YOUR CONVENIENT DASHBOARD CREATION CHECKLIST

(This article originally appeared in The Measurement Advisor newsletter.)

Getting ready to design a communications dashboard? Get your ducks in a row. Here is a checklist of things you need to know before you can start designing your perfect dashboard. (To print out this handy checklist for easier use, download this .pdf file.)

Define your universe:

__ Who is your target audience?

__ Where do they get their information? (Think beyond your traditional "top tier" media list.)

__ What influences your key stakeholders?

__ What outreach are you creating to reach them?

__ What social media platforms are your key stakeholders using?

__ What internal social networks are in place?

Check all the activities that you want to measure on your dashboard:

__ Traditional media outreach

__ Public Affairs (non-media outreach)

__Owned social media

__ Earned social media

__ Paid social media

__ Email marketing

__ Digital advertising

__ Blogging and other content placement

__ Live events/conferences

__ On-line conferences, webinars, etc.

__ Podcasts

__ Video

__ Web marketing

__ Lobbying

__ Internal engagement efforts

What data source(s) do you need to populate your dashboard? (check all that apply):

• For traditional earned media:

__ Online news media monitoring

__ Print news media monitoring

__ Video news media monitoring

__ Sentiment analysis

__ Message analysis

__ Spokesperson tracking

__ Competitive data

__ Trust and/or relationship data

__ Custom quality index

• For Public Affairs

__ Legislative progress data

__ Influencer relationship data

__ Thought leadership opinion

__Network analysis

__Message/issue tracking

For earned social media tracking:

__ Twitter Analytics

__ Facebook Insights

__ LinkedIn data

__ Pinterest

__ Instagram

__ SnapChat

__ YouTube

__ Blogs

__ Forums

__ Trust and/or relationship data

__Custom quality score

• **For owned digital or social media tracking:**

__ Google Analytics, Omniture, or other web analytics tool

__ Twitter Analytics

__ Facebook Insights

__ LinkedIn data

__ CRM or system to track customer actions, leads, etc.

__ Net Promoter Score (NPS)

• **For internal communications:**

__ Likelihood to refer or recommend

__ Turnover rate

__ Engagement rate in discretionary activities

__ Perceived engagement rate from employee pulse surveys

__ Tone of comments on social platforms

__ Trust and/or relationship data

What will you benchmark against? (check all that apply):

__ Peers

__ Competitors

__ Lines of business

__ Other marketing activities

__ Last period to this period

What are your measures of success? (check all that apply):

__ Percentage reach of key messages

__ Conversions

__ Leads

__ Issues discussed

__ Tonality of conversations

__ Increase in the marketable universe

__ Increase network reach

__ Visibility of key initiatives or campaigns

__ Attendance at events

__ Engagement with content

__ Engagement at events

__ Increase trust

__ Increase awareness

__ Increase consideration

__ Increase preference

What correlations or connections are you trying to prove? (check all that apply):

__ Impact of earned media on conversions

__ Impact of social media on conversions

__ Impact of events on conversions or lead generation

__ Relative impact of email, social, and earned media on conversions

__ Impact of external media on internal engagement

__ Relative impact of earned media on the marketing mix

How often do you want updated data?

Real Time __   Daily __   Weekly __   Monthly __   Quarterly __   Bi-annually __   Annually __

What formats might you need to present results?

PDF file __   PowerPoint __   Excel __   HTML __

Finally, make sure you have consensus on your answers: __

All finished? Congrats! Now you can take this list to your internal IT, Tableau, or dashboard development team and they will set you on your path to an accountable and informed future. And if you don't have the internal resources to develop your dashboard, feel free to call Paine Publishing. Katie Paine will be happy to help you design and/or implement it. She's available most anytime by phone (603-682-0735) or email.