

SKETCHES FOR A SAMPLE REPORTING PACKAGE

I'll go first.

This project is based on a customer satisfaction survey. The data and related insights will be reported to the senior leaders of this organization, who will use it to make strategic and operational decisions.

PROJECT PROFILE PAGE

Way back when I am first assigned the project, in a moment of down time (haha, I know, just go with it), I complete the Project Profile Page. In many cases, a communications department will dictate the fonts and colors to be used, but this company has only two colors and no condensed font identified, so I fill in the gaps. The company logo is a set of squares, so I'll incorporate squares into the overall design of this project's deliverables.

Resources

I go to <https://coolors.co/> and type the company colors into the first two sections and lock those. Then I hit the space bar on my keyboard to generate

color schemes that go with my two colors and keep hitting the space bar until I find a set of colors I like. I can even check how the colors will look to someone who is color-blind. Hovering into the other color swatches reveals their color codes. I jot those down here in my Project Profile Page. (Should Colors ever break, just search on “color palette generator” and you’ll find similar resources.)

To round out the font choices, I either go back to the communications department and ask them for a condensed version of one of the fonts they specified, or I secure permission to swap out the sans serif they provided with a different one that comes in a condensed version. If you have the liberty to pick new fonts, try searching on “condensed” at <https://fonts.google.com>. If you are concerned about picking fonts that will go well together, try searching on one of your fonts at <http://typ.io/>, where you’ll see recommended pairings, common descriptors of these fonts’ personalities, and how they look in action.

PROJECT PROFILE PAGE

Project Name: *Customer Satisfaction Survey*

Report Deliverable	Audience	Timing
<i>dashboard</i>	<i>VPs</i>	<i>wreklly</i>
<i>slides & handout (possibly)</i>	<i>VPs & higher</i>	<i>quarterly</i>
<i>report</i>	<i>VPs & higher</i>	<i>end of study</i>

Fonts

Heading (sans serif): *Roboto*

Narrative (serif or sans serif): *Merriweather*

Condensed (sans serif): *Roboto Condensed*

Color Codes

Color 1			Color 2			Color 3		
C 91	R 16	HEX	C 100	R 0	HEX	C 0	R 241	HEX
M 38	G 116	1074BC	M 87	G 174	00AEEF	M 46	G 128	F1803C
Y 0	B 188		Y 0	B 239		Y 75	B 60	
K 26	<i>dark blue</i>		K 6	<i>light blue</i>		K 5	<i>orange</i>	

Important Graphic Elements

(icons, navigational guides, shapes inspired by the logo):

VPs like up/down arrows for KPIs

logo has circles so use as data point markers & avoid icons

colorcode icon sections of slides & handout

Share a snapshot of your project profile page on your favorite social media! #evergreensketch

GRAPH GRIDS

Then, as the project unfolds and I learn what metrics are of most interest to my audience, I sketch out how I might graph the data once they arrive, knowing the frequency at which we are running the survey and the response options we are writing for each question. I use the graph paper to mock up some ideas and run these sketches by my boss to see if the graph form makes sense to her. I get feedback and eventually approval on these formats long before the data are in, so as to cut down on the number of decisions and possible delays during crunch time.

Graphs are where you'll illustrate the visual evidence that supports your main findings related to each metric you are tracking. Use the grid paper to sketch out how you will visualize the data you collect on your main metrics.

Don't know the best chart type to use? Consult the inside front cover for quantitative options. Let's say you want to show the results of a survey. Head to the section called "What the Survey Says" and you'll see a menu of chart choices that best show that kind of data. The inside back cover provides you with options for visualizing qualitative data. Identify the nature of the data you are working with and you'll see dots indicating which visuals can help you showcase that data.

Think carefully about how much detail your particular audience will need. Do they need to see data every month, or is quarterly or yearly sufficient? How many decimal places will they want to see? Will they expect and know how to interpret confidence intervals?

At this stage, you'll be sketching out only the best chart type, given the nature of your data, the number of variables you'll have to show, and your audience's data literacy levels. In the sketches on the next page, your chart titles are likely to be the name of your metric, for example, "Sales Growth." Remember to circle back to the chart's title when you have finished analyzing your data, so you can make the title more meaningful and interpretive, such as "Sales growth dipped in Q2 but rebounded by Q3."

Elevate the story you found in your analysis even further by applying colors to the graphs. Bust out those colored pencils and highlight the parts of the graph that are most germane to your point.

Resources

When it comes time to crank out these sketches digitally, I have posted some introductory step-by-step instructions for building quantitative graphs right in Excel at <https://stephanievergreen.com/how-to/>.

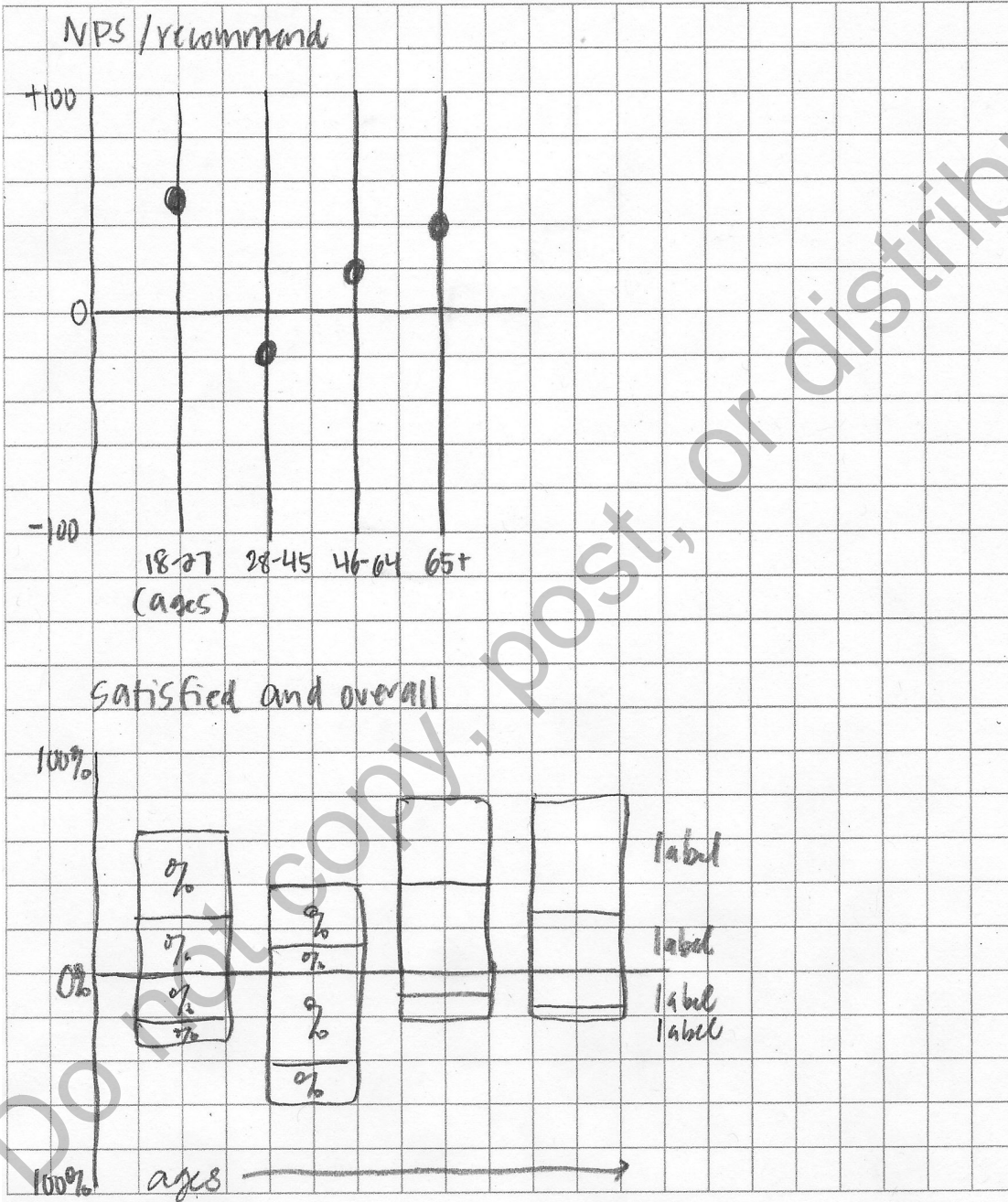
For step-by-step guidance on building qualitative visuals, head here: <https://stephanievergreen.com/qualitative-viz/>.

For more in-depth guidance on choosing the best chart type and generating it in Excel, read my book, *Effective Data Visualization*.⁷

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⁷Evergreen, S. (2019). *Effective data visualization* (2nd ed.). Thousand Oaks, CA: SAGE.

GRAPH GRID



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DASHBOARD DESIGN

With the basic graph forms approved, I sketch out how the data could look in a dashboard and run that by my supervisor to make sure I'm planning for the right filters and functionality.

Dashboards are intended to be a one-page document that reports the performance on your key indicators or metrics. They can be a handy guide in giving status updates to busy decision makers about the health of a project. Dashboards tend to lack narrative and context, so they are best suited for an audience that is already familiar with the project.

Use the templates to sketch out how you will lay out your dashboard. You'll find three different dashboard templates in this sketchbook. For my customer satisfaction survey project, I use Dashboard Template A. This particular template design provides space for four quick numbers, three primary graphs, and two larger graphs to house more detailed views. I choose Template A because I have a medium number of metrics to report. Dashboard Template B is for fewer metrics, providing space for six large graphs. Dashboard Template C is for many metrics, where your audience wants to see the raw numbers and you can make tiny snapshots of the trend and comparison data.

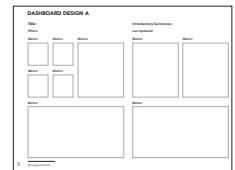
In Western cultures, people navigate through documents by starting in the upper left and finishing in the lower right. This means that your dashboard will need to have the highest-priority information in the upper left. From there, people will focus on what's in the top row (think "above the fold" in newspaper terms), with metrics of lesser importance or with greater detail in the bottom row or to the bottom right.

If you plan to allow drill-down into your data, sketch placeholders for filters/slicers near the top of the dashboard.

Even though dashboards do not typically contain much narrative, consider adding just a sentence or two that specifies the purpose of the dashboard and what people should be looking for or doing with the dashboard.

It is a common dashboarding mistake to show data primarily as a large number. While a single large number does give a quick bit of information, most decision makers want a little context to help them know if this number is trending up or down or whether it is close to the goal or far away. Restrict your single big number to just one to four metrics and show the others with their necessary context, such as in a line graph or dumbbell dot plot.

Remember to include a space to indicate when the dashboard was last updated. You don't want people making decisions with dated data.



Dashboard Template A



Dashboard Template B



Dashboard Template C

Resources

Stacey Barr is my top pick for helpful, practical, free advice on choosing the right metrics and organizing them into a dashboard. See her work at <https://www.staceybarr.com/>.

Final dashboard design can be made or broken by the little things, like alignment and tick marks. Check out *Information Dashboard Design* by graphing guru Stephen Few⁸ for a nice contrast between weak and solid dashboard designs.

*The Big Book of Dashboards*⁹ is a fun read, not just because it is filled with a wide variety of dashboard examples but also because each featured dashboard is accompanied by a critique of its strengths and weaknesses by the book's editors.

⁸Few, S. (2006). *Information dashboard design: The effective visual communication of data*. Sebastopol, CA: O'Reilly.

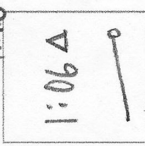
⁹Wexler, S., Shaffer, J., & Cotgreave, A. (2017). *The big book of dashboards*. Hoboken, NJ: Wiley.

DASHBOARD DESIGN A

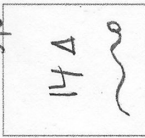
Title: Customer Satisfaction Survey

Filters: gender, race, income, age

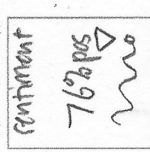
Metric: wait time



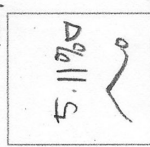
Metric: complaint site



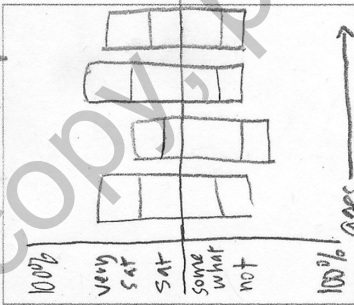
Metric: Twitter sentiment



Metric: churn



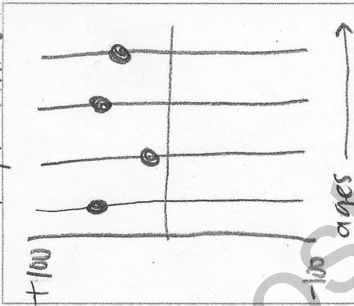
Metric: Satisfied w/help today



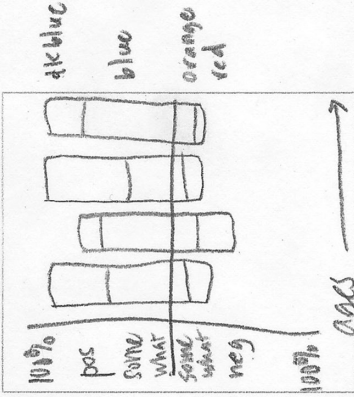
Introductory Sentences: We ran a survey of all customers at the end of their help call.

Last Updated:

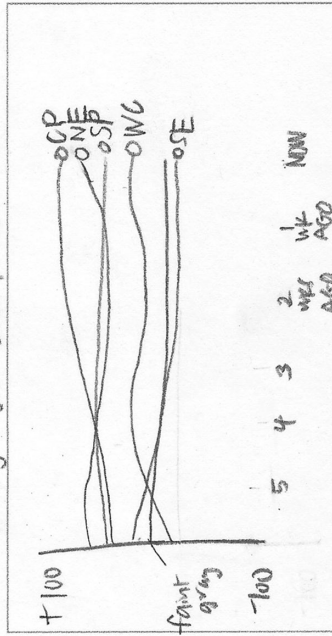
Metric: NPS / recommend



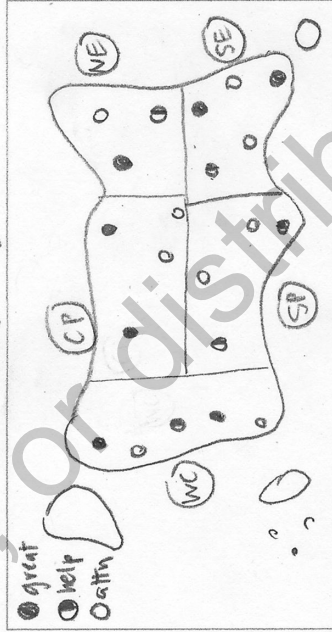
Metric: Overall view of us



Metric: NPS by region over time



Metric: managers / geography



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REPORT STRUCTURE

Reports are designed to be a platform where you dive into the details of your work, describing the insights you discovered and the evidence that supports them. Most people will also narrate things like action items, conclusions, and methods used in data collection and analysis.

At this point, I can also sketch out what our report structure will look like. I don't need the actual data to plan out what imagery we will use and where specific blocks of text will go. I use this as an opportunity to think about which colors could go where to support engagement without distracting. This one doesn't reveal any real or mock data, so I post a picture of this to Instagram, tagging it with #evergreensketch.

I often recommend the 1-3-25 reporting approach, where you have a one-page handout (templates provided), a three-page executive summary, and a 25-page report (with as many appendices as you'd like). This approach is a way to guarantee that you'll have a report with a level of detail that meets your audience where they are, wherever they are, without overloading them with so many details that they'll just stop engaging.

In keeping with a "bottom line up front" reporting orientation, you'll prioritize your findings, conclusions, and action items in the 25-page report and relegate most of the technical discussion of methods to the appendices.

The report structure has a place for you to sketch your three-page executive summary. It should have data-based visuals. You'll also see places to sketch key pages of your longer report: the cover, an internal section start page, and an internal narrative page.

The rule of thirds can also help the development of these pages, where you might have one-third of your page taken up by a sidebar to hold a case study. Or it might be blank so your page has some breathing room.

Sometimes long reports are unavoidable. You can help your readers quickly access the content they are seeking by implementing some navigational tools. Think about assigning icons or strips of color to each section, perhaps hyper-linked from the table of contents, so your readers can jump to what they came to read.

Resources

If you struggle to know what your funder really wants to see in your report, check out this guidance document I developed in collaboration with the Ewing Marion Kauffman Foundation: <https://www.kauffman.org/evaluation/evaluation-reporting-guide>. Working with funders enlightened me about what they are keen to see in a report, and I'm sure it'll help you, too.

My book *Presenting Data Effectively*¹⁰ has loads of examples of great reports.

Of course, reporting out our data does not always come in the form of a PDF or a web page. Kylie Hutchinson has fun ideas for sharing data and insights in her book *Innovative Evaluation Reporting*.¹¹

¹⁰Evergreen, S. (2018). *Presenting data effectively*. Thousand Oaks, CA: SAGE.

¹¹Hutchinson, K. (2018). *A short primer on innovative evaluation reporting*. Gibsons, BC, Canada: Author.

REPORT STRUCTURE

Executive Summary page 1

Customer Survey Q1	WHAT	DATA COLLECTION	CEO'S words
NPS	POC	Survey of X, Y%	[insert HR section on hiring]
analysis of transcripts		Post call	- impacts expected in 3 months
		tends to get love or hate	[comms report] - mistook trust

Heat map of themes x sampled calls

Executive Summary page 2

(blank)	SO WHAT	CEO'S words
		[insert HR section on hiring]
		- impacts expected in 3 months
		[comms report] - mistook trust

icons
Sidebar

Executive Summary page 3

(blank)	NOW WHAT	CONTACT INFO
	Monitoring Plan	.US
	- random samples of calls - 18 mo.	.boss
	- internal message	.HR
	- SVP of inclusion	.comms
	etc ↓	.CEO
		LOGO

Report cover page

(blank)	WHAT INCLUSION LOOKS LIKE HERE	working title
photo - cannot be smiling diverse stock photo		
contact info		
date of pub		LOGO

Section starter page

(blank)	WHAT	define section
(icon)		define problem
		Show metrics
		↑

Internal page

(blank)	WHAT	EXAMPLE TRANSCRIPT
Heading		~
graphs		~
highlight passages		~

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SLIDE GUIDE

Then the data come in and I put down the sketchbook for a while to explore, analyze, and think. Once I have some insights to share with senior management, I start planning the slideshow. The issue surfacing in the data is that middle-income people of color are reporting dissatisfaction, though other demographic groups are generally satisfied. Aside from the graphs, what imagery would I want to include in the slides? I have many choices here. I could include real photos of our actual customers to help decision makers keep them front of mind. I could include imagery related to our initial plans to listen in on calls to our technical support center and sketch out blobs that resemble (at least in my mind) a photo series of headsets and cell phones. I could work in icons that represent our problem-solving approach. In reality, decisions about the direction of the imagery often come down to budget and time constraints as well as access to photos that are accurate and representational.

Slideshows are used as a visual backbone, to support the speaker with visuals that mirror the content they are delivering verbally.

The best slideshows do not contain all the words the speaker will say, which strains the audience's cognition (and patience). The best slideshows are mainly pictures. Use the slide guide on the next page to write out your main point for each slide and sketch what visual you'll use to support that point. Then jot a few notes for your talking points on each slide.

Consider adapting the rule of thirds as a structure for each slide. With this structure, you divide your slide into three rows and three columns. You'll put your main point in one row and your visual support in the other two. Or you'll put your main point in one column and your visual support in the other two. Or you'll fill all three thirds with your visual support and you'll pop a text box on top to hold your main point in one of the thirds. This structure guarantees that your slides will look consistent and organized across your entire deck.

It may not be realistic for you to make every slide a large picture. That's okay. You will want pictures on the slides that are there to compel action in the audience. You'll also want a picture on the cover slide so that people are visually engaged as they walk into the presentation room. Use the slide guide to flesh out those slides.

You may have heard people suggest that you should "storyboard" your presentation. This means, simply, that you plan out the order of your slides so you can see how you'll progress through your content. What will be your logical first topic? Your second? Let me recommend a winning idea: Give people the bottom line up front. This is what they came to hear. Hook them in with a big reveal.

Resources

Great slides shouldn't be able to stand alone. They should need you there to provide the valuable content. If you need help convincing people (including yourself) that the slides should not be your handout, read up: <https://stephanieevergreen.com/stop-asking-if-the-slides-are-available/>.

For more examples of great-looking slides and details on how to use PowerPoint to construct them, check out my book *Presenting Data Effectively*.¹²

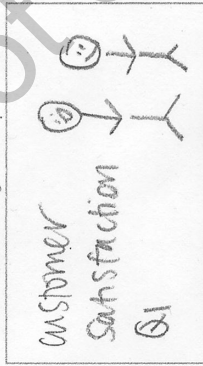
Garr Reynolds is the person who taught me about storyboarding and opened my eyes to what great presentations can do for you. His book *Presentation Zen*¹³ is a timeless classic, and his website (<https://www.presentationzen.com/>) is full of ideas.

¹²Evergreen, S. (2018). *Presenting data effectively*. Thousand Oaks, CA: SAGE.

¹³Reynolds, G. (2008). *Presentation zen*. Berkeley, CA: New Riders.

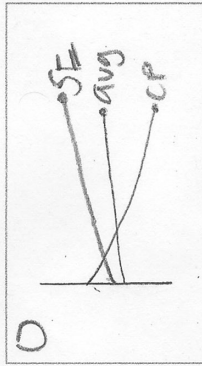
SLIDE GUIDE

Headline: Survey results!



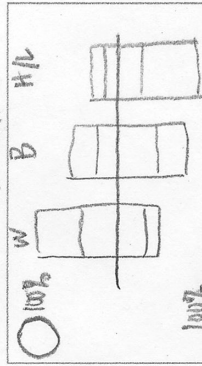
Talking Points: how & when we collected

Headline: but wait time is ↑



Talking Points: Animate regions & discuss trends

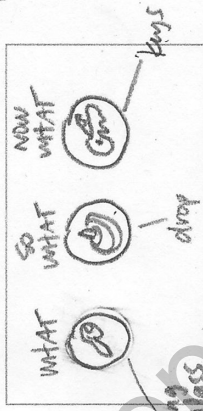
Headline: Call center sat ↓



Talking Points: esp w/ people of color, consistent over last few periods

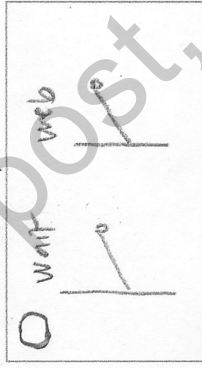
#evergreensketch

Headline: agenda



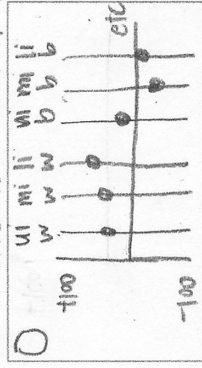
Talking Points: what we know, what it means, what to do

Headline: web complaints ↑



Talking Points: Correlates w/ wait time. historically, leads to losses

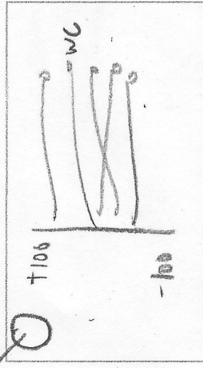
Headline: NPS view same story



Talking Points: break-down by income, pinpoint unhappiest group

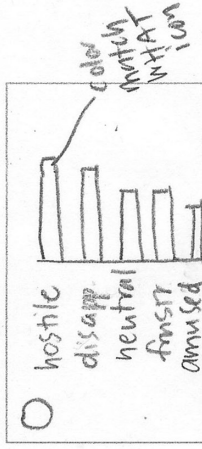
what icon

Headline: NPS - some regions are high



Talking Points: steady in some areas

Headline: Twitter sentiment ↓



Talking Points: weekly analysis Shows shift toward negative

Headline: So what



Talking Points: Moral, ethical, financial considerations

So what icon

ONE-PAGE HANDOUT HELPER

One-page handouts are a digestible, condensed form of your most important points and action items. They are incredibly useful accompaniments to a presentation, the birthplace of your web page content, or a more respectable alternative to an infographic.

Given the insights my team saw in the data and the plan of action we identified with our supervisor, I have the materials to generate a What/So What/Now What framework for a handout that will accompany the slideshow. It relies on colors, fonts, and graphic elements that I identified months ago, saving me loads of time and freeing up my brain space so I can focus on clear, informative content.

Like the dashboard, your one-page handout should be organized to align with a top-to-bottom, left-to-right reading culture.

You'll see three variations of handout templates in this sketchbook. All templates provide space for an informative title and a few sentences of narrative at the top and contact details and a logo in the lower right, within the gray bar. Template A is set up around three main topic areas, with two subpoints for each of those main topic areas, giving you space for six visuals. Template B prioritizes one main point but gives space for three secondary points and a location to spell out a recommendation or a call to action. Template C features three main points, where you'll have a little more room to elaborate with narrative, and placeholders for icons that will relate to each point. My customer satisfaction project is shaping up to be a What/So What/Now What structure, which is three points, so I'll go with Template C.

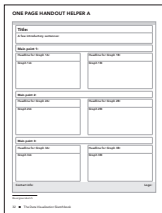
Unlike the dashboard, a one-page handout has a balance between narrative and visuals. Use the narrative to tell a story and the visuals to provide the evidence for your story.

Feel free to combine the space for two visuals into one larger visual if you have a graph with a lot of data that simply needs more space to be seen clearly.

Pay close attention to the titles of those visuals, since that is where you'll weave your story. In fact, the topic headings themselves should be more like headlines that make a statement.

Your visuals here can be quantitative or qualitative, of course. Indeed, it is the blend of the two that tends to be most convincing to audiences.

Alignment of the elements within the one-page handout is critical. Spaces for the visuals need to be the same size and they need to fill the space of an entire cell in this grid, lining up exactly with the other elements in the handout.



Handout Template A



Handout Template B



Handout Template C

When things don't line up, the handout comes off looking sloppy and amateur, and that is not you.

Resources

Check out this one-pager makeover to see how updates to titles and visuals tell a stronger story: <https://stephanieevergreen.com/easy-simple-one-page-handout/>.

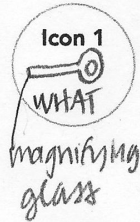
I make a one-page handout of my own personal success metrics each year. Read my 2018 Personal Annual Report for more ideas about how to report on a lot of metrics in one space: <https://stephanieevergreen.com/my-2018-personal-annual-report>.

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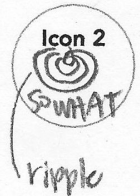
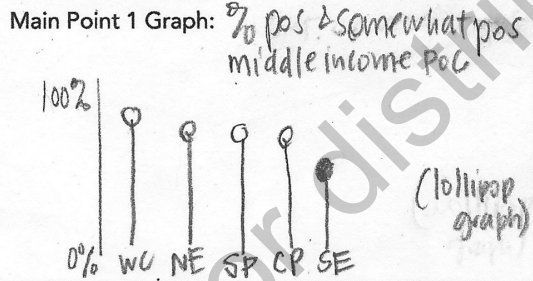
ONE PAGE HANDOUT HELPER C

Title: Customer Satisfaction Survey shows decline among key groups.

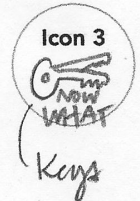
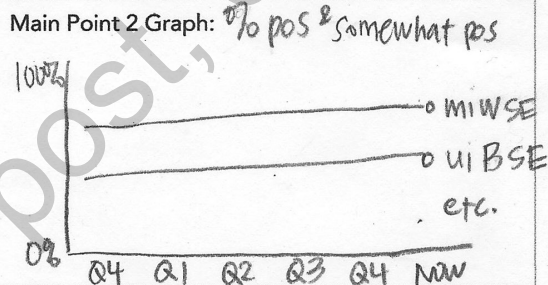
A few introductory sentences: We survey after every call (when consent) & analyze data weekly. Recent trends indicate... Survey questions are...



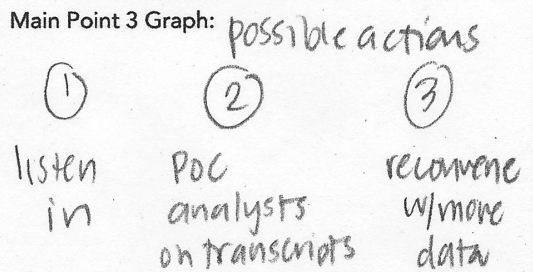
Main point 1:
Overall now of company
↓ in some areas, esp.
w/ middle income
people of color located
in Southeast.



Main point 2:
Likely to impact other
areas. Downward
trend in recent months
predicts loss of
\$ [] /mo.



Main point 3:
Proposed action plan
- collect equal data
from help calls &
analyze



Call to Action/Conclusion: still can turn this around w/ commitment to change

Contact info: Stephanie...

Logo:

This sketching process saves mental space and stress by offloading some critical decisions to noncritical times and creating a visual plan of action. Our sketched plans might have to be adjusted once we have actual data, but the expense is small compared to the cost of staring at a blank page while deadlines knock at your door.

You certainly do not have to use every template in each section for all projects. Some of my projects include only a report and a dashboard. Pick and choose what works best for you or use the wide-open sketch areas to invent a new template that fits you even better. And let us see it! Post a pic with #evergreensketch.