



ANALYTIC
VIZION

Turning Outdated Quarterly Reports into Weekly, Trusted Signals for Investment Decisions

A healthcare organization moved from manual quarterly portfolio reporting and less intuitive dashboard views to a weekly automated executive report and a redesigned dashboard aligned to leadership decision-making.

“Before this work, the team spent weeks each quarter stitching together a portfolio view that was out of date as soon as it was emailed, and the dashboard still made executives work to see the story. Afterward, they had a weekly, automated Excel portfolio report and a redesigned Tableau dashboard that matched how leaders think about location decisions, so leadership could focus on where to invest next instead of whether the data could be trusted.”

COLIN DUNLOP
Solution Leader

THE CHALLENGE

A healthcare organization relied on **two portfolio reporting assets, each with limitations**. The *Quarterly Portfolio Report* was a manually assembled Excel report for leadership review, and the *Portfolio Dashboard* was a Tableau dashboard to explore portfolio data across locations in more detail. Both were important and needed improvement.

Without change, leadership risked making investment and prioritization decisions with partial or misaligned views of the portfolio, creating exposure around capital allocation, response time, and visibility into where investments were being made.

TOOLS & TECHNOLOGY



OUR APPROACH

Analytic Vizion partnered with this healthcare organization to modernize portfolio reporting and redesign the Tableau executive dashboard, so leaders could work from current, trusted information instead of stale quarterly views.

- Co-designed the portfolio structure and dashboard layout to match leadership's mental model of "location type first."
- Automated the Quarterly Portfolio Report in Excel, moving from a manual quarterly build that took weeks to an automatically assembled weekly report
- Redesigned the Tableau-based Portfolio Dashboard to start with location type and then layer in other filters, making it more intuitive and snapshot-friendly for executive use.

THE RESULTS

The most immediate change was automating the Quarterly Portfolio Report. **A manual Excel process that took weeks every quarter is now generated weekly, giving leadership fresher information in the format they prefer.**

The Portfolio Dashboard was **reshaped into a more usable executive decision tool, with a structure that reflects the questions leaders ask most often** and a design that is more snapshot-friendly for presentations and conversations.

The client **committed additional investment** for continued portfolio improvements, signaling **trust in both the value delivered and the roadmap ahead.**

