

Dynamic Scorecard

Product Concept

(Note: This document has been “sanitized” to remove client proprietary information)

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Introduction

Dynamic Scorecard is the working title for an eSource application. Dynamic Scorecard is a comprehensive information center that provides customers with guided views into their Truck performance.

Dynamic Scorecard will be an important part of the eSource Suite. It will be a tool that will allow managers to understand their truck performance and identify areas that need attention.

Dynamic Scorecard is intended to be easy to comprehend. The views will be developed with an eye for simplicity and consistency.

To assist the customer in understanding the views, we have introduced the concept of a dynamic document. This is a document that helps the user understand how to interpret the views. The document can include text, illustrations and videos.

The concept of Dynamic Scorecard will evolve over time. The intent of this document is to share the concept for the product as it is currently envisioned with the understanding that there is a lot of thinking that will be taking place based on customer feedback and the creativity of Business Consultants.

For this reason, flexibility will be an important consideration in the design.

The Concept

Here are the key ideas in the product concept:

1. A comprehensive series of interactive views (dashboards) that display truck fleet performance. These dashboards are designed to be easy to comprehend and easy to navigate.
2. The views are organized hierarchically so the user can easily navigate among them and can drill down to get to more detail when desired.
3. Drill down can get to the vehicle (unit) or driver level so that the user can take action. For example, the user can obtain a list of drivers who have made problematic fuel purchases and can contact the drivers (or at least export the list to facilitate contact).
4. The user has the ability to set up alerts to let them know if a key performance indicator is going out of desired range. For example;

Notify me if 30 day fuel spend is [10% ▼] [more ▼] than last year.
5. Views are interactive and users can manipulate them using a standard set of controls.
6. Views always compare current performance to a user selected measure (benchmark, previous year, a specific geolocation or breakdown, possibly budget).

7. The system is configurable so that the dashboards are personalized. For example, the user can set the fiscal year and all dashboards can display the fiscal year. The user can also set default client numbers and breakdowns and can assign names to client numbers or breakdowns. This is all accomplished through a customization section.
8. The author of a view can develop a document that presents the user with guidance about how to interpret the associated view. This is a first step toward “guided analytics.” To accomplish this, the author needs to be able to script responses based on the values of data elements. This is discussed in more depth later.
9. Advanced users can add custom views by authoring them in the BI tool.

Comparisons

Comparisons are a key feature of this product. When a view is shown it would normally show current performance compared to one of the following:

- the previous year
- an industry benchmark
- a custom benchmark

The industry benchmark requires that the customer’s industry be available. The industry code is currently stored in Salesforce so provision will need to be made to acquire it.

It will be the responsibility of the consulting group to develop the benchmarks. There must be a mechanism for storing the benchmarks so they are available for use in the dashboards.

The user will be able to select a default benchmark but will be able to dynamically change the benchmark through the control panel that appears with all views.

Regional and Breakdown Comparisons

There is another type of comparison that the product will support. The comparison is between two operating units. For example, I might want to compare *branch1 vs branch2*, *branch 1 vs Truck average*.

There is a need to develop an easy and consistent way for the user to specify client number and breakdown. The user should be able to set the view to the entire Truck or any unit or roll-up (e.g. region) that the breakdown tree supports.

The user will specify breakdown when only one unit is displayed (e.g. Truck performance compared to last year). There will be a UI mechanism to allow the user to specify that the comparison is to be between two geographies. This will display a UI control that enables the user to specify the second geography.

A nice feature would be to be able to associate a name with a specific geography so the user could compare (for example) Chicago vs Minneapolis.

The Control Panel

There will be a persistent control panel. This will appear on every screen and should be always presented in the same format. The control panel allows the user to determine what should be displayed. While it can change from one view to another, the design should remain consistent.

In many cases, there will need to be multi-select so that users can create aggregations. For example:

Truck class:

- SUV
- Van
- Pickup

would specify that the view aggregate SUV and vans but not Pickup trucks.

The illustration to the right shows a concept for the Control Panel. Note that under “Client Info” there are two user assigned “nicknames” called Eastern Region and Western Region. These were defined in the customization section of the application.

INTERACTIVE CONTROLS	
Time Frame	
	Calendar Year
	Fiscal Year
	YTD
	Rolling 12 Month
Client Info	
	Client Number
	Breakdown
	Eastern Region
	Western Region
Vehicle	
	Make
	Model
	Model Year
	Class
Compare to	
	Budget
	Last Year
	Benchmark

Note that the control panel is conceptual. It does not show a UI.

Also, what is missing from the control panel is the ability to compare two branches. This needs to be further designed but should be considered in the development of the application.

Dynamic Documents

The dynamic document has two simple but very powerful programmatic features. First, it can obtain values from the view and display them in the text. Here is a conceptual example:

Notice that the highest value was [highestvalue] and this is [highestvalue-averagevalue:+] from the average of [averagevalue].

might render as

Notice that the highest value was 27.87 and this is +5.3 from the average of 22.57.

The second feature is the ability to use these values in conditional statements so that the author can display different text depending on the values. For example:

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If [averagevalue] > 0 then

As the average value is positive, you might want to also look at the...

Else

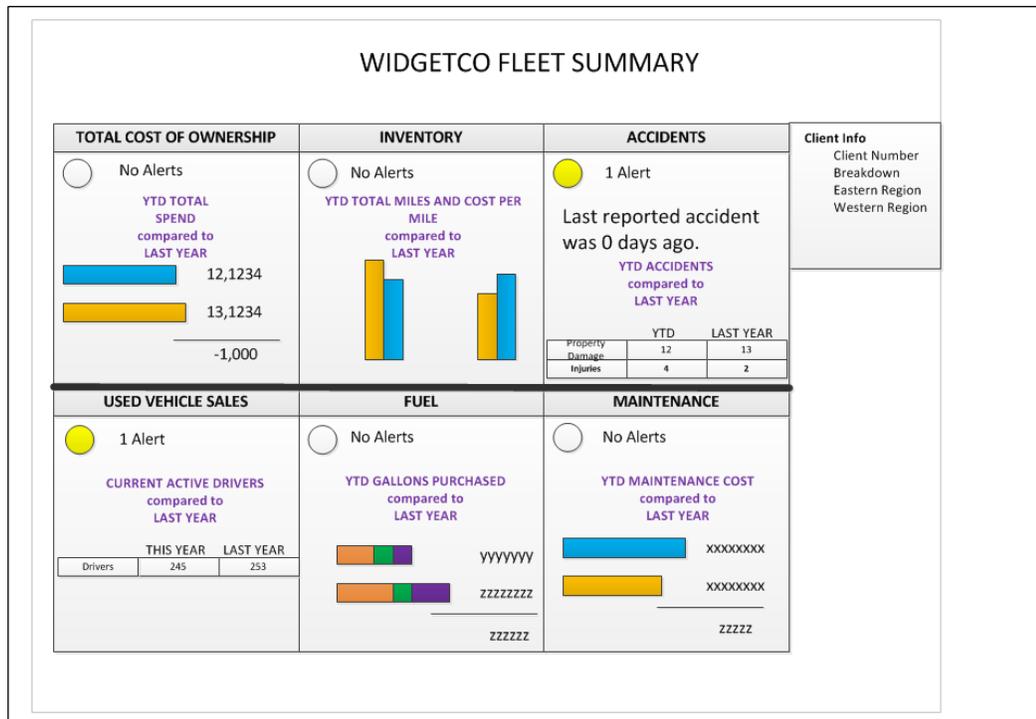
As the average value is zero or less, you might consider the possibility that...

Sample Screens

Following are sample, conceptual screens to help you understand the product concept. Product specifications have not yet been defined.

The Summary Card

The first page of the application is called the Summary Card. It consists of six panels:

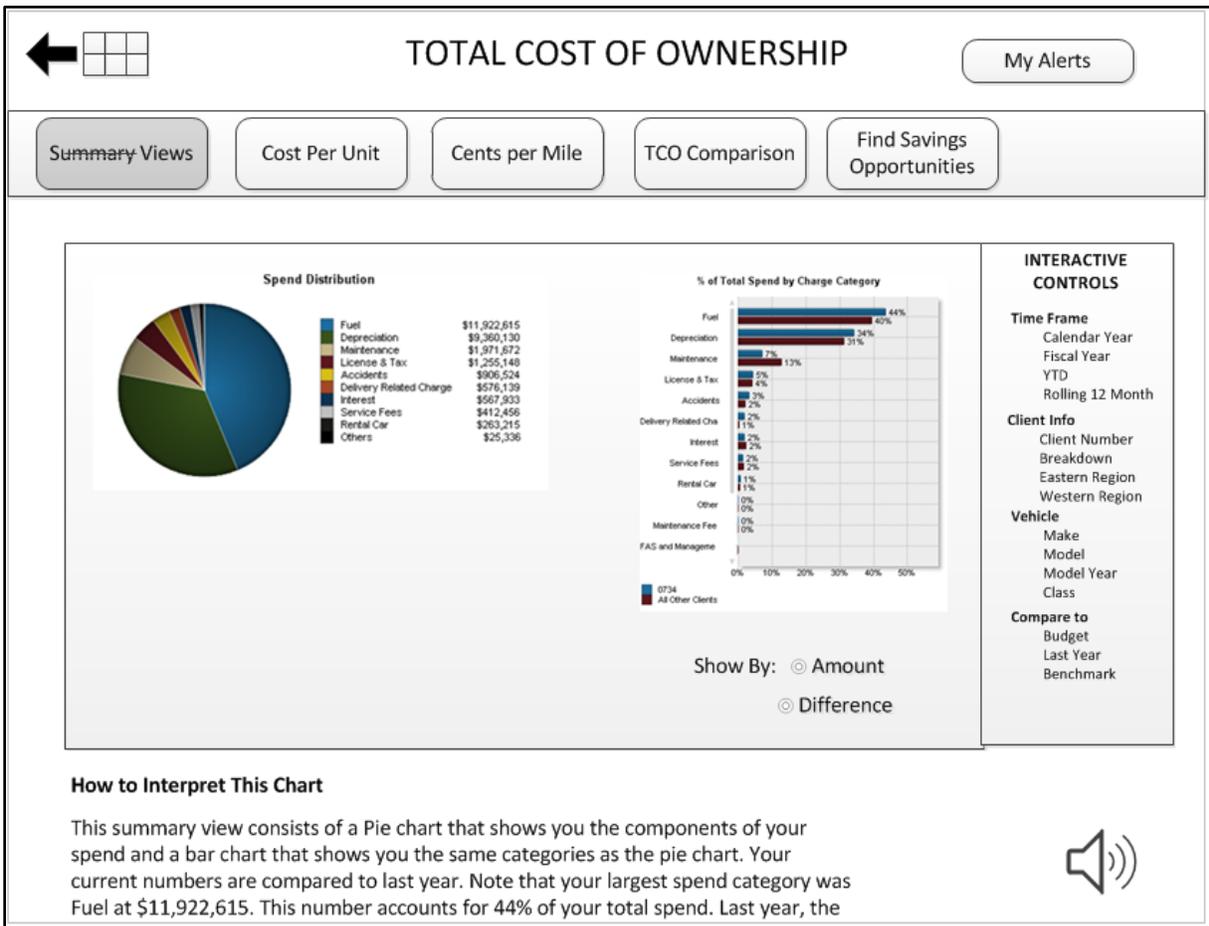


The concept for this screen is that it presents a birds-eye view of the Truck using the most current data. Each panel has two elements:

1. An alert indicator. If there are active alerts, the number will appear here and the associated indicator will be “on.” The user can view and dismiss alerts from this screen. Alerts also appear in the InfoCenter application.
2. The bottom of each panel shows one graphic indicator that summarizes the dimension at the highest level. Each indicator is specific to the panel and includes a comparison. For example, the indicator for Total Cost of Ownership might be Total Spend to Date and the comparison to the spend for the same period last year.

When the user clicks on a panel, (s)he is taken to a category “landing page” which presents an expanded summary view and from which (s)he can choose views.

The Landing Page



Here the user has navigated from the initial summary page to the landing page for category Total Cost of Ownership. There are two small views on this page. Clicking on the view would enlarge it. Note that the bar chart has an associated control that allows you to select whether it should be displayed in order of total or largest difference from last year.

The panel on the right allows the user to interact with the views.

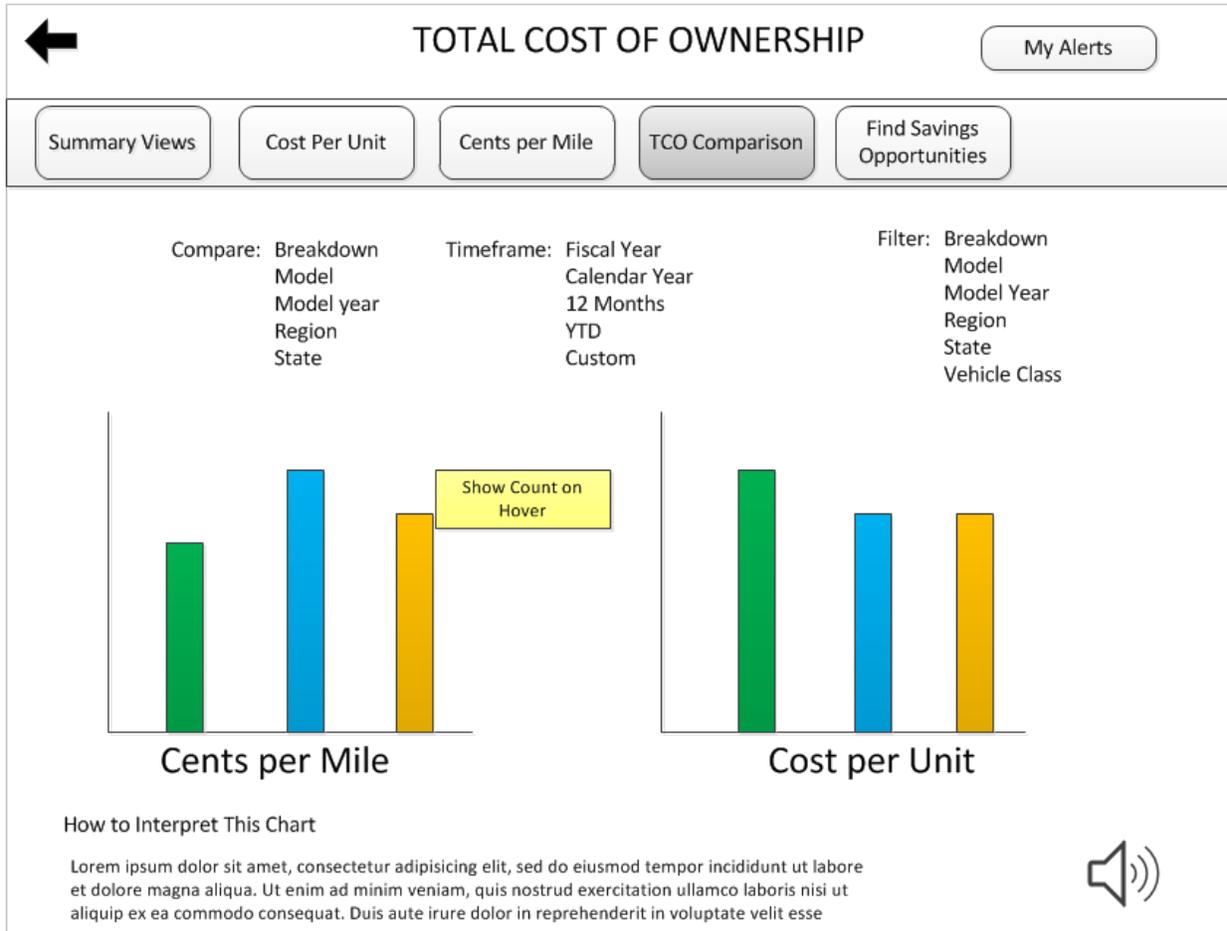
The row of buttons on the top allow the user to select among different views, all related to TOC. Note that the fourth button sets up a comparison view of two regions.

The fifth button is labeled "Find Savings Opportunities." This would launch a script that would analyze the data for patterns and provide the user with areas to focus for possible savings.

At the bottom of the screen (this is not fully designed) is a dynamic document. Note how values from the view are inserted in the text and how conditional text might be used. The speaker icon is there to suggest that there might be a multimedia component.

In the screen that follows, the user has clicked on the TCO comparison button and has specified three elements to compare. These appear in two charts, one showing Cost per Mile and the other showing Cost per Unit.

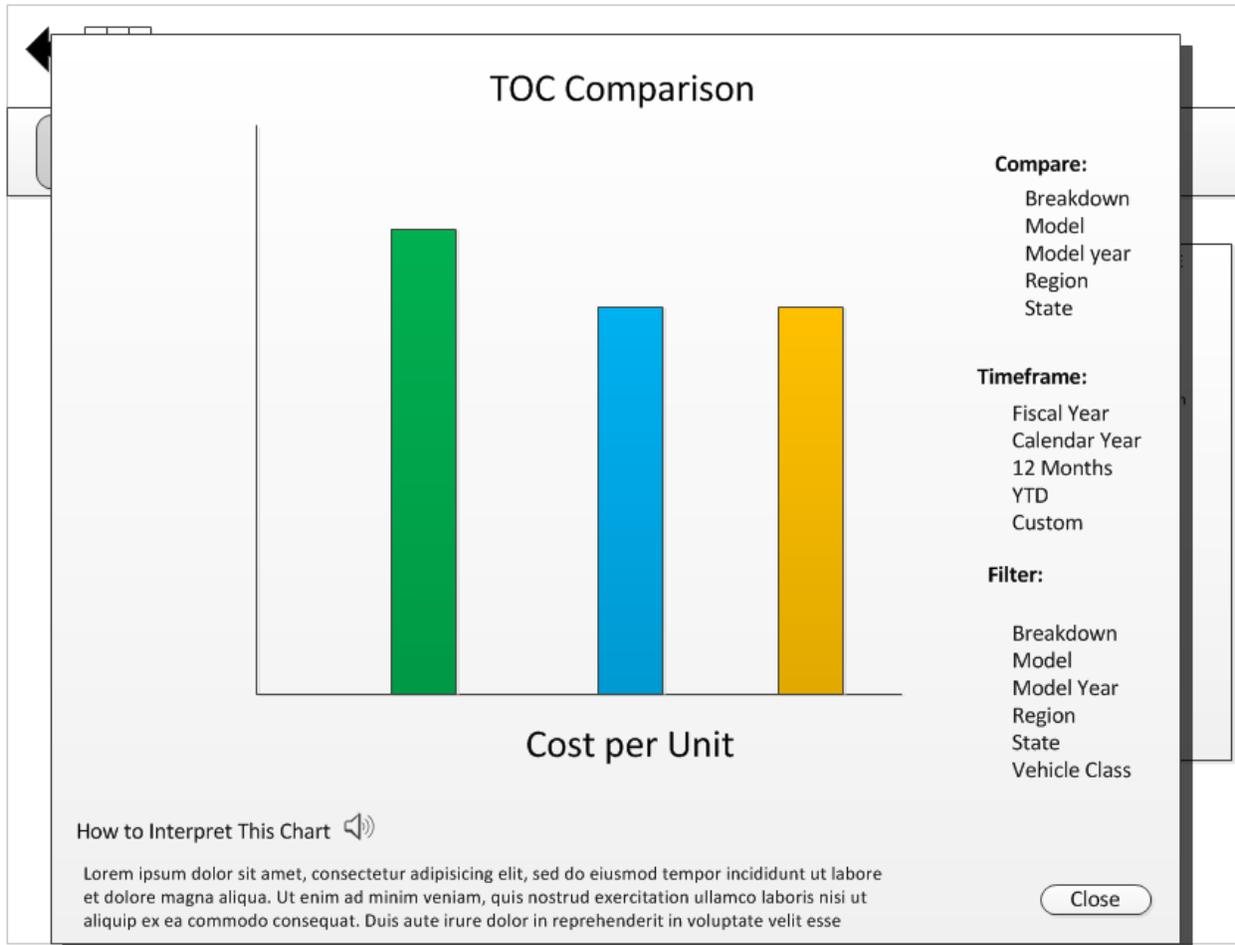
A Comparison View



As before there is a dynamic document that guides the user in interpreting the results. A tooltip is used to display counts on hover to make the graph simpler.

If the user clicked on the graph, an enlarged graph or drilldown could appear in a modal panel as shown below:

A Pop-Up Detail Panel



Customization and Alert Screens

The screens that follow are sketchy and are included to provide a sense of how customization and setting alerts might work.

Customize

General Settings | TCO Alerts | Fuel Alerts | Maintenance Alerts | Used Vehicle Sales Alerts | Inventory Alerts | Accident Alerts

My Fiscal year begins: ▼

←

TOTAL COST OF OWNERSHIP

General Settings | TCO Alerts | Fuel Alerts | Maintenance Alerts | Used Vehicle Sales Alerts | Inventory Alerts | Accident Alerts

Alert me when:

- My total spend is % than

- My cost/mile is % than

- My cost/unit is % than