

## Tracking Chapter Effectiveness: Tips for Creating Powerful Dashboards

*"Being able to monitor your KPIs, objectives, and crucial business metrics anywhere at any time ensures that they are always on your mind. You'll find yourself focusing more on ways that you can push the needle forward and improve your business."* Josh Flores, Comet Backup

### An effective dashboard...

- Keeps Your Eyes on the Road – Focuses attention on where we're going.
- Tells a Story – Provides context, color and meaning.

*The power of data is in what you do with it. The right dashboard lets you see opportunities, detect threats, improve decision making and drive behavior.*

### Characteristics of a well-designed dashboard include:

- Transparent/Simple Calculation – Does everyone understand how it was generated?
- User-friendly Navigation – Can I find what I need to know?
- Relevant Resources – Does it lead me to solutions I can implement to improve?

### Making it Meaningful

- **Identify the strategic goals** for your components. Clearly articulate how your components advance the mission of the association.
- **Translate the goals into performance metrics.** Focus on metrics that are actionable and which track outcomes. Avoid "hold xx events." Replace with "increase % of members participating in events." Follow the mantra: Meaningful (to mission and members); Measurable (trackable/countable); Achievable (Appalachians vs Himalayas); and Time-constrained. See [Compliance: Do We Really Need to Bring Our Volunteers to Volun"teers"?](#) for more ideas.
- **Identify the strategic goal(s) for your dashboard.** Determine the specific behaviors and outcomes you want the dashboard to drive.
  - Informational – support decision-making
  - Motivational – drive behavior
  - Correctional – keep on track (alerts)

#### Key Performance Indicators for Chapters

Engagement > Participation

Membership > Recruitment/Renewal

Financial > Income/Expense

Activity > Posts, Registrations, Volunteering, Donations...

Perceptions > Satisfaction, Net Promoter Score, Ratings, Comments

- **Identify who will use the dashboard and how they will use it. Remember** that Attention Span is SHORT! Needs of national staff vs. chapter staff vs. volunteer are all DIFFERENT!

**Tip!** Start with a task force of key stakeholders to generate the goals, what can be measured, what we want to measure. This input is critical to assure buy-in.

## Making it Usable – What does it look like?

- Focus attention on where we're going and what's important. Keeps Your Eyes on the Road.
- Tell a Story – Provides context, color and meaning.
- Show goal and progress – consider Act Now, Monitor, Celebrate
- Emphasize Exceptions
- Size Matters! - Data Appropriate Graphics
  - Appropriate Contrast
  - Generally Large Sans Serif Font
- Labels w/Mouse-Over Detail
- Display Timeline & Refresh Rate
- Offer Comparisons (Goal/History)
- Drill Down & Be Comment Capable
- Easy to aggregate data, draw trends, share results
- Easy for volunteers to submit: CFMA online form

### Test your Performance Indicators

- Are they valid, reliable, relevant?
- Actionable – Do I have any control over this outcome?
- Common Interpretation – Does my “10” = your “10”?
- Accessible/Credible – Is the data available with modest effort from trustworthy source?

*“Perfection is achieved, not when there is nothing more to add, but when there is nothing left to take away.” - Antoine de Saint-Exuper*

## Resources

- Listen to the [Tracking Chapter Effectiveness: Tips for Creating Powerful Dashboards](#)
- Read the [original study](#) on Chapter Dashboards for a look at make-or-break indicators
- Download [Creating Powerful Dashboards](#) for case studies from CRPs
- Read [On the Fast Track to Fast Data](#); connection with the ASAE ForesightWorks
- Read [Fast-Data Education](#) for a look at engaging staff in using dashboards
- View [Chapter Dashboards Part 1: What's Measured is Real](#)
- Read [How Do I Say It With Charts?](#)
- Read [Four Key to Leading with Data](#)
- Read [Confessions of a Dashboard-a-holic \(Texas Medical Association\)](#)
- Read [Drowning in Data? Create a Dashboard](#)

**Need Help?** We're here! Let Mariner help you evaluate options, build a dashboard or navigate how to help chapters use and flourish tapping into your dashboard.