

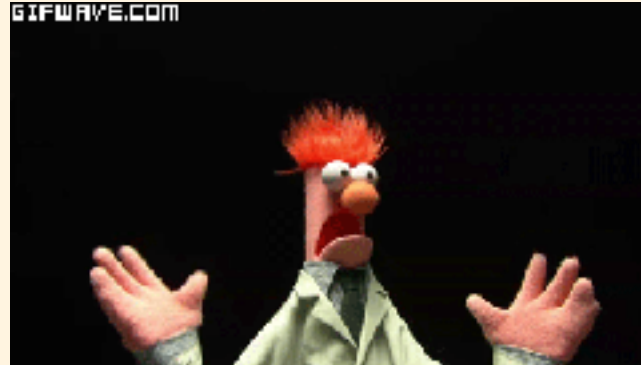


# REPORTING!

---

*Lizzie Ellis  
@lizmeister321  
May 21st, 2019*

# TODAY'S GOAL



 *Not You*

@lizmeister321

Reporting can seem really daunting

# WHAT IS REPORTING?

*Let's start at the very beginning...*



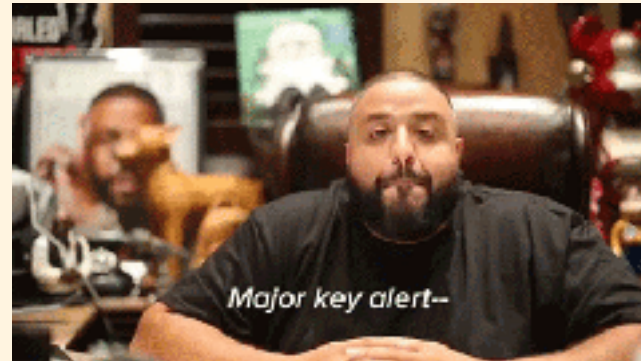
@lizmeister321

Ask: what do folks think reporting is?

Answer is most likely that all are correct answers — may seem overly simple but it's really important to start from ground 1 to make sure you're delivering what's needed.

The fun part about data is that

*Understanding what you're delivering is the key  
to being successful*



*Different situations call for different needs:*

**CAMPAIGN MANAGER?  
REGIONAL FIELD DIRECTOR?  
ALL STAFF DAILY REPORT?**

@lizmeister321

**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 GOALS

## 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?*

@lizmeister321

Make sure you know what you're measuring, and how you're measuring it.

- Get clarity on how your metrics are measured—does our week start on Saturday or Monday? Do we mean last 24 hours or Monday vs Tuesday?
- This last point can be sticky — someone may think they know what “contacts made last week means”, but it’s very important to be explicit at the beginning to avoid confusion later on. It’s very common for campaign people, especially those with less interest/exposure to data, to not realize that their question isn’t as simple as they thought it was, or that the words they’re saying mean something totally different than what they thought. Take some time up front and ASK!

CLEAR ON THE GOALS

CLEAR ON THE METRICS

**QUICK TO PULL REPEATEDLY**

EASY FOR NON-TECHNICAL FOLX TO  
READ

@lizmeister321

This one is pretty self explanatory. never create more work for yourself than you need to, it'll almost always bite you later — You might create a really clever, complicated report that's great a few times but then the report goes from weekly to daily and you're wasting precious time re-formatting things



Crystal Clear on the Goals

*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**

@lizmeister321

Your primary goal is to hand over a product that makes the answer to the question you're trying to answer CRYSTAL CLEAR.

- Ban jargon forever — keep it at a middle school reading level.
- Similarly, don't use ratios or made up scores, it'll just lead to confusion and over-explaining. No one wants to use a report that requires 30 min of training on how to read it.
  - Percentages are fine, but be careful not to overuse them.
- Similar note — no one is ever going to read your explanatory paragraph when they just want the daily numbers. Sorry not sorry.

## 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!

---



VAN walkthrough:

- Report builder
- Counts and Crosstabs: demo how to pull results by organizer, results by region
- Minivan: canvass results
- Export to excel

## 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?**

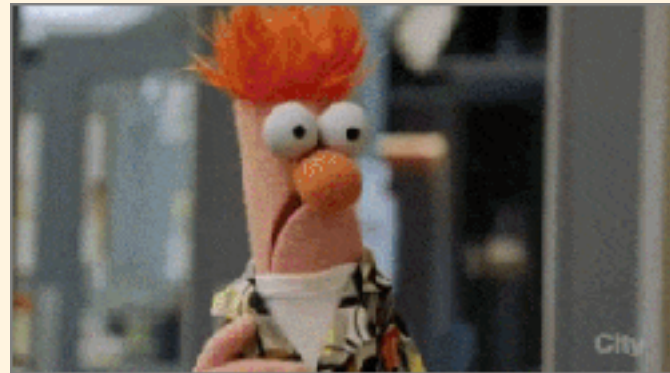
@lizmeister321

Sasha's running for Congress

# FEELING GOOD?



*You, a reporting expert*



# QUESTIONS?

Find these slides in PDF and Keynote form: [http://bit.ly/datadems\\_reports](http://bit.ly/datadems_reports)

@lizmeister321