DIGITAL DEPLOYMENT

INTRO TO DASHBOARDS & CUSTOM REPORTS

Streamline your web reporting & engage your internal stakeholders
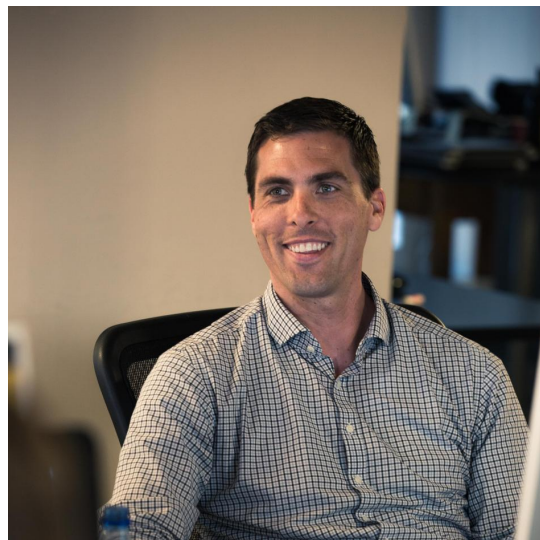
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DASHBOARDS AND CUSTOM REPORTS

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

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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.

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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
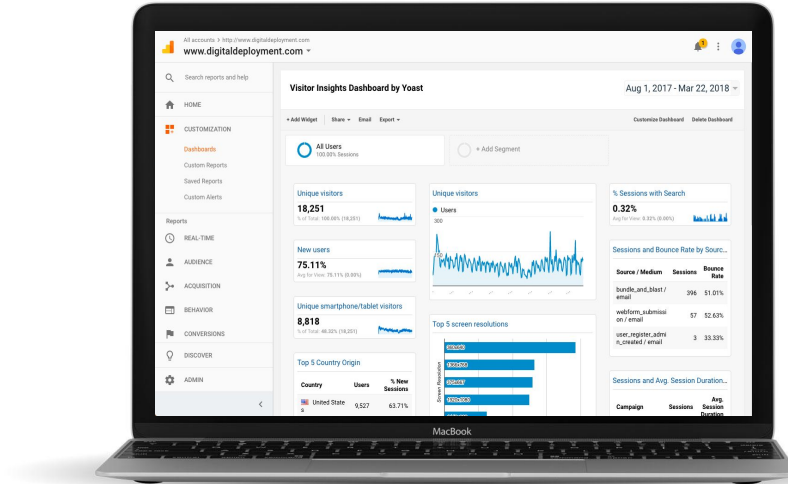 - Metrics, dimensions & filters
  - Examples
- **Questions?**

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DASHBOARDS

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

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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.
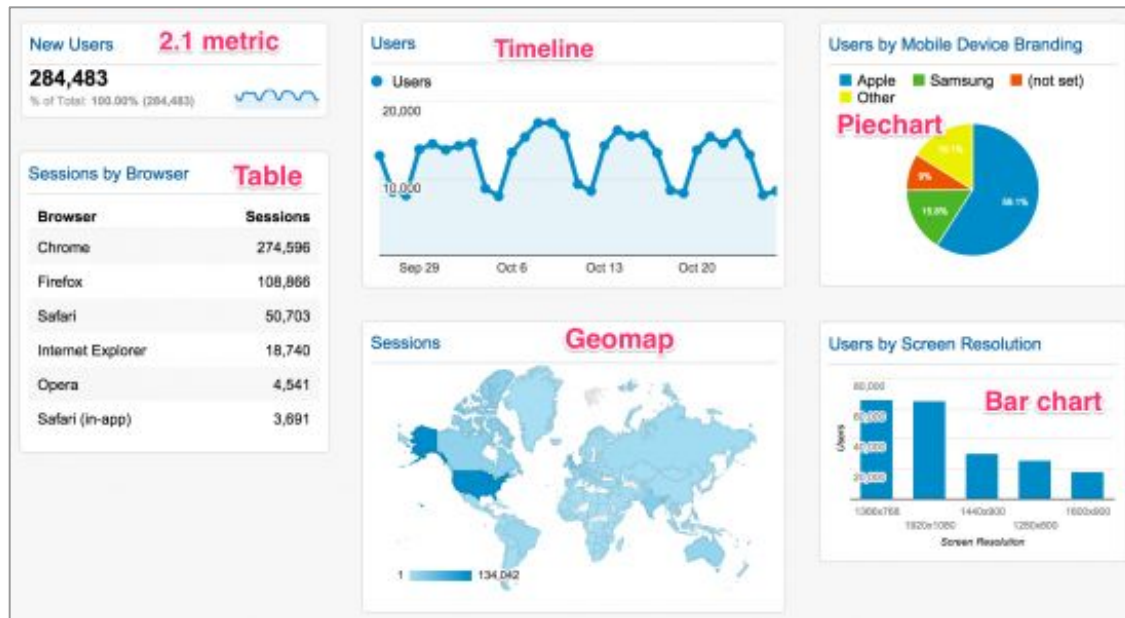
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Six ways to display data

Standard:

| 2.1 METRIC | TIMELINE | GEOMAP | TABLE | PIE | BAR |

Six representations of your data will look like this:

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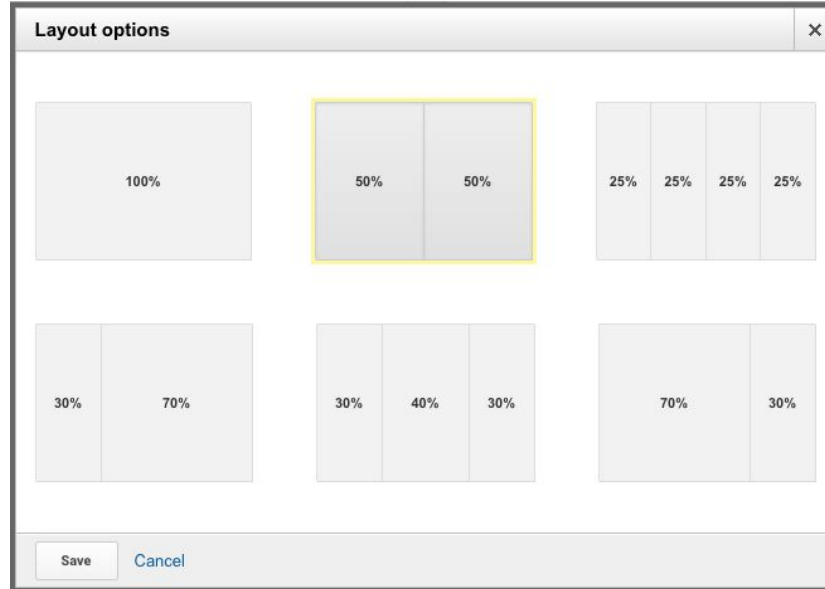
Six ways of laying out your data. Layouts are flexible :)
Pick a layout and drag/drop widgets to your heart's content.

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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?

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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.

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Examples: A few dashboards to get you started
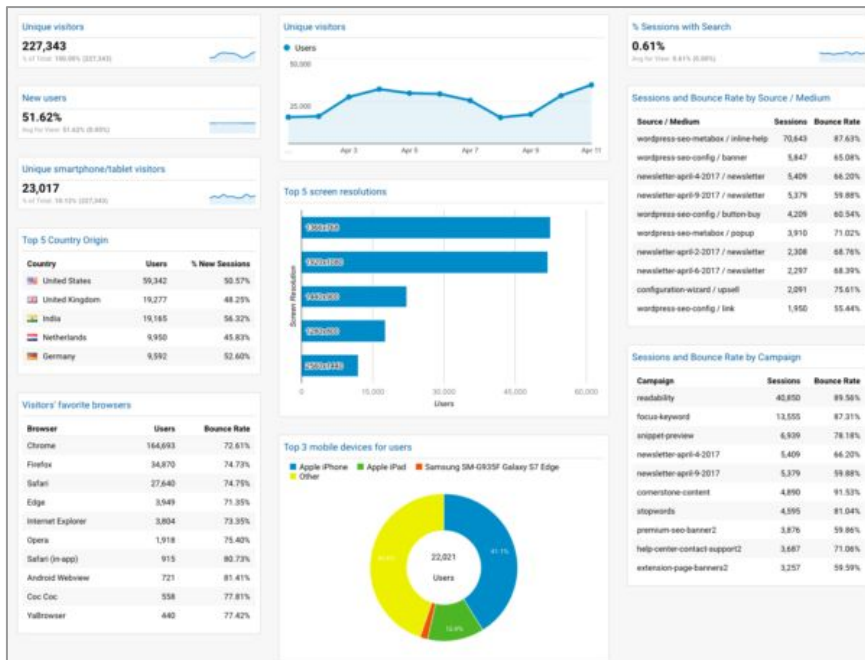
We've prepared a few dashboards to get you started:
Overall (baseline stats, acquisition & content), **Email marketing**, **Social performance**.

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Create a your first dashboard

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

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Bonus tips: Google Analytics solutions gallery

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.

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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 | ⊗ |
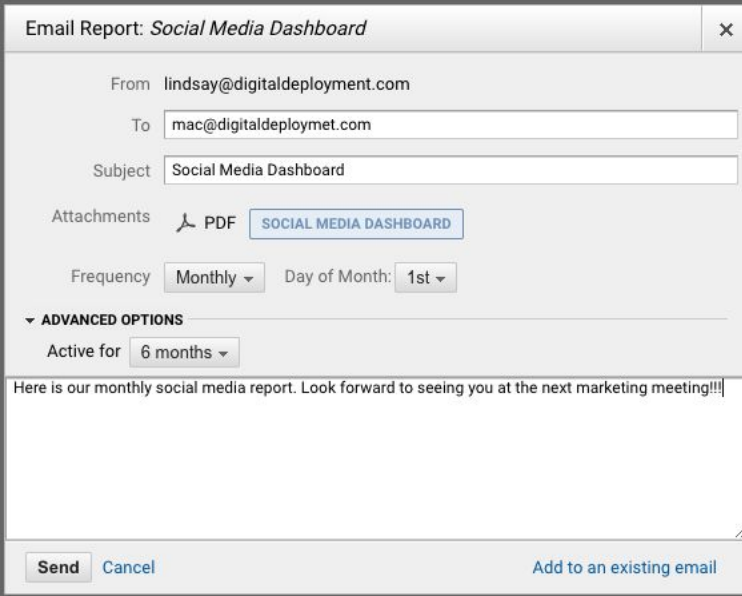
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Bonus tips: email the team!

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.

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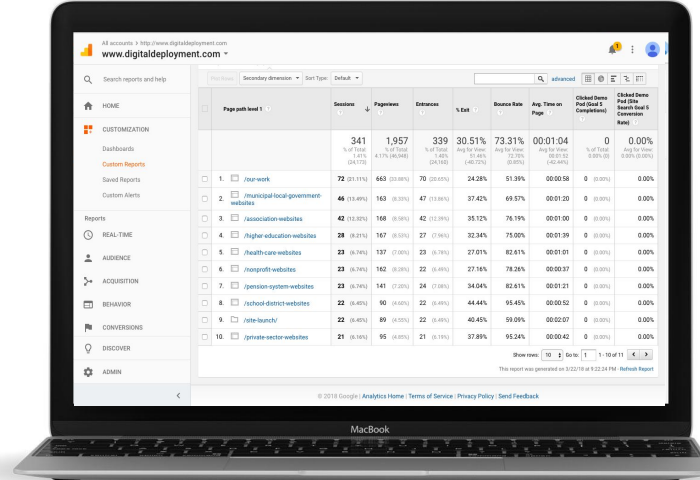
CUSTOM REPORTS

Diving a little deeper

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DASHBOARDS AND CUSTOM REPORTS

What is a custom report?

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.

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Metrics, dimensions & filters

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.)

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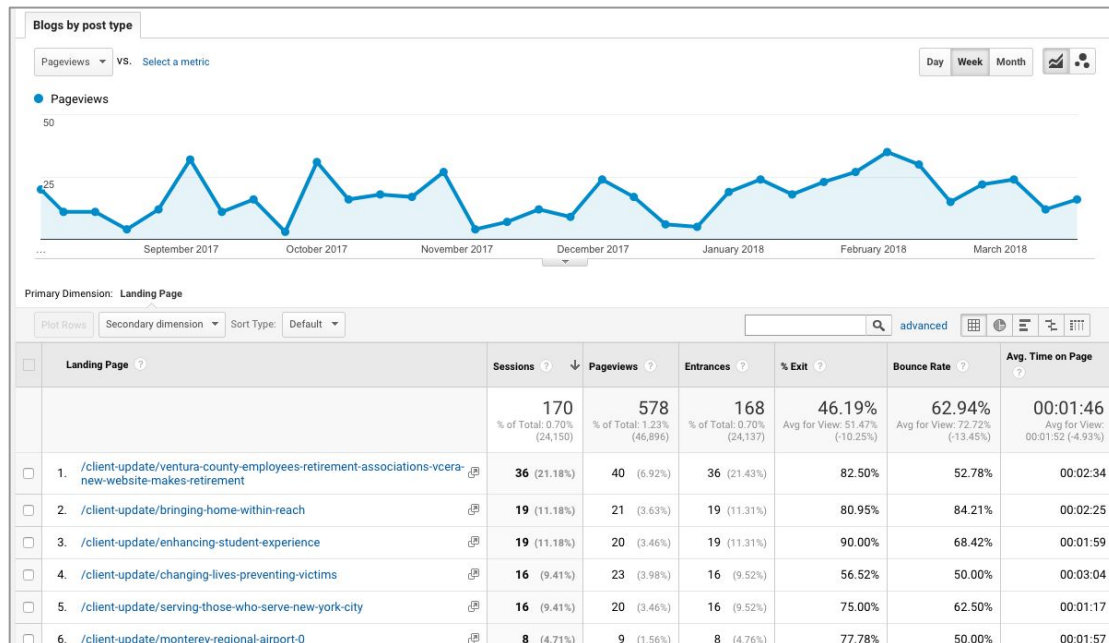
Explorer - Shows a trend line up top + a table beneath for specifics

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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.

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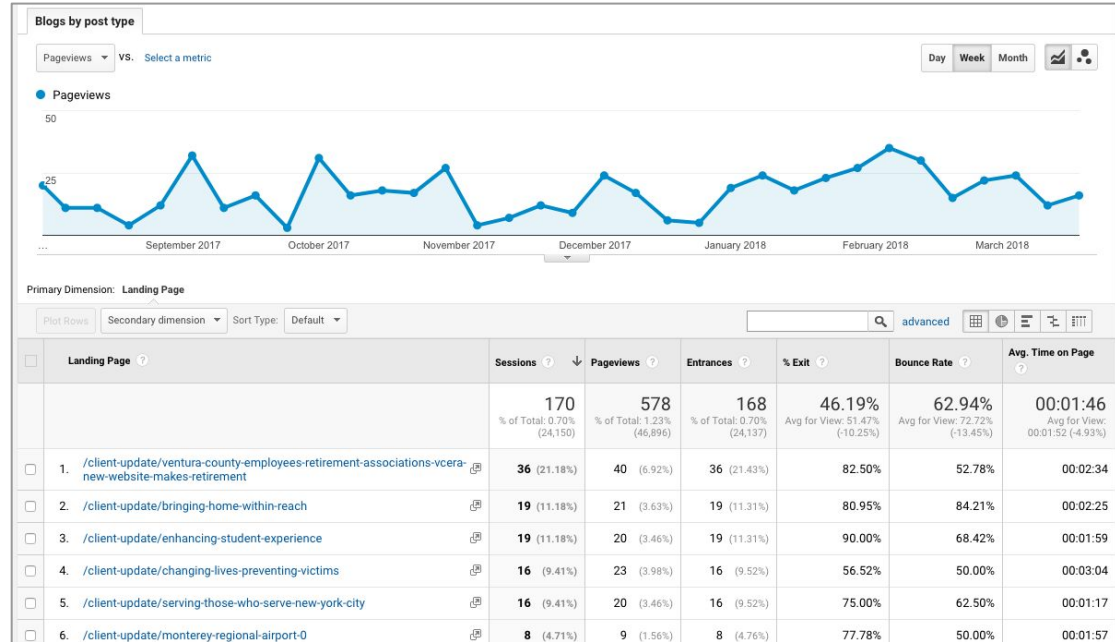
Displaying Data: Map Overlay
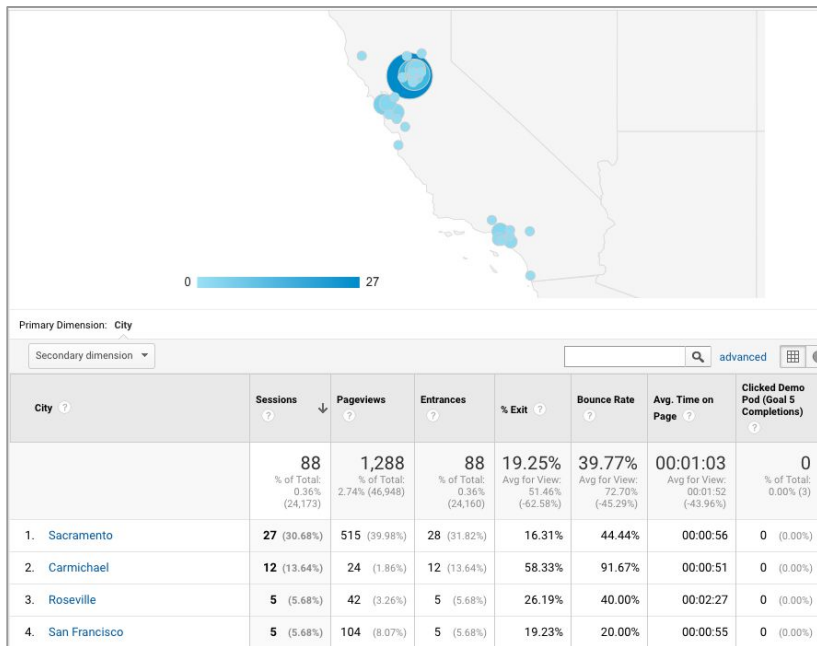
Map Overlay - Share your stats in a visual way with a map + table format

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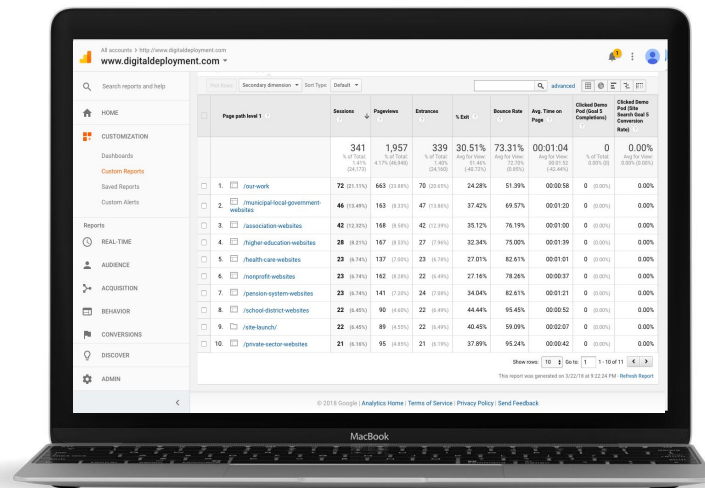
Examples: Analyzing a blog or portfolio

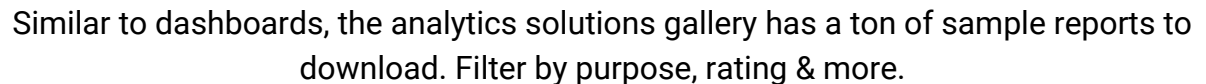Let's take a look at a sample report: **portfolio sections**.

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Create a custom report

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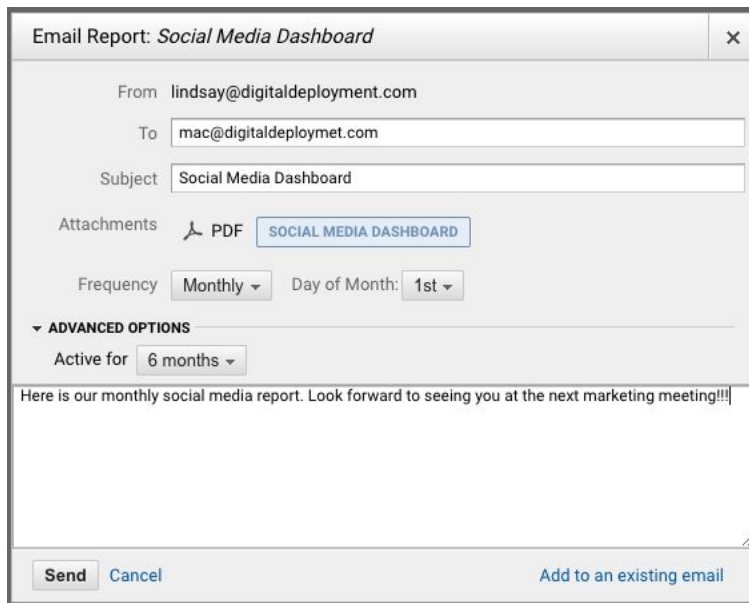3. Then select **"Custom reports"**

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Bonus tips: Google Analytics Solutions Gallery

Similar to dashboards, the analytics solutions gallery has a ton of sample reports to download. Filter by purpose, rating & more.

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Bonus tips: email the team!

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

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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.

ADDITIONAL QUESTIONS