

ASK

HERO

ABOUT DASHBOARD REPORTS

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**HELP EXPERTISE
RESOURCES ONLINE**

QUESTION: HOW CAN MY CHAMBER EASILY REPORT ITS SUCCESS?

ANSWER:

You've solidified your goals in a business plan – but how do you measure your performance? Like a vehicle dashboard, an organization's dashboard report provides a visual display of key performance measures. This type of report can be a very effective tool for communicating a lot of information about your chamber's performance in a simple, easy-to-digest layout. While most dashboard reports contain visual elements, they can take the form of a spreadsheet or a series of infographics (or something in between). What your report looks like and its length will be determined by its focus – whether it's a dashboard for communications and social media, financial markers or membership data – and your audience, which could range from only your board of directors to your entire membership. Start broadly and add in more measurements as you enhance reporting techniques.

**“What gets measured
gets improved.”**

– Peter Drucker

TIPS:

You can use Excel to produce a spreadsheet, a graphic report or a combination of tables and graphs.

Pull charts and graphs from the Chamber Profile, Operations and Salary Reports in Dynamic Chamber Benchmarking and download samples from the library.

FIVE EASY STEPS FOR CREATING A DASHBOARD

- 1. Determine what to measure.** Many chambers collect data related to membership growth and retention, market penetration, dues performance, revenues, expenses, social media reach, event participation, legislative successes and much more.
(Many even enter that information in ACCE's Dynamic Chamber Benchmarking survey platform and download free comparisons!)
Start by reviewing the Dashboard Report examples in the Samples Library to help you define what you want to measure. Ask yourself what the most important metrics are for your chamber of commerce. Revenues, membership growth, tourism activity? What top-level performance measurements does your board – or staff – ask for every month? You can then augment your data with other key metrics. You might add significant income sources to your revenues metric, for example. If you choose to highlight events, consider listing your most popular gatherings, how much revenue each earns and attendee satisfaction. For membership, consider including total number of members and dues income (and also members and dues per tier), membership retention stats (and specifically highlight first-year membership retention stats). Add in market penetration, number of drops and volunteer engagement data. Check your membership database/customer relationship management software to see what else you can collect.
- 2. Determine frequency.** Will it be monthly, quarterly or annual? Which option best suits your audience? If your primary objective is to measure against goals laid out in your program of work, adopt that same timetable for your dashboard reporting. The most effective dashboards include comparisons with another time period, such as the same quarter from the previous year, so consider tasking each department with regular data collection.
- 3. Gather data.** You can easily collect your revenue, expenses, and membership data from the Operations Survey in Dynamic Chamber Benchmarking. You can also use DCB to create charts and graphs for your report. Take a look at the software your chamber uses, as many collect data for you:
 - a. Database/CRM.** Use this for membership data, event registration and more. When in doubt, ask your vendor what's available.
 - b. Google Analytics.** Set up a free Google account to obtain stats and charts on web traffic.
 - c. Email marketing and social media.** Basic stats are available from your email marketing provider and social media platforms like Twitter, Facebook, Instagram and YouTube.
- 4. Gather feedback.** Do your metrics help tell your chamber's story? For example, are you able to make inferences over time on membership retention and market penetration? It's worth emphasizing again that it's important to measure the pieces of data essential to your selected audience. Ask your audience to provide feedback on what you're collecting and how you're presenting it.
- 5. Find the right format.** Do you prefer a visual report or are words and figures a better method of presenting your data? Do you want a simple one-page breakdown or a more elaborate infographic-style report? Review a few examples from the Samples Library, then consider which kind of report would be most effective for sharing your data with your audience.

UNSURE HOW TO START? SHORT ON TIME?

Adopt ACCE's new Key Performance Indicator Chamber Report Card as your dashboard report. Staffing, membership and financial statistics are available at a glance. This report is currently available to survey participants for Fiscal Years 2012 – 15 via DCB and the Operations Survey section.
(Click on "Reports and Charts" tab to download)

The HERO team is looking for examples of communications plans, job descriptions, annual reports, personnel policies and more. Share examples by sending your work to HERO@acce.org.



Sarah Melby and Holly South are ACCE's directors of information and research. They connect members with information resources to solve problems and explore opportunities.

Ask your question at: www.ACCE.org/ask