

Making communication performance data more compelling – Part 2

How to use dashboards, indexes and balanced scorecards to share progress

BY ANGELA SINICKAS

In Part 1 of this article in the last issue, Angela Sinickas described how to select a measurement approach, focus on the metrics that matter and set targets. Part 2 continues with advice on how to present your communication performance progress. To give data more impact and ensure it gets acted on, Sinickas suggests using simple “dashboard visualizations” such as bar graphs, a speedometer dial or mathematical symbols.

Editor’s note: The numbering of the figures included in this article continue from Part 1 – i.e. Figures One to Three featured in Part 1 in the last issue, and Figures Four to Seven continue in this article. However, for ease of reference we’ve included Figure One again (below).

Figure One: The Balanced Scorecard

| | Leading Measures (Measured Once Monthly) | Lagging Measures (Measured Once Quarterly) |
|--|---|---|
| Employee Learning & Growth • Clarity • Content alignment • Knowledge and attitudes | + = | + |
| Customer • Clarity • Content alignment • Knowledge and attitudes | - - | - |
| Internal Processes • Efficiency of approvals • Behavior of LD access code usage | - | + |
| Financial • Efficiency of comms budget • ROI on one campaign | = | + |

= On track for 2007 target + Over target - Off target

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A vital element of any communication research program is tracking progress over time and sharing the results so they can be acted on if necessary. So once you’ve settled on your research method, decided which metrics to focus on, established a baseline and set targets (all covered in Part 1 of this article), the next step is deciding how you will represent progress.

Representing your progress

For the detailed metrics within a category, you’ll measure the absolute numbers in your baselines, establish a target, and then measure again either monthly or quarterly to track your progress. For your dashboard, you’ll need to then summarize your progress within a category overall. Some common dashboard visualizations used to summarize progress toward goals include:

- *Bar graphs:* These show your current score in comparison to your starting baseline and your target. Figure Four (page 34) is an example of this approach, which looks a bit like a thermometer showing the current temperature, with marks indicating where freezing and boiling temperatures are. For your dashboard, you would show the combined or averaged results for each category of metrics. You would also need to hold in reserve the detailed bar graphs for each item within a category if the executive you’re presenting to wants to know more detail.
- *Speedometer dial:* The concept here is that you place your current baseline at the top of the

semi-circular shape (called a “chord” by your geometry teacher). You place your target at the far right. Then each time you update the dashboard, you position an arrow showing where your current result fits. Figure Five (page 34) shows the same numbers on knowledge and attitude improvement used in the bar graph approach in Figure Four. Your dashboard for a quarter could show multiple chords on a page, each one summarizing a different category.

- Mathematical symbols, arrows or color:** These approaches make judgments about how good or bad your current results are against target. For example, in Figure One (bottom left), an equal sign (=) means the quarterly result is on track for where you need to be to achieve the target by year-end. The plus sign (+) means you’re doing better than you need to be at that point in the year, and a minus sign (-) means you’re falling behind where you need to be. Often, choosing the right descriptor is a bit of a judgment call. For example, if you’re running one percent over your budget for the quarter, should that be rated as on target or off target? How much “wiggle room” should be allowed before you have to rate something as being off target? Figure Three (in the previous article) uses horizontal, up and down arrows to show the same concepts. You could also use color, by itself or with symbols or arrows. Typically green is used to show that results are better than target, red that you’re in the danger zone of being off target, and yellow for a range that is within target. However, since about seven percent of men and 0.4 percent of women are red/green color blind, I prefer to use blue to indicate a good result.
- Grades:** Depending on where you went to school, your teachers may have graded you on a letter scale, with “A” signifying excellence, “B” meaning very good, “C” indicating average, “D” warning of a poor result, and “F” announcing failure. (The “E” is skipped because it could be misinterpreted as representing “excellent.”) An example of this is illustrated in the far right column in Figure Two (previous article). Other schools use a numeric score, with 100 indicating a perfect score, though there is a great deal of variation in what a failing score would be. This approach is illustrated in Figure Six (page 35).

Scaling the targets

You also need to consider very carefully if reaching the target you set means you’ve done a

good job, a very good job or an outstanding job. Are you setting stretch goals or “low-hanging-fruit” goals? If your results stay the same as your baseline, should that be considered average performance or poor performance?

If your pay increase or bonus will be determined by your dashboard results, be sure you set lower targets that would indicate satisfactory completion of your job, so that actually achieving the stretch goal would merit a rating of “outstanding.”

Expect this process of setting targets and creating a scale of success for different levels of achievement to be time-consuming, especially the first time you do it. Target-setting for communication will be just as heavily disputed as setting the company’s annual goals or establishing a sales rep’s monthly quotas. You’ll need to practice your effective negotiation skills.

Weighting results

If we were to average the scores in Figure Two (previous article) for an overall rating, it would probably be a “B.” Averaging the pluses and minuses in Figure One, we’d have an overall “=” for on target, which “feels” more like a grade of “C.” For the numeric points in Figure Six (page 34), we have a 74, rated as “exceeds expectations”, which again feels like a “B.” The differences lie in which measures you include in your dashboard and how much “weight” you give to each category.

Figure Six illustrates a measurement approach called an index, which gives different categories of measures different weight. The column called “Maximum Points” shows the relative weight of each dashboard category. For example, “Content alignment” contributes up to 20 points of weight in the total score of 100, which is twice the

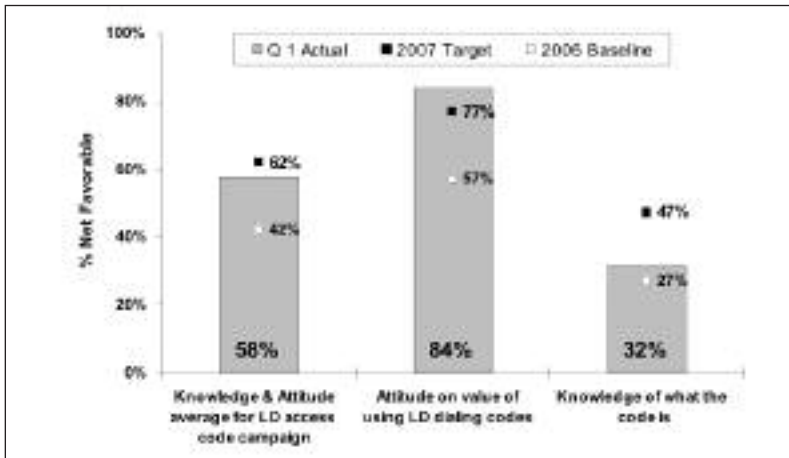


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KEY POINTS

- To give communication performance data more impact, track progress visually on a dashboard using symbols, grades or color.
- Performance targets should be scaled to identify whether reaching them means you’ve done an excellent, poor or satisfactory job.
- Target-setting could be disputed – be ready to negotiate.
- Each category of measure should be weighted. This can be done by creating an index.
- Keep it simple if you’re using dashboards for the first time. Resist using visuals that are complicated or time-consuming to create and interpret.

Figure Four: The bar graph “thermometer”



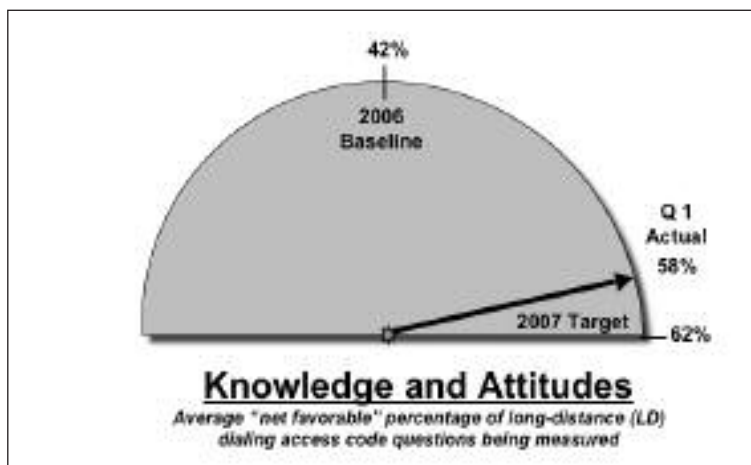
◀ weight of “Knowledge and attitudes”, contributing up to only 10 points of the total.

Creating an index

The time-consuming aspect of creating an index is that each category needs to have its own scale established, so that when the results come in each month or quarter, you know how many of the possible points to award each category. Figure Seven (page 35) shows how the scale could be established for “Knowledge and attitudes” for our long-distance dialing campaign (covered in Part 1).

In this example, staying at the starting baseline of 42 percent would be awarded five of the possible 10 points in this category. This is because our overall performance scale in Figure Six showed that achieving 50 points out of 100 would be the minimum score for a rating of “Satisfactory performance”. So achieving five points out of 10

Figure Five: The “speedometer” dial



would be consistent with the minimum score to maintain a level of satisfactory performance.

Reaching the stretch goal of 62 percent on knowledge and attitudes for the long-distance dialing campaign would gain the maximum 10 points for this category. The actual result for Q1, 58 percent, will contribute nine out of a maximum of 10 points to the quarterly index rating. Similar scales would need to be set up for each category, establishing the baseline as the half-way point in each scale.

Focusing on areas of influence

My recommendation for weighting different categories may sound counter-intuitive. Outcomes like improvements in knowledge and changes in behavior clearly are more important than the activities we engage in to achieve those results. However, our influence over those outcomes is not complete. Managers may not allow their call-center employees to visit the intranet while they’re at their desks. Managers may not conduct the staff meetings for which we’ve sent them background information. Employees may not attend the Town Hall in which key information will be shared.

That’s why I recommend giving more weight to the inputs we do have control over that will lead to greater knowledge and behavior change: the volume and quality of our messages and channels.

Leading and lagging measures

Using the terminology of the Balanced Scorecard (Figure One, page 32), these communication activities of ours, if executed well, can be seen as “leading” measures that can predict “lagging” measures like survey scores or financial results that tell you what happened in the past.

Most of the traditional financial measures are “lagging” in that they tell you where you’ve been, often too late to be able to intervene to change the trend of your results. There’s value in identifying the right “leading” measures that may have a cause-and-effect relationship with the lagging measures to act as predictors of the financial measures and other outcomes.

I believe many measures of communication activity can lead to improved knowledge and behavior change. For example:

- The clarity of our writing and if it’s appropriate to the reading grade level of our audiences.
- The number of times we send out a message in different channels.
- Ensuring our audience has access to the channels of communication in which the messages will appear.

These leading measures can often be quantified even before they are implemented, so they could be tracked every month, whereas surveys might be launched no more than quarterly.

Choosing a dashboard approach

With all these options, you’ll need to think carefully about which approach to dashboards makes the most sense for your organization and your communication department. Don’t get more complicated than you need to. You might start out with a one-page slide in PowerPoint that shows bar graphs of quarterly results in just four categories of measures.

Of course, the more measurements you’re currently conducting, the more you’ll want to show to management. And if your results will be used to help determine your compensation, be very careful in how much weight you give to each category of measures, and how you scale various levels of achieving target.

While it may seem like a time-consuming task the first year you set up a dashboard, the effort can really pay off. Once your organization’s leadership sees the communication department being measured as others are, our function gains stature as a true business process like the others – measurably contributing to the bottom line. scm

Figure Six: Weighted results in an index

| Starting Baseline | Maximum Points | Quarter 1 Points | Measures for Internal Communication |
|-------------------|----------------|------------------|---|
| 10 | 20 | 19 | Content alignment |
| 5 | 10 | 9 | Knowledge and attitudes (LD campaign only) |
| 2 | 4 | 4 | Clarity |
| 3 | 6 | 3 | Distribution |
| 9 | 18 | 11 | Effectiveness of channels |
| 10 | 20 | 8 | Efficiency of department |
| 8 | 16 | 14 | Behavior change from campaign |
| 3 | 6 | 6 | ROI |
| 50 | 100 | 74 | Total |

0-49 points by end of year = Below expectations
50-69 points = Satisfactory performance
70-89 points = Exceeds expectations
90-100 points = Outstanding performance

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Figure Seven: Awarding points in an index

Average “net favorable” percentage of knowledge and attitude questions being measured for long-distance dialing campaign

| | |
|-----------|---|
| 10 | 62% or higher (maximum points for reaching “stretch” target) |
| 9 | 58% |
| 8 | 54% |
| 7 | 50% |
| 6 | 46% |
| 5 | 42% not favorable average (starting baseline from end of previous year) |
| 4 | 38% |
| 3 | 34% |
| 2 | 30% |
| 1 | 26% |
| 0 | Less than 26% |

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