GTS MEDOH · MANAGEMENT INTELLIGENCE

Management Intelligence Guide

How to use the Management Intelligence dashboard to understand business performance, identify risk and act on opportunity.

THIS GUIDE IS FOR

Business owner · Senior management · Leadership team

GTS MedOH · May 2026 · support@gtsmedoh.com

The Management Intelligence Dashboard

The Management Intelligence dashboard gives you a complete picture of how the business is performing — revenue, renewals, customer health, compliance opportunity and growth indicators — on a single screen. It is designed to answer one question: **how is the business performing and where should we focus next?**

Access it from the **Management Intelligence** button at the top of the admin sidebar, or directly via your saved link. Data refreshes nightly, with a manual refresh option at the top of the page.

> 💡 The dashboard is most powerful when reviewed weekly — ideally at the start of each week as part of your commercial review routine.

Section 1: Executive KPIs

The top row of the dashboard shows seven key performance indicators. These are the numbers that tell you, at a glance, whether the business is growing, stable or declining.

KPI	WHAT IT TELLS YOU	WHEN TO ACT
Current Month Revenue	Revenue so far this calendar month, compared to the previous month	If it's tracking below last month by mid-month, look at upcoming sessions and bookings to understand whether it's timing or a real decline
Booked Revenue — 30/60/90 Days	Revenue already locked in from confirmed future sessions	Low booked revenue in the 30-day window means the next month's revenue is uncertain — focus commercial effort on closing renewals or new bookings
Active Organisations	Number of organisations with at least one booking in the last 12 months	If this is declining, customers are not returning — investigate relationship scores and renewal conversions
Delegates Trained YTD	Total delegates trained this year vs the same period last year	A year-on-year decline means either fewer customers or smaller bookings — both need investigation
Certificates Issued	Total certificates issued this year	This should broadly track with delegates trained — a significant difference may indicate sessions not being marked complete

Section 2: Renewal Revenue Pipeline

Renewal revenue — income from existing customers rebooking as their certifications expire — is typically your most predictable revenue stream. This section shows how much renewal revenue is available and how much of it is already secured.

Reading the pipeline

The pipeline is broken into four time windows: 30, 60, 90 and 180 days. Each window shows total forecast value, the number of delegates affected and the number of organisations involved.

> EXAMPLE
>
> The 90-day pipeline shows £52,000 across 47 delegates and 12 organisations. Of this, £31,000 is already booked. The remaining £21,000 is at risk of not converting — these organisations have expiring certificates but no renewal booking in place.

Confidence tiers

The stacked bar chart breaks each pipeline window into three confidence tiers:

- **High confidence** — organisation has renewed this certificate type before and the expiry is within 30 days. Probability: 85%
- **Medium confidence** — organisation has a renewal history or the expiry is 31–90 days away. Probability: 55%
- **Low confidence** — no renewal history and expiry is 91–180 days away. Probability: 25%

> i **What to do with this:** Focus commercial effort on medium and high confidence renewals within 60 days. These are real, near-term revenue opportunities. Low confidence items need longer-term relationship building.

Section 3: Customer Health Index

The Customer Health Index combines four measures into a single view for each of your top customers. It is the fastest way to identify which customers are thriving, which need attention and which are at risk.

SCORE	WHAT IT MEASURES
Health Score (0–100)	Overall compliance status — are their certifications current?
Relationship Score (0–100)	Engagement strength — are they booking, using the portal and renewing?
Revenue YTD	How much they have spent with you this year
Renewal Pipeline	How much renewal revenue they represent in the next 90 days

The flags to watch for

🔴 **High Revenue + Low Relationship Score** — This customer is spending with you but disengaging. Their compliance may be managed elsewhere. Act before their next renewal cycle — they are at risk of leaving.

🟡 **High Renewal Value + Low Engagement** — A significant renewal opportunity but the customer hasn't been active. Proactive outreach before the renewal window is essential — don't assume they will rebook automatically.

Section 4: Revenue Leakage

Revenue leakage is the gap between what your renewal pipeline is worth and how much of it you have actually secured with a confirmed booking.

TOTAL PIPELINE	ALREADY SECURED	LEAKAGE
£52k	**£31k**	**£21k**
Total forecast renewal revenue	Renewals with confirmed bookings	Pipeline at risk of not converting

The traffic light

- **Green** — less than 20% leakage. Most of your pipeline is converting well.
- **Amber** — 20–40% leakage. Action recommended. Review the at-risk organisations.
- **Red** — more than 40% leakage. Significant revenue at risk. Commercial action urgently needed.

Drilling down

Click the leakage card to expand a drill-down showing which organisations and which compliance types are contributing most to the leakage. Use this to prioritise which customers to contact first.

Section 5: Customer Relationship Intelligence

The Relationship Score measures how engaged a customer is with GTS MedOH — not just whether their compliance is in good shape, but whether they are actively working with you.

A customer can have a high Health Score (compliance is current) but a low Relationship Score (no recent bookings, no portal usage). This is the early warning sign of a customer who is sourcing their compliance training elsewhere.

When the commercial alert fires

When a customer has a renewal pipeline value of £2,000 or more AND a Relationship Score below 40, an automatic commercial alert appears on the dashboard. This is your signal to reach out before the renewal window — not after.

EXAMPLE ACTION

NHS Surrey Trust has £8,400 in upcoming renewals but a Relationship Score of 28 — declining. The alert reads: *"High renewal value — low engagement. Proactive outreach recommended."* A personal call from the account manager this week could secure that renewal.

Section 6: Account Opportunity Value

For each organisation, the Account Opportunity Value shows the total estimated revenue opportunity across three categories:

- **Training Renewals** — value from expiring certifications with no renewal booking
- **Certification Renewals** — compliance records approaching expiry × course price
- **Compliance Gaps** — missing mandatory competencies × course price to fill them

The Total Opportunity column shows the complete commercial picture per customer. Sort by this column to see which customers represent the largest untapped opportunity.

Section 7: AI Executive Insights

The AI panel at the bottom of the dashboard allows you to ask any commercial question about the business. The AI runs an approved report against live data and returns a structured answer with key findings and recommended actions.

Recommended weekly questions

- *"Give me a full business snapshot"* — revenue, pipeline, delegates and compliance in one summary
- *"Which customers are at risk and should I contact this week?"* — prioritised at-risk list with context
- *"Where are we losing renewal revenue?"* — leakage breakdown by organisation and type
- *"Which high-value customers are disengaging?"* — relationship risk list with commercial alerts
- *"What is our renewal outlook for the next 90 days?"* — forecast with confidence breakdown

> 💡 The AI answers are advisory only — they are based on the data in the platform and should be used to inform decisions, not replace professional judgement.

Section 8: Management Alerts

Configurable alerts fire automatically when key thresholds are breached. By default, alerts trigger for:

ALERT	DEFAULT THRESHOLD	SEVERITY
Customer inactivity	No booking in 90 days	Warning
Customer inactivity — critical	No booking in 180 days	Critical
High-value renewal at risk	£2,000+ expiring within 14 days, no booking	Critical
Revenue decline	Month-on-month decline of 15%+	Warning
Revenue leakage — warning	Leakage exceeds 20% of pipeline	Warning
Revenue leakage — critical	Leakage exceeds 40% of pipeline	Critical

Alerts appear at the bottom of the dashboard and are cleared once acknowledged. Thresholds can be adjusted by the platform administrator.

A Recommended Weekly Review Routine

1. **Check the KPI row**

   Is current month revenue on track? Is the 30-day booked pipeline healthy?

2. **Review the leakage figure**

   Is it green, amber or red? If amber or red, expand the drill-down and identify the top three organisations contributing to leakage.

3. **Scan the Customer Health Index**

   Look for any red flags — high revenue customers with low relationship scores, or high renewal value customers with no recent activity.

4. **Review management alerts**

   Action any critical alerts first. Assign at-risk customers to an account manager.

5. **Ask the AI**

   Run *"Which customers should I contact this week?"* for a prioritised action list based on current data.

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