

# Dashboards turn data into decisions

Great dashboards do more than show what happened.

They provide context for why it happened, what matters most, and what to do next.

Whether we're building streamlined performance dashboards or enterprise-level analysis, our approach is always the same:

- Start with real decisions
- Use only as much complexity as the problem requires
- Design visuals that make action obvious

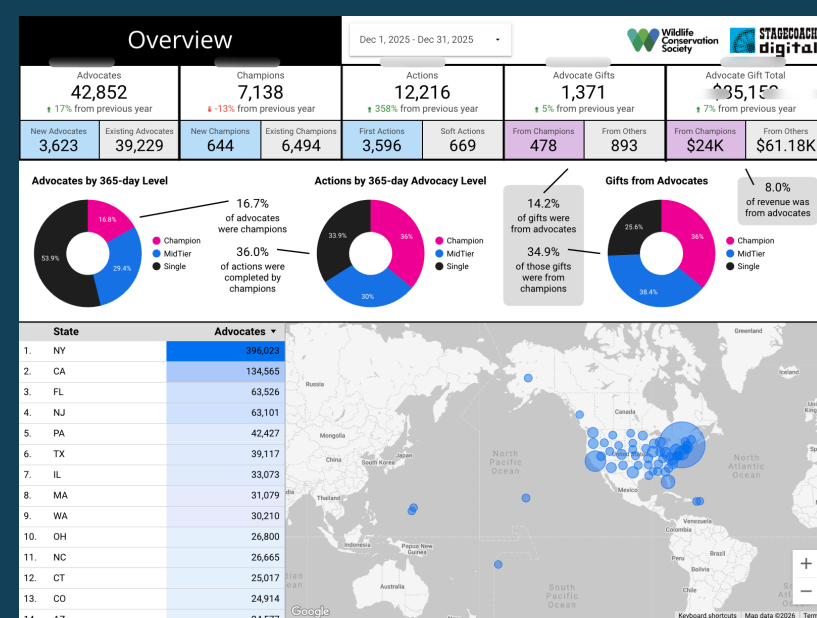
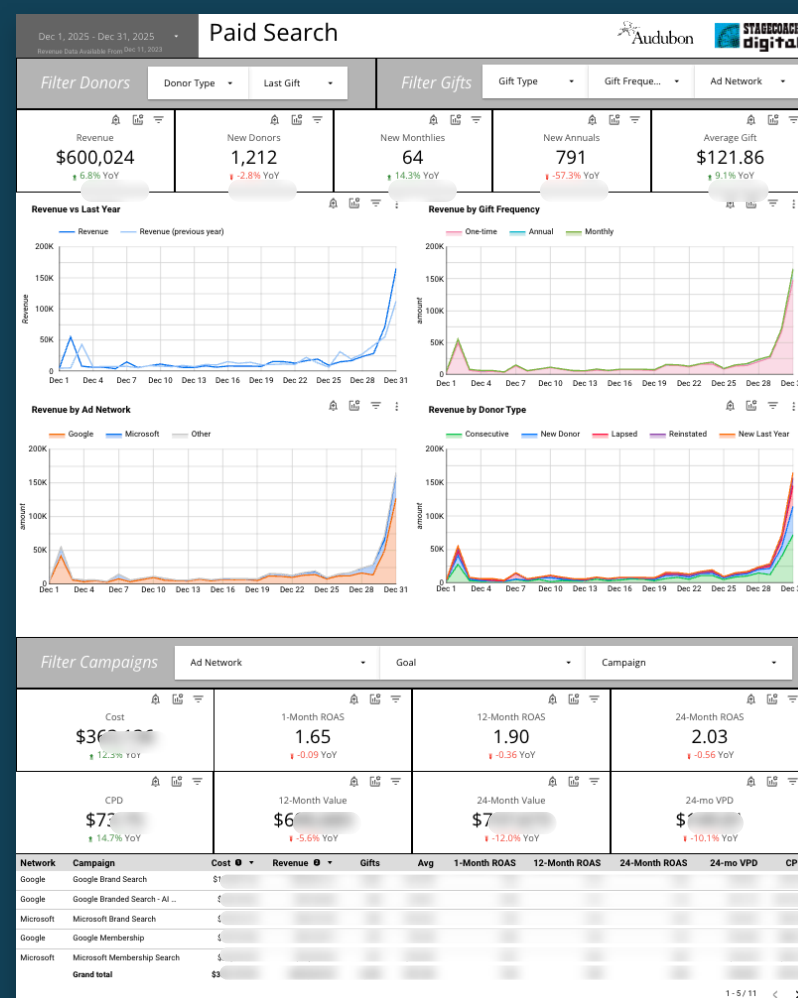


## Start with the decision, not the data

**Dashboards should answer real questions—not showcase everything you track.**

Too many dashboards fail because they begin with available metrics instead of strategic decisions. High-performing dashboards reverse that process: they clarify what leaders need to decide, then surface only the data that supports those choices.

- Clear question framing (e.g., “Which channels actually drive revenue?”)
- KPI hierarchies that separate signal from noise
- Executive views paired with drill-down paths for deeper analysis



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## Design dashboards to support action, not just reporting

**The best dashboards change behavior.**

A dashboard's success isn't measured by views—it's measured by what people do differently after seeing it.

- Filters that support real-world questions (“What if we exclude 2-year lapsed?”)
- Views aligned to how teams actually operate (weekly, monthly, seasonal)

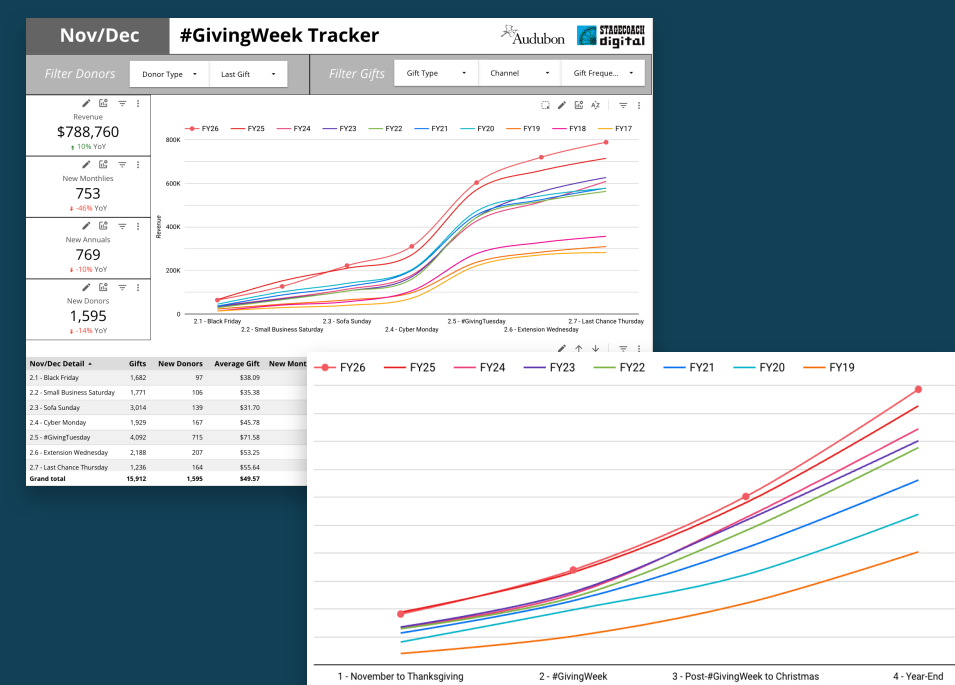
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## Build dashboards that make performance obvious at a glance

**If you need a meeting to explain it, it's too complicated.**

For smaller teams and non-enterprise organizations, dashboards should reduce cognitive load—not add to it. The goal is clarity, speed, and shared understanding.

- Focused views by channel, campaign, or timeframe
- Consistent visual patterns across dashboards
- Clear benchmarks and period-over-period comparisons
- “What changed?” indicators baked into the layout



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## Use advanced analysis when it unlocks clarity

**Complex tools are only useful when they make decisions clearer.**

For larger, more complex programs, we use advanced analytical approaches—like AI-assisted tree models or segmentation analysis—to surface insights that simpler reporting can't.

We help organizations make sense of complex, multi-channel ecosystems by cleaning up tracking, metadata, and definitions so dashboards reflect reality, not just what's easiest to measure.

- Look for patterns across channels, timing, and donor behavior
- Stress-test assumptions with multiple analytical lenses
- Translate technical findings into plain-language insights teams can act on

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## Use the right model to answer your question

Not all revenue is created equal. A donor who gives after seeing five touchpoints is fundamentally different from one who gives after one. Deploy different attribution models depending on the question and make results actionable through clear visualization.

- **Last-touch attribution:** Shows which channel directly converted the donor. Best for understanding immediate conversion drivers and optimizing bottom-of-funnel tactics.
- **First-touch attribution:** Reveals which channel introduced donors to your organization. Essential for evaluating awareness campaigns and acquisition channels.
- **Multi-touch attribution (time-decay):** Gives more credit to touchpoints closer to conversion. Shows how engagement builds over time and helps you understand the full donor journey.

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## Build pragmatic revenue projections

**Our models are only as complex as they need to be—and no more.**

Revenue projection and forecasting change depending on context: multi-year planning looks different from year-end, and GivingTuesday behaves differently

- Scenario modeling tied to real budget and strategy questions
- Seasonality-aware projections (including day-of-week and campaign timing)
- Side-by-side comparisons of reported vs. modeled revenue

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## Build once, iterate continuously

**Dashboards should continue developing as your strategy matures.**

The strongest dashboard ecosystems are modular and flexible—able to evolve from basic performance tracking to deeper insight without a full rebuild.

- Foundational dashboards that scale into more advanced analysis
- Consistent metric definitions across all views
- Regular reviews to retire what no longer serves a purpose

