

# Management information & dashboards



## Do you need expert insight and analytics to support your business?

### The problem with data

Organisations often have a wealth of **valuable data at their disposal** but find **difficulty in interpreting and exploiting** it to their organisational advantage. Data strategy is vital to **inform business decision making** in a way that drives revenue and reduces costs.

These issues are common across our client base, arising for a number of reasons:

-  Gathering data from **multiple sources** and **multiple analytics services** can be **costly in terms of time and effort**;
-  Disparate sources often mean that the **data is not easily comparable**;
-  It can be **difficult to draw meaningful conclusions** on business performance from the raw data without relevant benchmarks; and
-  Data is **rarely in a user-friendly or shareable format**, making it inaccessible to the wider team.

*"According to McKinsey, 90% of all data has been created in the last 2 years, let Optima use their experience to efficiently focus your business on the data that matters."*

**Mark O'Keefe**

Founding Director of  
Optima Consultancy

With **accountancy-trained professionals** and extensive experience in financial analysis, Optima can offer expert insight to help you **optimise the way your business uses its data**. We can refocus strategy, assess business performance and maximise decision-making capabilities to optimise your business.

### How can Optima help?

Our extensive experience in delivering management information and developing dashboards allows us to:

-  **Reduce duplication and complexity** and use automation to **streamline report production**;
-  Provide the ability to drill down and **analyse information easily**;
-  Provide the functionality to **produce different output versions** both in format and audience;
-  Provide a **clear audit trail** process; and
-  Improve the **look, feel and presentation** to help bring results to life.

### About Optima

Optima was founded in 2007 and since then has continued to grow as a professional consultancy practice renowned for excellence in client delivery and service, with a deep and thorough understanding of the payments ecosystem.



# Management information services



## Benchmark reporting

Optima offers a flexible, best-in-class approach to benchmark reporting to establish critical measures of success. In addition we can provide transactional and segmentation reporting to support management and proposition changes.

### Optima provides:

-  **Quality management reporting** delivery;
-  **MIS health checks** and **best practice reviews**;
-  **Performance benchmarking** validating key performance indicators; and
-  **External benchmarks**.



*Optima's expertise and experience allows us to deliver quick, impactful reporting solutions with efficient implementation to rapidly deliver value to your business.*



## Insight & analytics

Expert insight and analytics is a key facet of our benchmark reporting service. We have carried out in-depth analysis to support client campaigns, and have developed streamlined data collection techniques and proprietary models to assist with cost allocation and forecasting.

### Optima provides:

-  **Support and impact measurement** of campaigns;
-  **E2E responsibility** for analysis and presentation of results;
-  **Bespoke reporting** by segment;
-  **Model development** to analyse impact; and
-  A range of **data visualisation choices**.



*"Information is not knowledge", but Optima's analytical capabilities and know-how will help you unlock the value of your data to help drive your P&L.*



## Dashboards

Optima are able to create, develop and implement bespoke dashboard management tools, simplifying complex business processes to positively impact performance. We can provide a single reporting interface that gathers data from multiple sources.

### Optima provides:

-  **Simplification of complex data sets**;
-  **On-demand access** to core business metrics in a **user-friendly** way;
-  Design advice and **construction guidance**; and
-  Support for **scenario modelling** to aid strategic planning and the approach to decision making.



*Optima's dashboard design and implementation allows you to have a user-friendly, dynamic, multi-use tool at your fingertips.*