

# DIY | Assess Your Dashboards for Balance



## 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
<b>PILLAR 1: CUSTOMER PERCEPTION METRICS</b>				
Customer Satisfaction				
Net Promoter Score (NPS)				
Customer Retention				
Market Share				
Customer Loyalty				
Social Media				
<b>PILLAR 2: OPERATIONS AND INTERNAL EFFICIENCY METRICS</b>				
Sales				
Marketing				
Customer Service				
Product/Service Development and/or Production				
Partners/Suppliers				
Other Critical to Your Business (e.g., Logistics Metrics, etc.)				
<b>PILLAR 3: ORGANIZATIONAL CAPACITY, KNOWLEDGE, AND INNOVATION METRICS</b>				
Training of Workforce in Skills/Education				
Workforce Engagement				
New Ideas and Innovations Generated Internally				
Social Contributions Made by Employees				
<b>PILLAR 4: FINANCIAL PERFORMANCE METRICS</b>				
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