# Dashboard Reporting

Dashboard reporting is a strategic compass, guiding organizations toward a clearer understanding of their operations, their impact, and the avenues for improvement. As Salesforce consultants for DonorsChoose.org, our focus is on crafting a dashboard reporting system that not only simplifies data management but also transforms raw information into actionable insights.

This dashboard reporting endeavor is a tailored solution across four pivotal dimensions: Customers, Members, Donors, and Projects. Each category unveils specific perspectives that contribute to a holistic view of the organization's endeavors. From evaluating customer satisfaction to optimizing volunteer engagement and understanding donor demographics, our Salesforce dashboard proposal is designed to be a dynamic and intuitive tool for DonorsChoose.org's management team.

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## Create Report and Dashboard Folders

As part of the initial setup process, we can create organized folders for both reports and dashboards. This ensures that our data is well-structured and easily accessible, offering several advantages to our team. You can locate it at the top right-hand corner, under the Dashboards or the Reports tab.

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Utilizing folders for reports and dashboards brings several advantages to our workflow such as providing a systematic structure for our reports and dashboards, allowing for efficient organization based on projects, departments, or any other relevant criteria. With a well-organized folder structure, users can easily locate and access the reports and dashboards pertinent to their roles, reducing search time and improving overall visibility. By incorporating these organized folders into our Salesforce implementation, we lay the foundation for a streamlined and user-friendly experience.

## Create a Custom Report

As we progress in configuring the Salesforce dashboard for DonorsChoose.org, creating a summary report serves as a crucial step in shaping the foundation for our dashboards. Summary reports, unlike tabular reports, allow us to aggregate and summarize data, providing a higher-level overview of key metrics.

Before creating a summary report, it's essential to select the most appropriate report type based on the data you want to analyze. Salesforce offers various report types, such as Opportunities, Accounts, or Contacts, each tailored to specific data sets and analytical needs. Once you've chosen the relevant report type, you can further customize your report by adding or removing columns based on your preferences.

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This customization step empowers you to tailor the report to the specific insights you seek. You can include only the relevant fields, ensuring that your summary report provides the most pertinent and valuable information for your dashboard creation.

**Benefits of a Summary Report**

1. Summary reports enable us to aggregate data, allowing for a quick and consolidated view of essential metrics. This is crucial for dashboard components that require a summarized understanding of the data.
2. Since dashboards often rely on summarized data, creating a summary report beforehand streamlines the process of adding charts and components to the dashboard. This ensures that the dashboard reflects the most relevant and meaningful insights.

**Functions of the Summary Report**

1. **Filtering Data**
   * Summary reports facilitate the application of filters, allowing us to focus on specific subsets of data that are most relevant to our analysis.
2. **Grouping and Categorizing Data**
   * We can use summary reports to group and categorize data based on specific criteria, providing a structured presentation of information.
3. **Utilizing Summary and Row-Level Formulas**
   * Employing formulas in summary reports allows us to derive calculated values, providing additional insights into the data.

The next few sections will be going more in depth into these functions, exploring how they contribute to the creation of insightful dashboards for DonorsChoose.org.

### Filtering the Report

Filtering is a crucial aspect of report creation as it allows you to focus on specific subsets of data that are most relevant to your analysis. By strategically applying filters, you can refine your reports to display only the information that aligns with your objectives. This not only enhances the precision of your insights but also streamlines the report's visual presentation.

**Filtering Functions**

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   * Filter logic allows you to create complex conditions by combining multiple filters with AND, OR, and NOT operators. This is particularly helpful when you need to define intricate criteria for data inclusion or exclusion.
   * If you want to filter opportunities with a high amount (greater than $10,000) OR opportunities that are still open, you can use filter logic to express this condition.

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* + Use when you have complex criteria that require multiple conditions to accurately filter the data. This is especially useful in scenarios where you need a combination of AND, OR, and NOT conditions.

1. Add Cross Filter

* Cross filters enable you to reference related objects and include or exclude records based on related object criteria. This is valuable when you need to analyze data from multiple objects simultaneously.
* If you're creating a report on Donors and want to include only those donors who have donated in the last month, you can use a cross filter to reference the related Opportunities object.

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* Use when you want to incorporate data from related objects and filter records based on criteria from those related objects. This is common when analyzing data across different but connected entities.

1. Row Limit

* Row limit allows you to restrict the number of rows displayed in your report results. This can be beneficial when dealing with large datasets, improving performance and making reports more manageable.
* If you're creating a report on all Donors but want to display only the top 10 donors by contribution amount, you can apply a row limit to focus on the most significant contributors.

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* Use when dealing with large datasets to enhance report performance and focus on a specific subset of records. This is beneficial when you only need to analyze a portion of the data for your reporting goals.

By understanding and utilizing these filtering functions, you can tailor your reports to deliver more precise and meaningful insights, laying the groundwork for impactful dashboard visualizations.

### Grouping and Categorizing Data

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Description automatically generatedGrouping and categorizing data in your reports is a powerful way to organize information, providing a structured view that makes it easier to identify patterns and trends. This functionality allows you to group rows and columns based on specific criteria, providing a more insightful and user-friendly report.

1. **Grouping Rows**
   * Grouping rows allows you to organize data hierarchically based on a particular field. This is particularly useful when you want to view data in a structured way, such as grouping Opportunities by their respective stages.
   * If you're creating a report on Members, you can group the rows by the Day of the Week to track their weekly performance.A screenshot of a group

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2. **Grouping Columns**
   * Grouping columns allows you to create subtotals for numerical fields based on a grouping field. This is valuable when you want to see summarized data within each group, providing a more detailed understanding of your metrics.
   * If you're creating a report on Customer Satisfaction, you can group the columns to see how many record counts there for each Rating on a scale are of 1 to 10.

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**Bucket Columns**

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* Bucket columns provide a way to categorize and segment data into meaningful ranges, making it easier to analyze trends and patterns. This is especially beneficial when working with numerical data, such as grouping donation amounts into different giving levels.
* If you're creating a report on Donor Contributions, you can use a bucket column to categorize donation amounts into ranges like 'Small,' 'Medium,' and 'Large,' providing a quick overview of donor giving levels.

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By incorporating grouping for rows and columns, along with the use of bucket columns, you can transform your reports into more structured and insightful representations of your data. This not only enhances the readability of your reports but also lays the groundwork for creating meaningful visualizations in your Salesforce dashboards.

### Using Formulas in Report

Utilizing summary and row-level formulas provide the flexibility to create custom metrics and fields, enabling a tailored analysis that goes beyond standard report metrics. Summary formulas deliver insights at a higher level, perfect for aggregating data, while row-level formulas offer granular details for each record. By leveraging these formulas, DonorsChoose.org can enhance the depth of their analysis, gaining unique insights that align with their specific reporting objectives.

**Summary Formulas**

Summary formulas allow you to perform calculations on summarized data, providing valuable insights at a higher level of granularity. These formulas operate on the entire set of grouped data within a report, offering a way to derive meaningful metrics.

* Summary formulas are useful for creating custom metrics that go beyond standard aggregations. For example, you can calculate the average donation amount, the percentage of completed projects, or the highest volunteer hours worked.

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**Row-Level Formulas**

Row-level formulas, on the other hand, operate at the individual record level within a report. They allow you to create calculated fields for each record, providing a way to derive insights directly within the context of each data point.

* Row-level formulas are beneficial when you need to create custom fields based on specific criteria for each record. For instance, you can calculate the percentage of the total donations or determine the status of a project.

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Incorporating both summary and row-level formulas into your Salesforce reports allows for a comprehensive and tailored analysis of your data, setting the stage for creating more sophisticated and impactful dashboards.

## Visualize the Data

Dashboards serve as a powerful tool for DonorsChoose.org, offering a consolidated and visual representation of key metrics that align with the organization's mission. The benefits of dashboards are multifaceted, enabling the team to gauge performance, productivity, and transparency of data effectively. Dashboards play a pivotal role in helping DonorsChoose.org accomplish its aim in the following ways.

1. **Performance Measurement**

* Dashboards allow the team to track and measure performance against key performance indicators (KPIs), such as customer satisfaction and sales targets. With real-time insights, DonorsChoose.org can make data-driven decisions to enhance their operations and outreach.

1. **Productivity Monitoring**

* By visualizing data on program activities, volunteer service hours, and service hours leaderboards, dashboards provide a comprehensive overview of productivity. This empowers the team to assess the impact of their initiatives, identify areas for improvement, and celebrate successes, fostering a culture of continuous improvement.

1. **Enhanced Transparency of Data**

* Dashboards contribute to governance and accountability by offering transparent and accessible data visualizations. This ensures that stakeholders have a clear understanding of organizational performance, fostering accountability and supporting effective decision-making.

Furthermore, the selection of reports for each dashboard widget is a critical component of dashboard design. The quality and relevance of the underlying reports directly impact the effectiveness of the dashboards. Therefore, a strategic approach to report creation, as discussed earlier, is crucial.

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Selecting well-designed and insightful reports ensures that each widget on the dashboard provides meaningful, accurate, and up-to-date information. In essence, a good report is the foundation for producing impactful dashboards, and DonorsChoose.org can leverage this synergy to achieve a comprehensive and visually engaging representation of their data.

### Customer Satisfaction Score Gauge

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Within the 'Customers' category, the primary focus is on illustrating the potential of a gauge chart in evaluating customer satisfaction for DonorsChoose.org. The simulated gauge chart depicts an average customer satisfaction score (e.g., 7.5). This demonstration showcases the simplicity and effectiveness of using a gauge chart to convey satisfaction levels. Such a visual representation can be a powerful tool for DonorsChoose.org to regularly track and communicate customer sentiment.

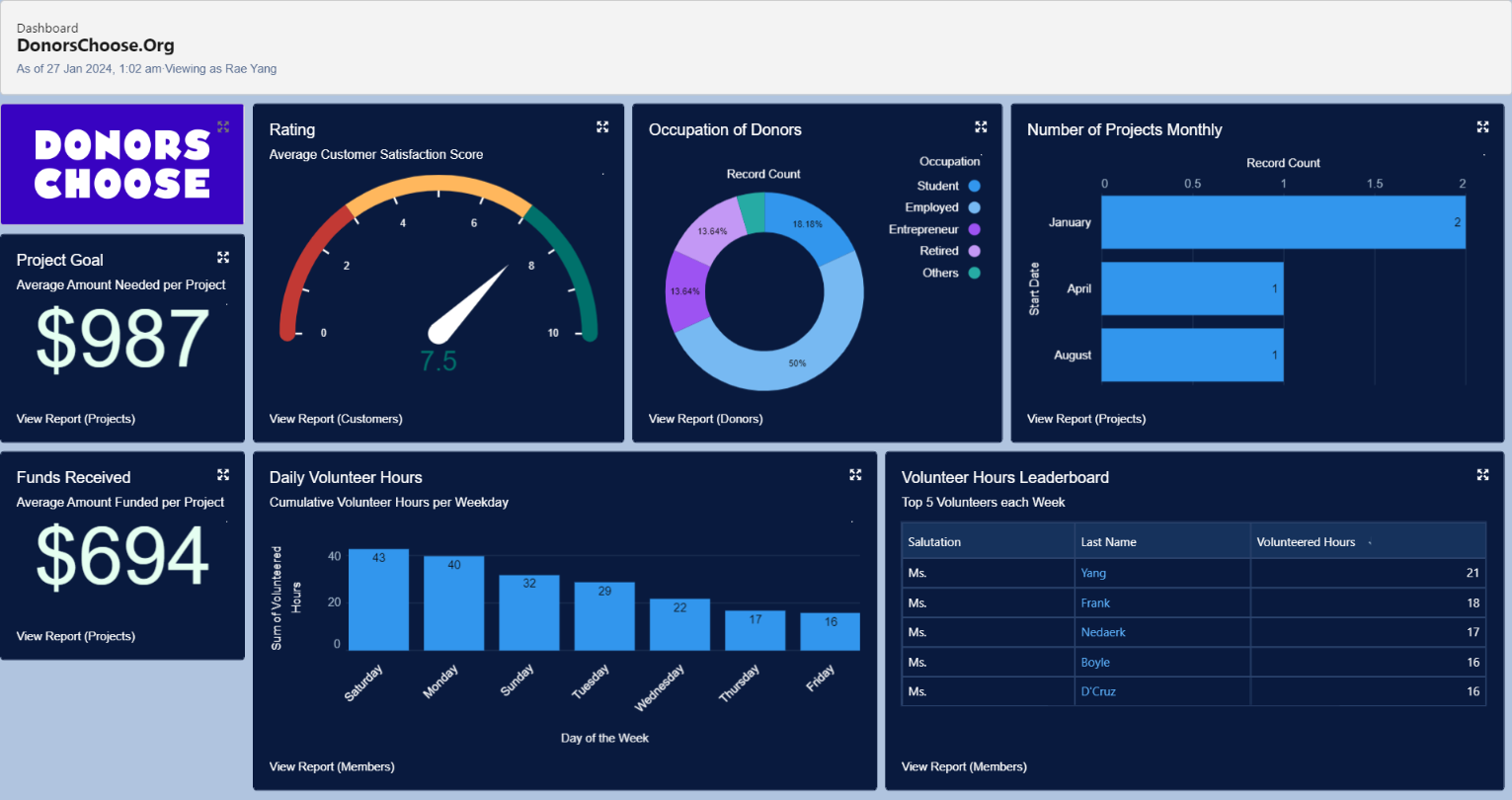
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This gauge chart is a result of careful analysis using insights derived from the dedicated 'Customer Report.' By utilizing this report, staff can efficiently aggregate and understand customer feedback, allowing for the creation of a visually impactful representation of satisfaction levels. The gauge chart serves as a visual cue, providing a quick and accessible means for staff to comprehend and act upon customer feedback, ultimately contributing to the organization's ongoing efforts to enhance engagement and support.

### Donor Occupation Donut Chart



In the 'Donors' category, the spotlight is on understanding the diverse occupations of donors through a visually engaging donut chart. This chart, based on simulated data indicating that 50% of donors are employed while the remaining 50% fall into various other categories, serves as a valuable tool for DonorsChoose.org in refining their marketing strategies. For instance, with half the donors identified as employed professionals, targeted initiatives can be designed to appeal to this significant group. Simultaneously, the organization can develop focused approaches for engaging donors in other categories, ensuring a holistic and personalized marketing strategy.

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The donut chart, with its intuitive display of proportions, simplifies the communication of complex data. Its visual appeal makes it easy for stakeholers to grasp the distribution of donor occupations at a glance. This visual representation not only enhances internal understanding but also provides a compelling way to communicate key insights to stakeholders, fostering informed decision-making within the organization. The utilization of such a visual aid exemplifies the importance of data visualization in enhancing strategic decision-making for DonorsChoose.org.

Monthly Project Count Bar Graph

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Within the 'Projects' category, the spotlight is on a bar graph illustrating the monthly count of projects. The bar graph meticulously details the number of projects for each month, enabling the organization to discern patterns and optimize their approach to project creation. For example, if a specific month consistently sees a surge in project initiatives, DonorsChoose.org can strategically align fundraising efforts to coincide with heightened donor engagement during these periods.

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Furthermore, the bar graph serves as a transparent and accessible means of communication for both internal staff and potential donors. Its visual simplicity allows for a quick understanding of project trends, facilitating effective internal decision-making and fostering donor awareness. This visual representation not only enhances internal analytics but also serves as a powerful communication tool, showcasing the impact of projects and guiding future funding initiatives for DonorsChoose.org.

### Project Goal and Funds Received Cards

In the 'Projects' category, attention is drawn to two impactful cards displaying essential metrics: the average project goal and the average funds received per project. These cards, utilizing median values to account for potential outliers, provide a clear and straightforward view of the financial aspects of each project.

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The 'Average Project Goal' card communicates the median amount needed per project, offering insight into the typical funding requirement. Paired with the 'Average Funds Received' card, which showcases the median amount actually funded per project, these visuals serve as a compelling indicator of the financial landscape of DonorsChoose.org projects.

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By opting for median values, the cards mitigate the influence of potential outliers, presenting a better representation of the typical funding scenario. This strategic choice enhances the reliability of the visualizations, providing a more accurate reflection of the funding landscape.

Moreover, the simplicity of the cards facilitates swift comprehension, allowing the team to gauge the current financial health of projects at a glance. The juxtaposition of the project goal against the funds received emphasizes the ongoing need for donor support. This visual insight underscores the importance of continuous efforts to attract new donors, ensuring that each project receives the necessary funding to thrive.

These user-friendly and insightful cards offer a direct visual comparison between project goals and funds received, emphasizing the ongoing necessity for donor engagement to drive the success of DonorsChoose.org projects.

### Volunteer Hours by Day Column Graph

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Moving into the 'Members' category, the focus shifts to a compelling column graph showcasing the sum of volunteered hours contributed by all members for each day. This insightful visualization, derived from the 'Member Report,' not only provides a comprehensive overview of volunteer engagement but also serves as a strategic tool for proactive resource management.

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The column graph, arranged in descending order based on volunteered hours for each day, offers a dynamic perspective on the flow of volunteer activity. This visual representation is instrumental in helping the organization predict and manage volunteer availability effectively. By identifying days with lower volunteer hours, DonorsChoose.org can strategically allocate tasks or launch targeted initiatives to ensure ample volunteer support.

Moreover, the transparency afforded by this graph extends beyond internal decision-making. DonorsChoose.org can consider publishing this data, empowering volunteers with insights into high and low engagement days. Volunteers can then proactively plan their participation, choosing to lend their support on days when additional manpower is needed. This not only enhances the flexibility of the volunteer program but also encourages a collaborative and informed approach to community engagement.

### Weekly Volunteer Leaderboard

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In the realm of 'Members,' the spotlight is on the Weekly Volunteer Leaderboard—a visual presentation showcasing the top 5 volunteers each week based on cumulated volunteer hours. This thoughtful and privacy-conscious display, featuring only the salutation and last name alongside the corresponding weekly volunteer hours, serves multiple strategic purposes for DonorsChoose.org.

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Primarily, the leaderboard acts as a dynamic recognition tool, offering a tangible and public acknowledgment of the outstanding contributions made by volunteers. By celebrating the achievements of the top contributors, the organization fosters a sense of accomplishment among volunteers. This recognition not only serves as a motivational factor for the individuals listed but also creates a positive and encouraging environment that can spur friendly competition among volunteers.

Importantly, the privacy measures implemented, showcasing only salutation and last name, demonstrate DonorsChoose.org's commitment to volunteer confidentiality and data protection. This approach strikes a balance between recognizing individual efforts and respecting privacy.

# Reflections

## Yang Xin Lei Rae

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Throughout the Customer Experience Management (CXM) module, I've gained a profound understanding of how customer-centric strategies, particularly in the context of non-profit organizations, play a role in building and sustaining relationships. As this assignment focuses on applying these concepts to a Salesforce Case Study for DonorsChoose.org, I've found that the concepts taught in class, emphasizing transparency and trust, are particularly pertinent.

I learnt that transparency is not merely a buzzword but a cornerstone for fostering trust. In the non-profit sector, especially when dealing with donations, maintaining a high level of transparency becomes imperative. Donors need assurance that their contributions are used efficiently and effectively, and this is achievable through clear communication of how funds are allocated.

The importance of transparency is magnified in the age of social media, where information travels swiftly. A misstep or lack of openness could lead to damaging scandals that tarnish the reputation of the organization. Consequently, this assignment prompts a thoughtful application of CXM principles to ensure that DonorsChoose.org upholds honesty and straightforwardness in handling donations, thereby safeguarding its standing in the eyes of the public.

Moreover, the concept of trust extends beyond donors to encompass the organization's relationship with its volunteers. These individuals entrust the organization with sensitive and private information, necessitating a commitment to data security and confidentiality. The CXM concepts explored during the module underscore the criticality of preserving transparency and trust not only with donors but also with the broader public.

In conclusion, the CXM module has equipped me with valuable insights that extend beyond conventional business contexts to address the unique challenges faced by non-profit organizations. The emphasis on transparency and trust serves as a guiding principle as we navigate the complexities of implementing a CRM system for DonorsChoose.org, ensuring that the organization maintains its integrity, secures donor trust, and continues to make a positive impact on education initiatives.