

# Dashboard Design & Development

## OpsDog Case Studies

### Client A

(Timeframe: 2 weeks)

#### Top 50 U.S. Bank

North America

##### ▶ OUR CUSTOMER:

**Director of Business Intelligence**

##### ▶ PROJECT DESCRIPTION:

Assessment of existing data warehouse contents (SQL Server 2012), detailed documentation of existing data sources (to support ETL processes) and development of interactive dashboards to assist in managing various functions within the bank.

##### ▶ SCOPE OF PROJECT:

- Retail Branch Operations
- Loan Origination
- Loan Servicing
- Underwriting
- Call Center

##### ▶ DELIVERABLES:

- Interactive Dashboards (Microsoft Power BI)
- Detailed Metric Documentation (PDF)
- Report Directory & Specifications (PDF)

##### ▶ OUTCOME:

Our research and past experience helped to identify the KPIs that were most vital to the areas in scope. We designed and built specifications for several reports to inform our staff in configuring dashboards for their sales, loan processing and customer service organizations. Dashboards were developed in Microsoft Power BI and published throughout the organization.

### Client B

(Timeframe: 3-6 weeks)

#### Mid-Size Health Plan

North America

##### ▶ OUR CUSTOMER:

**Chief Technology Officer**

##### ▶ PROJECT DESCRIPTION:

Analysis of existing data architecture, development of KPI documentation and supporting management report specifications to aid the OpsDog team in development and publication of more than 20 dashboards using the client's selected technology platform.

##### ▶ SCOPE OF PROJECT:

- Claims
- Customer Service/Call Center
- Provider Credentialing & Setup
- New Member Enrollment

##### ▶ DELIVERABLES:

- Interactive Dashboards (Tableau)
- Detailed Metric Documentation (PDF)
- Report Directory & Specifications (PDF)
- Ongoing Support

##### ▶ OUTCOME:

OpsDog produced detailed technical specifications for each report to be built, including thorough definitions of each vital KPI and the corresponding data source(s). We then transformed the client's existing data and configured real-time, interactive reports (built in Tableau) for use across the organization.

### Client C

(Timeframe: 6-12 weeks)

#### Mid-Size P&C Insurer

North America

##### ▶ OUR CUSTOMER:

**Chief Information Officer**

##### ▶ PROJECT DESCRIPTION:

Audit of existing data warehouse structure, recommendation of various improvements to data capture and tracking methods to improve report contents and development of more than 35 interactive reports for use across the business.

##### ▶ SCOPE OF PROJECT:

- Finance
- Human Resources
- Customer Service
- Sales (Agency Operations)
- Application Processing
- Claims

##### ▶ DELIVERABLES:

- Interactive Dashboards (Tableau)
- Detailed Metric Documentation (PDF)
- Report Directory & Specifications (PDF)
- Ongoing Support

##### ▶ OUTCOME:

Our team collaborated with the CIO to audit the organization's existing reports to determine areas where they could enrich existing data to improve business intelligence effectiveness. We worked with their IT Team to implement audit findings, and develop a set of user-friendly, interactive dashboards for use by more than 1,500 employees.

