



> SETTING IDEAS IN MOTION

Communications Dashboards

WHITEPAPER SERIES

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September 2009

EVALUATE STRATEGIC COMMUNICATIONS DECISIONS

You and your team have done the due diligence required to develop and implement a communications project. You've done your homework and now you are ready to monitor and communicate the results of the initiative. But are you prepared to properly evaluate the findings? Do you have the key performance indicators necessary to track or validate your next move and give you some indication that you're making the right decisions? This is where a communications dashboard will help.¹

A communications dashboard serves as a flexible evaluation framework to measure communications effectiveness – during a project's run – with a reasonable level of certainty. Successful dashboards are designed as self-guiding models or tools. They are customized, adaptable and minimally intrusive using current software platforms, like Microsoft Office Excel. The dashboard's indicators are capable of:

- Framing measurable or qualitative targets
- Making performance comparisons against objectives
- Evaluating the significance of the results

This is key information you need to go forward with confidence and explain any anomalies that come up. It's only a partial collection of indicators – a dashboard – but it enhances your decision making capability instead of bogging you down with useless information, and allows you to make directional changes on the fly that are relevant to the project at hand.

*A **Communications Dashboard** is a strategic evaluation tool customized to measure the effectiveness of an organization's communications activities.*

¹ Ingenium Communications wishes to thank its Communications Dashboard project clients for contributing their expertise and experience to the development of this White Paper. This White Paper is published as part of Ingenium Communications' White Paper Series providing specialized programs supporting clients. For more information and to access other papers published as part of the series, visit www.ingeniumcommunications.com

The hallmark of a good communications dashboard is its consistency in reporting on internal and external communications initiatives. It's flexible such that it dovetails with a variety of communications outputs (i.e. media, websites, intranet sites, etc.) and it also promotes informative, regular, relevant and measurable metrics through the collection of audience feedback and inputs from all relevant stakeholders.

Through extensive research and client applications, Ingenium Communications has uncovered a number of factors that present communications challenges, particularly in large organizations, where communications dashboards could provide some remedial help:

- Communications objectives – often poorly defined – are measured by quantity of output rather than impact on audiences
- Qualitative observations – like defining positive outcomes – are difficult to capture and assimilate into decision making
- Information gathering protocols that monitor and collect communications results are often lacking or inadequate
- Internal and external communications lack standardized key performance indicators (KPIs) understood by stakeholders
- Target audiences and their behaviours are not well defined. The general public for example, although acknowledged is not relevantly addressed
- The rush to publish too much information results in unfocused communications

BUILD A FOUNDATION

The following steps will ensure a solid foundation to start building your communications dashboard.

Step 1: Develop building blocks

Develop three building blocks as a solid base for your communications dashboard. This will help familiarize users with what you're trying to do and how you're trying to apply it:

- a. A *Reference Area* of self-serve instructions and guidelines
- b. An *Input Area* of independent variables that feed the dashboard with the project's performance factors including the baseline objectives and observed outcomes
- c. An *Output Area* that shows results against targets and evaluates the performance with some kind of scorecard based on predetermined levels of achievement

Figure 1 illustrates the layout of a communications dashboard foundation.

Step 2: Validate the framework

Validate the foundation, its framework and flow to get buy-in:

- a. Users need time beforehand to evaluate the framework within their own sphere of operations
- b. A label or title page should be created by the communications project manager for a given communications initiative. This provides all of the identifying features of the initiative upfront
- c. Everyone who will use the dashboard needs to understand the qualitative and quantitative inputs
- d. An important part of the dashboard's product development process involves setting clear objectives, assimilating simplified, discrete and meaningful inputs endorsed by all users, monitoring and capturing their performance and evaluating their results through the dashboard

Step 3: Apply the dashboard

Apply the dashboard using operational guidelines:

- a. Articulate a clear purpose and objectives for the communications dashboard project
- b. Revise the dashboard prototype to include simple and manageable inputs endorsed by all users including qualitative and quantitative parameters for internal and external communications
- c. Define and develop outputs that could be easily collected and interpreted

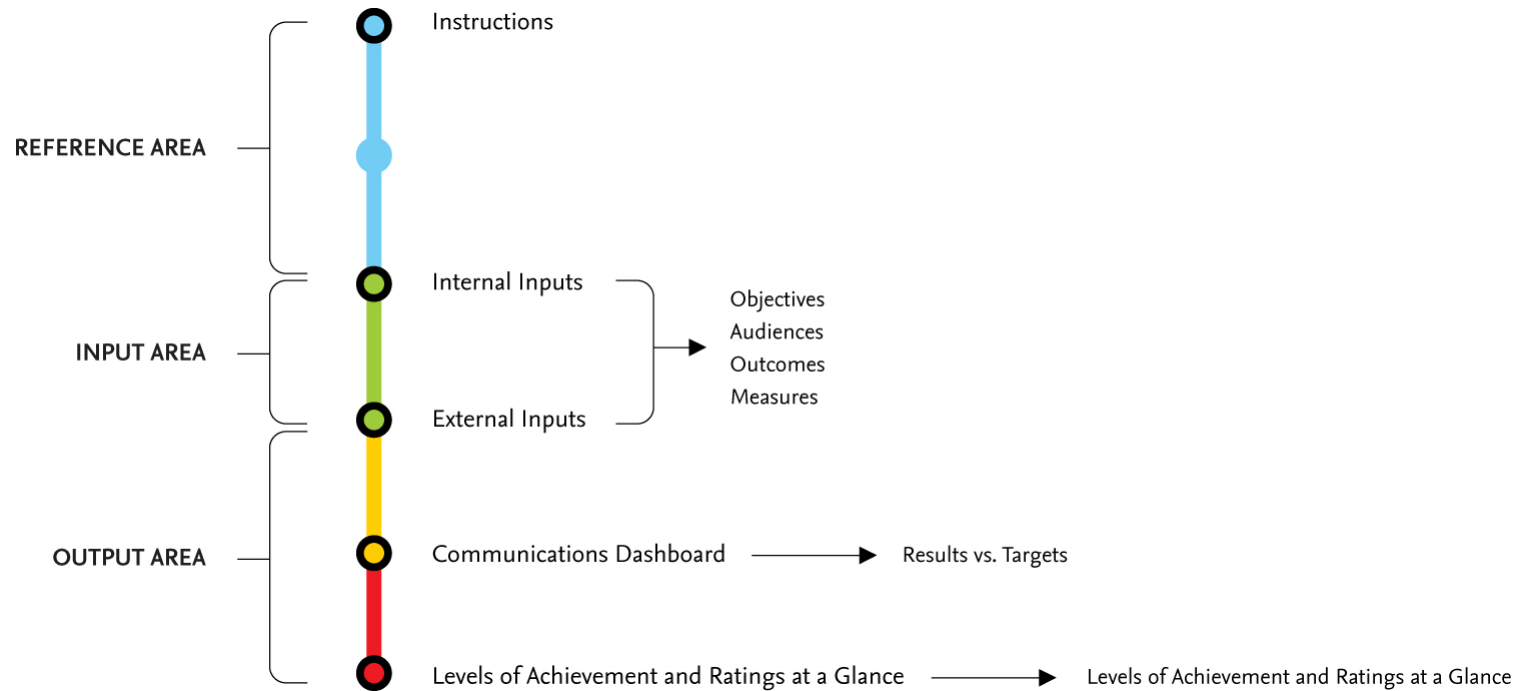
Steps to Building a Dashboard

- ❖ *Develop building block*
- ❖ *Validate the foundation and get buy-in*
- ❖ *Use operational guidelines to direct your dashboard application*

- d. Pilot and test the dashboard's application using simple and discrete parameters over a complete communications cycle for a given initiative
- e. Refine, implement and expand the dashboard as an operational tool following the pilot

Figure 1

The three building blocks of a communications dashboard function



DEVELOP A PROTOTYPE DASHBOARD

Contents in the following examples serve as demonstration placeholders to illustrate the communications dashboard's utility and functionality.

Customize the dashboard's KPIs to suit your particular needs, with indicators that you can scan for immediate feedback.

The following communications dashboard examples were developed for a number of clients in Microsoft Office Excel – a widespread and familiar software.

The communications dashboard is structured into five integrated worksheets as follows:

1. The Instructions worksheet marks the location for the Communications Dashboard's step-by-step user guidelines and flowchart. (Figure 1 illustrates the Communications Dashboard foundation and layout for a possible flowchart).
2. The Internal Inputs worksheet marks the location of the primary input area for entering independent – qualitative and quantitative – variables relating to internal communications including:
 - Communications objectives – setting targets, baselines and communications expectations
 - Key audiences – describing the communications recipients
 - Positive outcomes – defining successful communications
 - Measuring results – evaluating success against communications objectives

Table 1 illustrates possible contents found under Internal Inputs.

This is a highly customizable area that could work from a master list of qualitative inputs and quantitative measures that can be expanded or simplified depending on the communications need.

Table 1
An illustration of possible internal communications inputs

		Monthly Key Performance Targets												
		Total	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Key Performance Targets														
Internal print performance metrics														
Internal print audience population	12,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Target reach in % and quantity	80%	800	800	800	800	800	800	800	800	800	800	800	800	800
Pass-along rate and resultant circulation	25%	200	200	200	200	200	200	200	200	200	200	200	200	200
Print production of a Newsletter	7,200	600	600	600	600	600	600	600	600	600	600	600	600	600
Intranet correspondence metrics														
Intranet audience population	6,000	500	500	500	500	500	500	500	500	500	500	500	500	500
Target reach	90%	450	450	450	450	450	450	450	450	450	450	450	450	450
Page-views per reader	1													
Total page-views target	5,400	450	450	450	450	450	450	450	450	450	450	450	450	450
Observed Performance Results														
Internal print performance metrics														
Net print circulation	4,100	0	300	400	150	400	600	400	250	400	400	400	400	400
Total responses	2,210	10	200	200	200	200	200	200	200	200	200	200	200	200
Number of positive outcomes	295	20	25	25	25	25	25	25	25	25	25	25	25	25
Intranet correspondence metrics														
Net page-views	8,075	25	500	300	350	600	900	900	900	900	900	900	900	900
Total responses	370	20	300	5	5	5	5	5	5	5	5	5	5	5
Number of positive outcomes	133	15	100	5	5	1	1	1	1	1	1	1	1	1

The *External Inputs* worksheet marks the location for the primary input area for entering independent – qualitative and quantitative – variables relating to external communications including:

- Communications objectives – setting targets, baselines and communications expectations
- Key audiences – describing the communications recipients
- Positive outcomes – defining successful communications
- Measuring results – evaluating success against communications objectives

Table 2 illustrates possible contents found under *External Inputs*.

This is a highly customizable area that works from a master list of qualitative inputs and quantitative measures that can be expanded or simplified depending on the communications need.

Table 2

An illustration of possible external communications inputs

Key Performance Targets

External print performance metrics

External print audience population
 Target reach in % and quantity
 Pass-along rate and resultant circulation
 Print production of a Newsletter

Total	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
12,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
80%	800	800	800	800	800	800	800	800	800	800	800	800
25%	200	200	200	200	200	200	200	200	200	200	200	200
7,200	600	600	600	600	600	600	600	600	600	600	600	600

Intranet correspondence metrics

Intranet audience population
 Target reach
 Page-views per reader
 Total page-views target

6,000	500	500	500	500	500	500	500	500	500	500	500	500
90%	450	450	450	450	450	450	450	450	450	450	450	450
2												
10,800	900	900	900	900	900	900	900	900	900	900	900	900

Media outreach

Print and broadcast agencies
 Target reach

441	40	20	10	10	5	6	100	100	75	75	0	0
100%	40	20	10	10	5	6	100	100	75	75	0	0

Media outreach audience population

Media audience population
 Audience target reach
 Media audience population target

398,000	60,000	20,000	5,000	10,000	1,000	2,000	50,000	50,000	50,000	50,000	50,000	50,000
9.4%	15%	10%	10%	5%	5%	10%	8%	2%	15%	10%	5%	10%
37,250	9,000	2,000	500	500	50	200	4,000	1,000	7,500	5,000	2,500	5,000

Table 2 continued
An illustration of possible external communications inputs

Observed Performance Results		Monthly Key Performance Results												
		Total	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
External print performance metrics														
Net print circulation	9,900	0	900	900	900	900	900	900	900	900	900	900	900	900
Total responses	2,210	10	200	200	200	200	200	200	200	200	200	200	200	200
Number of positive outcomes	295	20	25	25	25	25	25	25	25	25	25	25	25	25
Intranet correspondence metrics														
Net page-views	8,075	25	500	300	350	600	900	900	900	900	900	900	900	900
Total responses	240	20	20	20	20	20	20	20	20	20	20	20	20	20
Number of positive outcomes	120	10	10	10	10	10	10	10	10	10	10	10	10	10
Media outreach														
Net media reached	36	2	2	2	2	2	2	2	2	5	5	5	5	5
Total media responses	24	2	2	2	2	2	2	2	2	2	2	2	2	2
Number of positive outcomes	12	1	1	1	1	1	1	1	1	1	1	1	1	1
Media outreach audience population														
Net media audience reach	8,725	200	100	500	100	25	200	2,000	200	3,000	200	2,000	200	200
Total audience responses	600	50	50	50	50	50	50	50	50	50	50	50	50	50
Number of positive outcomes	180	40	40	10	10	10	10	10	10	10	10	10	10	10

The *Dashboard* worksheet marks the location for the primary output area showing the internal and external key performance indicators (KPIs) per month over an annual time period in both tabular and graphic formats. This is the diagnostic part of the tool that measures desired outcomes against objectives. It's driven entirely by the internal and external input areas of the tool. Figure 2 illustrates possible content shown by the *Dashboard*.

Figure 2

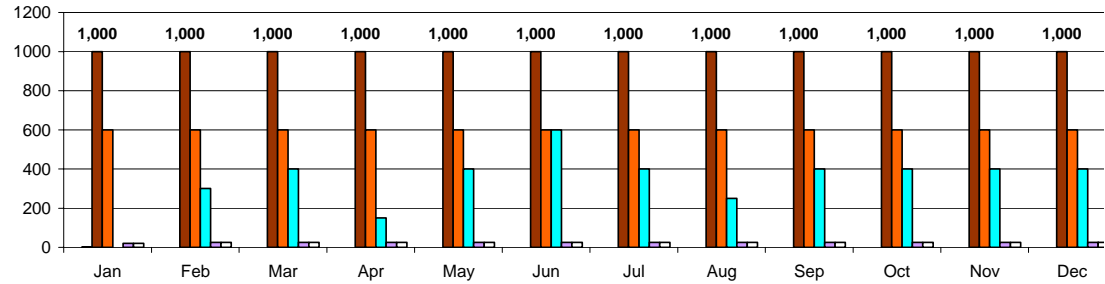
An illustration of a communications dashboard output

Internal Monthly Key Performance Indicators

Internal print performance metrics

Audience population target	12,000
Print production target	7,200
Print circulation	4,100
Responses	295
Outcomes	295

Total	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
600	600	600	600	600	600	600	600	600	600	600	600	600
0	300	400	150	400	600	400	250	400	400	400	400	400
20	25	25	25	25	25	25	25	25	25	25	25	25
20	25	25	25	25	25	25	25	25	25	25	25	25



The *Achievements* worksheet marks the location for the primary measurement of levels of achievement and ratings – like a scorecard – at a glance using a proprietary framework to structure some kind of report card.

Figure 3 illustrates an example of a possible format using ten areas that are being measured and scored.

Figure 3
An illustration of an achievements scorecard evaluating a communications initiative

Levels of Internal Communications Achievement and Ratings at a Glance

Operational Criteria	Rating Scale	1. Not Applicable	2. Attention Required	3. Opportunity for Improvement	4. Acceptable	5. Strong
Value-based leadership and organizational culture		1				
Effectiveness of the corporate management structure				3		
Managing organizational change						5
Effectiveness of information management					4	
Effectiveness of information technology management				3		
Effectiveness of asset management			2			
Effective project management		1				
Effective procurement			2			
Effectiveness of financial management and control				3		
Customer-focused service					4	
Total Counts within Levels of Achievement	Count	10				
Weighted Ratings		2	2	3	2	1
Overall Rating		2	4	9	8	5
Diagnostic		2.8 opportunity for improvement				

CONCLUSION

Ingenium Communications has uncovered a number of factors that present communications challenges in organizations where dashboards could have some positive influence. By combining the solutions from a number of case studies using communications dashboards, decision makers can more effectively measure results, see trends, evaluate the significance of gaps against targets and rate performance.

By applying a step-by-step process in building a solid foundation to capture internal and external communications metrics, showing outcomes and evaluating their performance with a scorecard, the basic tenets of a useful dashboard can be put in place in any organization, large or small.

The Dashboard's operating principles should be based on:

- **Simplicity** – easy to use requiring minimal training, intervention and manipulation
- **Functionality** – easy to adapt to internal and external communications requirements
- **Flexibility** – easy to modify, customize and grow
- **Scalability** – easy to apply for discrete communications projects or expand to aggregate multi-dimensional management requirements

Cohesiveness – all goals, objectives, outcomes and measures are integrated through relational flows

*Contact us today for more information about
Communications Dashboards, and to learn how we
can help your organization develop more rigorous
communications performance indicators.*

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