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Case Example: Management information tool

The Senior Investment Manager at one of our clients each month summarises the performance of ongoing investments and presents them to top management. data2impact were asked to develop a solution to enable the client to 1) automatically build this presentation for any selection of investments, and 2) create summary tables indicating overall performance.

Using a dashboard template we developed in Excel, the manager now selects which investments to present and enters the corresponding summary information. A PowerPoint presentation is then generated using the selected dashboards.

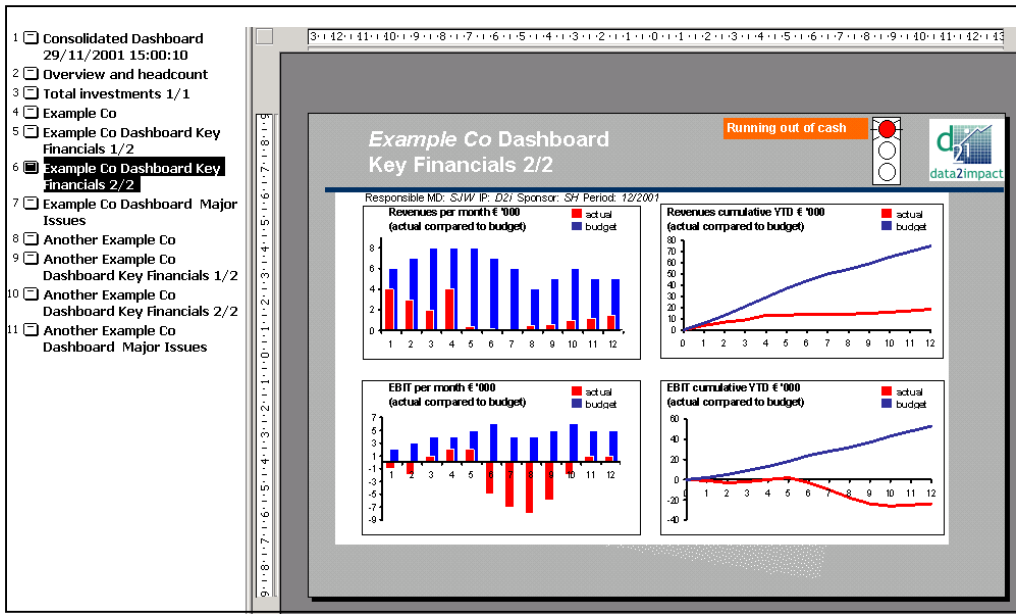
This is how it works:

- Data are entered in Excel into three high-level categories: Overview Financials, Headcount, and Investment Details (a description of the investment object).
- Within each category, the investment manager selects the data relevant to the subset chosen (e.g., a certain geographic region) and, in the Investment Details category, selects the investments to be reported on. These data are consolidated and form the basis for automatically generated summary tables.

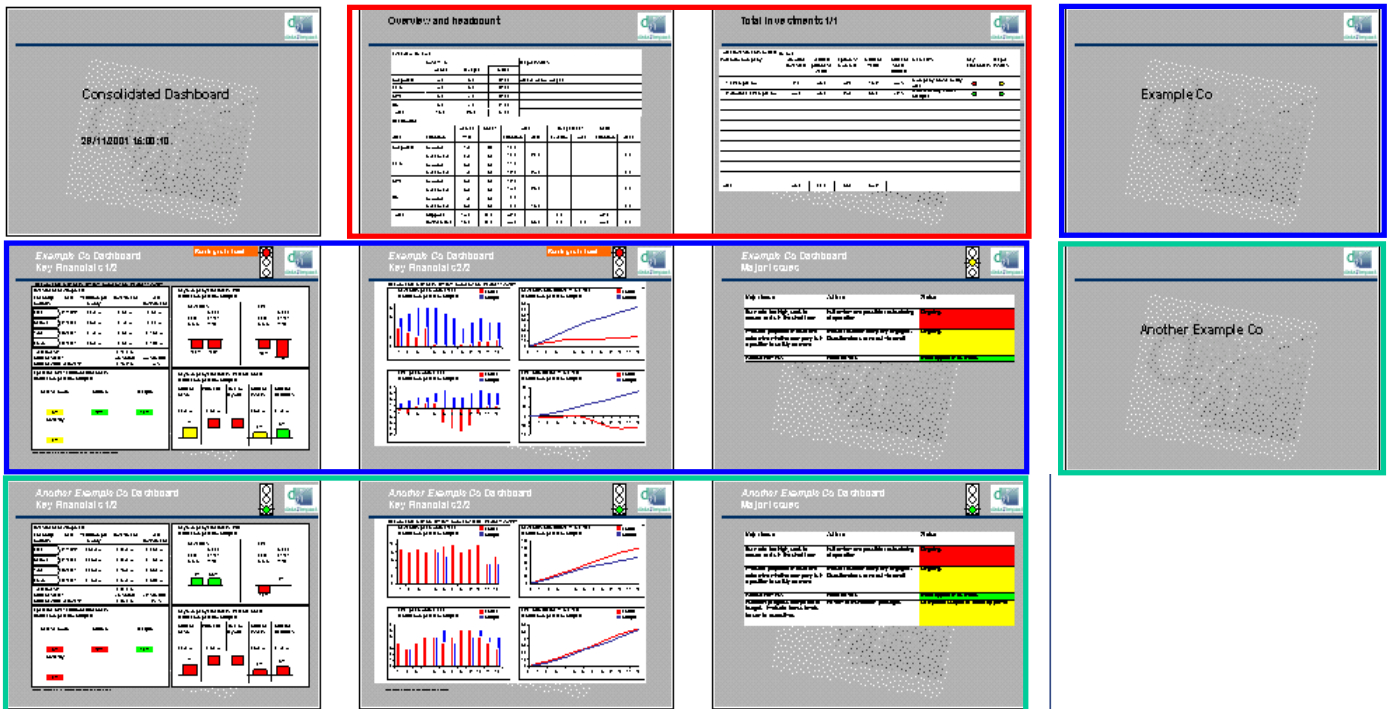
Directory to Search:		Create Presentation		Powerpoint template:					
Overview									
(in €m)	Cost YTD			Major Issues					
	Actual	Budget	Delta						
Corporate	3.0	5.0	(2.0)	All are below budget					
Region 1	4.0	6.0	(2.0)						
Region 2	5.0	7.0	(2.0)						
Region 3	6.0	7.0	(1.0)						
Total	18.0	25.0	(7.0)						
Headcount									
Area	Function	Actual YTD	Hired*	Total		Budget 2001		Delta	
				Function	Area	Function	Area	Function	Area
Corporate	Support	1.0	9.0	10.0	20.0			-10.0	-20.0
	Investment	2.0	8.0	10.0				-10.0	-20.0
Region 1	Support	3.0	8.0	11.0				-11.0	
	Investment	4.0	8.0	12.0	23.0			-12.0	-23.0
Region 2	Support	5.0	7.0	12.0				-12.0	
	Investment	6.0	7.0	13.0	25.0			-13.0	-25.0
Region 3	Support	4.0	5.0	9.0				-9.0	
	Investment	3.0	6.0	9.0	18.0			-9.0	-18.0
Total	Support Investment	13.0	29.0	42.0	86.0	0.0	0.0	-44.0	-86.0

Once all the data are entered, the manager only needs to click on "create presentation" to create a report for the subset chosen (or for all investments captured). All slides – including footnotes, titles, and graphics – are created automatically.

Under PowerPoint, titles are added in the "Outline" view to permit navigation within a presentation even if it covers a number of investments (see below).



Below is an example presentation using 2 investments:



The benefits of this solution are obvious: It provides a reliable monthly reporting framework with consistent formats, while allowing for substantial time-savings.