



Crawl | Building Your First Dashboard

June 15, 2023



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Today's Presenters



Gregory Chambers, MCSE

Manager, Data Solutions

West Hartford, CT

860-570-6352

gregory.chambers@CLAconnect.com



Troy Hollings

Director, Data Analytics

Indianapolis, IN

317-567-6123

troy.hollings@claconnect.com



Data Analytics: Crawl, Walk, Run Series

- **Crawl – Today**
Creating Your First Dashboard
- **Walk – August 8, 2023**
Data Warehouses, Data Lakehouses, and Your Data Estate
- **Run – October 10, 2023**
The Power of Predictive Analytics and Artificial Intelligence





We'll get you there.

CPAs | CONSULTANTS | WEALTH ADVISORS

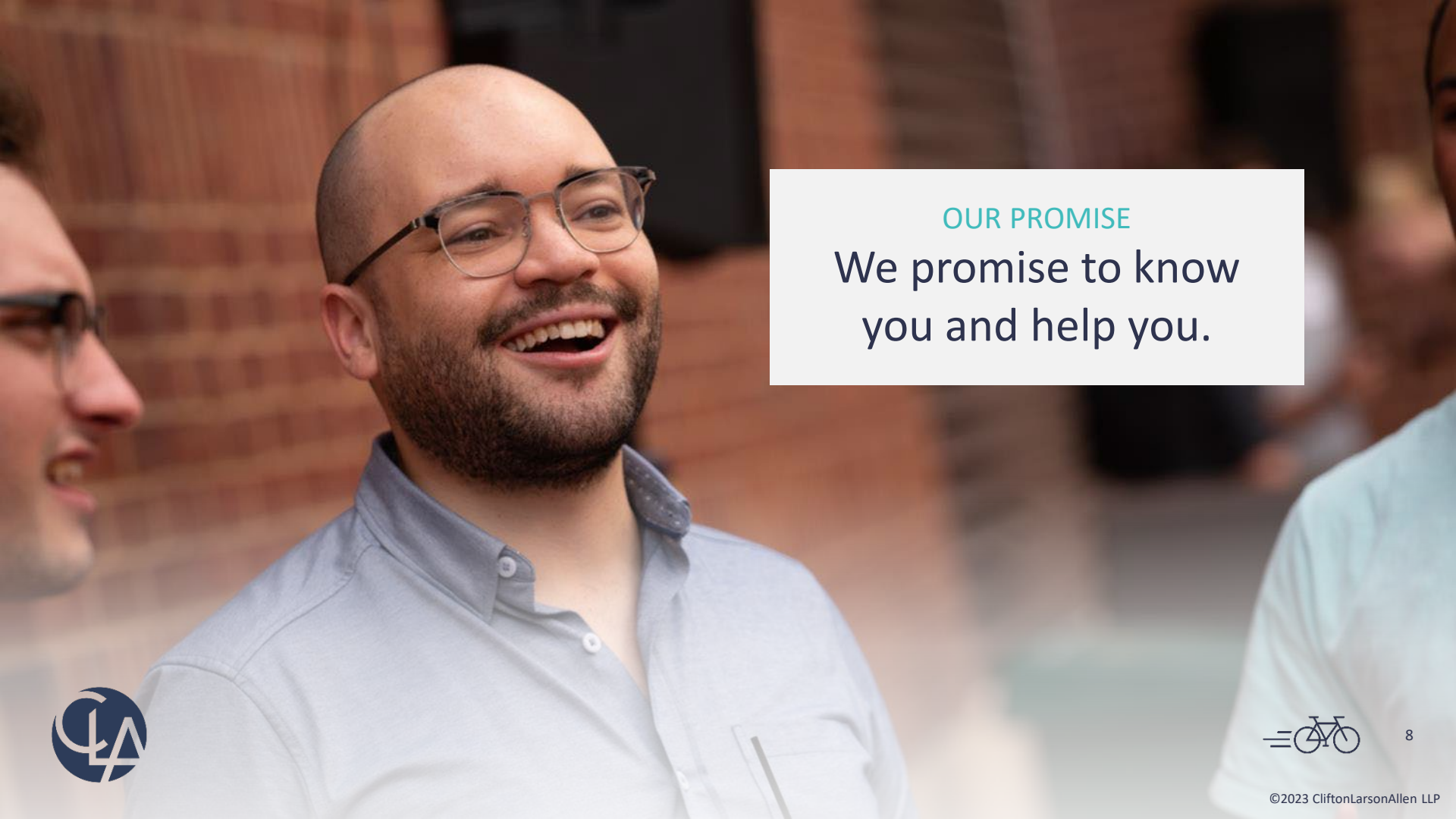
About CLA



The *four* *essential elements* of the CLA Promise

1. Our purpose
2. Our promise
3. Our family culture
4. Our strategic advantages





OUR PROMISE

We promise to know
you and help you.



Serving *You*

CLA creates opportunities for businesses, individuals, and communities through our wealth advisory, outsourcing, audit, tax and consulting services. With more than 8,500 people, nearly 130 U.S. locations, and a global vision, we promise to know you and help you.



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What is Digital?

CLA Digital uses data, automation, and software to meet our clients where they are and help them make data driven decisions.



What is Digital?

DATA

Business Intelligence and Decision Support

Derived from:

- Analytics & Reporting
- Loss Prevention
- Predictive Modeling
- Artificial Intelligence
- Assessments

AUTOMATION

Efficiency and Capability is created from:

- System Integration
- Process Automation
- Platform Optimization
- Custom App Development
- Strategy and Innovation

SOFTWARE

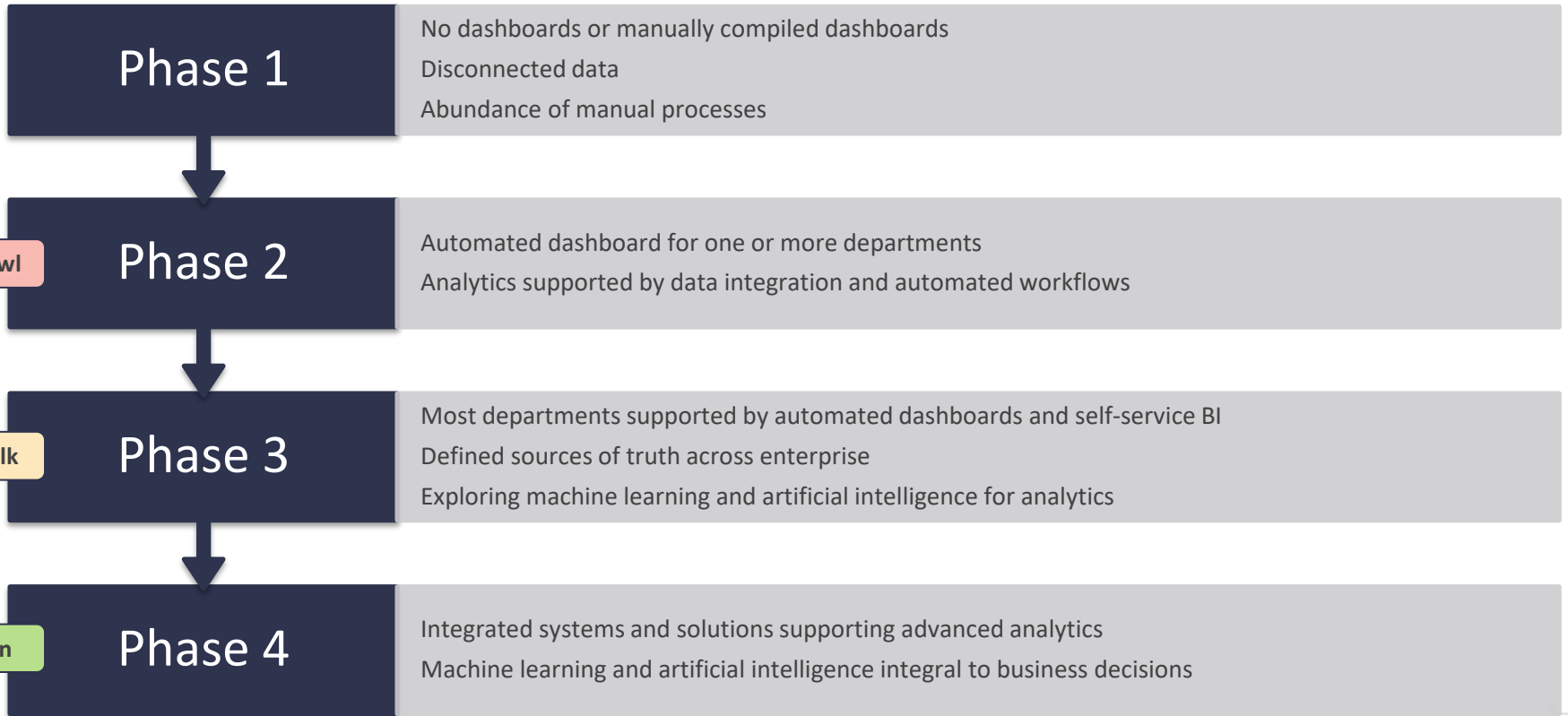
We maintain strategic partners to help our clients:

Software Implementation

- Sage Intacct
- Acumatica
- Microsoft & Azure



Client Lifecycle: CLA Digital



Polling Question

Where on the lifecycle do you see your organization?

- Phase 1: Mostly manual, disconnected systems, not easy to pull data, limited dashboards
- Phase 2: Starting to integrate systems, some dashboards
- Phase 3: Fully integrated environment, robust dashboarding and reporting, Self Service analytics
- Phase 4: Integrated environment, using AI and ML for multiple business decisions
- I'm not sure





Leveraging Your Data to Provide Effective Insights

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The Vision

DATA



SORTED



ARRANGED



PRESENTED VISUALLY



EXPLAINED WITH A STORY



The Challenge

Many companies struggle to access and organize the information they need to make timely decisions.

Software Sprawl

Best in breed software, mountains of data, how to take advantage?

Pressure to do more with less

Short staffed, budget constrained, need “good enough” solution

Competition for resources and talent makes digital capability a cost of entry

Everything is Manual

Multiple disparate systems, murky process, requires “reinventing the wheel” every time anyone needs data

Seemingly endless cycle of manual reporting exhausts staff

Lack of Clarity About What Data Matters

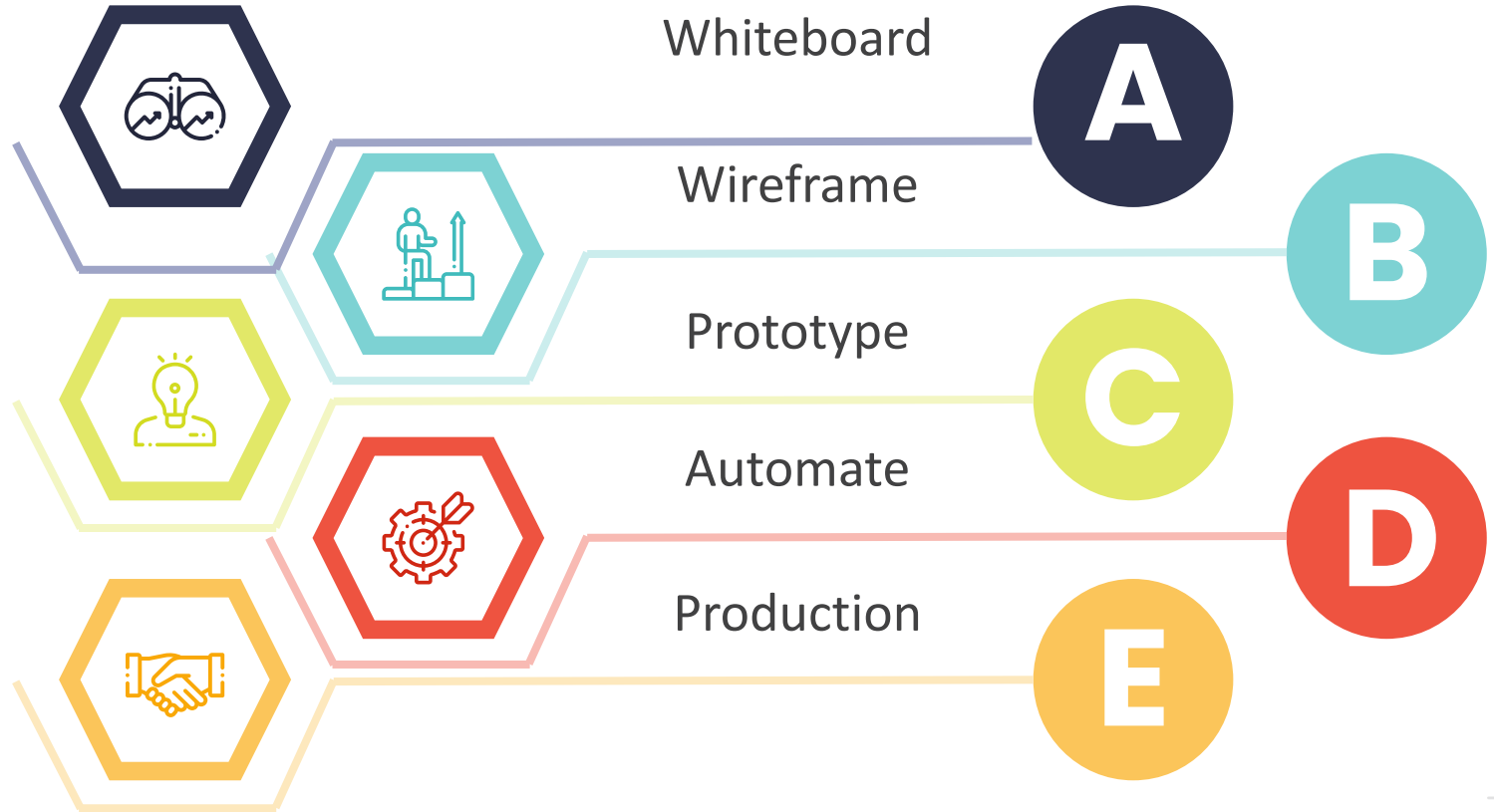
Translating the vision of your strategic plan into simple, measurable, and consistent KPI's.

Polling Question

I have at least one dashboard I look at on a weekly basis

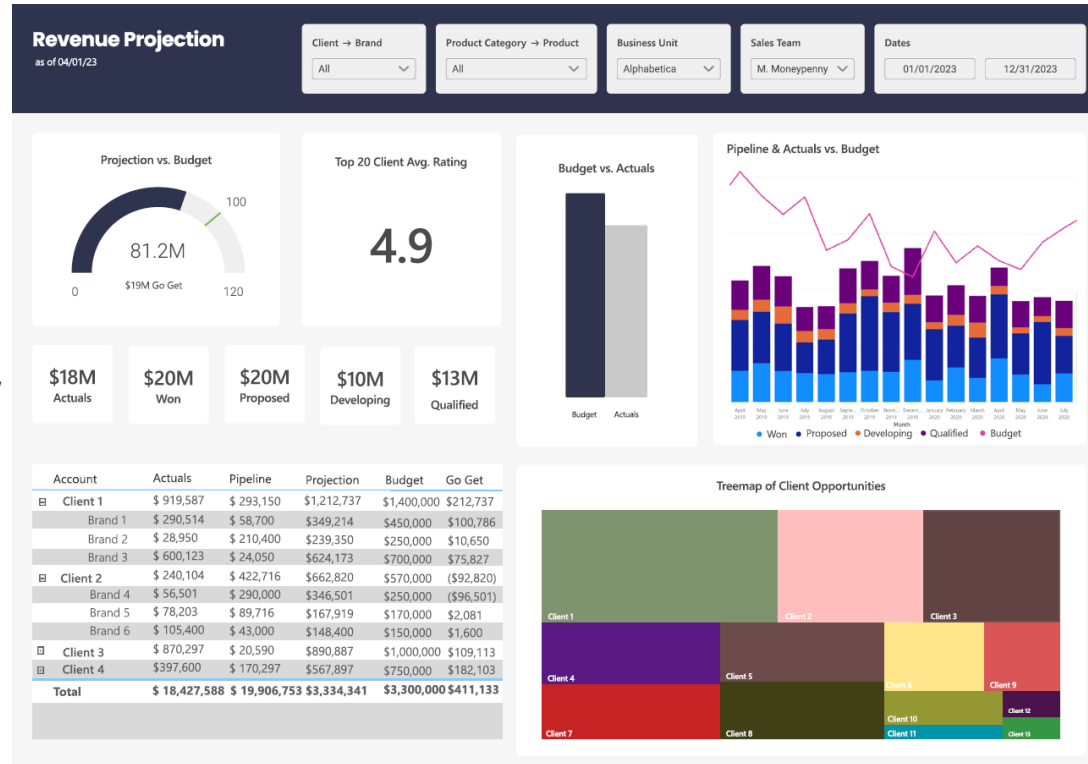
- Yes - dashboards and automated reports are integral to my work
- Yes - but I still find myself doing too much manual reporting outside of my dashboards
- Yes - but my dashboard is created manually
- No - having better dashboarding and reporting is a goal of ours
- No - I have everything I need

From Idea to Dashboard



Exercise: Whiteboarding Your Dashboard

1. Purpose
2. Determine Audience
 - a. Gather key stakeholders
3. Identify most important data & definition of success
 - a. Strategic Vision
4. Think about how to visualize story
5. Determine context and filters
6. Identify security needs



Where to Go From Here?

- 3 Part Series
 - Crawl – Today
 - Walk – Aug 8th
 - Run – Oct 10th
- Have specific questions or want to discuss 1:1?
 - Click “Let’s talk. Contact me.” and we’ll set up a complimentary consultation with one of our Digital specialists!
- Troy Hollings:
 - Phone: 317-569-6123 | Email: Troy.hollings@claconnect.com
- Gregory Chambers
 - Phone: 860-570-6352 | Email: Gregory.Chambers@claconnect.com





Thank you!