

Using Excel Dashboards to Monitor, Manage, and Report on Strategy Execution



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Strategic Plan Project Dashboard



Agenda

1. Context/Challenges
2. Dashboard Design
3. Dashboard Functionality
4. Questions

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Notre Dame de Namur University (NDNU)



- **Established in 1851 by the Sisters of Notre Dame de Namur**
- **Third oldest college in California**
- **Catholic, not-for-profit, coeducational university, located on the San Francisco peninsula in Silicon Valley**
- **Enrollment: 1,691 ***
 - 58% Undergraduate (20 Majors)
 - 42 % Graduate (10 Masters, 1 Ph.D.)
- **Hispanic-Serving Institution (HSI)**
 - 25% Hispanic undergraduate FTE student enrollment

2011-2014 Strategic Plan



Challenges with monitoring and reporting on a very ambitious strategic plan:

- **4 Key Initiatives with 36 Tactical Objectives**
 - Difficulty tracking who is doing what, what is getting done...and who is responsible
 - Difficulty assessing impact of executing plan
 - Long progress reports no one wanted to write or read

**"You never know what is enough
unless you know what is more
than enough."**

**"The road of excess leads to the
palace of wisdom."**

- William Blake

NDNU had enough and wises up



2015-2018 Strategic Plan

4 Strategic Initiatives ----> 3

36 Tactical Objectives ----> 10

Key Question



Can we develop a reporting tool that reflects and supports this more economical, disciplined approach to strategic planning?

Project Goal



Develop a reporting tool that helps NDNU:

- 1. Monitor plan implementation efficiently**
- 2. Assess impact of activity**
- 3. Communicate progress/results clearly and succinctly**

Project Dashboard (Excel)

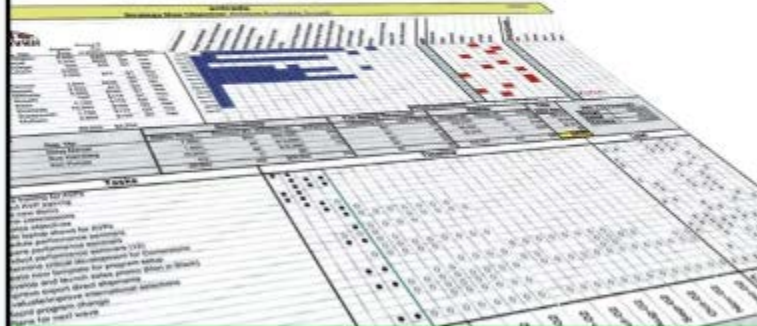


Design Principles

- **Efficiency**
 - Easy movement between report elements (e.g., work plans → metrics)
- **Concision**
 - Communicating a lot of information about strategy execution within a limited amount of space
- **Accountability**
 - Clear account of who is responsible and for what part of the strategy
- **Communication**
 - Progress reports embedded within the overview of work plans
- **Drill-downs**

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THE ONE-PAGE PROJECT MANAGER



COMMUNICATE AND MANAGE
ANY PROJECT WITH A SINGLE
SHEET OF PAPER

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Design Elements:

What we want to see on a single page



Home Page

1. Strategy Articulation (links)

- Strategy Map: visualizes how strategy aligns with/maps on to our mission, vision, and values
- Strategic Journey Map: describes our journey in developing and improving the university over time
- Measurement Alignment Map: measures what we do (process and outcome measures)

2. Strategic Initiatives and Tactical Objectives

- What we are doing to help us get the results we want

Design Elements, Cont.



3. Completion Dates

- Timelines describing when Tactical Objectives are to be completed

4. Budget Metrics

- Are we staying within budget?

5. Progress and Performance Summary

- Overall progress
- Accomplishments
- Challenges
- Next Steps
- Key Performance Indicators



Executive Summary

Work Plans



- **Drill-down from dashboard home page**
- **Design mostly mirrors home page**
 - Tasks
 - Timelines
 - Project Lead – Ultimate responsibility for completing Tactical Objective
 - Project tasks – Responsible (R) and Support (S)
 - Budget metrics
 - Measures (process and outcome)
 - Progress reports (Overall Progress, Accomplishments, etc.)

Dashboard Demo

Progress Report Demo

Questions