STRATEGY & TRANSFORMATION

The Decision View.

A report tells you what happened. A decision tool tells you what to do next. Build it from the decision backward, not from the data forward. *Understand first. Build second.*

STEP 01 Work backward from one decision

Decision, question, metric, data

1 · DECISION
What will we decide, and by when?

2 · QUESTION
What must the data answer for us to decide?

3 · METRIC
Which single number answers it best?

4 · DATA
Where does it live, and can we trust it?

Example. "Do we hire two more account managers this half?" becomes "Is the team at capacity, and is pipeline growing faster than they can serve it?", answered by one metric: open opportunities per account manager.

STEP 02 Build the view for one recurring meeting

3 to 5 questions, one metric each

QUESTION THIS MEETING MUST ANSWER	ONE METRIC	OWNER	ACT WHEN

If a number has been on the screen for a quarter and never changed a decision, move it to a report or retire it.

STEP 03 Check before you build

UNDERSTAND FIRST

- ☐ *Which decisions must this meeting make every month?*
- ☐ *What number would tell us it is time to act on each one?*
- ☐ *Which of our charts have never changed a decision?*

BUILD SECOND

- ☐ Rebuild one decision view around those decisions, with a few metrics only.
- ☐ Give every metric on it an owner and an action threshold.
- ☐ Move unused charts to a report, or retire them.

TAKE THIS INTO YOUR NEXT MEETING

What are the three decisions we will make in the next 90 days, and which single number would tell us it is time to make each one?