

# Reporting Framework: Dashboard Types

This framework helps measure the success of **business** and **strategic objectives** by tracking ownership and accountability. It will help guide conversations for the level of prioritization needed, define expected value, and measure realized value. It consists of these types of dashboards: **OPERATIONAL**, **ANALYTICAL**, and **STRATEGIC**.



**VISUALIZE** a library of dashboards to display Voice of the Customer (VOC)



**DELIVER** accurate, real-time views to “the why” behind all channels of customer feedback

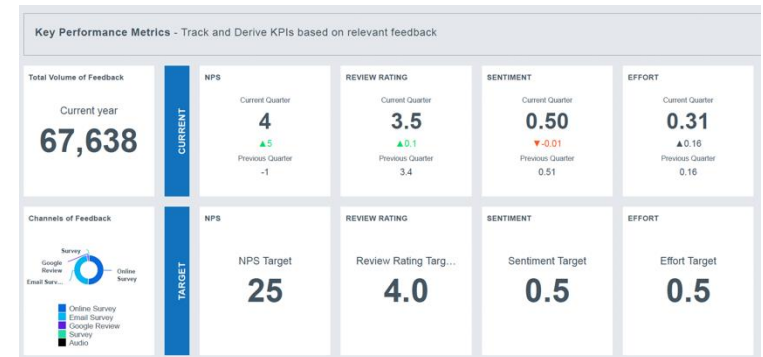


**DEPLOY** a set of dashboards used to identify specific actionable insights

## OPERATIONAL DASHBOARD

Designed to provide, at a glance, a comprehensive snapshot of the performance of the business in a given time period. It is an exploration tool to find and analyze pain points, the “pulse” of your customer feedback.

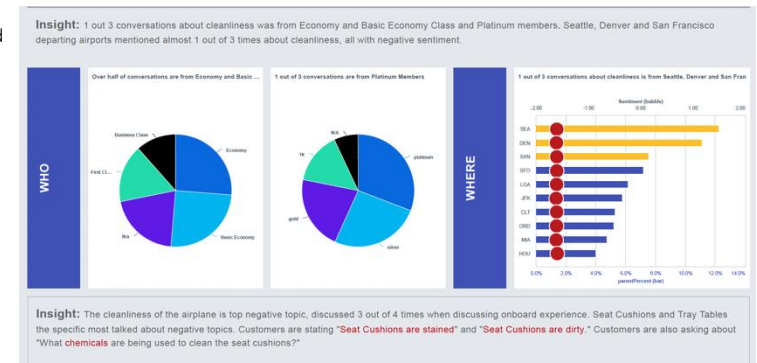
- **High-Level** or focused on a line of business, location, or product.
- **Track KPIs, Top Topics of Conversation, and VOC (Journey touchpoints)** continuously to identify issues easier and faster.
- **Highlight Abnormalities**, discover **WHAT** is worth analyzing further in an analytical dashboard. Schedule delivery of dashboards to alert stakeholders.
- **Top Areas of Conversation**. Defined by journey/touchpoints model and segmented by metric/sentiment trend, associated words, feedback preview, etc.



## ANALYTICAL DASHBOARD

A tool used to hone in on a specific business question to identify trends, changes to KPIs, and quantify impact. Results presented in the dashboard usually stem from using the operational dashboard as an exploration tool and often are static in nature.

- **Narrate a Story**. Investigate an observation discovered in an operational dashboard to create actionable insights.
- **5 W's**. Identify WHY, WHERE, WHO, WHAT, and WHEN is talking about different touch points.
- Focus on the **WHY** behind drivers and top themes, KPI/metric impact, and the reasons driving changes.
- **Call to Action**. Flag areas for improvement and praise by leveraging your categorization models to identify main areas of interest at the topic and leaf level.
- **Business Impact**. Interpret findings and identify actions. Showcase the business impact to stakeholders.



## STRATEGIC DASHBOARD

Retrospective in nature, looks at benchmark performance data and compares it to the current period to track value over time and close the loop in respect to a specific business question.

- **Value**. Trigger decision-making that improves performance resulting in estimated cost savings related to the KPIs, before and after actions taken.
- **Monitor KPIs BEFORE and AFTER Changes** are implemented based on actionable insights.
- **Quantify the Impact of Changes to KPIs from High-Level to Granular Viewpoints**. Keep the time period of impact consistent across the before and after.
- **Monitor KPIs from time insight was found to present day** to gauge impact of not acting upon insights.

