

Interactive Investor Dashboards

Start-Up, Energy

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Client

Our client is an Australian start-up energy company that builds and operates small-scale biofuels and waste-to-energy heat, electricity, pelletisation, and cogeneration plants.

Purpose

The client required a dashboard that would be used to present the business to potential investors during their capital raise roadshow. The dashboards were developed using Power BI and were securely embedded online with individual usernames and passwords. This provided investors real-time access to the numbers in a professional, presentation quality format.

The key requirements included:

- Visualisations and Data Tables – The dashboard included both visualisations and data tables to allow for trend analysis and ability to examine the finer detail. Drilldown functionality allows users to easily analyse the data across various levels.
- Slicers and Filters – The ability to turn on/off individual projects and adjust the time horizon presented in the visualisations to examine individual project profitability and the overall impact on the parent company.
- Data Export Functionality – The ability to easily export data from a financial model built in Excel to a format that can be loaded into Power BI.
- User Guide – A full user guide that explained how to use and interact with the dashboards was needed since not all users would have experience using data visualisation tools such as Power BI.

Approach

Forecast worked closely with the client's key stakeholders and used a prototype dashboard to draw and develop the visualisations, interactive slicers and filters, pages, and overall flow of the dashboard. Once the dashboard was designed and approved, it was implemented by Forecast's visualisation experts with feedback from the client throughout the development.

Outcome

The dashboard enabled the client to provide a live and interactive presentation of their business forecast information to potential investors. This enabled investors to examine the key metrics of the business in detail through high quality visualisations without having to dig through equations in a full financial model.

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