

CASE STUDY

A live business operations dashboard for a three-company portfolio

Everett Graphics – Tahoe Paperboard – SunGrown Packaging · Oakland, CA –2016

API Integration

Business Intelligence

Executive Support

Mobile Delivery

SITUATION

As Project Manager embedded with Everett Graphics and its subsidiaries — Tahoe Paperboard and SunGrown Packaging — Jacqueline quickly identified a problem that wasn't in her original brief. The CEO, responsible for overseeing three distinct companies simultaneously, was spending an enormous amount of time each week wading through siloed reports from each entity.

Shipping and receiving logs, sales and service contracts, financial data, printer output, and revenue updates all lived in separate systems and arrived as separate reports. With a 90-minute commute each way between home and the Oakland office, the CEO's available time for strategic thinking was being consumed by the administrative burden of simply knowing where his businesses stood.

There was no single view of the three companies. Getting a clear picture of operations meant days of manual review — not hours.

APPROACH

Jacqueline identified the problem, defined the solution, and drove the project independently. Working as a two-person team with a developer, she scoped and delivered a custom live business operations dashboard that unified all three companies into a single, visually intuitive interface.

The design was deliberately practical:

Interface design

Modeled on the familiar Chrome browser tab paradigm with primary vertical navigation on the left — giving the CEO an immediately intuitive way to move between companies and data views without any learning curve.

Data integration

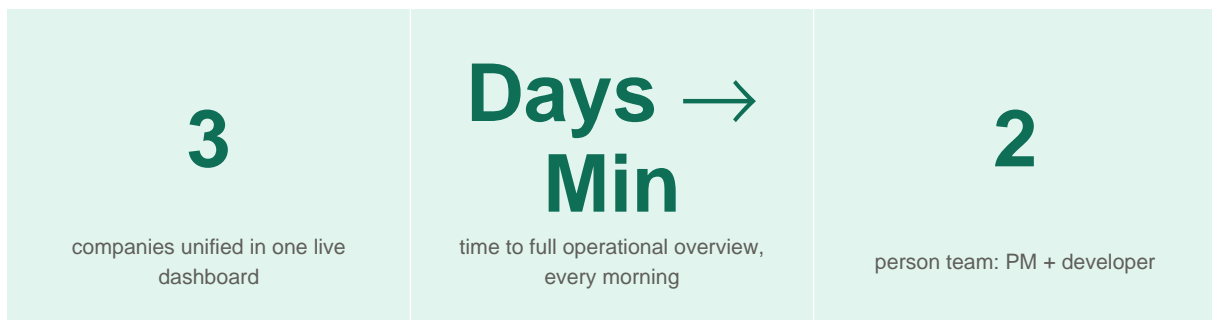
Built APIs to consolidate live data from Sage (accounting), multiple large-format printing systems, shipping and receiving feeds, and sales and revenue data across all three companies into a single continuously updated view.

Mobile delivery

Recognized that a 90-minute daily commute each way meant the CEO needed access beyond the office. Delivered a fully functional iPhone version of the dashboard so he could monitor all three businesses from anywhere — including from home.

“The best solutions feel obvious in hindsight. He was spending days reviewing what should have taken minutes. We just needed to bring the data together and get out of the way.”

RESULTS



The CEO adopted the dashboard immediately and uses it daily. What previously required days of report review — manually piecing together the operational status of three companies from separate systems — now takes minutes each morning. He can see outgoing shipments for each company, monitor revenue as it hits the bank, and track printer output across all three entities from a single screen.

The iPhone version gave him something no stack of reports ever could: the freedom to stay informed without being tethered to an office. For a CEO with a three-hour daily round-trip commute, that flexibility was transformative — and it showed in his response when the dashboard went live.

KEY TAKEAWAYS

- The most impactful projects are sometimes self-identified — staying curious about a client’s real pain points beyond the original brief creates outsized value
- API integration that consolidates siloed data sources is one of the highest-leverage investments an operations leader can make for an executive team
- Interface design matters as much as data architecture — a familiar UI model (browser tabs) eliminated the learning curve entirely
- Mobile-first delivery is not a feature request, it’s a recognition of how executives actually live and work

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