EXECUTIVE DASHBOARDS TO WIN OVER THE C-SUITE

Preethi Anand
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Consider a scenario in which you want to buy a new smartphone (who doesn’t, right?). You opt to go to the nearest store where you are presented with two options:

• a state-of-the-art smartphone with a 40 MP camera and a 15 MP selfie camera, running on 8 GB RAM with 512 GB storage

• a beautiful smartphone that was developed by a 25-member engineer design team, assembled in a 5,000 member, state-of-the-art factory, putting in 1,000 staff-hours of effort per device, without skipping a single deadline.

Now, take a few minutes to consider which one you would buy. Smartphone A seems to be the clear choice because, in the case of A, you know what you are paying for. Smartphone B could be a much better option than A, but it’s unlikely to be your first choice because the description doesn’t show value for your investment.

We all know how crucial a role L&D plays in ensuring that employees are knowledgeable and ready for any challenge the future might present. But many times, we struggle to show the value of our efforts. Influenced by our past, we lean more toward showcasing the efficiency in our processes (just like smartphone B in the example above) instead of promoting the effectiveness of our efforts (smartphone A).

Executive dashboards provide learning and development professionals with an opportunity to showcase the value of what we do. Because they are so effective, executive dashboards are gaining popularity as the most significant influencer to win over the C-suite and earn the L&D team a strategic seat at the table.

**WHAT AND WHY OF EXECUTIVE DASHBOARDS**

If you were to ask a gentleman in 18th-century England about dashboards, he would understand them to be the wooden planks in horse-powered carriages that protected the rider from the mud that “dashed up” from the hooves of the horses. Then came the modern-day automobiles with dashboards containing the speedometer, tachometer, fuel and temperature gauges, as well as battery and engine gauges, and more. In a car, dashboards give you a quick view of the internal system’s functioning so you can make smart decisions as you drive.

In the context of our organizations, dashboards showcase metrics and data on various initiatives and overall performance of business functions so that leaders can take stock of the current situation and chart a path forward.

Before we start work on the design of our executive dashboards, we need to understand some related concepts and ideas.

**What We Have Versus What We Measure**

Let’s start by looking at the fundamentals: data and metrics. The simplest way to explain data and metrics is this: Data are what we have, and metrics are what we measure. For example, the total number of sales professionals trained on customer service in a year is data; the customer satisfaction...
score that has increased due to this training is a metric.

As L&D professionals, we will have access to a wide variety of data—but to use dashboards effectively, we need to identify the metrics that most reflect the success of our initiatives.

**Maturity of Our L&D Metrics**

An ideal executive dashboard showcases the return on investment of the learning function, the profitability index of key learning initiatives, and the percentage contribution of L&D to the bottom line. But often, we may not be able to arrive at such insights. That does not mean we cannot produce meaningful, effective executive dashboards. However, it leads us to a reality to keep in mind when designing executive L&D dashboards: The maturity of our metrics will be indicative of the maturity of our learning and development function.

This is to say, when you are first setting up your L&D shop, you will have a limited amount of information—feedback metrics, for example. It is only after you have your team firmly established and have been “in business” for a while that you’ll be able to see trends, identify return on investment, and collect data that you can compare year over year. Thus, your dashboard will only be as mature as your L&D function.

**DESIGNING YOUR DASHBOARD**

There’s an old Zen story about a monk and his cat. The monk had a pet cat that was always by his side, even during meditation. When the monk passed away of old age, his disciples, as a tribute to their master, took care of the cat, and the cat continued to accompany the disciples in meditation.

Word spread about the cat in the meditation hall across other monasteries, where cats got adopted to accompany meditators. In the span of a century, cats became integral to meditation until one master, allergic to cats, decided to meditate alone. Slowly, more and more monks let go of their cats. It is said that it took more than 200 years for things to get back to normal.

Sometimes “we’ve always done it this way” becomes a reason we do not look at our tasks with a fresh set of eyes. When that happens, we run the risk of losing out on amazingly simple, smart, and creative solutions to our business challenges. As you start designing your executive dashboard, start from scratch, erasing everything you think you know about dashboards and, instead, design an objective, business-aligned, smart, creative L&D dashboard for the C-suite.

Detailed below is a step-by-step guide to doing so.

**Working Backward: Defining the Outcomes to Influence**

I have always believed that when designing an L&D or organization development initiative, the effectiveness evaluation plan plays a crucial role in setting the tone for the entire project. It is in
our effectiveness evaluation plans that we spell out the metric that we will be using to evaluate the program (What will success look like?) and how the metric and the initiative are linked. If we do not have an effectiveness evaluation plan, we will be relying on our program objectives to guide us in times of crisis. There is nothing wrong with this approach, but because our objectives, as L&D professionals, are learner and performance focused, the program objective will not help much in ensuring alignment with business results.

For that reason, when designing an executive L&D dashboard, instead of writing the objectives of having a dashboard, you should start with the outcomes in mind. As each business is unique, so is every learning function—and so too will be the outcomes. If you know the outcome that you want to influence, drawing an objective is relatively simple.

These questions will help you arrive at the outcomes you wish to influence with your dashboard:

- What is the main purpose of your learning and development function? For example, is it engagement and retention, performance acceleration, ensuring quality of products and services, or something else?

- Are there any business metrics tied to the performance of the L&D function, such as reduced time to resolution of a customer issue through training of your customer service reps?

- What decisions does the leadership team usually make with learning and development reports?

- Which of these decisions do you want to influence?

• In the best-case scenario, what change would result from your L&D intervention?

Your answers to these questions might not be the outcome you wish to influence for all your future dashboards. While dashboards can follow a standard template, they need to be responsive to the changing landscape within the learning function, the organization, and the industry as a whole.

And again, the maturity of your learning function will influence the maturity of your L&D metrics and their clear alignment to business outcomes. If this is your first time designing an executive dashboard for learning, it likely will be quite challenging. But it will be a step in the right direction, and it will provide an opportunity for you to look again at your priorities through the eyes of the business.

Slowly, as your dashboards become more mature, they will become indispensable to the L&D strategy—just as indispensable as an evaluation strategy is to a training program. Having dashboards will lead you to a new age in talent development, one in which you begin running the learning and development function like a B2B organization, with the business leadership team as your clients.

### Reporting Objectives and Business Priorities

Pat yourself on the back, because you have just completed the most crucial and most challenging task in designing your executive dashboards! Once you have decided on the outcomes you wish to influence, the next step is to write one or more objectives.

Unlike the outcomes, your dashboard’s objective defines the rationale behind having a dashboard. Therefore, your objective might be consistent across projects, or it might change with your chosen outcomes.

Here are a few examples of objectives for executive dashboards:

- to communicate the value of L&D initiatives to the business leadership team
- to present the L&D initiative’s progress to leaders, validate the direction taken, or enable course correction, if required