

# Build Your IT Dashboard Concierge Service Training Package

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# IT Dashboard Review

## What will we do?

- Review the Members IT Dashboard

## What is the benefit for the member?

- Ensure their dashboard holistically covers both their strategic and operational objectives, alignment is clear and recommend actions to improve usability and actionability.

## What is our competitive edge?

- Holistic COBIT-aligned metric recommendations that cover all areas of operating a modern IT organization. Also moves beyond the creation of the dashboard itself and reviews how it is used to drive performance.

# Help members succeed with our IT dashboard review service

## Member benefits:

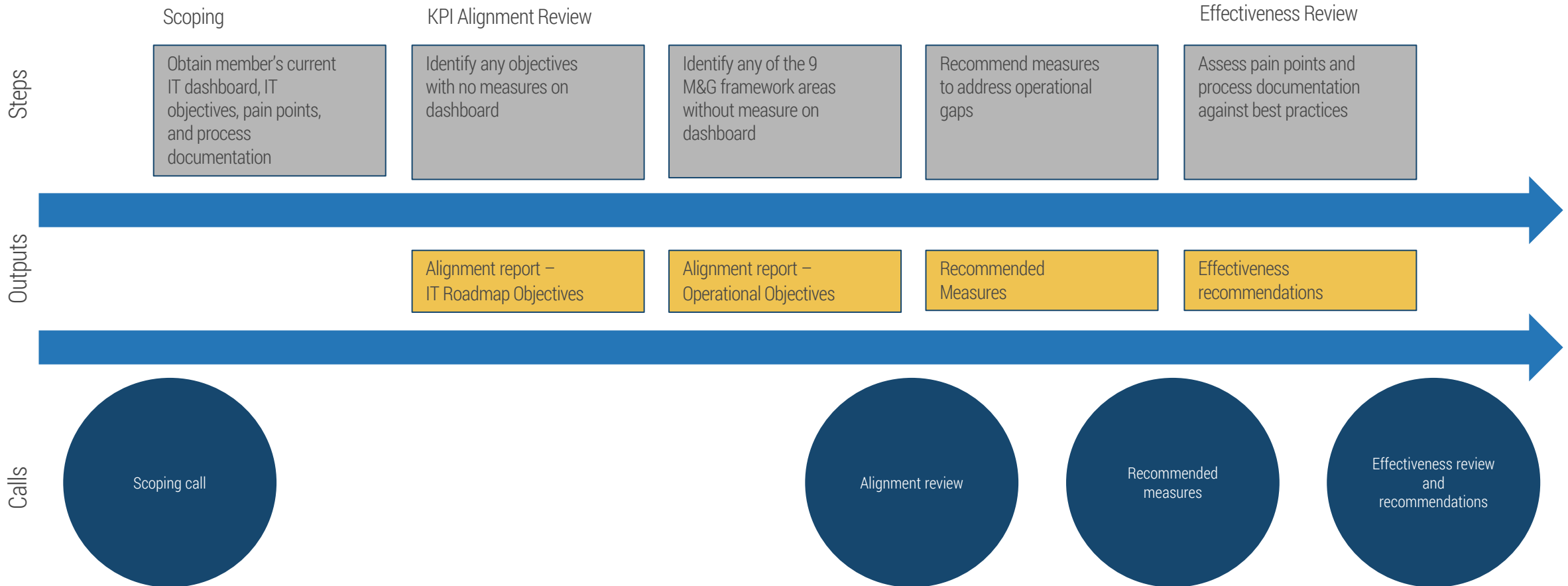
- Demonstrate alignment with business goals
- Ensure holistic view of IT health
- Get recommendations on missing KPIs
- Get recommendations on usability
- Review overall maturity of your KPI use to drive performance
- Follow-on experiences to improve initiative execution



# Call progression

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# IT Dashboard Review – High-level process



# Call Progression Sample

Below is a projected sample of calls for an IT Dashboard review

Call Number	Details
1. Scoping	Provide explanation for methodology. Procure IT Dashboard documents, IT Objectives, KPI review process documents if they exist. Set expectations with the member on the level of depth for the IT dashboard review. Give yourself enough time to review the documents before the next call.
2. Alignment review	Review the alignment reports for IT objectives and Operational Objectives. Discuss coverage of current KPIs and visibility of alignment to organizational goals.
3. Recommended measures	Discuss the recommended measures from the IT metrics library and the rationale for each. If they need recommendations on how to build KPIs for company specific strategic objectives, refer them to a GI.
4. Review Effectiveness assessment and recommendations	Go over the interpretation of the assessment criteria and your scoring. Review the recommendations and discuss tactics to drive up maturity.

# Estimated time commitment



Scoping call. Request existing dashboard and processes

1 Hour



Alignment report – IT roadmap objective review

1 Hour



Alignment report – Operational objective review + recommended measures

2 Hours



Alignment review call

1 Hour



Recommended measures call

1 Hour



Effectiveness assessment + recommendations

2 Hours



Effectiveness recommendations call

1 Hour

**Note: If the member cannot produce an IT Dashboard or IT objectives document, turn the engagement into the “Build Your IT Dashboard” GI.**

**Save yourself the trouble of reviewing a verbal document.**



**Note: If the member cannot produce process documentation for their KPI review, use judgment or warn that the effectiveness recommendations will be based on assumptions.**

**This may require an additional call to work through the effectiveness checklist.**

# KPI Alignment Review

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# IT Dashboard Review Concierge Service KPI Alignment Review

The IT Dashboard should be aligned with IT objectives and cover all areas of IT that should be managed



# KPI alignment report - IT Roadmap Objectives

Replace example objectives and observations with actual member data. Specifically focus on ease of identifying alignment and expect leading indicators.

IT Objective	KPI exists	Alignment is clear	KPI Observations
Drive adoption of self-serve portal	No	No	No KPI exists on dashboard related to this objective
Allow all staff ability to work from home	Yes	No	KPI only covers hardware, no mention of software capabilities
Transition all staff to Office 365	No	No	No KPI exists on dashboard related to this objective
Operational Excellence	Yes	No	Actions to be taken to achieve operational excellence is unclear

# KPI alignment report - Operational Objectives

Replace example objectives and observations with actual member data. Focus on KPIs existence, the ease or identifying alignment and whether it is a leading indicator

IT Capability	KPI exists	Alignment is clear	KPI Observations
Strategy and Governance			No KPI exists on dashboard related to this objective
Financial Management			Financial measures exist but are trailing indicators not tied to cost saving goals
People and Resources			No KPI exists on dashboard related to this objective
Service Planning and Architecture			No KPI exists on dashboard related to this objective
Infrastructure and Operations			Multiple operational KPIs exist but there is no mention of objectives or goals
Security and Risk			No KPI exists on dashboard related to this objective
Applications			No KPI exists on dashboard related to this objective
PPM & Projects			Only one project listed, and training indicator of project completion listed
Data and Business Intelligence			No KPI exists on dashboard related to this objective



# KPI Effectiveness Review

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# Effectiveness assessment criteria

1. Identify gaps in best practices for dashboard effectiveness

<ul style="list-style-type: none"><li><input type="checkbox"/> Metrics are tracked at operational team level</li><li><input type="checkbox"/> Metrics at operational level roll up to organizational level</li><li><input type="checkbox"/> Metrics are transparent at all levels of the organization</li><li><input type="checkbox"/> Drill downs are available at organizational level</li></ul>	Basics
<ul style="list-style-type: none"><li><input type="checkbox"/> Trending data is available for KPIs</li><li><input type="checkbox"/> KPIs are clearly aligned to team goals</li><li><input type="checkbox"/> Team goals are clearly aligned to organizational goals</li><li><input type="checkbox"/> Organizational goals are clearly linked to value creation</li><li><input type="checkbox"/> KPIs have an owner responsible for data collection, verification, and performance</li><li><input type="checkbox"/> Data is represented in an easy-to-understand graphical way (charts/indicators)</li><li><input type="checkbox"/> Target ranges are set for each KPI</li></ul>	Aligned
<ul style="list-style-type: none"><li><input type="checkbox"/> KPIs are reviewed on an appropriate review cycle (frequency = agility)</li><li><input type="checkbox"/> KPI reviews are clearly leading to remediation action</li><li><input type="checkbox"/> Remediation progress is clearly tracked</li><li><input type="checkbox"/> Effectiveness of measures and remediation are measured</li><li><input type="checkbox"/> Dashboard processes are clearly leading to improved performance</li></ul>	Lead to action
<ul style="list-style-type: none"><li><input type="checkbox"/> Data collection for <i>institutional KPIs</i> is automated</li><li><input type="checkbox"/> Visual management techniques exist to draw attention to KPIs deviating from standards</li><li><input type="checkbox"/> Real-time data is available for review between review cycles</li><li><input type="checkbox"/> Full transparency of performance of all teams is available and actively shared across the organization</li></ul>	Institutionalized



# Effectiveness Recommendations

Assessment on effectiveness of dashboard

Denote items missing from each level of maturity.  
Colour levels G=mostly done, O=partially done, R=mostly not done



**Basics tracked**

- Most of the basics are covered.
- Drill downs from organizational level could be made easier to perform

**Aligned**

- Trending data not graphically represented
- Alignment between team and organizational goals could be better represented

**Lead to action**

- KPIs are only reviewed monthly
- Review does not lead to action
- Effectiveness of measures is not assessed

**Institutionalized**

- Data collection should be automated
- Visual management techniques should be used to draw attention to KPIs deviating from standards
- Real-time data is unavailable for review between review cycles
- No transparency of performance actively shared across the organization

# Recommended next steps

Customize recommendations  
based on observations

1. Ensure all IT roadmap objectives have a corresponding measure on the IT Dashboard
2. Ensure all IT operational objectives have a corresponding measure on the IT Dashboard
3. Ensure all items on the dashboard have alignment to goals clearly articulated
4. Address all items on the effectiveness recommendations starting from the basics up to the institutionalized items.

# Related Info-Tech Research



## Develop Meaningful Service Metrics to Ensure Business and User Satisfaction

- Reinforce service orientation in your IT organization by ensuring your IT metrics generate value-driven resource behavior.



## Use Applications Metrics That Matter

- It all starts with quality and customer satisfaction.



## Take Control of Infrastructure Metrics

- Master the metrics maze to help make decisions, manage costs, and plan for change.