REPORTING!

Lizzie Ellis
@lizmeister321
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TODAY'S GOAL

Not You

WHAT IS REPORTING?

Let's start at the very beginning…

CLEAR ON THE GOALS

CLEAR ON THE METRICS

QUICK TO PULL REPEATEDLY

EASY FOR NON-TECHNICAL FOLX TO READ

CLEAR ON THE GOALS

What is the point of this report?
Who is the primary audience?
What are we trying to communicate in this report?

CLEAR ON THE METRICS

What are we trying to measure?

What am I being asked for?

Does this person actually KNOW what they're asking for?

CLEAR ON THE GOALS

CLEAR ON THE METRICS

QUICK TO PULL REPEATEDLY

EASY FOR NON-TECHNICAL FOLX TO READ

Get rid of your jargon

Keep the stats simple

Gets the message across without clutter

Avoid explanatory paragraphs

EASY FOR NON-TECHNICAL FOLX TO READ

A CHECKLIST FOR CREATING A REPORT

- ☐ Who is the primary audience for this report?

- ☐ How often do we need this report?

- ☐ What metrics do we need to be measuring?

- ☐ Is this data something we store in the VAN? If not, is it somewhere else we can it easily?

- ☐ What should our final report look like — Excel? PDF? Dashboard?

- ☐ Is the report legible? Easy to read? — distinctive colors if used & consistent throughout, no confusing stats, metrics labeled

LET'S TRY IT OUT!

A SCENARIO

Welcome to the Obama For America 2036 Campaign!

We've just launched our first state program. I want to know how our organizers are doing in the field daily, and if there's any regions that need some extra attention
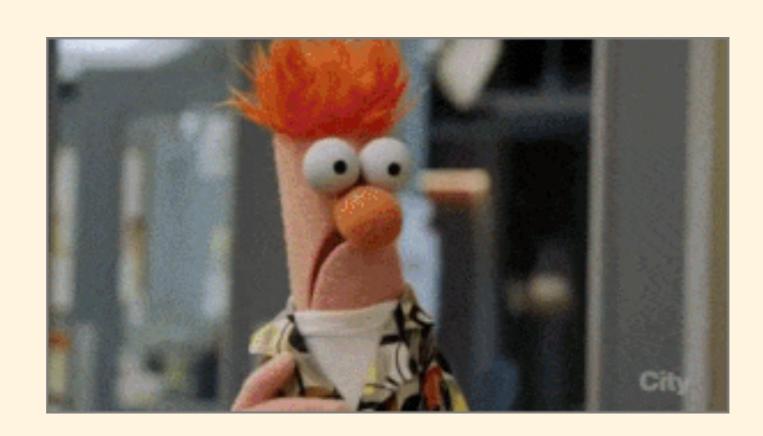

WHAT SHOULD WE BE MEASURING?

FEELING GOOD?

QUESTIONS?

You, a reporting expert