Build Your IT Dashboard Concierge Service Training Package

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.

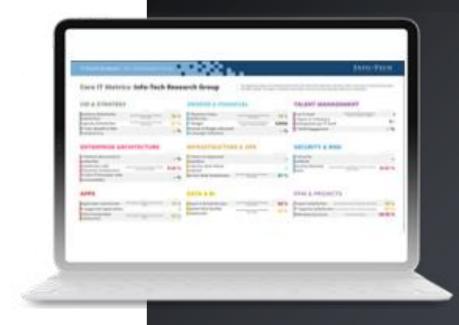
What is our competitive edge?

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:

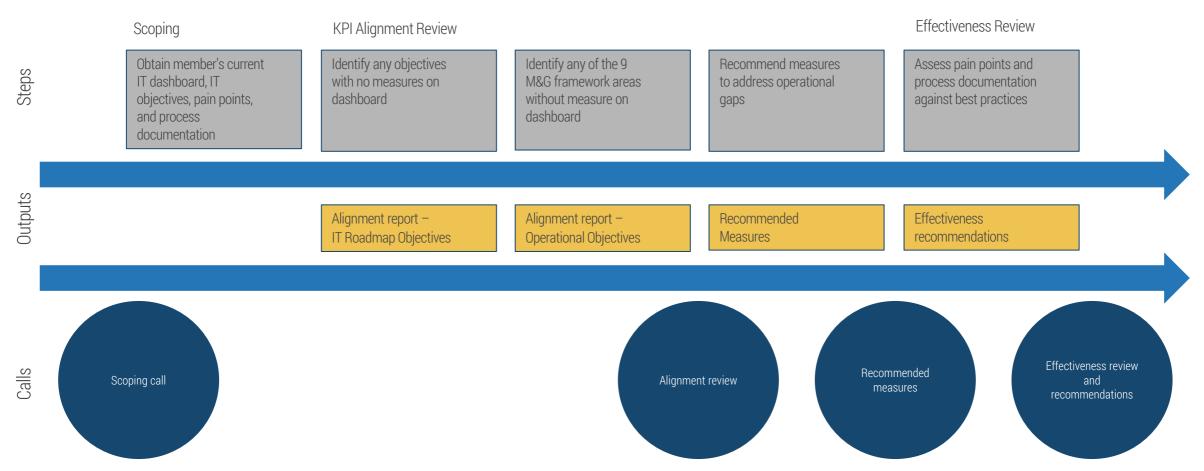
- Demonstrate alignment with business goals
- Ensure holistic view of IT health
- Get recommendations on missing KPIs
- Get recommendations on usability
- Review overall maturity of your KPI use to drive performance
- Follow-on experiences to improve initiative execution



Call progression



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

Effectiveness recommendations call

<u></u>	Scoping call. Request existing dashboard and processes	1 Hour
0	Alignment report – IT roadmap objective review	1 Hour
0	Alignment report – Operational objective review + recommended measures	2 Hours
<u></u>	Alignment review call	1 Hour
8	Recommended measures call	1 Hour
0	Effectiveness assessment + recommendations	2 Hours

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.

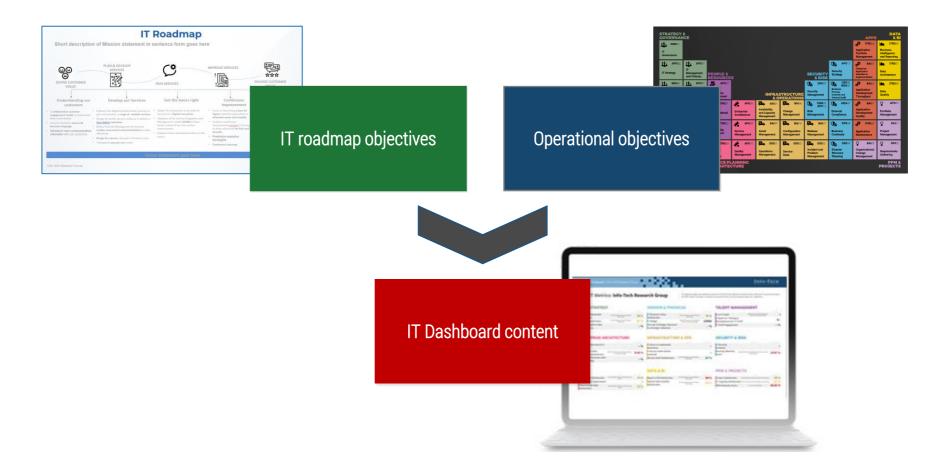
Note: If the member cannot produce process documentation for their KPI review, use judgment or warn that the effectiveness recommendations will be based on assumptions.

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

KPI Alignment Review

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 KPI exists on dashboard related to this objective	
Allow all staff ability to work from home			KPI only covers hardware, no mention of software capabilities	
Transition all staff to Office 365			No KPI exists on dashboard related to this objective	
Operational Excellence			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			

Recommended measures to address operational gaps

Practice Area	Recommended KPI					
Strategy and Governance	Percent of IT initiatives that meet or exceed value expectation defined in business case					
Financial Management	Satisfaction with the business value delivered by IT					
People and Resources	Employee Engagement Score					
Service Planning and Architecture	Overall end customer satisfaction					
Infrastructure and Operations	No additional measures required but show alignment to operational goals					
Security and Risk	Number of firewall events unresolved					
Applications	Cost per user for enterprise applications Satisfaction that solutions delivered are cost-effective					
PPM & Projects	Satisfaction with the ability of IT to prepare stakeholders for changes					
Data and Business Intelligence	Number of reports that are used for decision making					

Use IT metrics library for recommended measures for each of the 9 practice areas if needed

KPI	CSF	Goal	Owner	Data Source (typic	Baseline	Target	Action	Blueprint	Practice	Process
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KPI Effectiveness Review



Effectiveness assessment criteria

1. Identify gaps in best practices for dashboard effectiveness

Metrics are tracked at operational team level	Basics
Metrics at operational level roll up to organizational level	Da3163
Metrics are transparent at all levels of the organization	
Drill downs are available at organizational level	
Trending data is available for KPIs	A Players and
KPIs are clearly aligned to team goals	Aligned
Team goals are clearly aligned to organizational goals	<u> </u>
Organizational goals are clearly linked to value creation	
KPIs have an owner responsible for data collection, verification, and performance	
Data is represented in an easy-to-understand graphical way (charts/indicators)	
Target ranges are set for each KPI	
KPIs are reviewed on an appropriate review cycle (frequency = agility)	Local ta cation
KPI reviews are clearly leading to remediation action	Lead to action
Remediation progress is clearly tracked	
Effectiveness of measures and remediation are measured	
Dashboard processes are clearly leading to improved performance	
Data collection for <i>institutional KPIs</i> is automated	Inatitutionalizad
Visual management techniques exist to draw attention to KPIs deviating from standards	Institutionalized
Real-time data is available for review between review cycles	
Full transparency of performance of all teams is available and actively shared across the org	anization

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

Aligned

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

Trending data not graphically represented

· Alignment between team and organizational goals could be better represented

Lead to action

- KPIs are only reviewed monthly
- Beview 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

- 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.