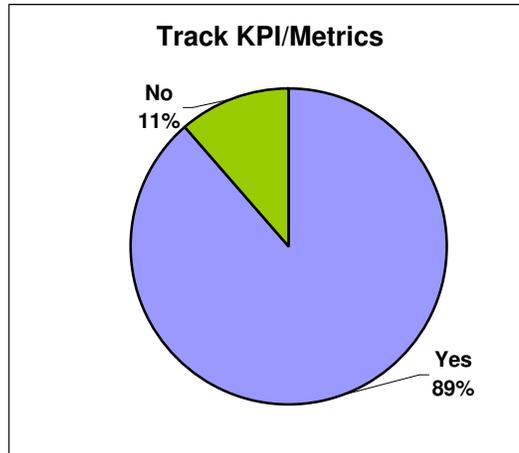


Figure 3.

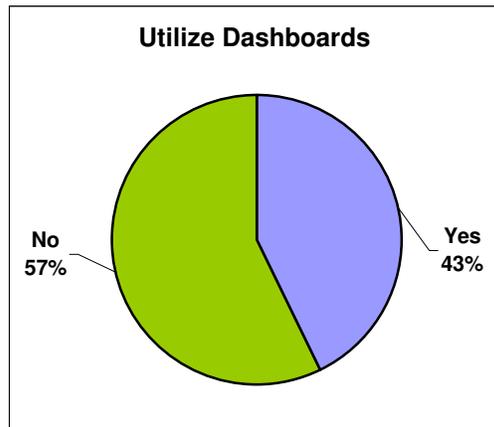
And they are measuring and tracking KPI/Metrics in the following primary categories:

Primary KPI/Metric Categories Tracked	
15%	Project Costs (e.g. Design, Construction, Installations)
14%	Cost/SF (e.g. Maintenance, Operations, overall Facilities)
12%	SF/Person
11%	Response Times (e.g. Project or Work Order Cycles)
10 %	Space Utilization/Efficiency
10%	Service Provider Efficiency (e.g. Costs, Products, Timeliness)
10%	Churn/Occupancy/Move Rates
9%	Costs/Person (e.g. Furniture, Space, Moves)
8%	Labor Costs

We also asked if they were regularly conducting customer satisfaction surveys (a great way to collect performance data) and not surprisingly 72% of responder’s organizations are utilizing surveys for process improvement, quality assurance and to stay on top of the needs of their organization.

Clearly FM professionals got the message that metrics are critical components of managing and improving their processes. Tracking KPIs/Metrics make you accountable for the results – if you commit to measuring it, you will do it.

With all of the data being collected out there, the next question is - how is that data analyzed and shared and is it being used to its best potential? What is the point of using resources to collect information if you are not going to use it and use it well?



One way to make data super smart is to convert that data, in the form of measurable objectives and metrics, into a Dashboard tool. Just like the dashboard of your car is designed to provide you with information to make quick tactical and strategic decisions a Dashboard tool visually displays your critical data to allow for intelligent decision making.

Our survey indicates that 43% of respondents are in fact utilizing some type of Dashboard tool for organizing and communicating their data (Figure 4.). These FM professionals understand the value of this tool and its ability to help them communicate essential information.

Figure 4.

FMs currently rely either on Excel (48%) to create their Dashboard tool or a variety of customized/specialty software (52%) for Dashboard documents and interfaces. There are also a number of highly sophisticated software companies that create integrated dashboards with terrific graphic interfaces (e.g. iDashboard, LogiXML, Corda), although most FMs are not utilizing these systems yet. (Refer to Figure 2 for an example or check out their websites).

A number of respondents indicated that they utilize a Dashboard reporting feature found in their IWMS (Integrated Work Management Systems), CAFM, CMMS or BMS software (e.g. Archibus, FM Systems, Maximo, Tririga 9, Sightlines, Vision). This might suggest that FM based software companies have really keyed into this growing need for stronger and smarter reporting mechanisms.

For those who have not yet gotten on the Dashboard bandwagon, 59% indicated they might be interested in learning more about this business intelligent tool and how it might apply to their world.

The data from this survey suggests that more sophisticated business tools are truly becoming more common place in the facility professional's 'kit of parts'. FMs are indeed speaking the language of senior management and becoming integral to pivotal dialogue in their organizations.

## IN THEIR OWN WORDS

The FM professionals who regularly utilize Dashboards had a lot to say about the value and cautions of using this tool. Those who use Dashboards see them as effective and valuable tools and recommend everyone consider incorporating a Dashboard into their reporting process. Here is a sampling of their words:

- Dashboard documents can be a very effective tool; however I think they have to be easily customizable to allow you to make modifications depending on your audience. For

example, a Mid-level manager will not necessarily be interested in the same dashboard metrics as a Senior/Executive Manager.

- Dashboards are a good way to communicate outside the facilities department regarding performance.
- Dashboards are a great way of getting a good pulse check on how well what you are measuring is performing. I have found that in order to be effective the measurements must be both objective and subjective. But as always must be achievable. And with any data, "garbage in...garbage out" so it must have data integrity, with an allowable percentage or margin of error.
- Dashboards are an essential tool that enables the best decisions and continuous improvement processes.
- Excellent tool to ensure everyone is working from the same page
- Great easy tool if designed easy to input data.
- Great idea and one that should help FM's "promote" the important achievements through metrics and simple dashboard displays. Will also create more awareness of measured/displayed metrics and potentially positively impact them.
- Great tools for the industry. Would recommend every company utilize such a tool.
- I have seen the dashboard used in other organizations (The Army has been doing it since pre-PowerPoint days - using paper.) It is very useful but care needs to be taken in interpreting data that is "snapshot" vs. looking at trends.
- I love using dashboards. Unfortunately, I work for the State and the efficiency ratio of thru-put and thought process are not utilized.
- I think they're crucial for communications about supporting our value to the organization.
- It must be able to work within a company's intranet environment yet be password protected, or ID login protected.
- KPI's need to be measured easily
- Managing with "data"
- Our Facilities Director is becoming more metrics-minded so I feel confident we will utilize the dashboard function of Maximo when we migrate to the newer version.
- The full utilization of an effective dashboard front end is probably one of the best investments a facilities group can make. I think of Company A for example which has been successfully using one for years. It enables the FM to quickly and accurately speak to real time measurements which are relevant to current senior management concern. This adds significant value add from his group to the company and enhances overall efficiencies of operation. It also demonstrates to senior management that the group is the best steward to the assets for which they are responsible as possible and therefore protecting shareholder value long term - that is the bottom line. Every company should have some kind of dashboard system to truly manage their facilities properly.
- They are a great tool to manage with....cannot imagine working without it. I use it every day!
- To be successful, the dashboard must be easily assembled with reliable data that is relatively easy to capture.
- Very useful. Ours will be a combination of a simple stop light version (using Excel), web based data (from a 3rd party vendor) and PowerPoint to facilitate merging metrics w/other info.
- We also use ARCHIBUS as our CMMS and are going to transition to the web based version in the next Fiscal Year where we anticipate using dashboard style access to for our client base to status work

## **BOTTOMLINE**

So the answer is Yes, facility professionals are using basic Dashboard tools to manage their data and communicate to senior management. They see Dashboards as a streamlined reporting process to keep them focused and on target with theirs and the organization's goals and

objectives. The most effective Dashboards are those that are easy to maintain and share and ultimately must assist in helping to make intelligent business decisions.

*In the upcoming presentation, we will further this discussion and talk about how to actually build a Dashboard; how to define your goals and objectives; how to create a Dashboard tool utilizing a simple spreadsheet and how to populate your Dashboard with the right metrics and data.*

*For a downloadable PDF copy of the survey results, this whitepaper or dashboard templates go to [www.afdfacilityplanning.com](http://www.afdfacilityplanning.com)*

#### *Cited Resources*

iDashboards.com *Insurance Example*

Fuchs, Gabriel. Whitepaper, Dashboards: the New Face of Business Intelligence. December 2007.