



DIGITAL DEPLOYMENT



INTRO TO DASHBOARDS & CUSTOM REPORTS

Streamline your web reporting & engage your internal stakeholders

3

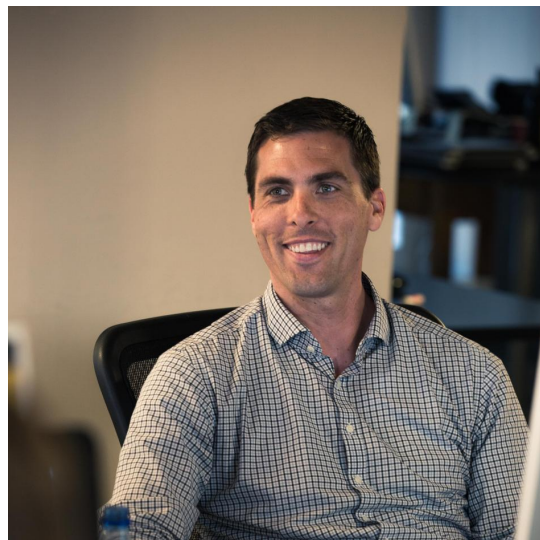
DASHBOARDS AND CUSTOM REPORTS

Introductions

Lindsay Hardy

Strategist at Digital Deployment. Helps clients create meaningful user experiences by talking with internal stakeholders, polling key audience groups, and researching website performance.

- **Fav Tools:**
 - Google Analytics
 - Stakeholder Surveys
 - Exploration Exercises & User Stories
 - Focus Groups



4

DASHBOARDS AND CUSTOM REPORTS

Introductions

Mac Clemmens

CEO of Digital Deployment. His passion is empowering institutions, associations, and nonprofits to communicate online and better connect with their users while teaching them how to build measurable and sustainable business value.



5

DASHBOARDS AND CUSTOM REPORTS

What we'll cover today

- **Introduction**
- **Getting started with analytics dashboards**
 - What is a dashboard?
 - Displaying data & layout options
 - Popular metrics & filters
 - When to use a dashboard
 - Creating a dashboard
 - Get a head start: dashboard templates
 - Bonus tips
- **Custom reports**
 - When to create a custom report
 - Metrics, dimensions & filters
 - Examples
- **Questions?**

6

DASHBOARDS

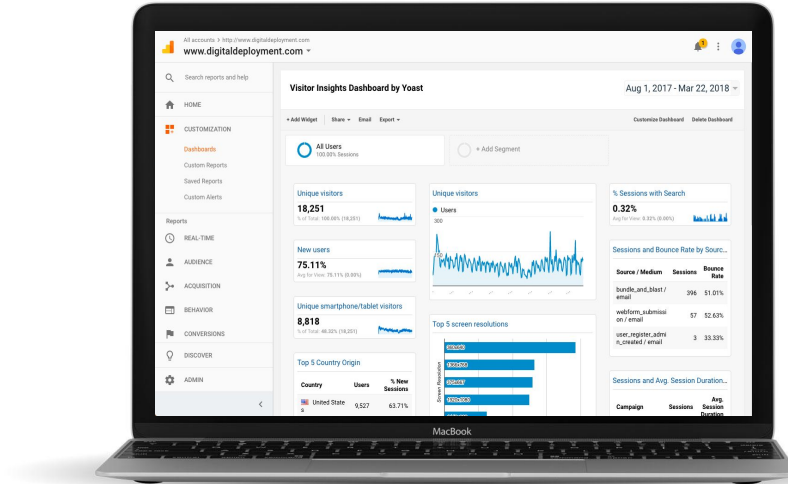
What are they? How do I use them? So many questions...



7

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What is a dashboard?



An analytics dashboard is a customized set of data that **gives you an overview of how your website is performing in a given area**, like social media, mobile, SEO, and so forth.

By creating a customized set of data widgets in this flexible format, you can have a quick snapshot of your website's performance whenever you need it.

8

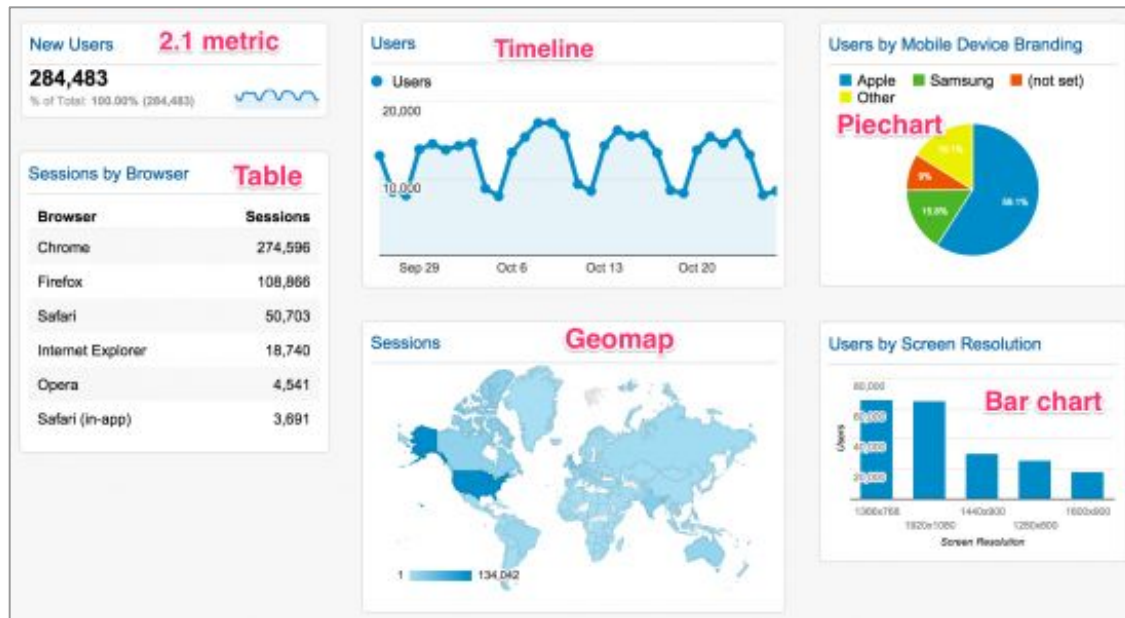
DASHBOARDS AND CUSTOM REPORTS

Six ways to display data

Standard:



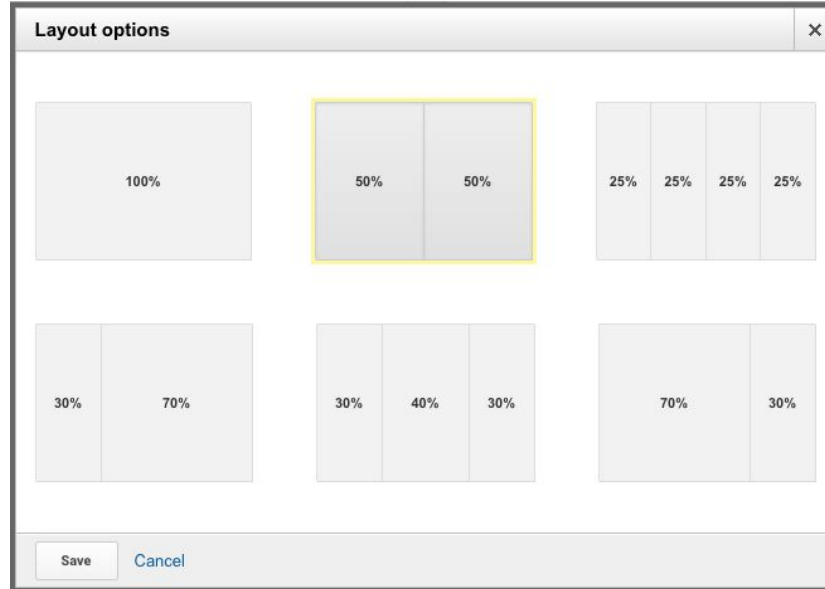
Six representations of your data will look like this:



9

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Layout options



Six ways of laying out your data. Layouts are flexible :)
Pick a layout and drag/drop widgets to your heart's content.

10

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Metrics: a few popular definitions

- **Sessions** - Visits to your site.
- **Users** - Unique visitors to your site.
- **Pageviews** - Individual times a page is viewed.
- **Pages / Session** - Average number of pages viewed per visit.
- **Avg. Session Duration** - Average time a person spends on their visit to your site
- **Bounce Rate** - A bounce is when someone comes to your site and leaves after the first page. Bounce rate is the % of visitors that leave without visiting a second page.
- **Page / Page Title** - Pages people are viewing on the site.
- **Landing page** - Pages people are entering the site through.
- **City / Country** - Which cities or countries people are viewing your site from?
- **Device** - Find out if people are visiting via mobile, tablet or desktop
- **Screen size** - Are people viewing your site on a giant screen or something smaller?
- **Goals** - Are you tracking specific events?
- **Value** - Have you set value to specific goals on your site?

11

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When to use a dashboard

A few popular examples and the questions I consider:

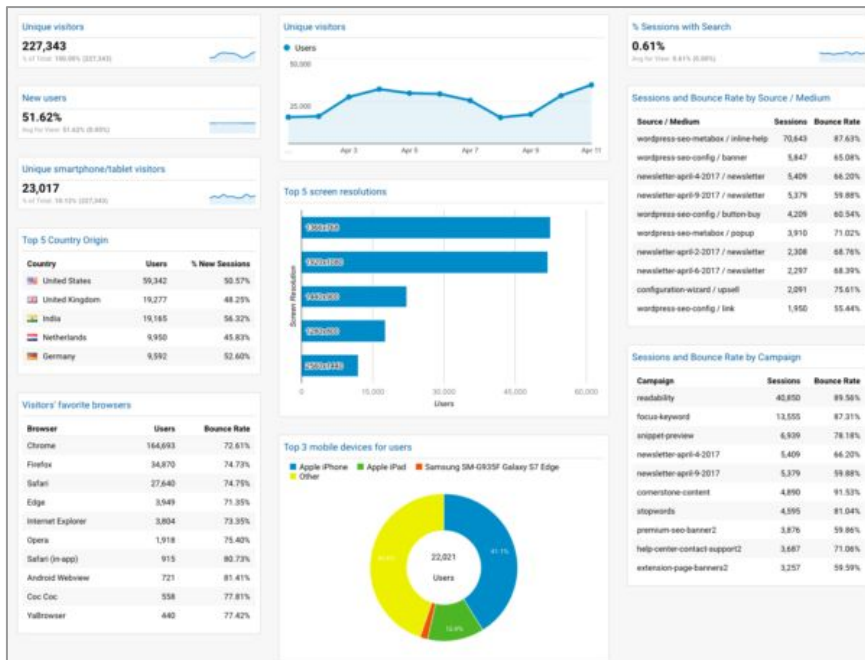
- **Overall Visitor Insights** - How many visitors? Are they engaged? What devices are they using? Location? Landing pages? Top content?
- **Mobile Performance** - How are mobile visitors behaving? Popular devices? Screen sizes? Top landing pages? Are they engaged?
- **Social Performance** - Which social networks are driving visitors? Popular content? Are they engaged? (Pages/visit? Time on site?)
- **Email Marketing Performance** - What campaigns are performing best? Are people visiting more than one article? Was a specific subject line more effective? What are the most popular landing pages.
- **Search/SEO Performance** - How many visitors? Organic or paid? Are they engaged? Are they converting?

Note: Dashboards are wonderful for getting a quick pulse, but they aren't great for a deep dive.

12

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Examples: A few dashboards to get you started



We've prepared a few dashboards to get you started:

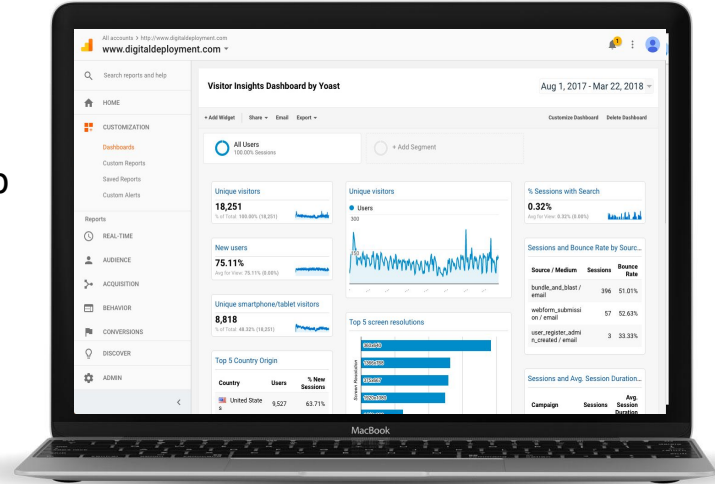
[Overall \(baseline stats, acquisition & content\)](#), [Email marketing](#), [Social performance](#).

13

DASHBOARDS AND CUSTOM REPORTS

1. **Log in** to Google Analytics
2. Select the **“Customization”** tab
3. Then select **“Dashboards”**
4. Click **“CREATE”**
5. Choose **“Starter Dashboard”**

Create a your first dashboard



14

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Bonus tips: Google Analytics solutions gallery

The screenshot displays the Google Analytics Solutions Gallery interface. At the top, the header reads 'Google Analytics | Solutions Gallery' with a search bar and user profile 'Lindsay Handy'. The main content area features the solution 'Occam's Razor Awesomeness' by Avinash Kaushik, who has 255,042 imports and a 4.2 rating. The solution description states it is a collection of top segments, custom reports, and dashboards. The rating section shows a 4.2 average with a bar chart of individual ratings. On the left, there are filters for type, ranking, and category. On the right, a sidebar lists various configurations shared with the user, including 'All New Site Data', 'Advanced Segments', and 'Custom Reports'.

Google Analytics | Solutions Gallery

By Avinash Kaushik

4.2 (343)

255,042

Aug 20, 2013

Aug 20, 2013

Dashboard
Custom Report
Segments

It's always good to look like the office pro or engage the team on important web issues. Dashboards are easy to download or set up as a scheduled email. Take advantage.

15

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Bonus tips: filtering data

There are many good ways to filter data, but applying filters to the right widgets can help you get started when setting up your own custom dashboard.

Mobile:

Filter this data:

Only show ▾

Mobile (Including Tablet) ▾

Containing ▾

yes



Social:

Filter this data:

Only show ▾

Social Source Referral ▾

Containing ▾

yes



Email:

Filter this data:

Only show ▾

Source / Medium ▾

Containing ▾

email



AND

Don't show ▾

Campaign ▾

Containing ▾

(not set)



Search:

Filter this data:

Only show ▾

Medium ▾

Exactly matching ▾

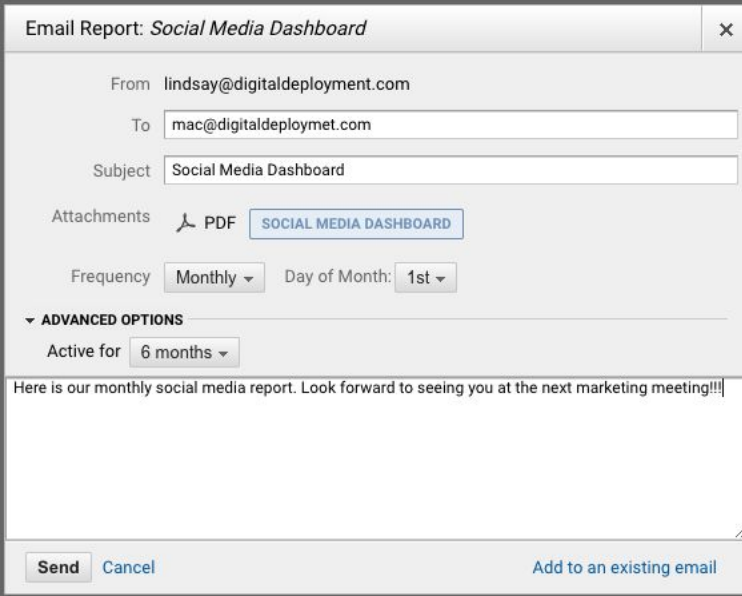
organic



16

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Bonus tips: email the team!



The screenshot shows a configuration window for an email report. The title bar reads "Email Report: Social Media Dashboard" with a close button (X) on the right. The form contains the following fields and options:

- From:** lindsay@digitaldeployment.com
- To:** mac@digitaldeployment.com
- Subject:** Social Media Dashboard
- Attachments:** A PDF icon followed by a button labeled "SOCIAL MEDIA DASHBOARD".
- Frequency:** A dropdown menu set to "Monthly".
- Day of Month:** A dropdown menu set to "1st".
- ADVANCED OPTIONS:** A section header with a downward arrow.
- Active for:** A dropdown menu set to "6 months".
- Message Body:** A text area containing the text: "Here is our monthly social media report. Look forward to seeing you at the next marketing meeting!!!".
- Buttons:** "Send" and "Cancel" buttons are at the bottom left. A link "Add to an existing email" is at the bottom right.

Dashboards can be the perfect tool for keeping a variety of stakeholders informed. Provides a snapshot for a date range that can be a great conversation piece for your weekly marketing meeting without getting into the weeds.

17

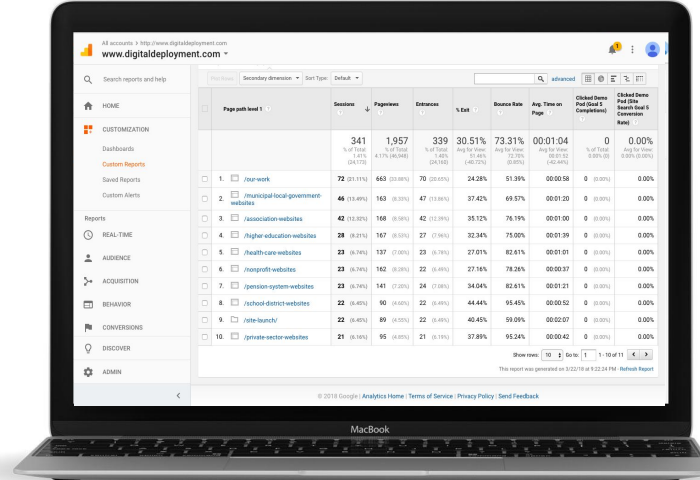
CUSTOM REPORTS

Diving a little deeper

18

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What is a custom report?







Page path level 1	Sessions	Pageviews	Bounce Rate	Conversion Rate
1. /your work	72 (21.17%)	663 (21.66%)	70 (28.67%)	24.26%
2. /municipal-local government websites	46 (13.49%)	163 (5.39%)	47 (13.85%)	37.42%
3. /association websites	42 (12.32%)	168 (5.39%)	42 (12.32%)	35.12%
4. /higher education websites	28 (8.21%)	167 (5.32%)	27 (7.96%)	32.34%
5. /health care websites	23 (6.74%)	127 (3.93%)	23 (6.74%)	27.01%
6. /nonprofit websites	23 (6.74%)	162 (5.06%)	22 (6.49%)	27.14%
7. /government websites	23 (6.74%)	141 (4.38%)	24 (7.03%)	34.04%
8. /school district websites	22 (6.40%)	90 (2.80%)	22 (6.40%)	44.44%
9. /radio/television	22 (6.40%)	89 (2.77%)	22 (6.40%)	40.45%
10. /private sector websites	21 (6.16%)	95 (2.93%)	21 (6.16%)	37.86%

A Custom Report is a more detailed report that you can create. You pick the dimensions (City and Browser, for example) and metrics (Sessions, Pageviews, and Bounce Rate, for example) and decide how they should be displayed. **Note:** You must specify at least one dimension and one metric.

19

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Metrics, dimensions & filters

Page path level 1 ?		Sessions ?	Pageviews ?	Entrances	% Exit ?	Bounce Rate ?	Avg. Time on Page ?
dimensions		metrics					
		346 % of Total: 0.94% (36,748)	1,967 % of Total: 2.37% (83,135)	344 % of Total: 0.94% (36,732)	30.50% Avg for View: 44.18% (-30.96%)	72.54% Avg for View: 64.26% (12.89%)	00:01:05 Avg for View: 00:01:46 (-38.55%)
<input type="checkbox"/>	1.  /our-work	71 (20.52%)	655 (33.30%)	69 (20.06%)	24.12%	50.70%	00:00:56
<input type="checkbox"/>	2.  /municipal-local-government-websites	46 (13.29%)	163 (8.29%)	47 (13.66%)	37.42%	69.57%	00:01:20
<input type="checkbox"/>	3.  /association-websites	42 (12.14%)	167 (8.49%)	42 (12.21%)	35.33%	76.19%	00:01:00
<input type="checkbox"/>	4.  /higher-education-websites	28 (8.00%)	167 (8.49%)	27 (7.85%)	32.34%	75.00%	00:01:30

Metric groups: Pick the measurements that matter for you (e.g. sessions, pageviews, entrances, exit rate, conversion rate, etc.)

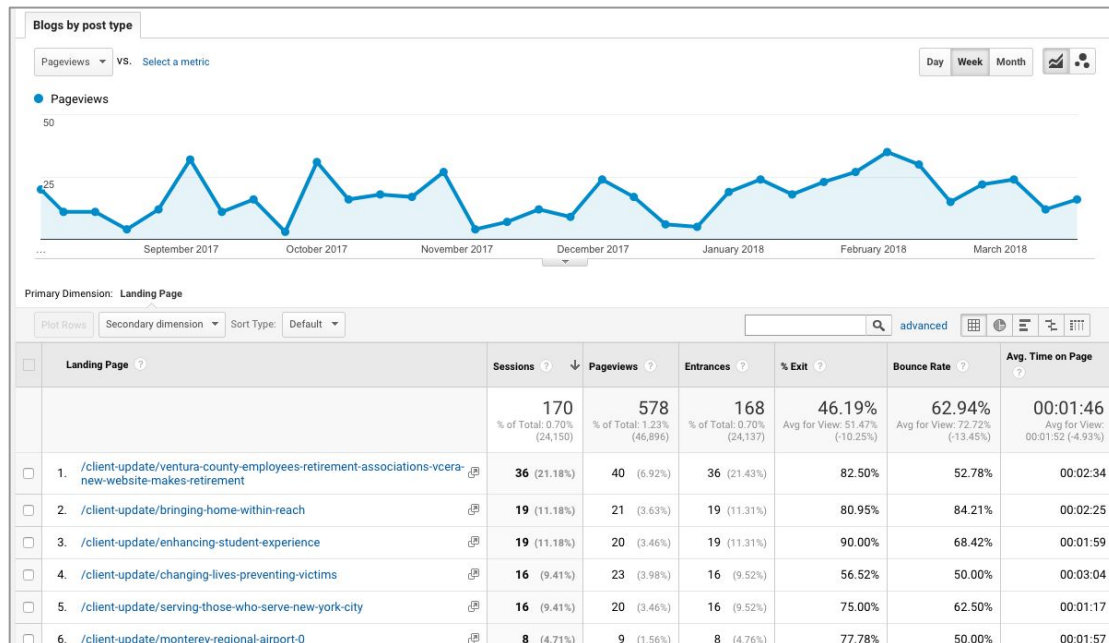
Dimension drilldowns: The topic in the left column of your table (e.g. page, landing page, page title, source/medium, etc.)

Filters: Allows you to isolate specific data (e.g. only show data for folks who arrived from facebook or even just isolate a specific section of your site.)

20

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Displaying Data: Explorer





















Explorer - Shows a trend line up top + a table beneath for specifics

21

DASHBOARDS AND CUSTOM REPORTS

Displaying Data: Flat Table

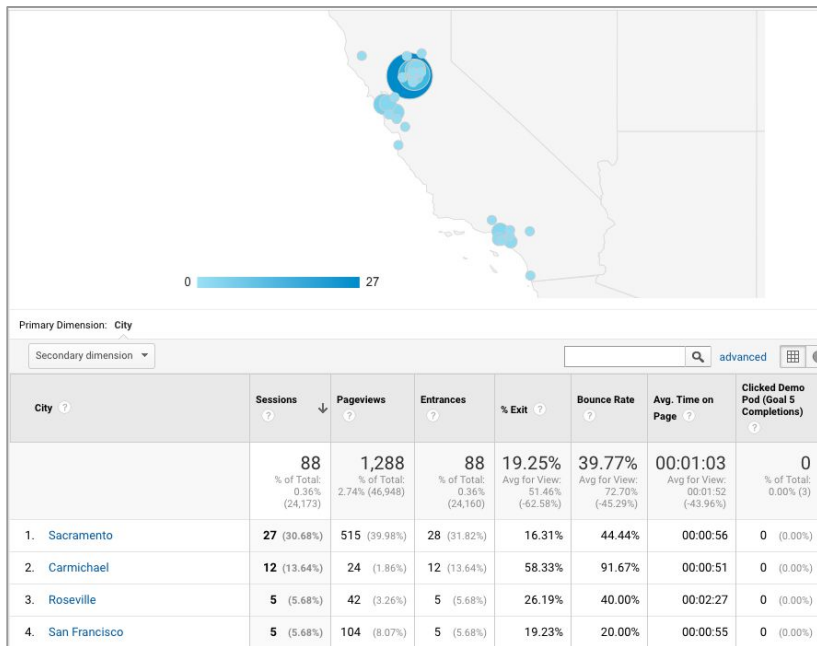
Page path level 1 ?	Page ?	Sessions ? ↓	Pageviews ?	Entrances ?	% Exit ?	Bounce Rate ?	Avg. Time on Page ?	Clicked Demo Pod (Goal 5 Completions) ?	Clicked Demo Pod (Site Search Goal 5 Conversion Rate) ?
1.  /our-work	/our-work 	72 (21.11%)	663 (33.88%)	70 (20.65%)	24.28%	51.39%	00:00:58	0 (0.00%)	0.00%
2.  /municipal-local-government-websites	/municipal-local-government-websites 	46 (13.49%)	163 (8.33%)	47 (13.86%)	37.42%	69.57%	00:01:20	0 (0.00%)	0.00%
3.  /association-websites	/association-websites 	42 (12.32%)	168 (8.58%)	42 (12.39%)	35.12%	76.19%	00:01:00	0 (0.00%)	0.00%
4.  /higher-education-websites	/higher-education-websites 	28 (8.21%)	167 (8.53%)	27 (7.96%)	32.34%	75.00%	00:01:39	0 (0.00%)	0.00%
5.  /health-care-websites	/health-care-websites 	23 (6.74%)	137 (7.00%)	23 (6.78%)	27.01%	82.61%	00:01:01	0 (0.00%)	0.00%
6.  /nonprofit-websites	/nonprofit-websites 	23 (6.74%)	162 (8.28%)	22 (6.49%)	27.16%	78.26%	00:00:37	0 (0.00%)	0.00%
7.  /pension-system-websites	/pension-system-websites 	23 (6.74%)	141 (7.20%)	24 (7.08%)	34.04%	82.61%	00:01:21	0 (0.00%)	0.00%
8.  /school-district-websites	/school-district-websites 	22 (6.45%)	90 (4.60%)	22 (6.49%)	44.44%	95.45%	00:00:52	0 (0.00%)	0.00%
9.  /private-sector-websites	/private-sector-websites 	21 (6.16%)	95 (4.85%)	21 (6.19%)	37.89%	95.24%	00:00:42	0 (0.00%)	0.00%

Flat table - Classic table - You lose the fun trendline but you can show multiple dimensions side-by-side.

22

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Displaying Data: Map Overlay

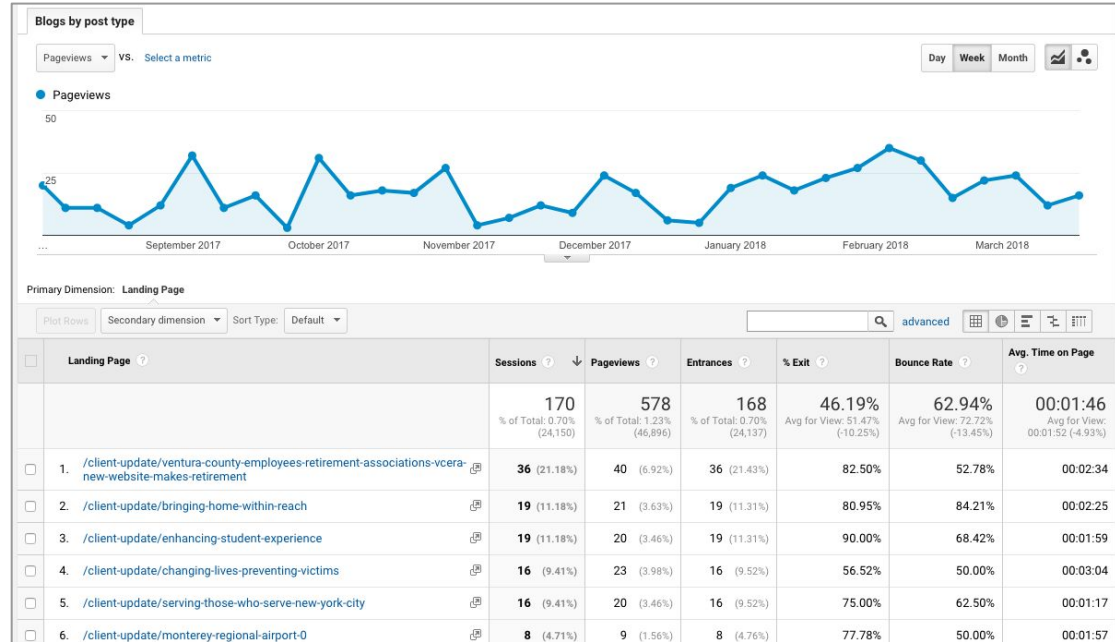


Map Overlay - Share your stats in a visual way with a map + table format

23

DASHBOARDS AND CUSTOM REPORTS

Examples: Analyzing a blog or portfolio



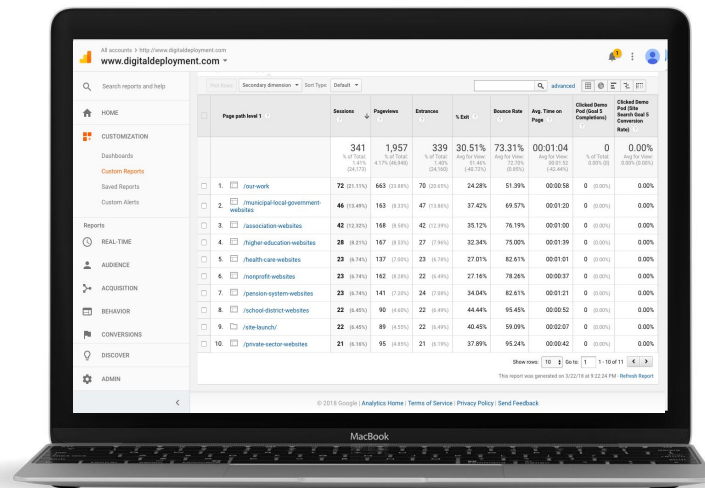
Let's take a look at a sample report: [portfolio sections](#).

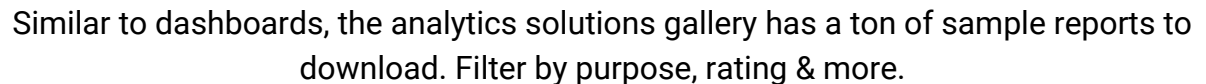
24

DASHBOARDS AND CUSTOM REPORTS

1. **Log in** to Google Analytics
2. Select the **“Customization”** tab
3. Then select **“Custom reports”**

Create a custom report

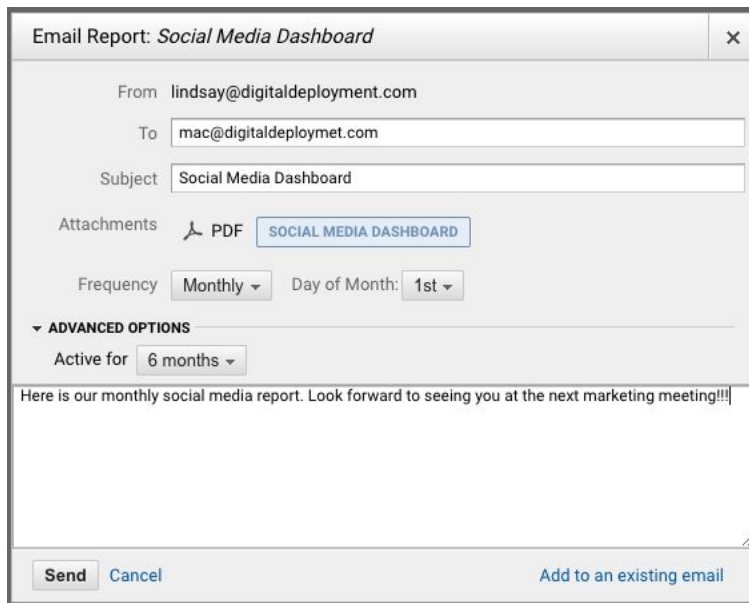




26

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- Buttons:** "Send" and "Cancel" buttons are on the left, and a link "Add to an existing email" is on the right.

Custom reports can be shared the same way that dashboards can!

27

DASHBOARDS AND CUSTOM REPORTS

A bit of review

- If you need **a snapshot of overall performance in a general area**, the dashboard is the right choice for you! Begin with a starter dashboard or import a template and start making your tweaks.
- If you need to more **closely monitor the performance of something specific on your site**, a custom report is the right choice for you. Pick the layout, metrics and dimensions that are right for you and make it happen.

The background of the slide is a repeating pattern of various business and technology icons in a light blue color. These icons include a smartphone, a document with lines, a magnifying glass, a target with an arrow, a gear, a pie chart, an envelope, a speech bubble, a thumbs up, a lightbulb, a clock, a checkmark in a circle, a presentation board with a line graph, a tag, and puzzle pieces. The icons are arranged in a grid-like fashion, creating a textured background.

ADDITIONAL QUESTIONS