

hearsay

Hearsay's Guide to Business Outcome Value Measure Dashboards



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Contents

02

Introduction to Outcome Value
Measures Dashboards

03

Navigating to the Reports
and Dashboards Menu

04

Reach & Attract

05

Retain & Grow

Introduction to Outcome Value Measure Dashboards

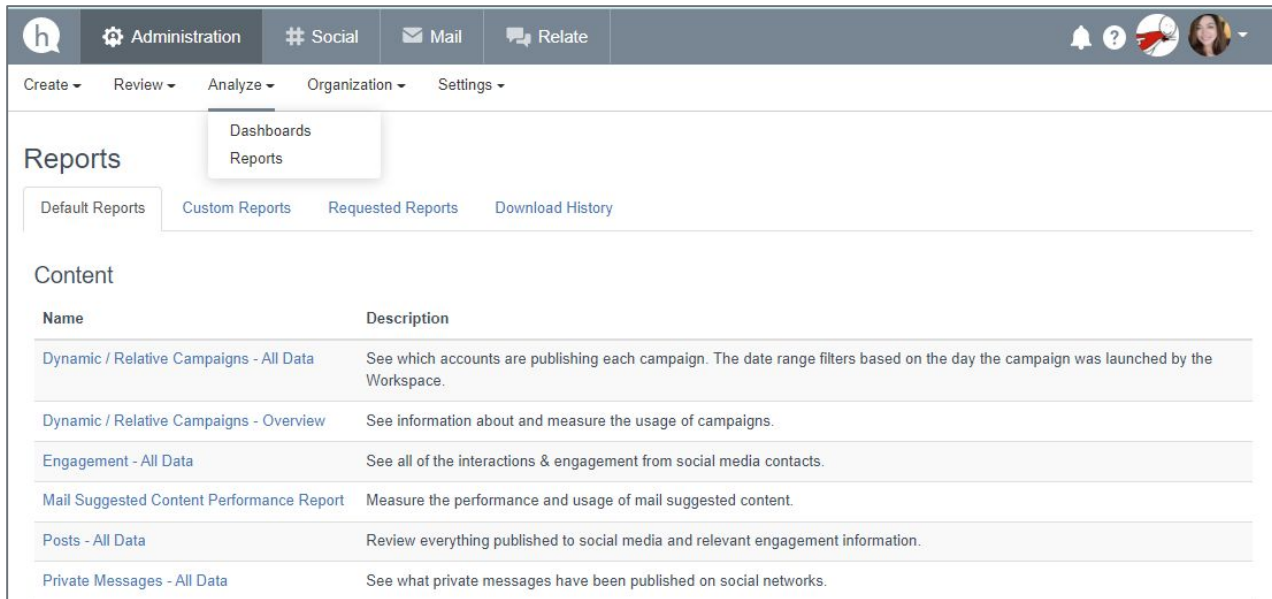


The Outcome Value Measure dashboards are intended to give business insights on key program metrics and the underlying KPIs. The dashboards are intended for use by customer admins to understand business performance and derive actions.

The dashboards are on two levels, L1 are summary level KPIs, L2 is a drill-down for the details. You will find the usual filtering for date range (for entire months) and the hierarchy.

The following sections describe the content categories of the dashboards, give examples of the business questions that the user can answer, the associated metrics and screenshot samples.

Navigating to the Reports and Dashboards Menu



Getting Started

1. Sign in to Hearsay Admin View.
2. From the Analyze tab, navigate to Dashboards.

Reach and Attract

The Reach and Attract dashboards focus on one to many communications, brand awareness, content publishing activities. They provide details on how the published content is performing depending on the content types and social media channels.

Marketing Team Content Creation and Distribution

- Purpose of this dashboard: overview on campaign content creation and usage
- Summary of insights this dashboard offers:
 - Number of new and existing campaigns
 - New and all subscriptions to campaigns
 - Sites campaigns
- What other dashboards you should use in conjunction with this dashboard:
 - L2 Campaign content publishing - to check campaign publishing performance
 - L2 Workspace publishing - to check WS publishing performance in total
 - L2 Social profiles - to check how social connections dynamics correlates with campaigns

Reach and Attract

Marketing team content creation and distribution (cont'd)

Questions Addressable by this Dashboard	Metrics to Review
How many campaigns is the org using (new/existing)?	# existing live campaigns # new campaigns
How is the average engagement changing months by months?	Average engagement rate
What were the most successful campaigns in the last month (or any past months..)?	New campaign subscribers (click to column header to sort)
What were the campaigns not used at all?	Subscriber per All Campaigns (click on last column header for ascending order)
What % of live campaigns no one subscribed to?	Popularity of the campaigns
How many Sites were active?	# active Sites
How many new and returning visitors on Sites?	# new/returning visitors
How many leads (contact submission forms) are generated?	# new leads
How is the lead conversion rate changing month over month?	Conversion rate %

Reach and Attract

Campaign Content Publishing

- Purpose of this dashboard: overview on campaign content publishing
- Summary of insights this dashboard offers:
 - # WS campaign posts
 - # Modified / unmodified posts, and engagement rates
 - # Campaign publishes per channel
 - Most published campaign posts
 - # FB/LI/IG/TW publishes and engagement rates
- What other dashboards you should use in conjunction with this dashboard:
 - L2 Marketing team content creation

Questions Addressable by this Dashboard	Metrics to Review
How many campaign posts are the workspaces publishing? Most active months? Trend?	Campaign posts
How were modified and unmodified campaign posts performing?	Campaign posts published, average engagement rates tables
What was the most used channel for campaign publishing?	Campaign publishes per channel
What were the most published campaigns?	Most published campaigns
What channel had the best engagement rate?	Channel publishes, engagement rates

Reach and Attract

Workspace Publishing

- Purpose of this dashboard: overview of workspace overall publishing performance (including own and library content)
- Summary of Insights this dashboard offers:
 - All published posts and engagement rates
 - Original and suggested content publishing and engagement rates
 - Average number of publishes per WS
- What other dashboards you should use in conjunction with this dashboard:
 - L2 Campaign content creation
 - L2 Campaign content publishing - to check campaign publishing performance
 - L2 Social profiles - to check how social connections dynamics correlates with campaigns

Questions Addressable by this Dashboard	Metrics to Review
How many posts are published overall? Trend? Lowest/highest month?	Post counts Engagement rates
What is the distribution of original and suggested content publishing?	Published posts per type: original, suggested modified, suggested unmodified
What months are the highest/lowest periods for original/suggested content publishes?	Published posts per type: original, suggested modified, suggested unmodified
How different is the engagement rate for original and suggested content?	Average engagement rate by type: original, suggested modified, suggested unmodified
How is the number of posts per WS trending?	Post per WS
How is the engagement rate for posts per WS trending?	Engagement rate per post per WS

Reach and Attract

Social Connections

- Purpose of this dashboard: show the dynamic of the number of social profiles and social connections. See the effect of campaigning and publishing.
- Summary of insights this dashboard offers:
 - # active social profiles: new, existing, disconnected
 - % attached profiles per channels
 - # profile updates and frequencies
 - # social connections, total and per channels

Questions Addressable by this Dashboard	Metrics to Review
How many active profiles are active? Trend?	# new, existing, disconnected profiles
How many active profiles per WS? Trend?	# profiles per WS
What are the most used social media channels?	% attached profiles per WS per channel
How many social profiles were updated? Are the updates frequent enough?	Profile updates and frequencies
How is the number of social connections trending, in total and on WS level?	# social connections # median connections per WS
How many social connections per social media channel?	# connections per FB/LI/IG/TW

Retain and Grow

The Retain and Grow dashboards focus on 1:1 client engagements measures, contact engagements activities through the various channels. The key insights from this dashboard are the dynamics of the contacts and the contact engagement activities, and the voice, text, social media messaging statistics.

Contacts

- Purpose of this dashboard: presents the dynamics of the number of contacts on total and workspace level
- Summary of insights this dashboard offers:
 - # contacts (total)
 - # median contacts per workspaces
 - Opt-in statistics
- What other dashboards you should use in conjunction with this dashboard:
 - L2 Contact engagement dashboard

Questions Addressable by this Dashboard	Metrics to Review
How is the total number of contacts changing month over month? What are the trends?	Number of Contacts
Does the number of contacts per workspace show an increasing or decreasing trend?	Number of Contacts per Workspace
How many workspaces have more than less than 100, more than 500 contacts?	Number of Contacts per Workspace
How is the opt-in % changes month over month?	Ratio of Contacts by Attestation Status

Retain and Grow

Contact Engagement

- Purpose of this dashboard: presents the trend of contact engagements on total and channel specific
- Summary of insights this dashboard offers:
 - Number of contacts engaged
 - Number of contacts engaged per channel (text, voice, DM)
 - Number of inbound/outbound contact engagements per channel
- What other dashboards you should use in conjunction with this dashboard:
 - Contacts
 - Relate Voice
 - Relate Text
 - Social Direct Messages

Questions Addressable by this Dashboard	Metrics to Review
What is the preferred way to communicate with the client (voice/text/DM)?	Avg number of contacts engaged per WS by channel
How many engagements are month over month for text/voice/DM?	Social - Avg number of contacts engaged per WS Relate - Avg number of contacts engaged per WS
How is the number of inbound/outbound communication changing month over months for text/voice/DM?	# Inbound vs Outbound contact engagements by voice/text/DM
How many workspaces have engaged with more than 20/50/100 contacts?	# contacts engaged per workspace

Retain and Grow

Relate Text

- Purpose of this dashboard: gives details on text usage, contact engagements and response times
- Summary of insights this dashboard offers:
 - Average number of texts per WS
 - Number of contacts engaged with text per WS
 - Median response times for inbound/outbound texts
- What other dashboards you should use in conjunction with this dashboard:
 - Relate Voice
 - Social DM
 - Contact Engagements

Questions Addressable by this Dashboard	Metrics to Review
How is text usage trending on WS level?	Average # texts per WS
How many contacts were engaged per WS on a monthly basis by using text?	Number of Unique Contacts Engaged with Text per Workspace
How many inbound and outbound messages were sent? Trends?	# texts by type
What is the average response type for inbound texts? How quick the agents/advisors reply	Inbound / Outbound Response Times (Median)
What is the average response type for outbound texts? How quick do the clients reply?	Inbound / Outbound Response Times (Median)
How many texts were answered within 5/30/60 minutes?	Inbound / Outbound response by time

Retain and Grow

Relate Voice

- Purpose of this dashboard: gives details on voice usage, contact engagements and response times
- Summary of insights this dashboard offers:
 - Average number of voice calls per WS
 - Number of contacts engaged with voice per WS
 - Number of inbound/outbound calls in total
 - Number of missed inbound calls per WS
 - Average call duration (inbound, outbound)
- What other dashboards you should use in conjunction with this dashboard:
 - Relate Text
 - Social DM
 - Contact engagements

Questions Addressable by this Dashboard	Metrics to Review
How is voice usage trending on WS level?	Average number of calls per WS
How many contacts were engaged per WS on a monthly basis by using voice calls?	Number of Unique Contacts Engaged with Voice per Workspace
How many inbound and outbound voice calls were made in total? Trends?	Number of inbound/outbound calls
How many incoming calls were missed by the agents?	Number of missed inbound calls
What is the average duration of the inbound/outbound calls?	Average call duration

Retain and Grow

Social DMs

- Purpose of this dashboard: gives details on Social DM usage, the type of DMs used by the organization
- Summary of Insights this dashboard offers:
 - Average number of DMs per WS
 - Number of contacts engaged with DM per WS
 - Number of inbound/outbound DMs in total
 - DMs per channel (FB/LI/TW)
- What other dashboards you should use in conjunction with this dashboard:
 - Relate Text
 - Relate Voice
 - Contact engagements

Questions Addressable by this Dashboard	Metrics to Review
How is DM usage trending on WS level?	Average Number of DMs per Social WS
How many contacts were engaged per WS on a monthly basis by using voice calls?	Number of Unique Contacts Engaged with DMs per Social WS
How many inbound and outbound DMs were made in total? Trends?	Number of inbound / outbound DMs
What are the most used social media channels?	Number of DMs per Channel (FB, LI, TW)
What was the most active month for Social DM usage?	Number of DMs by Type (sorted by LI DMs)