



REPORTING FRAMEWORK

SESSION 36055
Thursday, 10th November



THE UNIVERSITY OF SYDNEY

- Australia's first University
- Established 1852
- Sidere mens eadem mutato

ADU 9-11 NOVEMBER 2016

PRESENTER

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- Scorpio
- Degree in Medical Science
- Caught over 130 Pokémon
- Not good at walking



OVERVIEW

1. PURPOSE OF A REPORTING FRAMEWORK
2. APPROACH
 - Review existing reports
 - Determining KPIs
 - Categorising KPIs
 - Design Report
3. CURRENT STATE
4. SUMMARY
5. QUESTIONS?

PURPOSE

WHAT IS THE PURPOSE OF
THE REPORTING
FRAMEWORK?

PURPOSE



What?

- Monitor performance
- Professional visualisations
- Increase accuracy of data
- Consistent comparable reports

Why?

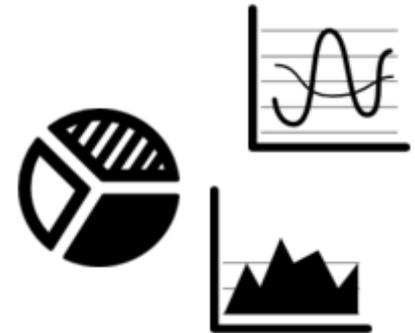
- Save time and resources
- Increase confidence
- Reputational

APPROACH

HOW DID WE GO ABOUT
CREATING A REPORTING
FRAMEWORK?

APPROACH

- Review existing reports
- Determining KPIs
 - Research best practices
 - Review and refine metrics. Define red/amber/green thresholds
 - Data hierarchy (KPIs/metrics/appendices)
- Group relevant data
- Design Reports



APPROACH — REVIEW EXISTING REPORTS



APPROACH — DETERMINING KPIS

- **Determining KPIs**

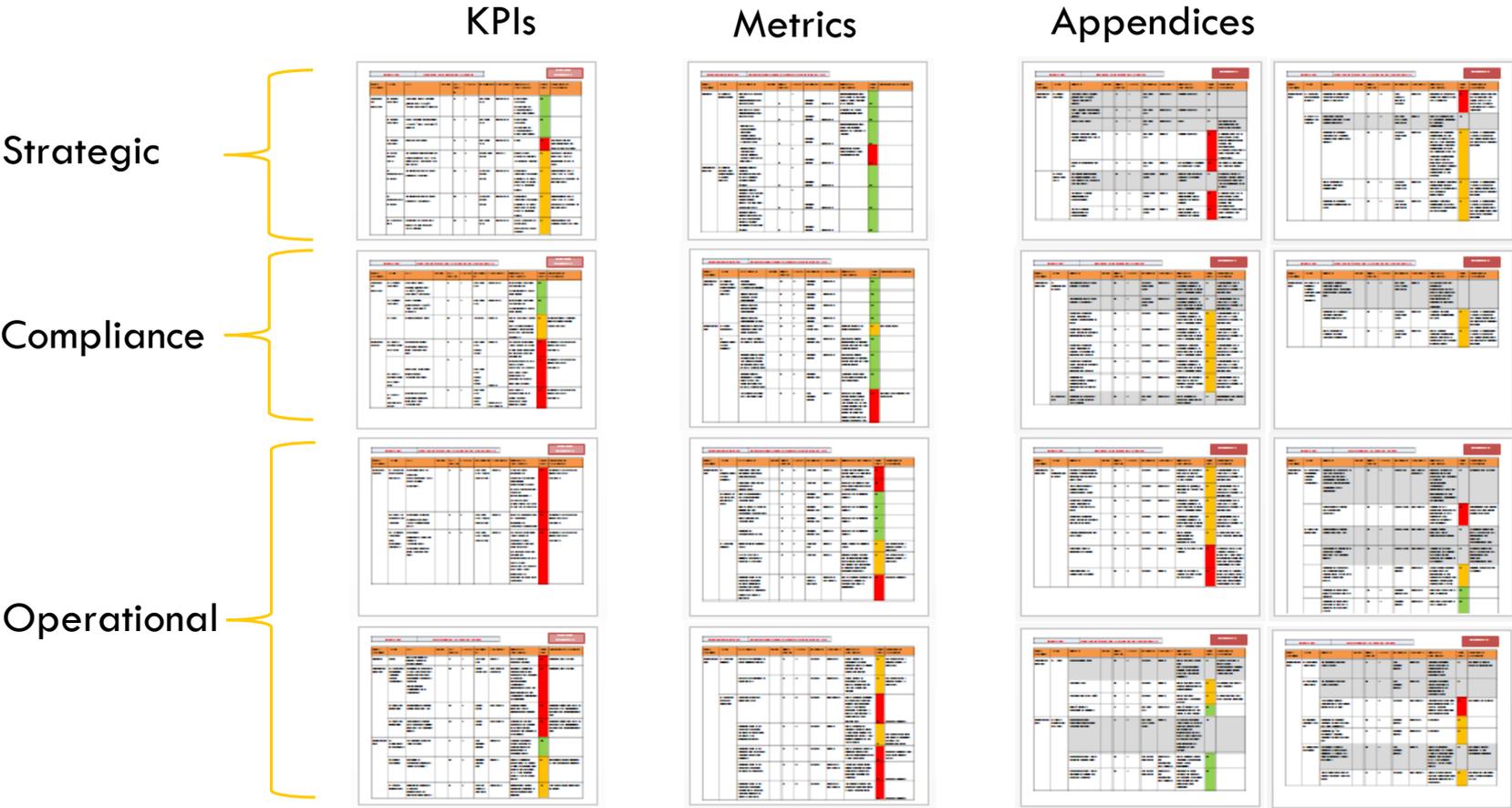
- Research best practices
- Review and refine metrics. Define red/amber/green thresholds
- Data hierarchy (KPIs/metrics/appendices)



APPROACH — DETERMINING KPIS

Metric	RAG Thresholds		
	Red	Amber	Green
	A problem needs serious attention and action now	Not complete, in progress, a risk but not an issue yet	On track, in progress and complete to plan, no issues
Generic Corporate Card Acquittal metric	$x > \$500K$	$\$250K < x < \$500K$	$x < \$250K$
Generic outstanding unapproved requisitions	$x > 20\%$	$10\% < x < 20\%$	$x < 10\%$
Percentage of generic non compliant requests	$x > 20\%$	$10\% < x < 20\%$	$x < 10\%$
Generic Purchase Order metric	$x > 30\%$	$10\% < x < 30\%$	$x < 10\%$
Generic voucher creation metric	$x > 30\%$	$10\% < x < 30\%$	$x < 10\%$
Percentage of invoice sample metric	$x > 10\%$	$5\% < x < 10\%$	$x < 5\%$
Percentage of payments that are not compliant to generic policy	$x > 5\%$	$1\% < x < 5\%$	$x < 1\%$
Percentage of suppliers that are compliant to a spend policy	$x > 80\%$	$80\% < x < 90\%$	$x < 90\%$

APPROACH — DETERMINING KPIS

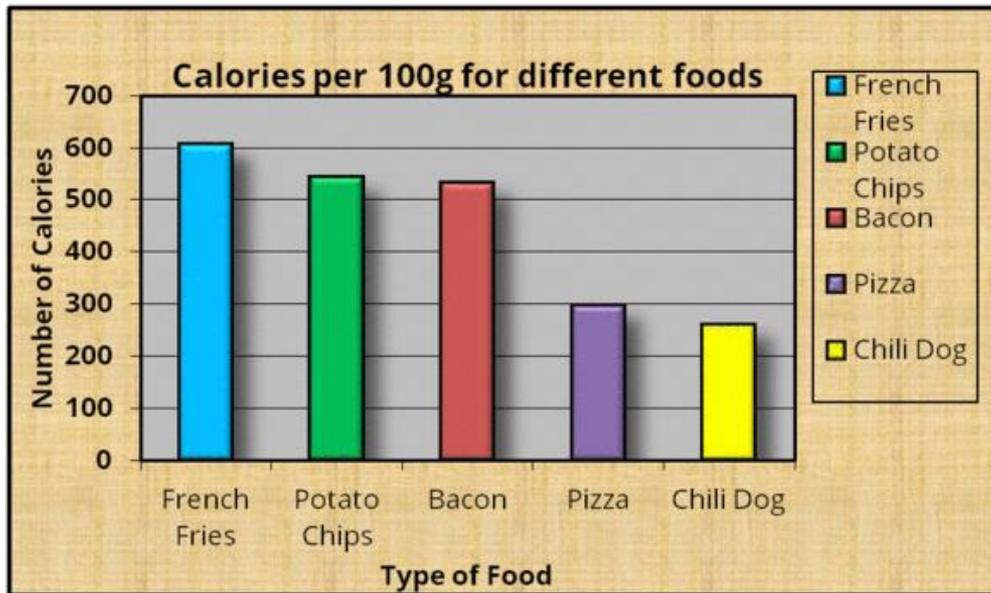


APPROACH — GROUP RELEVANT DATA



APPROACH — REPORT DESIGN

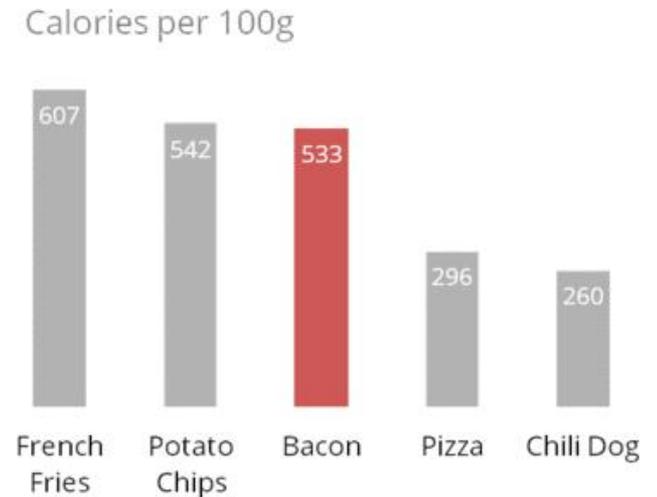
Before



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After



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APPROACH — REPORT DESIGN

Before

Role	Name	Year of the...	Debut	Number of Fans	Takedown Rate
Face (The Hero)	The Ultimate Warrior	Tiger	May-2011	97320.00	86.2
Face (The Hero)	Hulk Hogan	Oxen	Jan-2008	988551.00	61.978
Face (The Hero)	Macho Man Randy Savage	Monkey	Feb-2008	157618.00	59.29
Face (The Hero)	Hacksaw Jim Duggan	Pig	Mar-2008	30300.00	53.4332
Face (The Hero)	Superfly Jimmy Snuka	Dragon	Mar-2008	12341.00	52.7
Heel (The Bad Guy)	Rowdy Roddy Piper	Rooster	Jun-1968	71645.00	45.4
Heel (The Bad Guy)	The Million Dollar Man Ted DiBiase	Rat	Apr-1975	449342.00	43.7689
Heel (The Bad Guy)	Mr. Perfect Curt Henning	Rat	May-1980	13773.00	38
Heel (The Bad Guy)	Jake the Snake Roberts	Snake	Jul-1975	5609.00	37.99
Jobber (The Unknown)	Brad Smith	Sheep	Aug-2008	1103.00	36.316
Jobber (The Unknown)	Ted Duncan	Sheep	Aug-2008	200.00	33.61
Jobber (The Unknown)	Joey the Uber Nerd Cherdarchuk	Snake	Aug-2008	5.00	21.0196

After

Role	Name	Year of the...	Debut	Thousands of Fans	Takedown Rate
Face (The Hero)	The Ultimate Warrior	Tiger	May-2011	97.3	86.2
	Hulk Hogan	Oxen	Jan-2008	988.6	62.0
	Macho Man Randy Savage	Monkey	Feb-2008	157.6	59.3
	Hacksaw Jim Duggan	Pig	Mar-2008	30.3	53.4
	Superfly Jimmy Snuka	Dragon	Mar-2008	12.3	52.7
Heel (The Bad Guy)	Rowdy Roddy Piper	Rooster	Jun-1968	71.6	45.4
	The Million Dollar Man Ted DiBiase	Rat	Apr-1975	449.3	43.8
	Mr. Perfect Curt Henning	Rat	May-1980	13.8	38.0
	Jake the Snake Roberts	Snake	Jul-1975	5.6	38.0
Jobber (The Unknown)	Brad Smith	Sheep	Aug-2008	1.1	36.3
	Ted Duncan	Sheep	Aug-2008	0.2	33.6
	Joey the Uber Nerd Cherdarchuk	Snake	Aug-2008	0.0	21.0

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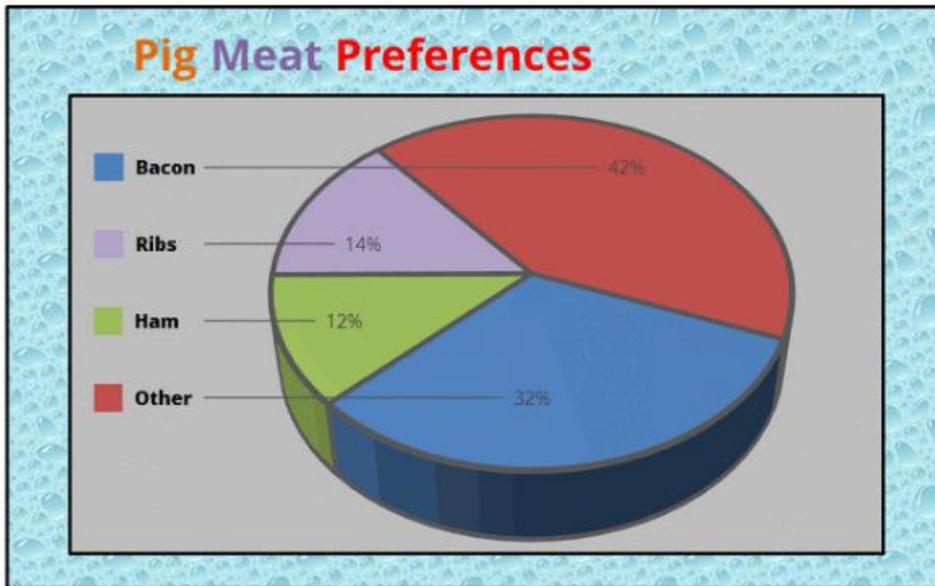
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<http://www.darkhorseanalytics.com/blog/clear-off-the-table>

APPROACH — REPORT DESIGN

Before

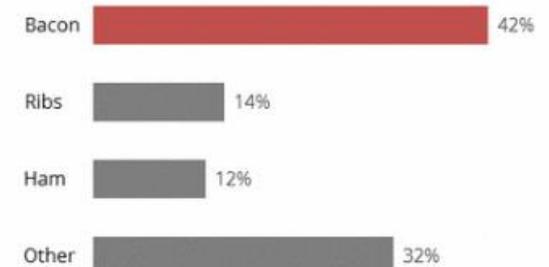


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After

Pig Meat Preferences



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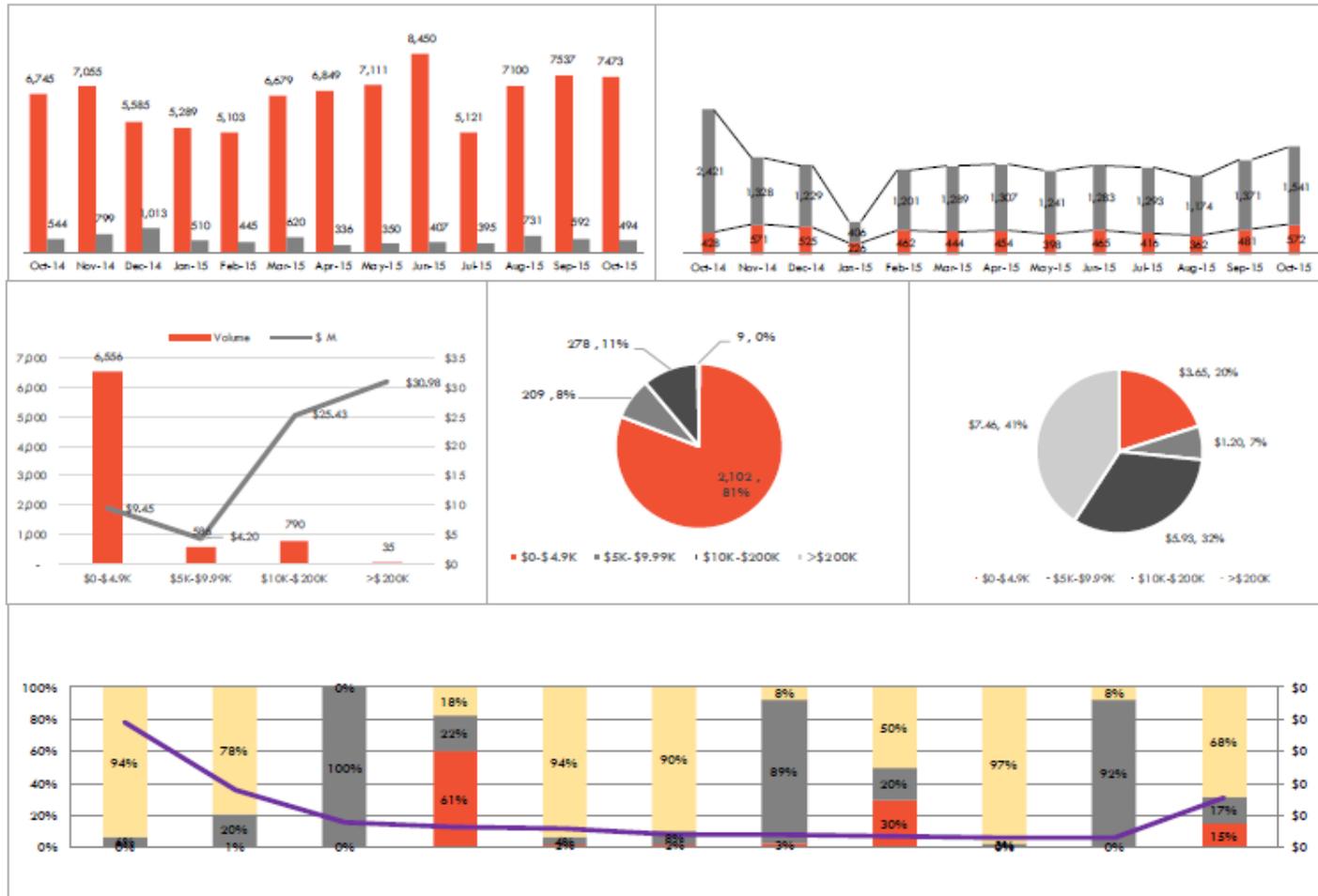
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<http://www.darkhorseanalytics.com/blog/salvaging-the-pie>

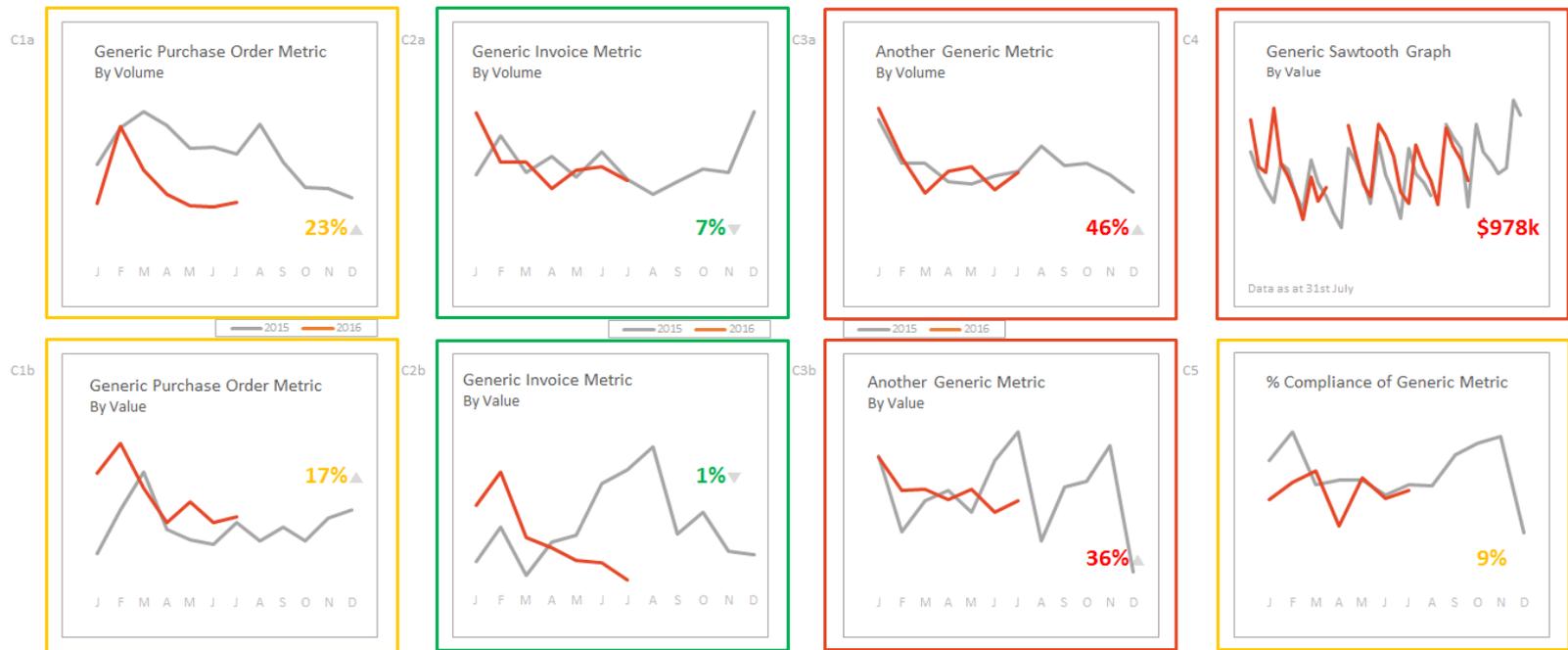
CURRENT STATE

WHAT ARE THE REPORTS
LOOKING LIKE NOW?

CURRENT STATE — STARTING STATE REMINDER!

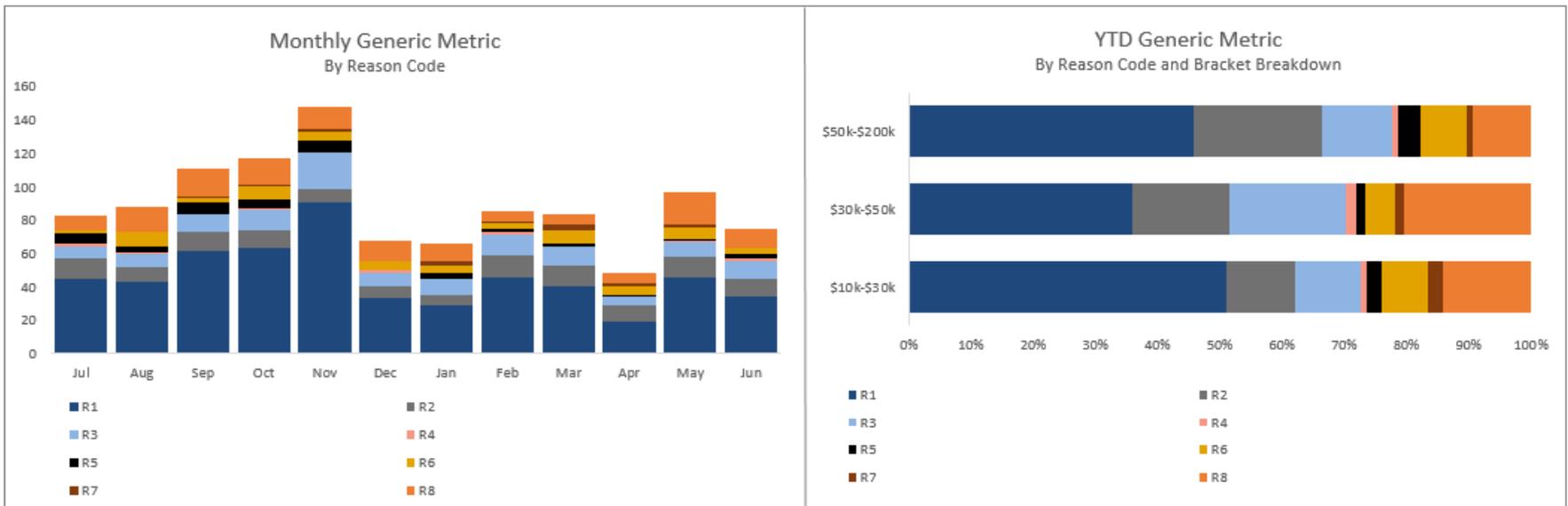


CURRENT STATE - KPIS



The purpose of this format is to ensure that the status can be determined at a glance. This will allow focus to be applied on problem areas. There is usually enough visual information to see trends and year on year comparisons.

CURRENT STATE — METRICS AND APPENDICES



In cases where KPIs are trending red, metrics and appendices are supplied. This will help to determine why they are red and how we can work on improving the situation

SUMMARY

WHAT SOME TAKE HOME
MESSAGES THAT I'VE
LEARNED?

SUMMARY

What are the main things I learned?

- Higher education like to think they are different.
- Where there is a lack of trust in data, everyone wants to see everything
- Data looks better naked
- Some people really don't like pie charts
- When a report has a couple of graphs, people will call it a dashboard

QUESTIONS

THANK YOU FOR
LISTENING, ARE THERE
ANY QUESTIONS?

QUESTIONS



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THANK YOU!



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