Feedback Round 1

I had some external feedback which has helped me think through some of the choices we have made here

1. There is no clear hierarchy in the current view- it just feels overwhelming with charts. The executive's job is not to be lost in a sea of metrics. It is to quickly surface the issue, look at a couple of important numbers, and then take action. An action for them looks like
    a. highlighting the issue to a POC, asking them what is missing
    b. meeting with the POC to have this exact discussion.
    c. But they need to quickly take actions and enable other leaders to resolve things and build what's required.
    d. Unless we are looking at something like Talk to Your Data functionality, which is a different kind of use, not day-to-day. It is more of a frequent recurrence where you want to look at different kinds of data for exploratory and research reasons. So that requires a completely different look, and you can check the requirements for that there- explained further below.
2. **Regular time based view- Day to day regular usage.**
    a. **Core metrics:** Every executive has a max 4-5 metrics they truly care about which is what they keep looking at regularly. Depending on how much time they have they would deep dive for details. They usually do a 5 min , 15 min, 50 min - On the current dashboard these flows or pattern of usage doesn’t have easy ways to interact.
        i. **5min view** to view their core metrics to check if everything is on track, view quick summary
        ii. **15 min view** to double click on a few metrics, check status of anything they were tracking in the past
        iii. **in 50 min view** they would check their metrics, get into details of issues, look for info on their own, and they would also like to take actions on what they find in the deep dive, also while looking at status of past bookmarked things
3. **Makeup of their core/main page**. We talked about having a 5-minute and 15-minute view for CXOs. Let's talk about design of their core page. As soon as the CXO lands on their core page view, they will want a quick summary of what is happening. A three, max four-liner first, which is supposed to catch them up on the most pressing matters, that is their core metrics. A quick look at their core metrics also helps them further solidify context and understand if they are going strong or not. Next, they will look for metrics they were previously tracking, either in a past meeting or some crucial number that they have pinned and want to look at. This is all what happens in the five minutes. If they have any further time, they will look at what actions are recommended for them to look at and also see the status of those actions. Within these actions, they might see certain targets or alerts they might have set, whether that's achieved, not achieved, unassigned issues, assigned issues, and that's all. In a 15-minute view, they might further go to take some actions or do some interaction with these actions listed. Apart from this, any additional charts placed on their core view is only a distraction. We should be able to break this up into three sections,

which is the three-four liner quick summary to catch them up, therefore the three to five core metrics that they monitor, and their actions. The actions is a summary of all the recommended actions based on their underlying data, where all issues are there within their core metrics. Recommended to have within each action is what action needs to be done, by which identified POC, when was it assigned, when is it due, urgency, whether it is open or not, and possibly some target, if that's relevant. And there should also be quick actions to follow up, send a follow-up email, set a follow-up meeting, and so on. When sharing or assigning such actions to somebody, it should also send them the requisite analysis and context of that situation. The part that I told about the core metrics originating from core actions or core responsibilities of a CXO, and then further coming down to drilling down the value tree, needs to be mapped out as a node diagram, which you can provide to me as a requirement, and I will start working on it separately.

4. **Hard Prioritization- Core screen redesign** For each user, we have currently decided and created a core strip, which is the CEO's core metrics, and we are showing them to all other CXOs in their respective views. This is core prime real estate that is being occupied to show metrics which they don't even use day to day. For example, a CSO will want to check how different sales heads are doing as per their monthly targets. How much penetration have they done? Does it look like they will be able to meet their targets for the month? Is something that the CSO will keep checking regularly using this dashboard. Similarly, a COO would regularly check stock levels and try and ensure that healthy stock levels are maintained across the warehouses and also within stores. Similar considerations a CFO will be taking for their prime responsibilities and so on. By putting this strip in every single view, we are deviating from their core purpose. Remove the CEO strip from other CXOs. The core strip will only show core metrics of the CXO. Core sections include
    a. 3-4 line issue and status summary
    b. Core metrics for CXO (including bookmarked things)
    c. Action window (assessed from the metrics and which are under their purview)
5. **Hard Prioritization check** Every time you are going beyond these three sections for a CXO in their core page, ask yourself:
    a. **Do we need this and why?** which core requirement of theirs is this addressing? Should we add this or not? Can it be a secondary, tertiary, or a quaternary view?
    b. **Position:** And is it really required here? If it is required, then think about where should it be located. Should it be given upfront? Should it be in a collapsible view? And why does it make sense there only?
    c. Find the most appropriate location for it. If you are not able to do either, you can ask. Remember, the executive dashboard is a dashboard to highlight core issues and take action. Either of these function fails, the dashboard is not doing its job.
6. **Repeated viewing past tracked data:** Certain data (single or multiple or a combination of metrics) could be tracked for longer periods of time (such as an extended issue or project which the user may be wanting to track for a week/month/year) until the user decides they are done tracking
    a. For handful of metrics they user should be able to bookmark a few metrics from their main view in the dashboard and see trends

    b. For several metrics they should have an option to name and save a custom dashboard view/configuration to pull up when needed.
7. **(Pretty frequent custom need) Talk to your data:** Executives lead with a lot of random things in their work, so many proposals, strategising and planning out of the box things, talking to different external people, press interviews, etc. they would require a lot of random specific things Eg1- How do we compare against xx and yy brands in zz category in the UK from 2022 to 2026? Eg2- How is the market in Indonesia doing after we did that pivot? Eg3- Do we need a new agency in Taiwan? Eg4- Meeting the CEO of one of your largest accounts. Etc. For all of this a CXO needs a lot of custom views which usually takes time for an analyst to prepare and give (losing precious time) and these filters may not always allow the user to set this up for themselves, and neither is the CXO willing to fiddle with filters every single time.
    a. **Interaction model:** They would rather say/enter this directly into a terminal which would help me narrow their exact ask and provide these specific views of their data along with a summary explaining the key takeaways from the data. This information could look like a single chart/multiple charts, one metric or several metrics with different slices and filters/dimensions with an AI summary highlighting the
    b. **Saving progress:** CXOs might need to view some of these views again or sometimes for over an extended period of time. They could have multiple such cases/dashboards.
    c. **Share views** Some of these analyses they would like to share with other employees who might further build or modify the dashboard/analyses. This is a pretty common action here.

8. **Setting alerts** Users (Execs) will like to send themselves (and other emails) alerts on a metric of their choosing. The alert must be sent via email. The alerts can of these types
    a. Metric goes beyond a select value
    b. Metric goes under a select value
    c. Metric goes beyond a select range (upper and lower limit)
9. **Recommending actions** Users (execs) are using the dashboard to understand data in order to take actions and implement them. The dashboard must be evolved enough to understand the entire business context (business, industry, past actions, past performance, past decisions, future long-term outlook, annual targets, revenue growth targets, industry dynamics, global events and economic situation, etc) and accordingly provide sound solutions/fixes.
10. **Taking action** Users (execs) are using the dashboard to take actions and implement them. Users would need to provide detailed context and analyses when trying to get in touch with respective POCs. Their actions would involve identifying an issue/recommended action and the POCs
    a. Either emailing them with issue/recommended fix
    b. Setting up a call with identified POC
11. **Share views** Some of these analyses/filtered views they would like to share with other employees who might further build or modify the dashboard/analyses (especially a custom view)

12. **Bookmarking**: CXOs might need to view some of these views again or sometimes for over an extended period of time. And these should be visible in relevant sections eg- settings of filters should be where filters are, you should be able to pin metrics to you main/a an expandable section within your home/main page. Or also easily view your saved analyses as an expandable list (to view analyses as a separate page) in the main page. They could have multiple such cases/dashboards.
    a. Individual metrics
    b. Custom analyses
    c. Actions
    d. Dashboard config/Filters config
    e. Interactions- create, rename, delete
13. **Recheck/Hard prioritization- Selection of core metrics for a CXO** Every CXO only monitors a core set of metrics, which enable them to address their most important core responsibilities. Each metric then has a value tree. And what I mean by that is if there is an issue with a core metric, and diving deeper into what makes up that core metric will help them identify the root cause of where issues are. And this is how it should work. Any metric that is a good-to-have, that they cannot impact, is unnecessary to place on this dashboard.
14. **Clustering:** When you are showing a core metric, for example, you are showing contribution margin or contribution margin percentage as a core metric, there could be two, three, four subsequent charts within that that a user might want to look at. There is limited use if you provide the first chart on the top left corner and the contextual charts in the bottom right, somewhere else, and in between there is a lot of other additional information. Ideally, a user should be able to see both charts side by side, or next to one another, or one below the other, so that they can make continuous information. So double-clicking on a core metric should allow users to see similar or most commonly seen views, or derivative charts, or different views of the same chart in that double-click, which is an expandable and collapsible view. Showing it in a different location in the chart is wrong.
15. **View on the move: {Roadmap}** A large part of users' **(**exec) would involve traveling and be spent in meetings- the handiest thing available is a phone. They need to be able to see core metrics, saved custom views/metrics and the sumary and bookmarked and ongoing actions.

Benchmark

5. Benchmark against leading tools

Capability	Leading tools	Ours today	After the redesign
Proactive summary of what changed and why	**Tableau Pulse**: daily digests in Slack or email with plain-English drivers	Briefing on the page	Same, plus role-specific. Weaker: no email or Slack delivery
Follow / pin metrics	Pulse: followed metrics, alerts on unfavorable trends	❌	✅ Pins and bookmarks
Alerts	Pulse, Power BI	❌	Rules ✅; email roadmap
Ask your data	**Power BI Copilot**, **ThoughtSpot Spotter** (governed semantic layer, follow-up questions)	❌	✅ Prototype-grade. Weaker on governance and data breadth
"Why" analysis	**Circana Complete Why**: up to 60 drivers per product and market, including competitors, economy and weather	Bridge + rule-based likely cause	Ours is **narrower and less rigorous**, but tied to P&L and margin, which Circana's sales-driver focus isn't
Turning insight into owned action	Mostly weak: tools push to chat, with no owner, due date or status workflow	Partial	**Our main differentiator**: actions with owners, dates, status, context packs
Role-specific CPG value trees	Generic tools leave this to the builder	✅	✅ Our strength
Missing in ours	Governance and permissions, live data refresh, chat and calendar integrations, what-if scenarios, audit trail	—	List them in Deliverable 1 as production requirements