GSA PBS Customer Forum

Hosted by the Office of Portfolio Management and Customer Engagement

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PBS Customer Dashboards
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Instant access to your project and financial information, available in real time, accessible anywhere

Presented by

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What is the PBS Customer Dashboard?

Operational view of your occupancies, projects, rent and RWAs

- Project and RWA Status
- Point of Contacts
- Funding, Obligations, Balance
- Key Dates and Milestones
- Occupancy Planning Timeline
- Map of Occupancies & Projects

Portfolio or Project-Level Views; filter and slice the data by:

- Bureau
- Project Type
- Funding Type
- Size (SF or Funding)
- Current Phase or Key Dates
- Location

Easy Access

Reliable Data

Meaningful Information
Easy Access

● Online resource thought D2D
  ○ Do you have an OMB Max account?
  ○ You can register now and be a step ahead when we go live! https://max.omb.gov/
  ○ Access will be provided through https://d2d.gsa.gov

● Can control access based on user
  ○ Access will be controlled by customer contacts at the Agency and Bureau level
  ○ Anyone who has access will be able to view all dashboard pages and sections

● Self-service - push vs. pull of information
  ○ Constant access to project information, trends, and raw data downloads
  ○ Reduce manual burden of shaping static data into actionable trend formats
  ○ Export data (you can do everything you want)
Reliable Data

- Collaboration between all PBS Business Lines
- Data is taken directly from PBS Systems
- Collaboration tool - same view at the same time, GSA and customers, communication mechanism
- Unified view (same data across regions)
- Increased trust in accuracy and currentness of data due to consistent ‘source of truth’
Meaningful Information

- Meaningful Information
  - Providing access to the 4 most requested data sets
    - Rent
    - RWAs
    - Occupancy Agreements
    - Projects

- Holistic view of your interactions with PBS - you can see your occupancies, projects, and RWAs in one place.

- User Guide includes links to resources, including policy and how to information
Demonstration of Staging Data

My Occupancies

My Rent

My Projects

My RWAs
What to Expect

- **July**
  - Complete dashboard and quality assurance
  - Initiate and test access protocol

- **September - Early FY19**
  - Customer access, training, guidance

- **On going after Go Live**
  - User feedback
  - Engagement in dashboard future development
  - Strategy to continue to evolve dashboard

*Thank you to those who have provided feedback on the prototype! Your input greatly influenced this product.*
Continue the Conversation

Come visit us at the Exhibit Booth
Questions after today, before Go Live?
pbs.dashboard@gsa.gov
Questions?

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