

The Value Management Dashboard & QVR Template: The operational guide for weekly value tracking, structuring and executing the QVR

Instructions: A living internal tracker. Use this to monitor health weekly.

How to Use:

- The Project Conductor Agent pulls the raw data for Part 1.
- The Value Analyst Agent synthesizes Part 1 to create the narrative for Part 2.

PART 1: THE VALUE MANAGEMENT DASHBOARD (TRACKING)

Pre-populate the baseline column with data from Workshop 2's ROI Plan.

Metric Category	KPI	Description	Calculation Logic / Target
Productivity	Avg Task Time	Time per task (e.g., support ticket)	=AVERAGE(range); Goal: 20% below baseline
Quality / Accuracy	Error Rate / Rework	% outputs needing correction	(Errors / Total) * 100; Lower than baseline
User Experience	CSAT Score	Avg user rating post-interaction	Scale 1–5; Goal: +0.5 points vs baseline
Adoption / Usage	Monthly Active Users	Unique users of the system	Count active users; Goal: ≥ 50% of target cohort
Efficiency	AI-Absorbed Vol	Count of fully automated tasks	Total "Automate" Skills triggered
Efficiency	Hybrid Vol	Count of augmented tasks	Total "Augment" Skills triggered
Financials	Cost per Task	Operating cost per output	=TotalCost / NumberOfTasks; Should reduce
ROI	Cognitive Dividend	Monetized Time Savings	(BaselineTime – NewTime) * TaskCount * Rate
Risk / Governance	Drift Alerts Count	Count of drift/ out-of-bound incidents	Track weekly; Goal: ≤1 alerts
Governance	Compliance Score	% compliance with policies (audit-based)	Score / Total Checks * 100; Aim for 100%

Adoption & Engagement Metrics:

- % of Licensed Users Active Weekly
- Top 5 Most Used Agents & Prompts
- User Satisfaction / Feedback Scores

Efficiency & Productivity Metrics:

- Time Saved Per Task/Workflow (as estimated by users or measured in pilots)
- Reduction in Manual Errors or Rework
- Increase in Tasks Completed or Throughput

Business Outcome Metrics (tied to the SOW):

- [e.g., % increase in Sales Qualified Leads]
- [e.g., % reduction in customer ticket resolution time]
- [e.g., % improvement in compliance audit scores]

Qualitative Insights:

- Direct quotes and success stories from users.
- Examples of high-quality, AI-augmented work artifacts.

PART 2: THE QUARTERLY VALUE REVIEW (QVR) DECK

*The definitive report for demonstrating ROI, validating the human alpha reinvestment, and securing contract renewal. Use your **Client Success (CSC) Co-Pilot** to generate this draft.*

Slide 1: Executive Summary

- **Period:** Q[X] [Year]
- **Headline:** [One sentence summary of value delivered]

Slide 2: The Cognitive Dividend (Efficiency)

- **Metric:** Total Hours Saved vs. Target.
 - *AI-Absorbed (Automate):* [X] Hours
 - *Hybrid (Augment):* [Y] Hours
- **ROI Calculation:** [Hours Saved] × [Avg Hourly Cost] = \$[Savings]

Slide 3: The Performance Amplifier (Impact)

- **Metric:** Improvement in Core Business KPI (e.g., Win Rate, CSAT).
- **Trend Analysis:** Baseline vs. Current Quarter.

Slide 4: The Human Alpha Report (Reinvestment)

- **Strategic Wins:** List 3 strategic outcomes achieved using the saved time.

Slide 5: Governance Health

- **Safety Score:** [Pass/Fail] on latest AI Audit.
- **Risk Flags:** [Number] incidents resolved.

Slide 6: The Expansion Roadmap

- **Recommendation:** [Next Process to Reinvent] or [Move to Academy Tier].