



Measurement Master Class



SNAPSHOT

SPEAKERS

Hillary Boucher (TheCR),
Jillian Bejtlich (TheCR)

COMPETENCIES

Metrics and Measurement

MATURITY PHASES

CMM1, CMM2, CMM3

TOP THREE TAKEAWAYS

Participants enjoyed the insights from a presentation that Jillian gave within a bigger workshop at Jive World.

- Learn this most important trick of the trade when it comes to getting your dashboard read.
- Want to understand the “do’s” and “don’ts” of creating an effective dashboard? Jillian shared these tips, along with 3 visuals of successful dashboards.
- Interested in an exercise that will help you understand your community’s shared purpose? These 3 questions will help you learn what to measure for your dashboard.

OVERVIEW

- **Background:** Jillian has been a Community Architect with TheCR for 4 years. She has a background in architectural engineering and a computer science degree.
- **Know your Audience:** Jillian stressed the importance of always keeping that in the back of your mind. That’s an important “trick of the trade” – know your audience. Also keep these factors in mind:

| Executive Audience Profile | What they do Want |
|----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| They likely don’t have a lot of time, so they don’t want to weed through a lot of data | The bottom line, i.e. value, engagement, are the important metrics going up or down, etc. |
| They don’t want all the details | To ask probing questions |
| They almost always don’t use the community | To see the data in dashboards that they can easily understand |

- **The Difference Between Metrics and Dashboards:**
 - **Dashboards:** This is how you present your data. It’s generally a PowerPoint, a PDF file or a polished Excel worksheet.
 - **Metrics:** Metrics are your database, i.e. the data that lives in Excel. The content is raw data; your working copy. This isn’t the information you want to share.

BEST PRACTICES

Understand The “Don’ts” of Preparing a Dashboard:

- *Don’t display every single metric.* It makes the data very confusing.
- *Don’t present metrics that fall trap to correlation without causation.* Don’t make assumptions.
- *Don’t set yourself up for uncomfortable conversations.* This happens often if there is no context provided for comparisons or understanding.

Understand How to Prepare a Great Dashboard: It is important that dashboards have strong, engaging narratives. They draw your viewers in because they want to keep reading.

- The dashboard needs to speak for itself and stand on its own. Keep in mind a good dashboard will be shared. Therefore, it’s important that anyone reading it can understand it. Include a legend and ensure that it relates to the purpose of your community.

Visually Understand a Great Dashboard:

Chart #1: This is an example of a summary slide. All the relevant data is shown at the very beginning of the slide.

- The audience knows which month the data is for.
- The metrics are defined.
- People know if the data is good or bad by the colors.
- Additional data is presented below

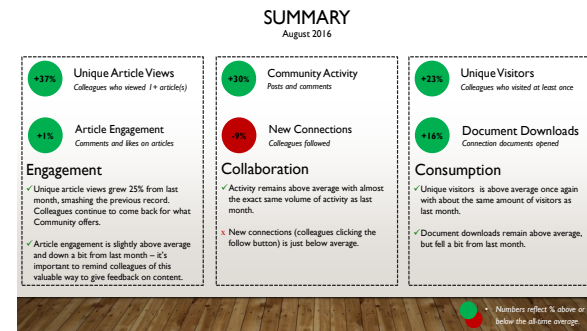


Chart #1

Chart #2: Dashboards don’t have to be quantitative.

- You are walked through what happened in the month.



Chart #2

Chart #3: Good chart for audiences that are metrics-oriented.

- The search rate is defined.
- A formula is shown for how the data was derived.
- Information in the box explains the data.
- All the guesswork is removed for what the data means.

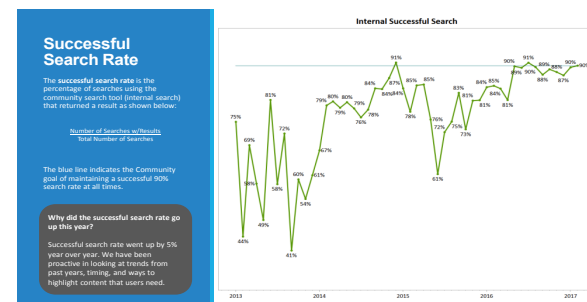


Chart #3

BEST PRACTICES, CONT.

Put More Qualitative Information in your Dashboard: By closing your dashboard with key takeaways, actions or goals, your audience will gain a better understanding of the story you want to tell. TheCR's rule is to do this in sets of 3's. This way, you'll always have 3 talking points for impromptu conversations.

Realize that Best Practices Will Vary by Organization: Again, always think about your intended audience when answering these questions:

- **One Page or Novel:** Think about the time that your intended audience has to read the dashboard. Tailor the amount of data to your audience.
- **Language:** It is a common mistake to use community language. If your dashboard is intended for non-users, always explain your data in non-user language to minimize questions.
- **What Comes Next?** Your job is to pass along your community knowledge to those receiving your dashboard. Therefore, provide action items, key takeaways, goals and objectives.

Understand your Community Mission or Shared Purpose: If you understand this, you'll know what to measure.

- Communities work best when they work for everyone. This means finding a compromise between your organizational objectives and your member objectives so that metrics aren't one-sided. This is an important point.
- A community mission gives you your organizational purpose and your member purpose. The place where those 2 intersect is your shared purpose, i.e. everyone involved benefits from the community. The organization gets what they want and the members get what they need. That spells value. *See Additional Insights for an exercise to help you understand your shared purpose.*

LESSONS LEARNED

- Jillian was asked what format she believes is the best for collecting data. Jillian uses a multi-tab Excel file that stores overall year-to-date metrics and a monthly database, etc.
- When it comes to frequency of dashboard preparation, Jillian stated that it depends on your product and your cycles. Remember to always relate it to your goals.
- It has taken Jillian a while to settle on a dashboard format. Usually her 3rd or 4th revision is when she feels she can share it. The length of time depends on where the data is pulled from, which can sometimes take up to 12 hours. Jillian has streamlined the procedure using repetitive processes.
- When creating a community dashboard that can be merged with other departments, such as marketing, Jillian recommends keeping it as generic as possible. Use terminology that everyone can understand, such as “likes” instead of “kudos”.
- It is worth the time to make dashboards visually appealing. People pay more attention to it. Jillian has experimented with this, which is why she knows it to be true. The dashboards that are less visually appealing receive more questions because the data is harder to understand.

ADDITIONAL INSIGHTS

Jillian asked for volunteers to participate in an exercise consisting of 3 questions. Where the answers to these questions overlap is the shared purpose.

| Question | Volunteer Response 1 | Volunteer Response 2 |
|--------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| <i>Why have you invested in building a community?</i> | It's part of the company's 9 values. Without a community, the company would not deliver on value or promise. | To connect people in order to share/transfer knowledge across 39 offices. |
| <i>Why should a member participate?</i> | To get answers to their questions, connect with others, solve problems and feel a part of the company. | To receive answers to their questions in a place that offers a collaborative option to email. |
| <i>How are you going to achieve the outcome you're looking for, i.e. how do these 2 questions intersect?</i> | Customers expect to be able to interact in a community, so the company has to and wants to deliver on it ¹ . | A one-to-many solution vs. one-to-one ² . |

- Jillian recommended sharing this exercise with your community team to see how they answer the questions. What you'll notice is that some of the answers are the same for organization and member objectives. That will help you understand your shared purpose.

¹ Jillian explained that this is a good example of objectives driving the dashboard, i.e. your dashboard/metrics should try to figure out the overlap.

² Jillian suggested that this is a great example of a dashboard/metric that points towards the indirect value of answers, which can help demonstrate ROI.