Problem Statement

In some cases AS’s create data silos and individualized dashboards, leading to fragmentation of insights and confusions around core metrics. There’s an immediate need to identify the use cases for high and medium usage dashboards and to identify the use cases for high and medium usage dashboards. The team recommended that an optimized migration plan needs to be charted out for 3000+ dashboards in Google’s.

Google’s SAS team is responsible (in part) for providing actionable insights to teams of Account Strategists (AS)

Case Studies

Alibaba and Meituan-Dianping’s transformation provides some insight to the problem of data silos and individualized dashboards. This transformation is based on the principle of one data, one entity and one services.

The platform is designed under the principle of one data, one entity and one services.

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Phase 1

Internal Interviews

6 external/internal interviews to understand the customers and the current states of the platform

3 account strategists as end users

3 platform developers/specialists

Senior Manager in Same Store

Strategic Partner Manager (Channel Sales)

Sales Consultant in the EMEA SMB

Dashboard Name Analysis

3,773 dashboards, created by 1,300+ account strategists from April 2016 to July 2019

Information includes dashboard name, creator’s sales org, region (Americas, EMEA, APAC), and number of unique users

Root Cause Analysis

A growing number of dashboards were created outside of Discovery, peaked at 800+ in 2019 Q2

Major Use Case

72% copies contains either names of “PGA” or “taskmaster” (136 out of 189)

Region and Sales Org

EMEA-GMS dashboard accounts for 75% increase (306 out of 419) in Q2 2019

Organization wise annual increase in custom dashboards

- GMS - More than 400% increase
- PSA - Around 200% increase
- RSQ - Around 100% increase

Region wise annual increase in custom dashboards

- EMEA - Around 112% increase

Dashboard names and metadata have a meaningful relation to its use case. These themes can be identified using text analytics.

Identified 6 unique themes:

- Product Growth Areas
- Activity Tracking (Meetings, Pitches)
- Mix of the above themes
- Points (Incentive Metrics)
- Channel Sales (Third Party Sales)
- Ads Campaign Tracking

Sample Analysis of Survey Responses

Of the total amount of time you spend using dashboards, how does your usage break down across the following platforms?

200 creators of custom dashboards with monthly active users

Understand use cases for custom dashboards and rationale for creating custom dashboards

Recommendations

Democratize reporting use cases via a Self Service Data Mart, a platform that is based on a single, well-managed data repository

Distribute training materials about functionalities of standard platforms and keep AS informed about platform updates

Dashboard Platform

Information Systems - Public Policy - Management

Carnegie Mellon University

Heinz College

Google

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