

IBM Workplace for Business Strategy Execution And the IBM Workplace Dashboard Framework

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IBM Workplace for Business Strategy Execution and Workplace Dashboard Framework help ensure effective implementation of business strategies across the enterprise and decrease the risk of missing critical business targets. Using these products, organizations can keep their workforce aligned with overall objectives and focused on meeting common goals.

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Ronnie Espinosa is the Chief Operating Officer and Vice President of Sales for the Power Renovations Company. She is monitoring performance on a broad scope of deliverables pertaining to gross profit, market share, finance & budget targets, and customer satisfaction ratings.

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Accessing the Workplace for Business Strategy Execution home page, Ronnie can assess high priority items using a personalized Scorecard. Her strategic objectives are organized into four key areas called perspectives, including Customer, Finance, Internal Business Process, and Learning & Growth. Because the Scorecard is regularly updated with current data, she can see the status and performance trends of all her objectives and initiatives at-a-glance.

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Placing the cursor on the figures listed in the columns for each objective and initiative displays additional detail, such as due date or previous numbers.

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Ronnie is dependent on others in the organization to meet her objectives. With Workplace for Business Strategy Execution, she can show these dependencies and aggregate their status. Here, she notices that the “New Product Innovation” objective is in the red and getting worse, and decides to investigate further.

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The objective’s Status Map allows Ronnie to identify the root cause of the low performance. She sees that Franklyn Naderi’s “Product Development Release” objective is off track, and looks to see what initiatives, or actions, he is taking to remedy the situation.

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Franklyn has put two initiatives in place to reach this objective, but they are also performing poorly. If she chooses, Ronnie can take advantage of integrated instant messaging capability to discuss this issue directly with him.

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Using the Status Map, she is able to manage by exception, and can focus on the areas and owners that need her attention, see what plans are being put in place, and collaborate with colleagues, all without leaving the page.

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For any given objective, a user may want to drill down into a richer set of background information. Ronnie notices that her “Customer Satisfaction” objective has turned yellow and is not improving. She can use her Customer Dashboard to view detailed information in context to her objective.

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This dashboard was created with IBM Workplace Dashboard Framework – a powerful and flexible tool for assembling business data into a customized context based on a business role. On this dashboard, Ronnie can use the interactive graphs to view the customers who are the least satisfied with their products.

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She chooses a customer from the resulting list, and detailed information displays in the “Customer Detail” portlet, including current opportunities, recent bookings, and the latest support issues. She can even take action directly from the dashboard – sending an email or an instant message to the customer rep.

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Ronnie can customize her dashboards to suit her needs by dragging and dropping portlets onto the page. Here, she uses the content palette to deploy a web services portlet that displays data from an external data source.

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She can also easily customize individual portlets.

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In the “Opportunities by Stage” portlet, she selects the data and chart type to be represented in her customized view.

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She can dynamically configure the details page, including the threshold at which opportunities become inactive.

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The newly customized chart now displays the financial value of the “opportunities by stage” in a bar chart format. This powerful configuration capability, combined with IBM’s built-in support for role-based dashboards, ensures that each user has the right set of metrics and portlets – tailored to their specific role and needs.

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Returning to her Scorecard, Ronnie sees an alert indicating that her manager, CEO Dennis Michaels, has pushed a new “Gross Profit” objective to her. She opens the objective properties and moves to the Targets tab to see the new profit target.

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She sees that her final target is \$800,000.

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Ronnie looks closely at the milestone target schedule. She knows from past experience that the home improvement business is very seasonal. Sales are typically slow in the summer but pick up at the end of the year. She thinks that she can make the \$800,000 final target, but believes that the October profit figures are too ambitious due to anticipated expenses.

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Ronnie can easily reset the schedule to reflect this pattern. She simply moves the appropriate target point to set the new value.

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The actual profit figures are kept in a Power Renovations database. Each member of Ronnie’s team is responsible for driving a portion of the profit. The profitability of the employees she manages will be aggregated and counted toward her goal. To ensure this, she checks that the data source is set correctly.

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Next, Ronnie creates an objective for one of her direct reports.

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She finds Minh Li, the Vice-President of Asian Sales, in the company directory and assigns 30% of her own goal to Minh. Minh will assign a part of her overall goal to each of her employees in a similar manner, ensuring that everyone is aligned with corporate objectives and accountable for their specific targets.

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When the objective is complete, Ronnie pushes it to Minh, and can then submit her updated scorecard to Dennis for review and approval.

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IBM Workplace for Business Strategy Execution and the Workplace Dashboard Framework provide role-based, contextual access to information, helping organizations drive alignment and accountability, and rapidly respond to issues. These tools help companies remove ambiguities from expectations and execute plans with confidence and commitment.

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