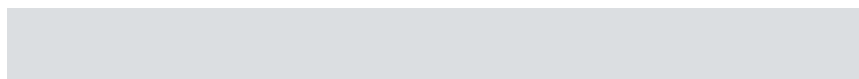




# Dashboards of Marketing and Communications Output within University Advancement Units



# Advancement Forum

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# 1) Executive Overview

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## Key Observations

**Directors of marketing and communications offices collect website usage, social media, advertising, and publication output metrics to evaluate the effectiveness of their office's activities.** Statistical data and anecdotal evidence demonstrates the value of marketing and communications efforts on broader development goals to advancement senior leadership. Metrics include traffic to the website, the number of advertisements placed, comments on social media stories, and attributes of alumni who open marketing emails. Marketing and communications teams track metrics over time, after major campaigns or events, and for specified targeted periods.

**The target audience of most dashboards is the university foundations staff, development office senior leadership, and the marketing and communications team.** Individuals and offices closely impacted by marketing and communications initiatives also benefit from the dashboard content. Several institutions produce multiple dashboards on different topics and share those reports with the appropriate audiences (e.g., the alumni association receives a dashboard on online alumni community metrics). Dashboards enable directors of development initiatives and marketing and communications teams to make strategic decisions on website publications, social media presence, advertisements, and targeted email outreach.

**Graphs, charts, and different colors represent key metrics on double-sided PDFs to draw readers' attention to specific sections.** Typically dashboards of raw data exist only for the marketing and communications staff to view. Dashboards intended for broader audiences and senior leadership include detailed analysis of the data, summarization of the key points, and highlights of important trends. Although some senior leaders prefer to see only the raw data for certain metrics, such as the number of proposals written and their success rates, most high-level executives prefer dashboards that provide broader analysis of key data points. In particular, effective dashboards clearly present how the data impacts development initiatives and the precise value marketing and communications activities add to the advancement unit.

**Analytic software programs such as Ellucian Advance, Google Analytics, and Hootsuite enable marketing and communications directors to customize data collection and analysis.** Contacts supplement software that only tracks metrics with tools that can manipulate, segment, and analyze data, such as Tableau. Contacts often pull charts and graphs directly from software tools and add text through programs such as Adobe Acrobat Pro or include text summary in an email with the PDF report of graphics attached. Collaboration with internal analytics teams and external consulting firms help marketing and communications offices create new tracking mechanisms and unique data reports within the software programs.

**Most contacts informally solicit feedback on the dashboard's effectiveness and incorporate any changes into the next dashboard iteration.** Contacts acquire feedback from conversations with the dashboard audience and regularly incorporate comments into dashboard updates. Recommended modifications from senior leadership include the addition of specific information, a graphic adjustment, or presentation of a different metric.

## 2) Content and Display

### Metrics that Demonstrate Output

The Director of Communications at **Institution E** tracks anecdotal evidence such as someone who reads about a gift opportunity in a publication that furthered their interest in supporting that project.

### *Collect Output Metrics to Quantify Value of Marketing and Communications Activities*

Marketing and communications officers track overall output, website usage, and social media metrics to measure the effectiveness of office endeavors. Anecdotal stories and the data collected demonstrate the success of various initiatives to staff members and leadership. Directors of marketing and communications offices employ this data to guide future outreach, update website pages, or begin new social media strategies. Dashboards consolidate and present these metrics for regular review by internal staff and senior leadership of advancement offices.

Metric data collection may require collaboration with other teams within the advancement unit. The marketing and communications team at **Institution A** partners with the Annual Giving department to track response rates and the amount raised from particular solicitations, such as emails and social media campaigns that have a giving aspect, to evaluate the value of communications contributions to broader advancement goals. Contacts at **Institution E** are collaborating with the internal research department to determine how to identify people who have expressed an interest in donating, and then how to market to them.

### Track Specific Milestones

In addition to the regular metrics marketing and communications offices track, many offices measure their contributions to specific advancement campaigns. For example, if the annual giving office promotes a campaign that involves many emails sent to alumni, marketing staff track the correlation of those emails with increased website traffic.

### Key Metrics to Collect by Category

#### Communications Output

- Number of press releases written annually
- Number of proposals and the amount of money raised through proposals
- Number of direct mail pieces sent
- Attributes (e.g., undergraduate or graduate alumni, parents) of who opens emails and if the email leads them to the website

#### Advertising

- Number of news stories and ads placed
- Where (e.g., which publications) news stories and ads are placed
- Readership reached of the publication where ads are placed
- Number of impressions (i.e., how many times an ad is seen)

## Website

- Number of hits on the website
- How long people stay on each page of website
- Frequency of pages accessed on website
- From where (e.g., search engine, social media page) visitors navigate to website
- Number of unique visitors versus returning visitors
- Geographic location of visitors
- Search engine key words that bring visitors to website
- Device (i.e., desktop vs. mobile) and browser used

## Social Media

- Number of “likes” and comments on stories and updates
- Overall reach (e.g., number of followers)

Marketing staff at **Institution D** will use data about the top 2,000 donors to tailor emails and increase quantity of certain website content according to donor behavior.



### **Additional Metrics Collected by the Marketing Office at *Institution D***

- Attributes of who (e.g., class and class decade of alumni) uses the online giving collection
- Monthly total and largest gifts over time
- Quarterly breakout of gift type (e.g., new gift, matching gift, pledge payment)
- How the behavior (e.g. website activity) of the top 2,000 prospects differ from all other prospective donors
- Responses from print and online magazine

### ***Employ Software Tools to Measure Key Metrics, Analyze Data, and Customize Reports***

Although programs such as Google Analytics track and analyze data, some marketing and communications offices employ multiple software tools to customize data analysis. Contacts at **Institution C** funnel data from ExactTarget email outreach and website traffic from Google Analytics into Tableau to manipulate the combined data sets. Through Tableau, they hope to create a new dashboard that tracks the website behavior of individuals who open outreach emails. In addition to software tools that automatically track key metrics, marketing and communications staff manually input and track data such as proposals, ask amount, and gift amount to Microsoft Excel.

## Software Tools that Track and Analyze Metrics across Profiled Institutions

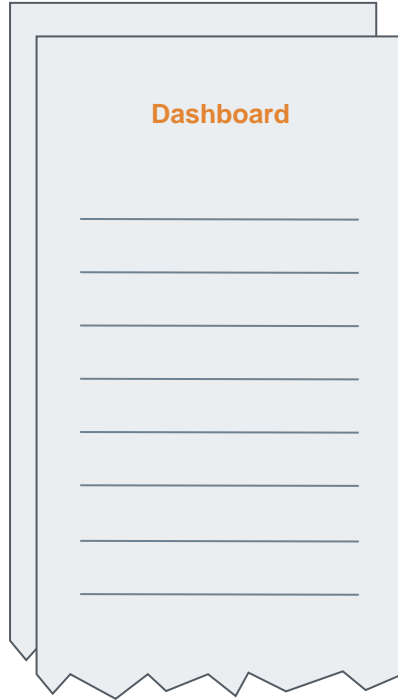
Software Tool	Functions
<a href="#">Google Analytics</a>	<ul style="list-style-type: none"> <li>Tracks website metrics</li> <li>Manipulates and segments data</li> <li>Exports PDF reports on metrics</li> </ul>
<a href="#">Ellucian Advance</a>	<ul style="list-style-type: none"> <li>Tracks and categorizes outreach and interactions with donors</li> <li>Tracks key metrics</li> <li>Allows customization of reports</li> </ul>
<a href="#">Meltwater</a>	<ul style="list-style-type: none"> <li>Tracks key metrics</li> <li>Optimizes social media campaigns</li> </ul>
<a href="#">Crystal Reports</a>	<ul style="list-style-type: none"> <li>Creates customized reports from data sources</li> </ul>
<a href="#">ExactTarget</a>	<ul style="list-style-type: none"> <li>Tracks attributes of individuals who open emails</li> </ul>
<a href="#">Tableau</a>	<ul style="list-style-type: none"> <li>Analyzes and visually presents data</li> <li>Creates interactive, web-accessible dashboards</li> </ul>
<a href="#">Hootsuite</a>	<ul style="list-style-type: none"> <li>Employs backend social media analytics</li> <li>Tracks impressions, retweets, “likes”</li> <li>Analyzes who the audience is and helps target posts accordingly</li> <li>Exports PDF reports on metrics</li> </ul>

## Dashboard Content and Presentation

### ***Include Statistical Data and Anecdotal Stories in Dashboards***

Dashboards that present the output of marketing and communications offices include metrics that indicate the success of outreach, publications, advertisements, the website, and social media strategies, as listed on pages five and six. Anecdotal stories often supplement and provide captions about statistical data to demonstrate the true value marketing and communications efforts add to broader advancement goals. Contacts at many profiled institutions currently or plan to produce multiple dashboards that emphasize different content areas, such as website traffic or social media.

## Content to Include in Topic-Specific Dashboards



### Online Alumni Community

- The monthly increase of registered users
- The number of active users (i.e., users who viewed content in past month)
- The number of participating users (i.e., users who respond to content)

### Website Traffic

- Overall website usage
- Most frequently accessed pages
- Average time spent on each page
- From where visitors navigate to website
- Aggregate time spent on related pages
- Behavior of certain segments of alumni or donors in comparison to all other visitors

### Unique Occurrences

*Note: dashboards can present data correlated to unique instances, such as:*

- Analysis of returning subscribers and their medium preferences during a shift from print to electronic publications



### Intranet Site at *Institution B*

The Development Communications office at **Institution B** oversees the content of a development office-wide intranet site that contains internal news, announcements, and metrics from all development areas. The site, which will soon be delivered through Microsoft [SharePoint](#), allows senior leadership and staff members to track the progress of all office initiatives daily. Elements of the site serve as a dashboard for metrics applicable beyond just the marketing and communications office.

## Present Data in Graphs and Tables with Explanations for Dashboard Audiences

Within each graphic on **Institution B's** intranet site, a viewer can click on a link leading them to reports that show progress on those metrics by development unit.

Visually effective dashboards present content in colorful, labeled tables, bar graphs, and pie charts. The graphs on **Institution B's** intranet site display the metrics' progress against the goals for either the year or the current campaign. Dashboards also include a written summary of the data and analysis of what the graphs represent. Often, marketing and communications staff at profiled institutions pull dashboard reports directly from Google Analytics or other software tools. Because Google Analytics reports limit description and commentary, contacts at **Institution C** include a separate document that summarizes the statistical data in the report when sharing it with senior leadership.



### Effective Dashboards Include:

- **Snapshots** of most important data
- **Summary** of data
- **Graphs** and tables
- **Eye-catching text boxes** and graphics that call attention to interesting data
- **Comparisons** of appropriate segmentations
- **Data rankings**, if applicable
- Presentation of **anecdotal stories**

If a graph shows a sudden rise or fall in data, explain what it means and possible contributing factors.



#### **Allow Dashboard Audience to Determine Data Presentation**

Contacts at **Institution A** explain that merely showing raw data of social media metrics is not useful to senior management. As a result, the social media-focused dashboard contains higher-level analysis of how social media is impacting broader development initiatives. Alternatively, the targeted audience of the proposals dashboard prefers to see only a spreadsheet of raw data, and thus a dashboard of textual analysis is unnecessary.

## 3) Production and Implementation

### Dashboard Creation

#### ***Direct Marketing and Communications Staffs to Create Dashboards***

Directors of marketing and communications offices oversee dashboard production, and typically a dedicated staff member pulls the data and creates the reports. A marketing staff member at **Institution D** will soon spend half of their time creating dashboards and advising marketing leadership on metrics to employ for future publications. The analytics office collaborates with Development Communications at **Institution C** to integrate all data into Tableau and create reports. Contacts typically export Google Analytics reports directly into PDF format, but further editing can be done in Adobe Acrobat Pro.

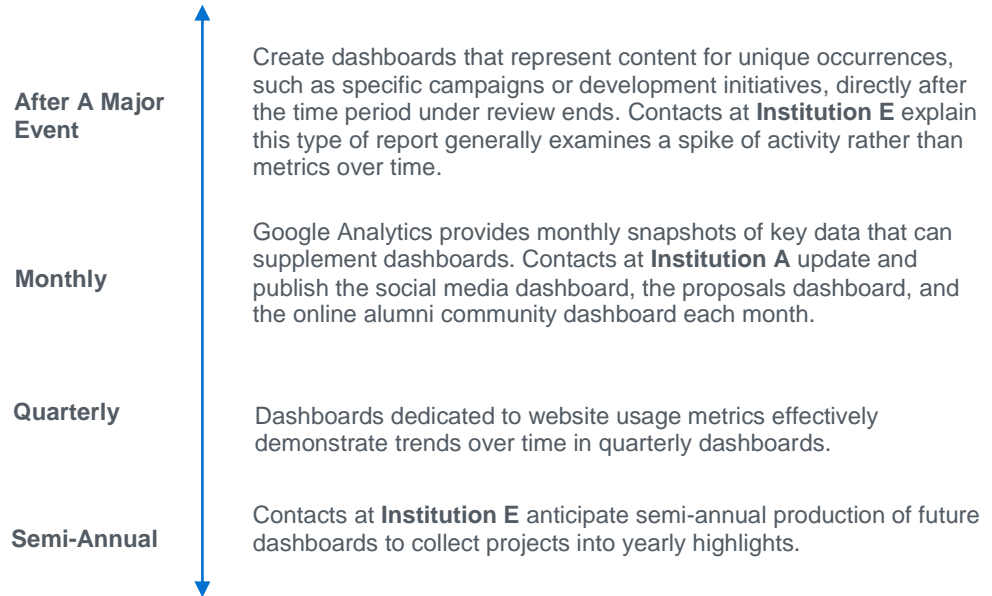
Once the software tools are customized to track the appropriate metrics, dashboard creation requires **less than an hour** to export, clean, and summarize data.

#### ***Consider Dashboard Content and Audience to Determine Publication Frequency***

Typically, marketing and communications directors share statistical data with staff frequently and reserve textual analysis of data for less frequent dashboard publication shared with a broader audience. Several marketing and communications teams internally review dashboards of raw data monthly, while senior leadership receives dashboards that include metric comparisons over time and broader analysis of content

quarterly. The Associate Director for Digital Media at **Institution C** shares dashboards such as website metrics and annual giving email metrics with the communications team more frequently than senior leadership. Although the intranet site at **Institution B** automatically updates all metrics daily, the Executive Director of Development Communications also creates a quarterly report of website usage for their direct boss.

### Frequency of Dashboard Publication



### Targeted Audience

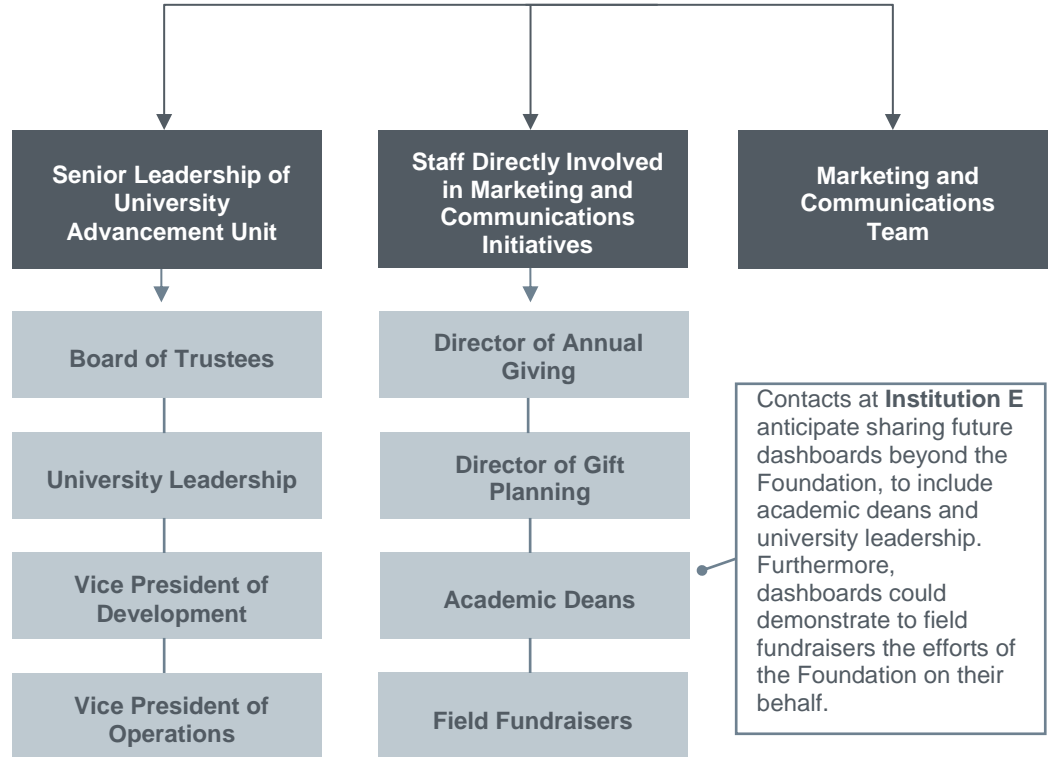
#### ***Share Dashboards with Senior Leadership and Marketing and Communications Staff to Update all Stakeholders on Office Progress***

The dashboard's intended audience drives both content and format. Marketing and communications directors share dashboards with all individuals who express an interest in the particular content of the dashboard. Often, the primary audience of dashboards is both the advancement unit's senior leadership and the internal marketing and communications team. Both viewer groups benefit from the analysis of key metrics, and employ dashboards to drive future marketing and communication strategies and initiatives. Dashboards at **Institution C** guide annual giving strategy changes at the director level, and inform outreach decisions such as email subject line for subsequent projects at the communications team level.

## Examples of Primary and Secondary Dashboard Audiences



### Targeted Dashboard Audience



### Intended Audiences for Different Dashboards at *Institution A*

- The dashboard that analyzes the online alumni community is shared with senior managers from the alumni community, staff from the alumni association, and the annual giving office. Contacts also plan to share this dashboard with the Vice President of Alumni Relations and Development on a quarterly basis.
- The Excel spreadsheet of raw proposals data is shared with the Vice President of Alumni Relations and Development, other Vice Presidents, and the campaign manager.
- Only the marketing and communications team views the Google Analytics reports on website usage data as the raw data on site traffic is not useful for senior leadership without further analysis of its impact.

### ***Leverage Dashboard Information for Internal Office Requests***

Contacts at **Institution D** and **Institution C** do not employ dashboard information to leverage marketing and communications office requests, but acknowledge that it is possible. The Executive Director of Development Communications at **Institution B** does rely on metrics such as the intranet site usage and the external development website traffic to justify budget requests. Similarly, when the Executive Director of Marketing and Communications at **Institution A** initially began tracking proposals, they leveraged the data to expand the writing team. The proposals dashboard displayed metrics that demonstrated the success of their activities, and helped contacts explain to senior leadership how more resources could maximize their results.

## 4) Research Methodology

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### Project Challenge

Leadership at a member institution approached the Forum with the following questions:

- How do contacts at other institutions quantify the value of marketing and communications endeavors? What metrics do they collect? Why do contacts choose to collect these metrics?
- How (e.g., analytic software) do contacts collect the information necessary to analyze the effectiveness of marketing and communications initiatives?
- How do contacts determine which content to include in the dashboard?
- What types of information (e.g., statistical data, anecdotal stories) do dashboards include?
- How is information visually presented on the dashboard? What are the primary components of a successful dashboard? What design elements do contacts find particularly effective?
- Who oversees dashboard production? How much time does it take to create the dashboard? How often do contacts update and publish the dashboard?
- What software tools (e.g., Microsoft Word, InDesign, Photoshop) do contacts employ to design the dashboard?
- Who is the targeted audience (e.g., foundation senior leadership, marketing and communications employees) for the dashboard? What decisions do these viewers make based on this information?
- How do contacts leverage the information contained in the dashboard to justify budget and personnel requests?
- How do institutions solicit and use feedback on the dashboard's effectiveness?

### Project Sources

The Forum consulted the following sources for this report:

- EAB's internal and online research libraries (eab.com)
- The Chronicle of Higher Education (<http://chronicle.com>)
- National Center for Education Statistics (NCES) (<http://nces.ed.gov/>)

The Forum interviewed leaders of marketing and communications departments in university foundations and development offices at high-research universities.

## A Guide to Institutions Profiled in this Brief

<b>Institution</b>	<b>Type</b>	<b>Location</b>	<b>Approximate Institutional Enrollment (Undergraduate/Total)</b>	<b>Classification</b>
<b>Institution A</b>	Private	Midwest	9,000/ 22,000	Research University (very high research activity)
<b>Institution B</b>	Public	Mid-Atlantic	39,000/ 45,000	Research University (very high research activity)
<b>Institution C</b>	Private	Mid-Atlantic	5,000/ 8,000	Research University (very high research activity)
<b>Institution D</b>	Public	South	39,000/ 49,000	Research University (very high research activity)
<b>Institution E</b>	Public	Mountain West	31,000/ 40,000	Research University (very high research activity)