

UNIVERSITY OF MICHIGAN MEDICAL SCHOOL BREATHES NEW LIFE INTO BUDGETING PROCESS WITH XCELSIUS® DASHBOARDS

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Bill Elger, Executive Director for Administration and CFO, UMMS



Industry Education

Business Process Budgeting, planning, financial assessment

Challenge
UMMS wanted to give staff the ability to drill down into KPIs for each of the school's departments and perform what-if scenarios with interactive dashboards.

Why Business Objects?
With Xcelsius, department chairs and other staff have access to critical school information at their fingertips – in a sleek dashboard design that allows them to toggle between charts, graphs, and numbers.

Business Objects Products and Services
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CHALLENGE

The University of Michigan Medical School (UMMS) has provided training to doctors and scientists for over 150 years and is consistently ranked one of the top medical schools in the United States. UMMS has approximately 1,800 faculty, 1,000 residents and fellows, 680 medical students, 350 graduate students, and a yearly budget close to \$1 billion.



With a budget that large, traditional budgeting processes are not easy to implement. Furthermore, UMMS, like many other medical schools, operates as a collection of silos, with each discipline principally concerned with its own vertical structure. Funding and budgeting issues for the different units were kept separate, leading to significant fragmentation of management processes between departments.

Because of these factors, it was difficult to know where the school stood financially, which made planning on the department and

school level extremely difficult. For example, budget meetings between the dean of the UMMS and department chairs became arduous because most of the time was spent on trying to reconcile the different financial figures for each department. Bill Elger, executive director for administration and CFO, explains, “Instead of using the time to plan for short-term and long-term objectives from one set of financial data, the department chairs and the dean had to waste time comparing all the different numbers. And, because units defined metrics differently, they were not on the same page about which metrics to measure and how to measure them.”

Elger and his team proposed that the school move to a uniform reporting system in which all departments tracked the same key performance indicators (KPIs). The team wanted a solution that would give the dean or any department chair an at-a-glance view of the school's performance on a variety of KPIs. It was also important that the department chairs have the ability to drill down into more specific metrics for each department.

APPROACH

The university had already standardized on business intelligence (BI) solutions from Business Objects, an SAP company. Elger looked to Business Objects again for help in creating an interactive dashboard to track KPIs. To make the reporting process more interactive, the school chose to deploy Xcelsius® software.

Elger says, “Our old reports produced a lot of data which were dry and not very useful in highlighting trends or focusing on key performance indicators. As soon as we saw Xcelsius, we knew we found the right product to give life to our reports.”

Xcelsius was extremely easy for the school to implement. In fact, Elger and his associates had the school's staff fully running an application built on the product in about five months. Now, the system pulls data from multiple sources, including a data warehouse, the billing office (including relative value units, or RVU, information that ranks the level of technical difficulty of medical procedures undertaken by the staff), and the National Institutes of Health website, which helps compare how the university is performing relative to other institutions.

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RESULTS

With Xcelsius, UMMS department chairs are better able to view at a glance critical data – such as the research rankings, research grant information, research space, among many other factors –and drill down into the interactive dashboards for more information. For example, with dashboards created in Xcelsius, users can view the current research portfolio and perform what-if scenarios around the number or dollar amount of grants to see how changes in the portfolio might change the unit's research ranking.

The Xcelsius dashboards are also extremely valuable in figuring out how well research space is being utilized. In most cases, research requires a subsidy to cover all costs, so using the research space effectively is very important to keeping those costs under control. UMMS created a research dashboard that provides a tool that has three variable factors that a user can manipulate, which will show the amount of direct research dollars that are required to support a given number of square feet. Formerly this was a manual process – or, in many cases, these calculations were not performed at all and decisions were made blindly without the data.

In the future, Elger hopes to roll out an email alert system using the Xcelsius reports. If a key performance indicator falls outside a predetermined range, an email will go out to the specified user. Today, with Xcelsius, users have critical data at their fingertips, allowing them to make more informed decisions.

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