

What the dashboard can't see

Business intelligence dashboards show you what's happening. They can't tell you why and acting on numbers alone can mean you miss something important.

When the dashboard showed declining sales in a previously steady area, the team decided to look into it further. The answer wasn't on the dashboard because no one had told it what was happening.

Everyone in the company knew their top salesperson in the area was due to retire in a few months. John Levitt had agreed to train a replacement and couldn't do his usual sales job and the training one at the same time, which had caused a drop in sales.

This was an informal agreement made one-to-one with his line manager. Human Resources had recorded John's retirement date, but nothing connected this with him training a replacement.

Overlooked information

Business intelligence dashboards have given companies an insight into their data, allowing them to make better, more informed decisions than ever before. Insights that might have taken weeks to bring together before are now available in seconds.

As in the case above, a drop in sales can be spotted early, before it begins to impact the business. In a difficult economy, these insights help keep companies ahead of the competition.

And for many companies, bringing their data together has not been easy. It might have existed in silos and in different formats, and it needed to be carefully cleaned and assessed before the platform had access to it.

But as in the example above, in the rush to ensure a platform has as much data as possible, a valuable source of information has been overlooked, which can, at times, distort what the dashboard is telling a company.

The fact is that no matter how sophisticated the system, we still can't scan a human mind and see that that person spoke to a line manager for 10 minutes one afternoon.

The dashboard's analysis isn't wrong, and it's still valuable information; where we need to be careful is in how we interpret it.

In the above case, there wasn't necessarily a problem with sales in the area; rather, there weren't enough salespeople with John Levitt's depth of knowledge and skill. He had recognised the issue and had found a solution.

In turn, this could mean that the company intervened in the region, believing there was a sales problem, creating unnecessary time and expense solving a problem that was already in the process of being solved. And may even cause further problems by disrupting the solution that was already in place.

All this from a misinterpretation about data on a dashboard.

The dashboard's value comes from what it tells a company about a situation, and from their teams looking at that data and asking themselves: "Is there something more going on here that we can't see with just the data alone?"

The company could check whether any regional issues caused a fall in sales, such as economic problems, elections, or a long holiday. The next step would be to phone the regional manager and ask them.

When they did, the manager would have been able to explain that John was due to retire in a few months and was currently training his successor. Because of this, he wasn't able to make as many sales contacts and calls as he normally would.

Knowing the problem, the company could now move other salespeople to John's area to help him and, in doing so, reverse the fall in sales.

By looking beyond the data, a company is less likely to make expensive mistakes. And by talking to people 'on the ground', they gain additional information to make better decisions, rather than relying solely on the platform. When people and platform work together, a company gets better results.

The reasonable expectation is that we'll build better systems, and that these platforms will continually improve over time, making this issue irrelevant.

These systems and platforms will have new, higher-quality data, new ways to analyse it, access to more information, and so on. However, there will always be John Levitt situations that the platform can't analyse because it lacks the necessary information.

The human side of data collection

Apart from the logistics of trying to capture all this information, some staff may feel that they don't want every little thing they think, say and do recorded. We can already see this in responses to forms; if someone doesn't want to answer a question, they don't. If the question is mandatory, they'll stop filling out the form.

If staff feel they're being pressured to share information, they're less likely to do so. The more the company pushes, the more their staff will resist being pushed.

Worse than not getting the data and information the company wants, it damages one of the most important relationships a company has: the one between it and its staff.

If staff feel they're valued and can trust the company's processes, they're more likely to help. Not only in sharing data but also by working alongside the platform to share their thoughts and insights, because they have real-time, real-world knowledge that it's unlikely any platform will have.

Which brings us to one of the biggest risks in using a dashboard: taking what it says at face value without pausing to question why it's reporting what it's reporting.

When a company does this, they're no longer acting on data analysis alone; they're combining it with all the knowledge and experience within their staff.

And they can do this by bringing together platform and people with specific practices. The same applies anywhere that a dashboard is reporting numbers or issues without explaining them.

Putting this into practice

Here's another example: a dashboard shows lengthening customer support queues. After checking the most obvious causes, such as staff shortages or system outages, the company may decide that the answer is more phone lines, more staff moved to customer support, and more chatbots being deployed.

But if they have a process in place to consider the bigger picture, they will probably find the real cause.

After talking to the customer support manager, the company might find that a recent software update has caused problems with certain software, so they can send out updates with advice on what to do.

They ask the customer support tech team and discover that customers don't want to talk to the chatbot, as they get frustrated with it and click the 'talk to an adviser' button. The solution is to retrain the chatbot with more real-world-type chats.

With this approach, a company is not going to find itself making the wrong decision because they acted only on what the dashboard was telling them.

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