Dashboard — execution, energy focus, projection

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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Ready on the 3rd of the month · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **Every figure carries its extraction date in the footer:** a dashboard without a date turns against whoever presents it as soon as one figure has moved in the meantime.

What the dashboard carries

Block	Content	Why in this form
Execution of the 14 chapters	**Amount and percentage of forecast, with the same month of the three previous years**	**The only comparison worth making: it neutralises seasonality**
Energy focus	**+38 %, broken down into price and volume, for the 14 heaviest consuming buildings**	Two causes, two decisions

Block	Content	Why in this form
Year-end projection	On the 14 chapters, with its range	**The assumption is written in one line under the chart**
Management measures	Three, with their costed effect	**The committee weighs amounts**
Extraction date	**In the footer, for every figure**	**What makes the document stand up**

The three expected questions, and their answers already in the pack

Question	Prepared answer
“Is 012 really holding?”	**Yes, +1 %, with the detail by directorate**
“Are the €214,000 of heating realistic?”	**The calculation is written from the occupancy records**
“And capital spending?”	**€4.2m of carry-overs, of which €2.1m on three schemes set out**

The time this moves

Item	Before	With the agent	Over the year
Preparing a dashboard	**60 % — 8 h 24**	**12 % — 1 h 41**	**322 hours across 48 dashboards**
Analysing a chapter's variance	**20 % — 2 h 48**	**8 % — 1 h 07**	**282 hours across 168 analyses**

The management note and the activity report

Document	State	Origin

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Management note	Written, two pages: position, three variances, measures and effects	In the form of the department's previous notes, read and kept
Annual activity report of the finance department	**80 % built as soon as the twelve monthly notes exist**	Same material, same sources

> **A figure that arrives on the 3rd is decided within the month; a figure that arrives on the 21st is decided next quarter.** Over the last five financial years, 4 management decisions were taken more than six weeks after the fact they were correcting.

To be settled by the authority

Date on which the monthly dashboard is made available: the _____ of the month

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