



HOW DO I INTERPRET THE DASHBOARDS IN THE PBC ASSESSMENT?

Section Links

What dashboards are in the PBC Client Dashboards?

How to interpret the PBC Assessment dashboards in the PBC Client Dashboards?

How to interpret the Action Plan dashboards in the PBC Client Dashboards?

What dashboards are in the PBC Client Dashboards?

- There are two types of dashboard:
 - 1. PBC Assessment dashboards**
 - This shows the outcomes of the current PBC Assessment and, if more than one assessment has been done, it will also show a comparison of the assessments
 - 2. Action Plan dashboards**
 - This shows the proportion of action items completed, in progress and not started for each assessment and enables a comparison across multiple assessments

PBC CLIENT DASHBOARDS

Version 4 - 2021-02-13

NAME: *
Tiana Weasley

WHAT TO ACHIEVE: *
I want to grow my business to be as big and successful as possible and to increase profitability

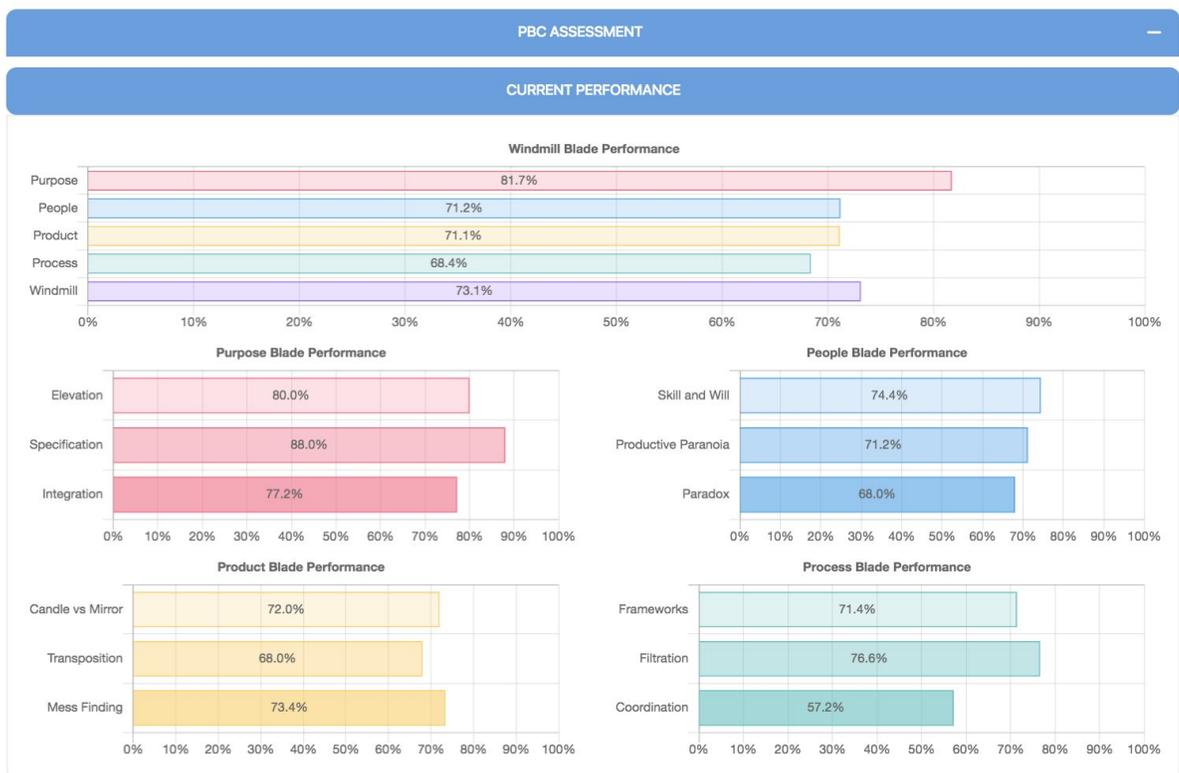
PBC ASSESSMENT	+
ACTION PLAN	+

How to interpret the PBC Assessment dashboards in the PBC Client Dashboards?

- The following dashboards are included:
 1. Current Performance
 2. Current Performance Against Target
 3. Comparison Performance
 4. Comparison Performance Against Target
- Each of these will be covered off in turn

1. Current Performance

- This shows the overall performance for the PBC Assessment as well as the performance for each blade and each sub-blade for the current PBC Assessment, that is, the version that has been selected to be viewed.

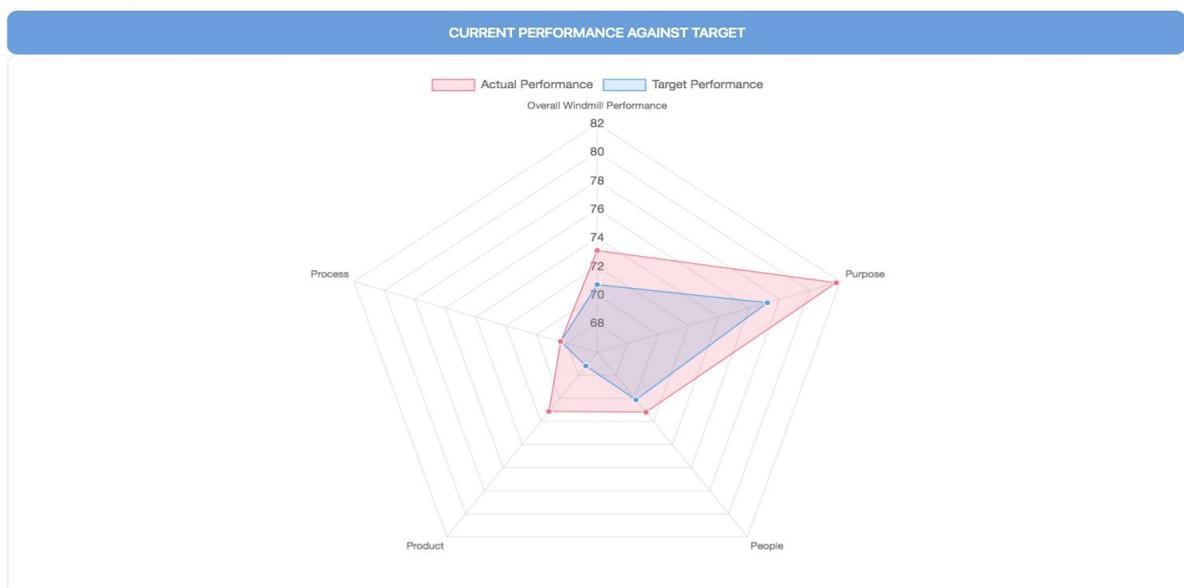


- The first chart in this section shows the percentage scores received for this assessment.
 - For this example, we can see they have performed best in the Purpose blade and lowest in the Product blade.
- Then we have an additional four charts underneath. There is one chart for each of the four windmill blades.
 - These charts show performance for each sub-blade within the relevant blade.

- As an example, for the Purpose blade, there are scores for each sub-blade of Elevation, Specification and Integration.
 - We can see that in this blade, they have scored highest for Specification.
 - Likewise, for the Product blade charts, the performance for Transposition is very low.
- These charts are useful to very quickly identify the key problem areas that we can focus on for our next assessment to improve in this area and also in our overall performance.
- We can do this by including an action item, or items, for specific sub-blades into our Action Plan.

2. Current Performance Against Target

- This shows the actual performance for the current PBC Assessment for each blade as well as for overall against the target performance.
- After each assessment, the scores from that are used to set a target which is 5% higher for the next assessment, this is done automatically.
- This chart will only show for assessments starting at version 2 as there is no target for version 1.

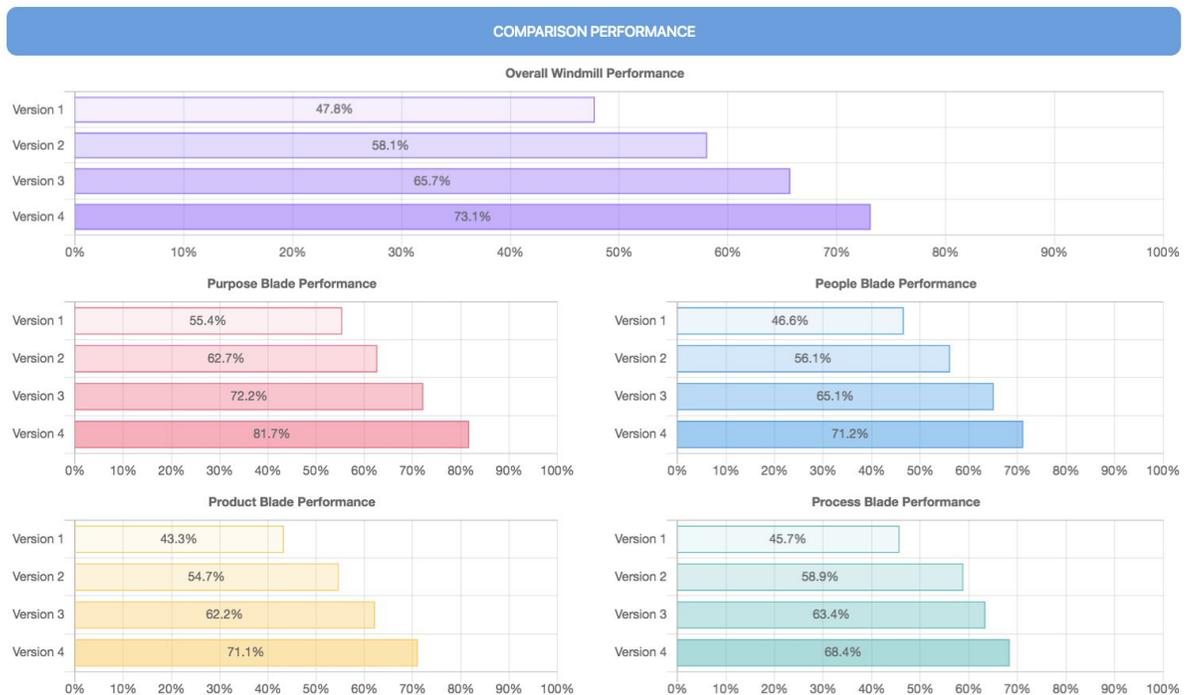


- This is a radial diagram that compares actual performance, shown in light red, to the target performance, shown in light blue.
- Whenever the light red exceeds the light blue, we have performed higher than the target.
- However, when the light blue exceeds the light red we have underperformed, so achieved less than the target rate.
- You can click on the legend to hide either the actual or target performance.
- **This functionality exists for all charts.**

- The targets for the PBC Assessment are set automatically to 5% higher than for the previous assessment. They automatically update, based on performance, for each new assessment.
- In the fourth assessment, for all blades they have exceeded the targets and have improved quite a lot from the previous assessment.
- There is no need to exceed targets for each assessment.
- Rather they are used as a guide to indicate if performance is actually improving incrementally.

3. Comparison Performance

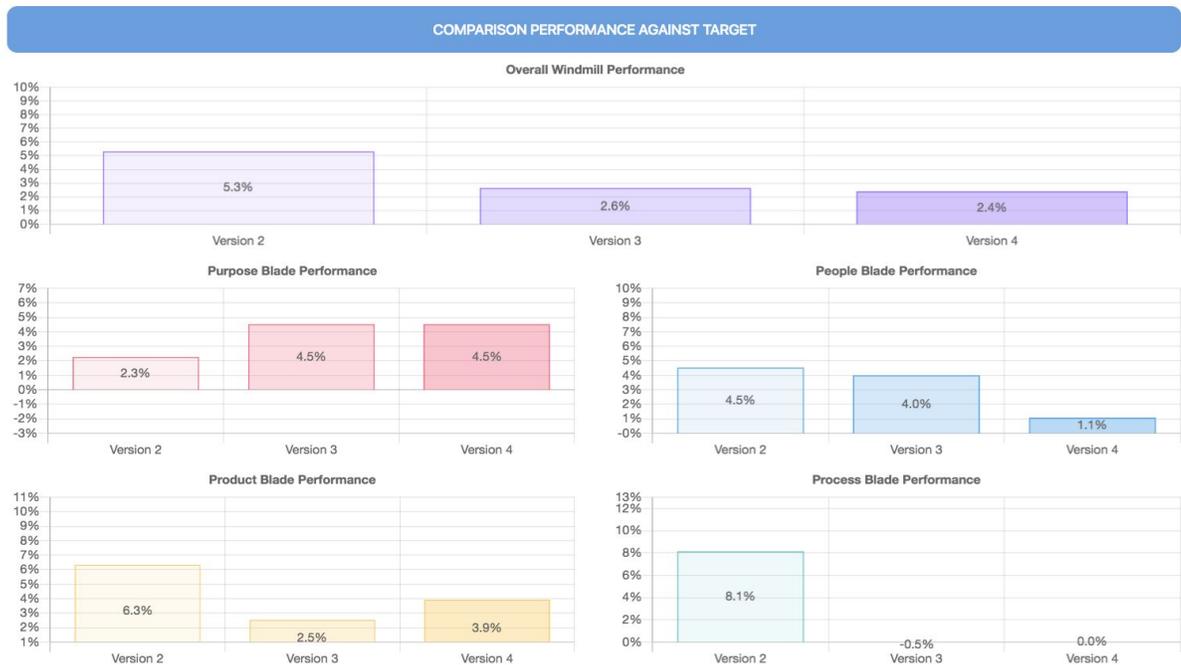
- This shows a comparison of performance for each PBC Assessment to enable you to see how your performance has improved over time.



- This shows how we have performed for each PBC Assessment overall, as well as for each blade.
- From this chart it is very easy to see if our performance has improved overtime, and in which blades we are improving or not improving.
- Again this helps us to monitor if we are progressing and helps to identify potential problem areas that we can focus on to improve.

4. Comparison Performance Against Target

- This shows the actual performance for each PBC Assessment against the target performance, for each blade as well as overall.
- However, the first version of the assessment does not display in the comparison against the target chart, as there is no target for version 1. The outcomes of version 1 are used as the basis for the targets for version 2.
- After each assessment, for the next assessment a target is set of 5% higher for the next assessment, this is done automatically.



- We also compare the performance against target for each of the assessments we have completed in the Comparison Performance Against Target chart.
- This shows for each PBC Assessment we have completed, from version 2 onward, if we are achieving less than the target or more than the target.
- If it's less than the target the value will be negative and it will be positive if we've exceeded the target.
- Performance against target is shown overtime for overall performance, as well as for each of the four windmill blades.
- For this example, we can see in the second assessment that overall performance increased by 5.3%, with the biggest improvements in the Product and Process blades at 6.3% and 8.1% respectively.
- In the third and fourth assessments, overall performance still improved but by a smaller amount. For these assessments, they have improved most in the Purpose and People blades generally.
- Again, this information can be used to identify where we need the most help and focusing on those areas to improve our overall performance and help to fast track our success.

How to interpret the Action Plan dashboards in the PBC Client Dashboards?

- The following dashboards are included:
 1. Action Items Current Performance
 2. Action Items Current Performance Against Target
 3. Action Items Comparison Performance
- Each of these will be covered off in turn

1. Action Items Current Performance

- This shows the distribution of action items by status and the overall completion rate for the current (or selected) assessment.
- A default target rate of 80% completion rate is set automatically as a benchmark for action item completion rates.



- The Action Items Current Performance shows the progress we have made in terms of completing our action items. We can see the proportion of action items that are Not Started, that are In Progress, as well as those which have been completed. This is shown in the pie chart.
- On the right-hand side, is the Action Item Completion Rate. This shows the percentage of action items completed for this assessment. The target completion rate is set as a default of 80%. The value underneath the completion rate, indicates how well we have performed against the target of 80%.
- If this value is negative, we've achieved a completion rate of less than 80%. If it's positive, we've achieved a completion rate greater than 80%.
- As this assessment has been completed, the values for the action items are showing as at the end of the assessment.
- However, if we are in an active assessment, these values will update as we change the status of action items to In Progress or to Complete.
- This enables us to proactively monitor our progress throughout the assessment and to help us more effectively manage what we are working on, which should help to achieve our goals and improve our performance and results.

2. Action Items Comparison Performance

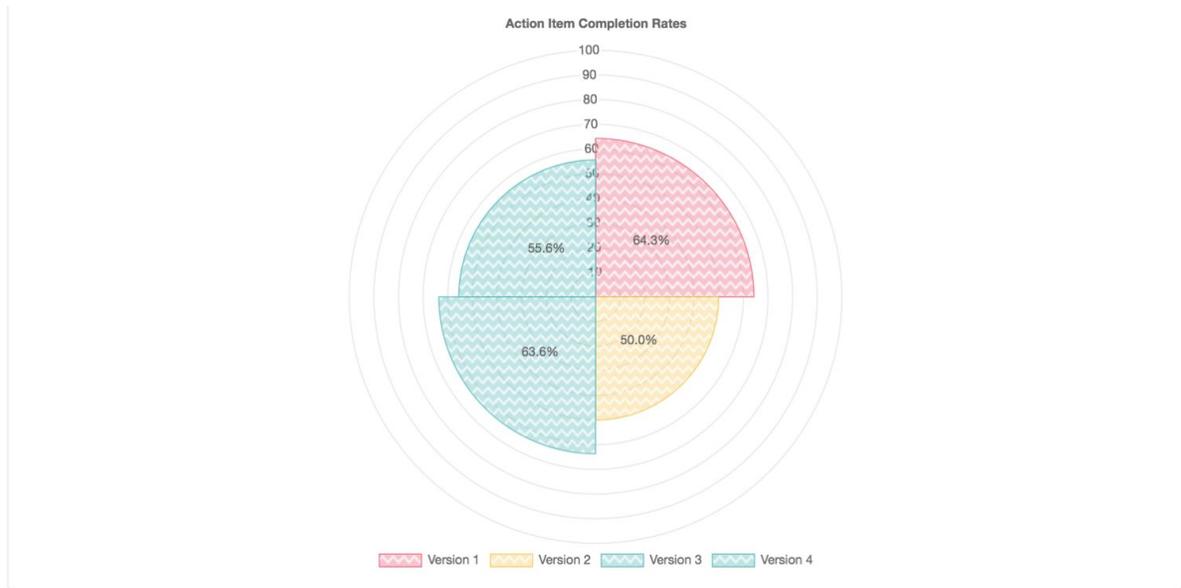
- This shows how effectively action items have been completed across multiple PBC Assessments, or versions.
- This is important as the action items should be targeted to helping us improve our results and achieve our goals.
- This chart enables us to gauge how well we are performing and progressing over time.



- This chart shows, for each PBC Assessment we have completed, the distribution of action items by status.
- For this example, in this chart we can see that the completion rate has varied across the PBC assessments.
- In the second assessment, they had the lowest completion rate and highest proportion of action items not started.

3. Action Items Completion Rate

- This shows the completion rate of action items for all our PBC Assessments.
- This enables the completion rates to be compared directly between assessments.



- Again, we can see how well we are performing, in terms of being able to complete our action items for our assessments, and if this is improving over time.
- If it is not improving then it indicates there may be some issues that need to be addressed.
- It could require us to break our action items down to more granular ones that we can complete.
- It may mean we need to assess if we are simply adding too many action items and that is why we aren't completing them.
- Essentially, based on this information we can start to figure out how effectively we are performing and progressing, if we are having issues, what these issues are and then we can work toward resolving them.