

CASE STUDY

MIS AND IMPLEMENTATION

DEVELOPING A STRATEGIC DASHBOARD

Background

XY Trading Limited is a young and dynamic exporting company in the mobile market. The company has been growing very quickly since they had a breakthrough with their initial product in 2002. Since then the company has developed a number of new and ancillary products and has successfully managed to commercialise these products in Ireland, the UK and across the main markets in Europe. XY Trading has a manufacturing plant and sales office in Ireland, and a mixture of direct sales and channel partners in the UK and Germany. The additions of the UK and Germany outlets to the company were achieved through acquisition; both transactions were successfully completed in 2011.

The company is keen to take advantage of their designs and new products but are already beginning to see competition increase in their current markets. The management team have been discussing, more and more regularly, the challenges that they are experiencing associated with identifying and understanding the most important measures for their business including individual product profitability, country product penetration, customer turnover and profitability, market shares... to-date there has been a lot of debate but a lack of decisions.

Strategic Issues

XY Trading does not currently have a formal MIS / Performance measurement system (or methodology) that covers all areas of the organisation, including manufacturing and sales. The main challenges that the company face, from an MIS and company performance management perspective, include:

- Company performance has been measured and managed through excel, with differing approaches and understanding across the various business units and countries
- There is now a distributed management team and goals and tracking of goals and objectives is not transparent
- There is a growing number of employees involved in developing reports and clarifying reporting / report definition ambiguities across the company
- Country and Business Unit performance is difficult to compare and overall company performance is also difficult to measure and forecast

Case Study Questions

What approaches should be considered by the management team to create an effective performance management and reporting capability for the whole organisation – concentrating on people, process and technology?

- How should they go about linking performance metrics to company strategy, which includes moving into additional markets in America?
- What key areas do you believe they should focus on for metrics, across the whole business?
- Given the distributed nature of the workforce (manufacturing and sales teams) how could online / mobile reporting tools support the organisation?