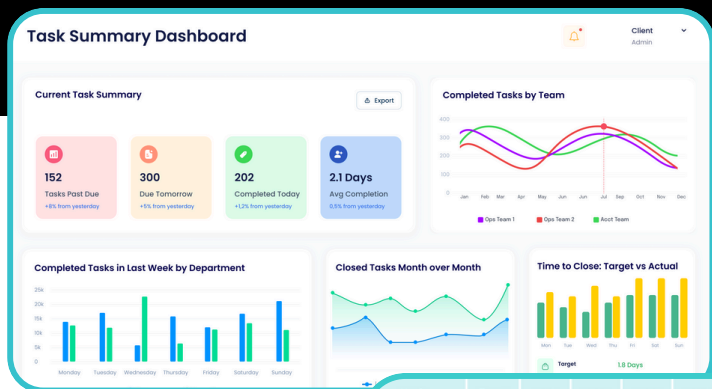


Dashboard & Scorecard

Enhance decision-making & long term success through clear and actionable insights



When to use Dashboards vs. Scorecards

Metric	Target	1/5/24	1/12/24	1/19/24	1/26/24	2/2/24	2/9/24	2/16/24	2/23/24
Total Leads Submitted	40	49	42	44	35	38	41	35	30
Total Meetings Set - Weekly	15	15	21	24	29	24	20	17	17
Meeting to Developing %	50%	56%	55%	52%	55%	51%	52%	50%	48%
Developing to Proposing %	35%	44%	42%	44%	40%	35%	34%	34%	31%
Proposing to Closed Won %	20%	22%	20%	18%	18%	10%	15%	21%	20%

	Dashboard	Scorecard
Time Frame	Real-time, short-term data	Long-term strategic insights
Purpose	Operational monitoring Immediate decision-making	Align activities with long-term goals
Content	Current metrics & KPIs	Strategic objectives, targets, & initiatives
Scope	Department-specific Customizable	Broad, organizational view



Challenges

- ✗ Inability to access, aggregate, and analyze data effectively
- ✗ Data overload without actionable insights
- ✗ No technical or analytical resources to derive value from data



Solutions

- ✓ Automatically aggregate and analyze data from multiple sources
- ✓ Obtain real-time insights through interactive dashboards and scorecards
- ✓ Automate calls to action to address issues and opportunities

Questions to Consider

Do you have visibility into the state of your business?

How often do you refresh and/or review your KPI data?

How confident are you in the decisions you're making?



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