



## 1. Assess Your Dashboards for Metrics and Opportunities

If good metrics exist on the dashboard, mark it with a green dot.  
If you think the metrics should be added or improved, mark it as an OFI.

● = Exists on Dashboard    OFI = Opportunity For Improvement

	Organization Dashboard	Sales Executive Dashboard	Marketing Executive Dashboard	Service Executive Dashboard
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### PILLAR 1: CUSTOMER PERCEPTION METRICS

Customer Satisfaction				
Net Promoter Score (NPS)				
Customer Retention				
Market Share				
Customer Loyalty				
Social Media				

### PILLAR 2: OPERATIONS AND INTERNAL EFFICIENCY METRICS

Sales				
Marketing				
Customer Service				
Product/Service Development and/or Production				
Partners/Suppliers				
Other Critical to Your Business (e.g., Logistics Metrics, etc.)				

### PILLAR 3: ORGANIZATIONAL CAPACITY, KNOWLEDGE, AND INNOVATION METRICS

Training of Workforce in Skills/Education				
Workforce Engagement				
New Ideas and Innovations Generated Internally				
Social Contributions Made by Employees				

### PILLAR 4: FINANCIAL PERFORMANCE METRICS

Key Overall Financial Metrics				
Department Contribution to Financial Performance				

## 2. Rate Your Dashboards Overall Balance

BALANCED = Metrics in All Pillars  
PARTIALLY BALANCED = Metrics in 3 Pillars  
UNBALANCED = Metrics in Less Than 3 Pillars

## 3. Next Steps to Help the Organization