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Delivering Performance Measures to Decision Makers

Sage Intacct Dashboards

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Introductions

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Today's Agenda

- Who: Decision Makers
- What: Key Insights – Performance Data
- When: On-Demand Access
- Where & How: Secure, Cloud Solution with Meaningful Dashboards

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Baseline

- Most organizations *have* a set of key performance measures
- Value add opportunities
  - ☆ Moving toward more real-time views
  - ☆ Expanding analysis
    - ‘Industry champions’
    - Comparative organizations
    - Internal conversation

Trend: Moving from Annual Report to Real-time Views

For Internal Managers, Boards, Funding Sources

How do we get there?

Converting to ‘Real Time’ On-Demand Views

- **Step #1 – Access Goal**: Self-Service or Data Delivery or BOTH
  - Evaluate Toolset
  - Consider both Laptop/Desktop & Mobile Support
  - Security

Converting to ‘Real Time’ On-Demand Views

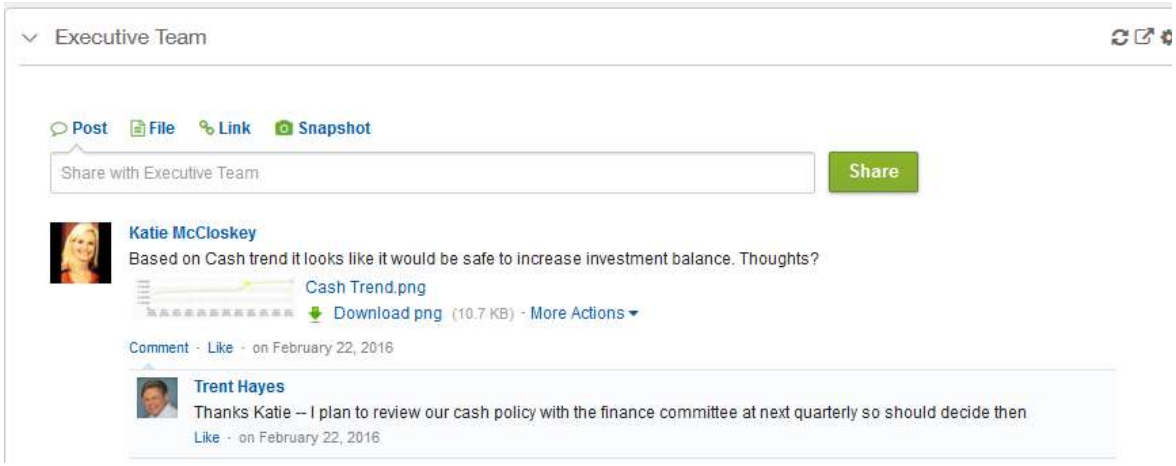
- **Step #2 – Data Goal:** Marry financial & statistical data in single place
  - Ease of data centralization & interval
  - Accuracy & trust [verifiable data]
  - Consider importance of access to detail including source documents
  - List of known key performance measures by audience
  - Seek buy-in for data to be most useful
  - Flexibility to adjust based on feed-back & over-time as operations change

Converting to ‘Real Time’ On-Demand Views

- **#3 – Ideal Presentation: Meaningfully arrange information**
  - Graphical views vs. statement style vs. key performance indicators
  - Ease of consumption
  - Elicit feedback again
  - Consider point and time capture

Converting to ‘Real Time’ On-Demand Views

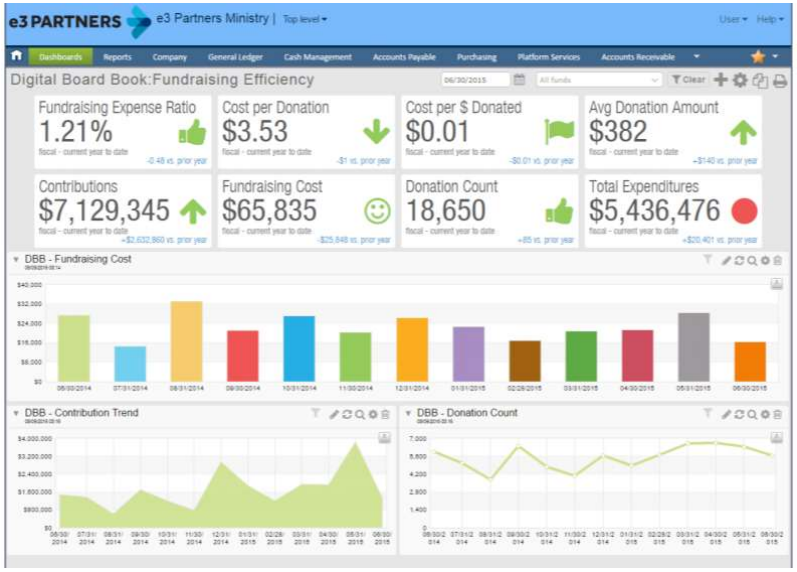
- **#4 – Action Goal**: Conversation & Analysis
  - Not enough to have it, must consider it and act
  - Collaboration often a critical element
  - Well documented action for history of quality, data-driven decision making



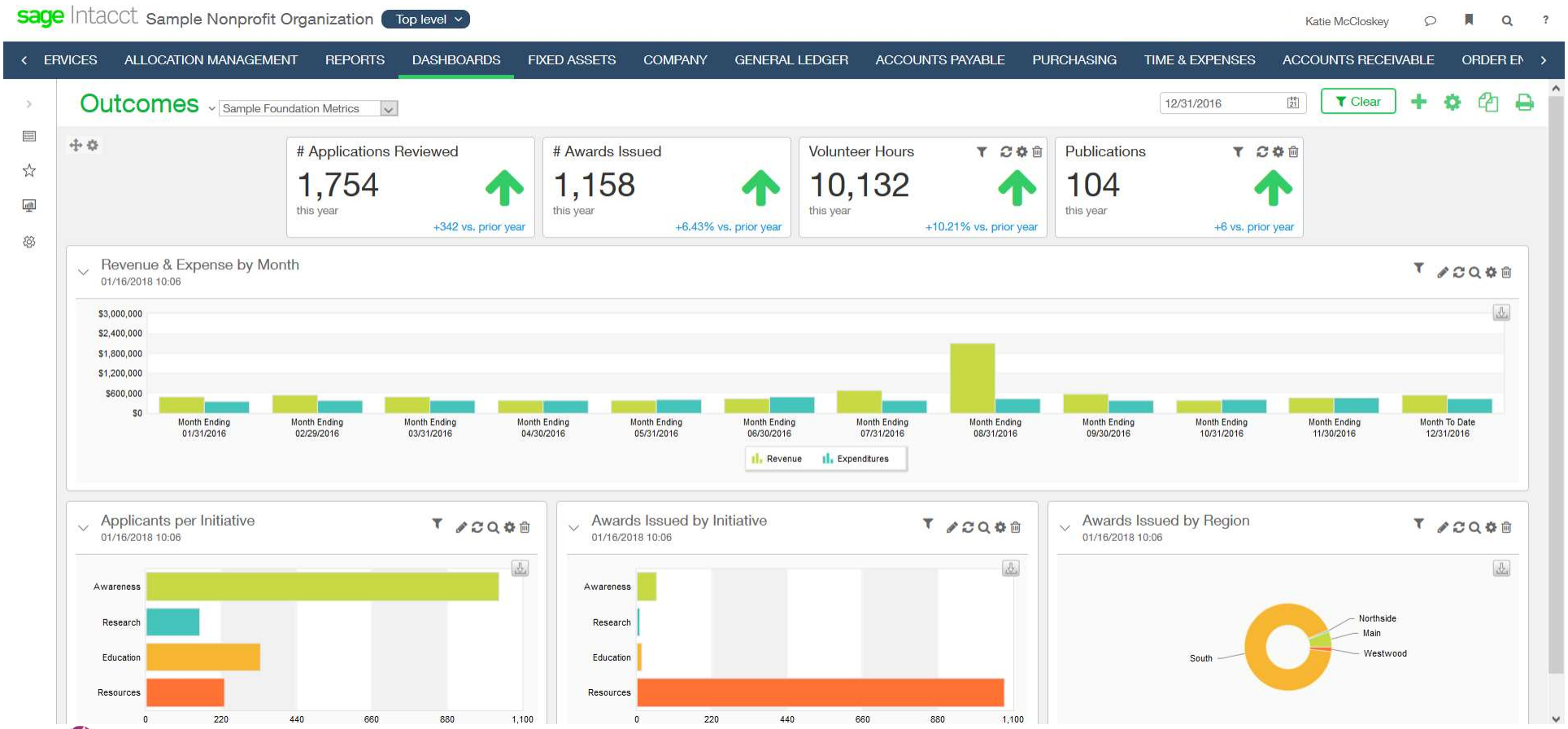
Impact

"The Intacct Digital Board Book for Fundraising is transformational for E3Ministries. I now have a tool that can crush the data silos. We get real time KPIs, with data pulled from multiple systems, that keeps everyone focused on the right information. This allows us to respond faster, make better decisions, strengthen stewardship, and achieve greater impact."

Mark Lincoln, CFO E3 Ministries



Foundations: Tracking What Matters



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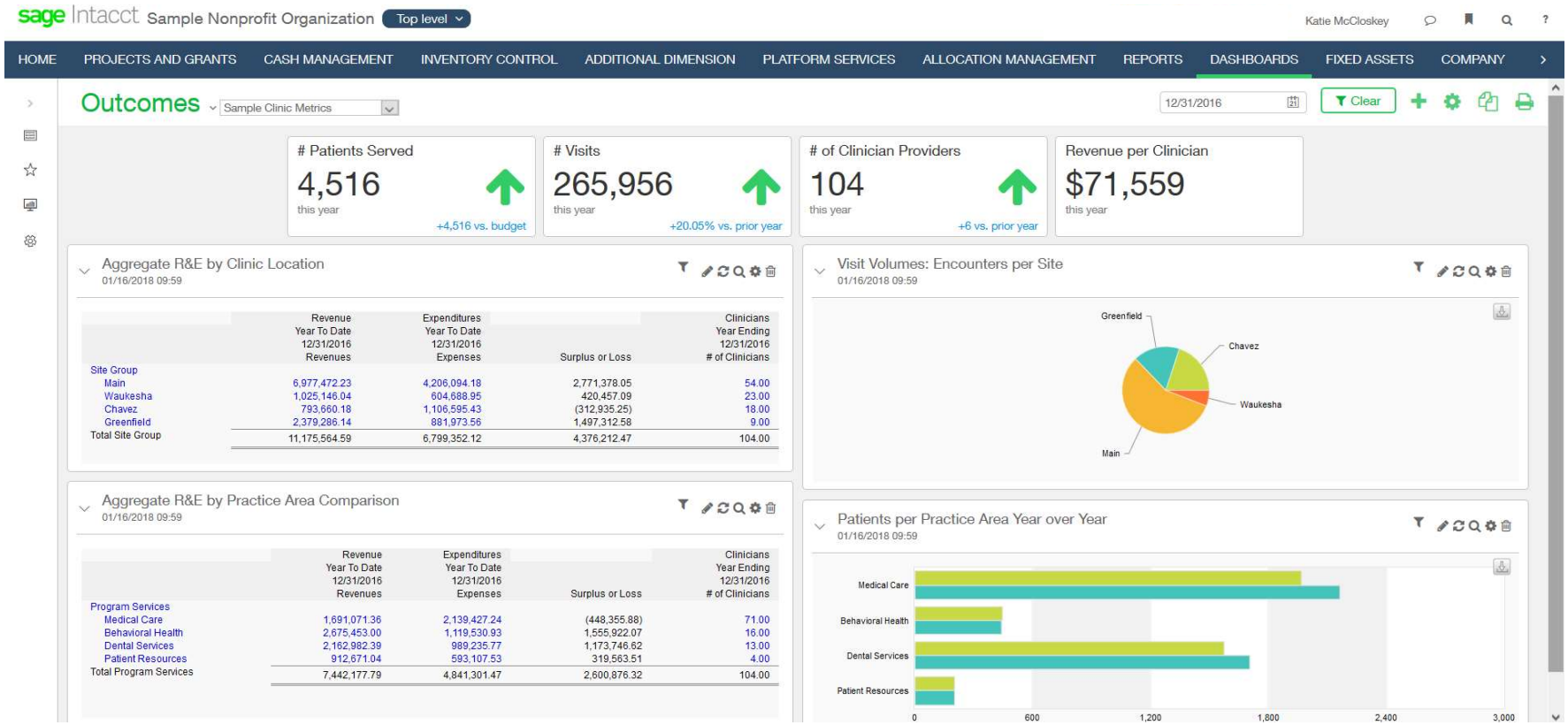
Nonprofit Healthcare: Sustaining Impact



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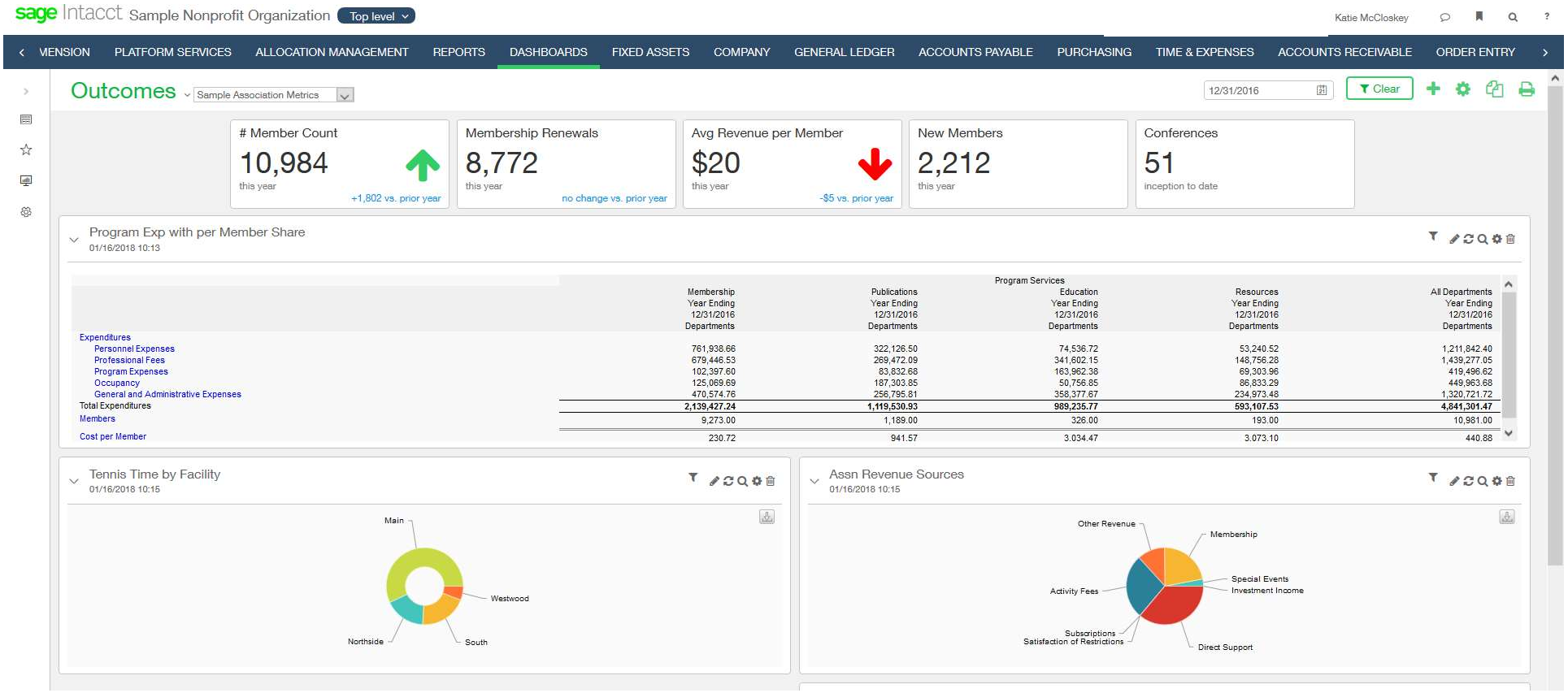
Association/Membership Metrics



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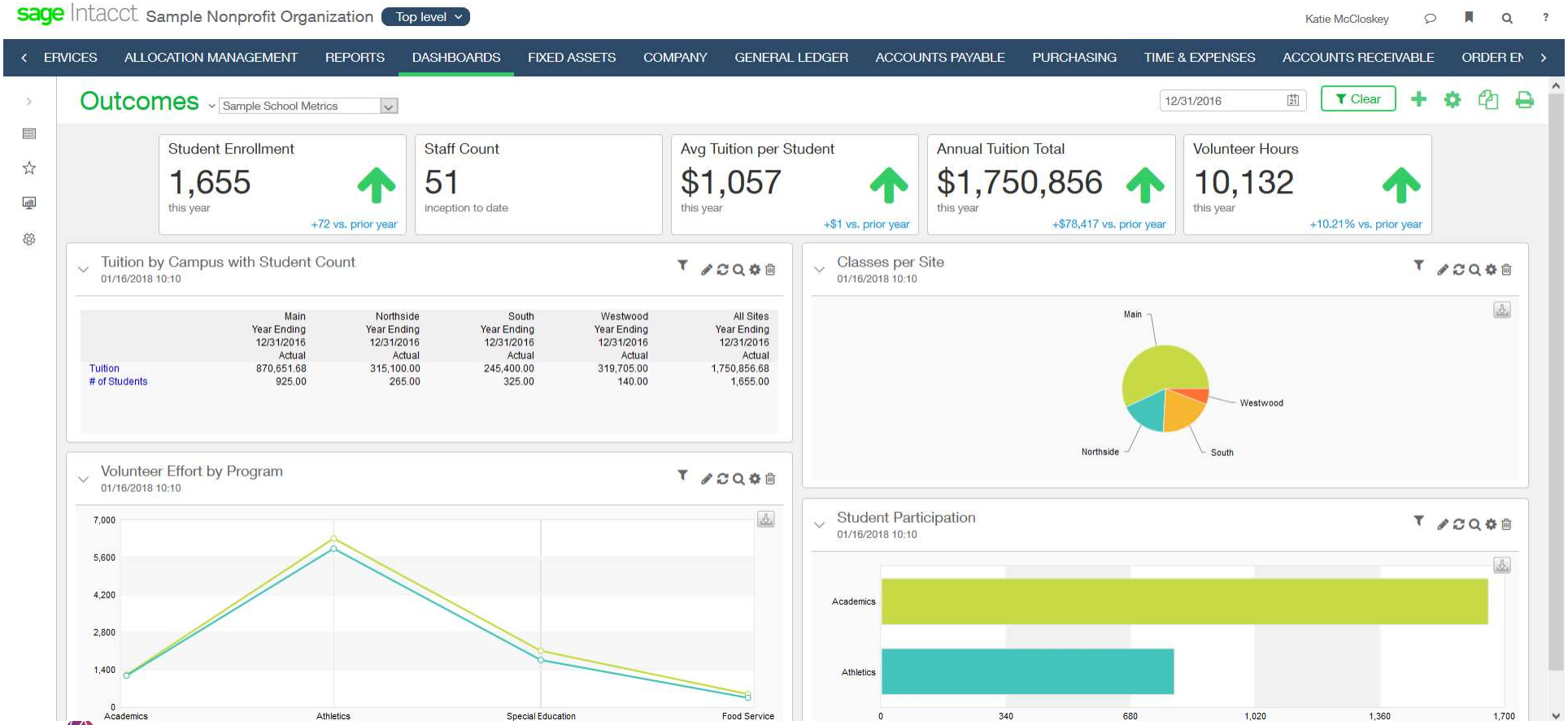
Education: Real Time Insights



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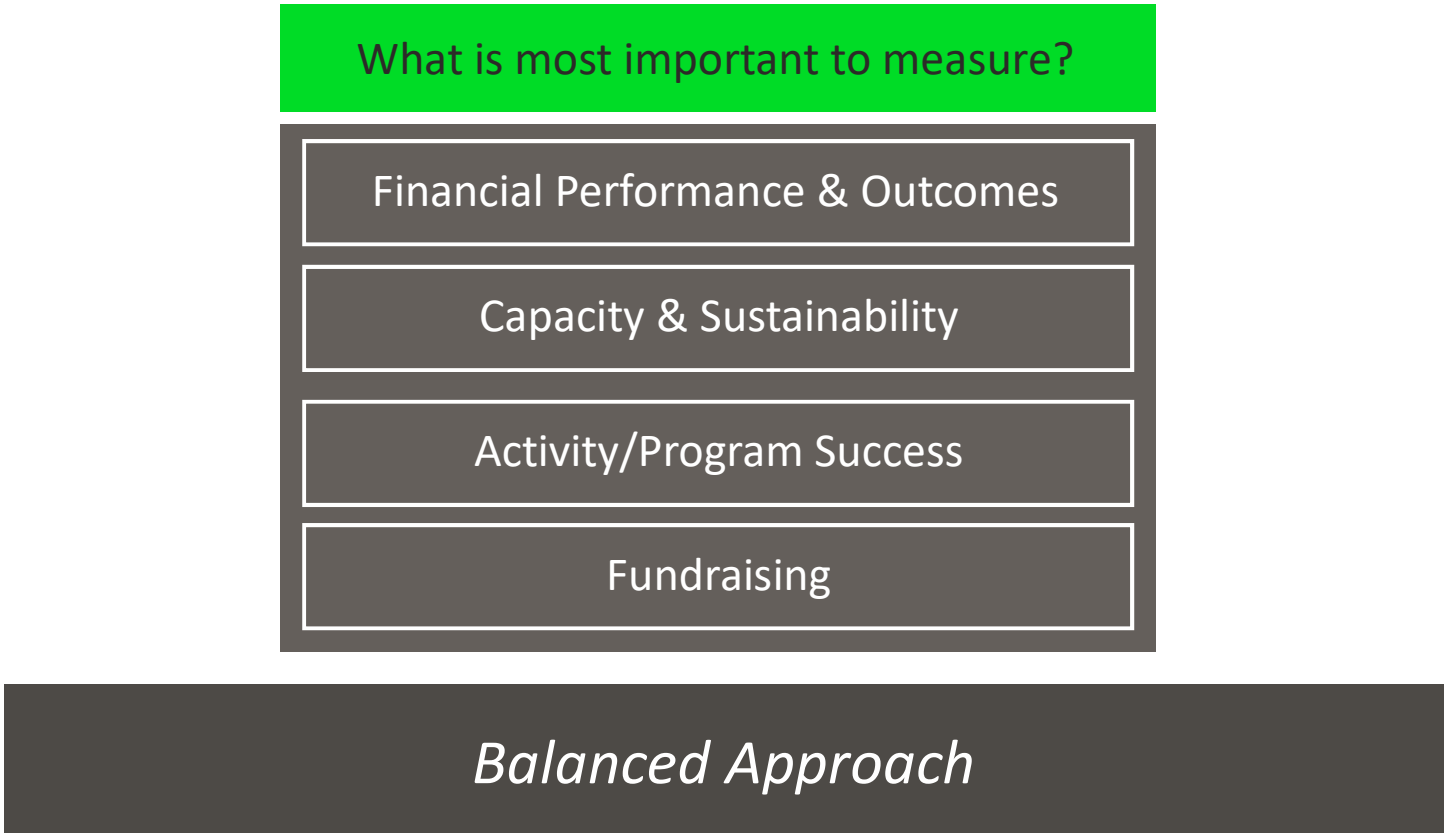
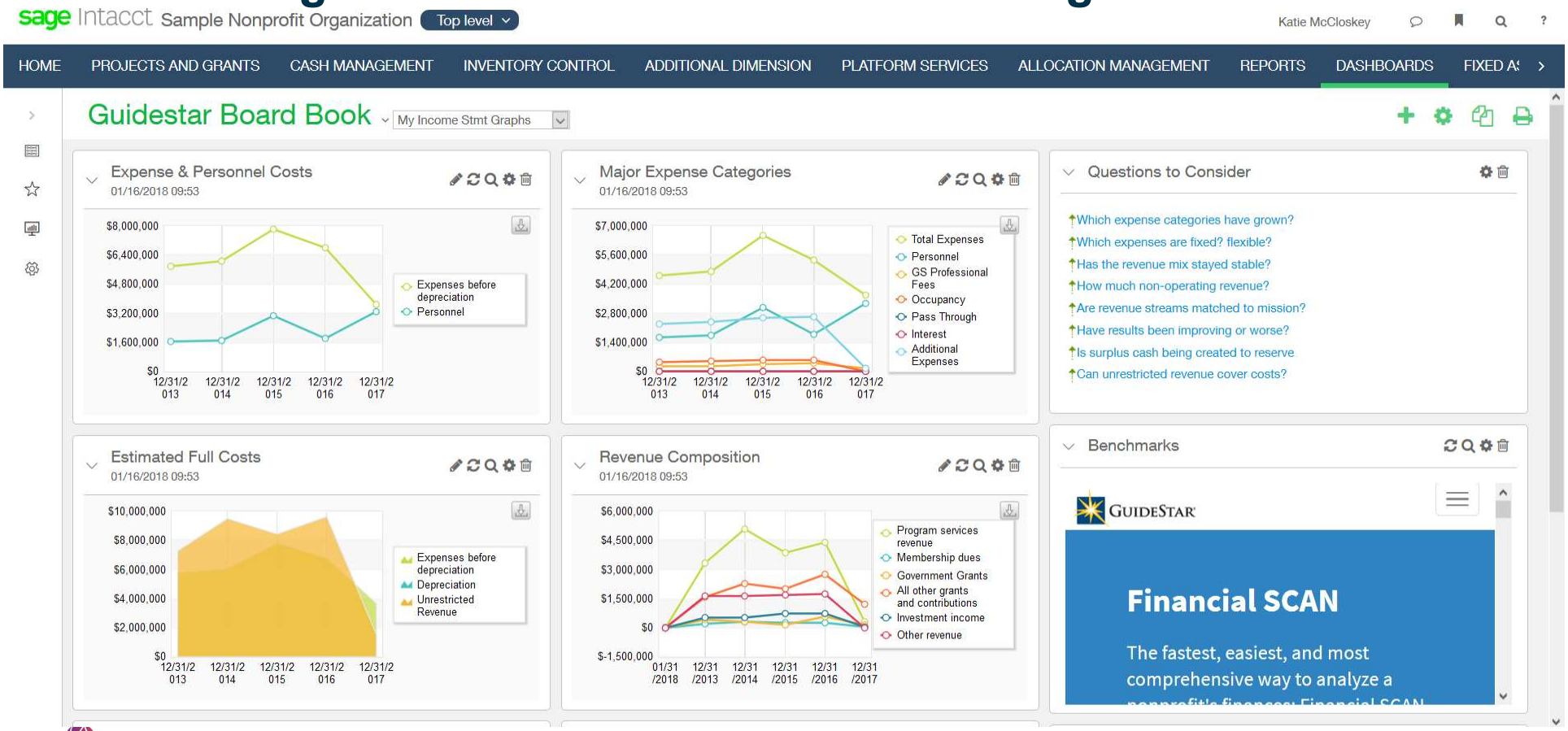
Analytic Paths



Monitoring Financial Health + Benchmarking



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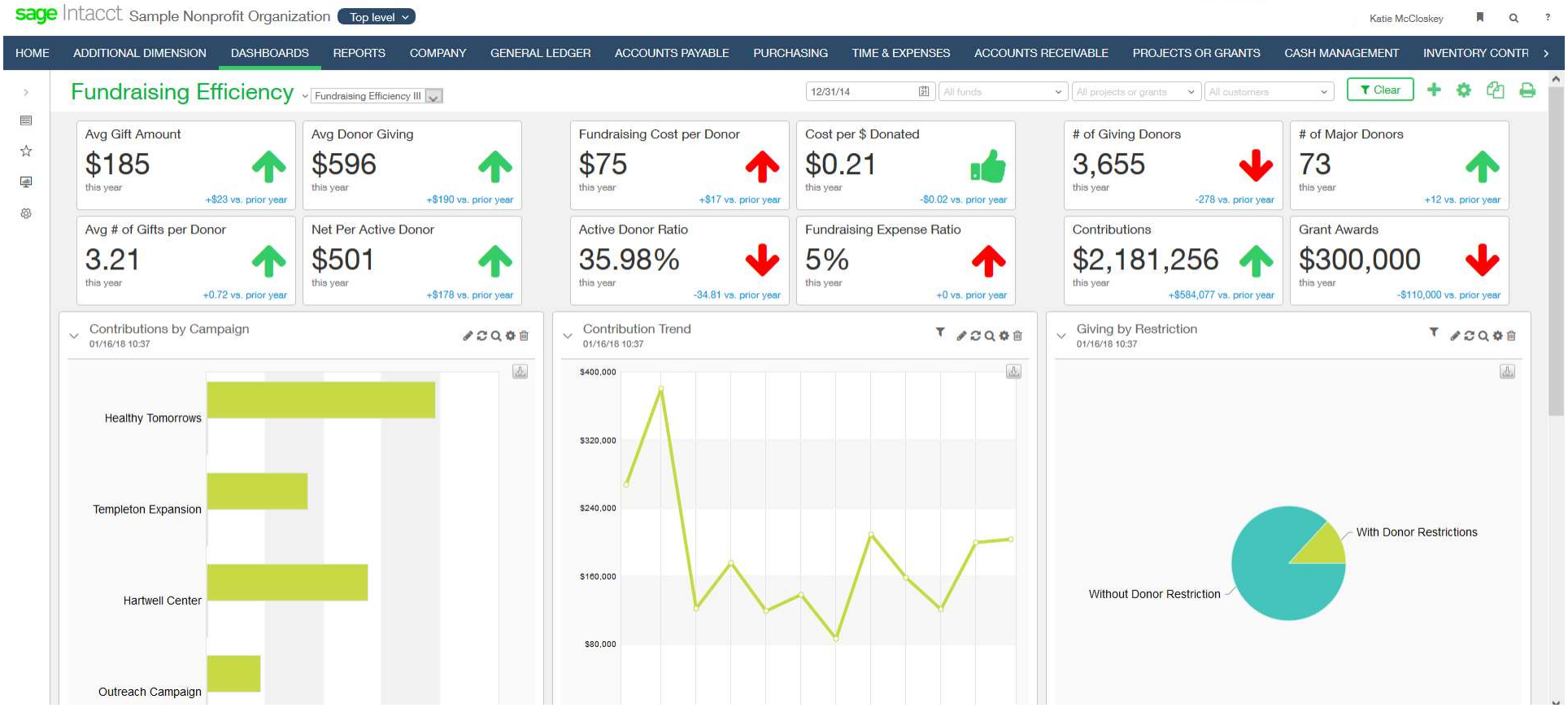
Fundraising Efficiency



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Sources to Expand Analysis

- Industry Champions: Associations, Nonprofits for Nonprofits
- Peer Organizations: Collaborate
- Internal Feedback: Keep Data Delivered Relevant

Your Data is Telling Your Story:

Meaning = Results, Respect, Relationships, Reward

Proven Cloud Access

+

Financial & Operational Insight

=

Better Decisions for Mission Success

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