Dashboarding For Effective Altruism

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Role – UI / UX Designer

Company – Nonprofit Megaphone

Skills – Information Architecture, Wireframing, Prototyping, A/B testing, Usability Testing

Research Methods – 5 Whys Interviewing, Card Sorting, Shadowing, Needs Assessments

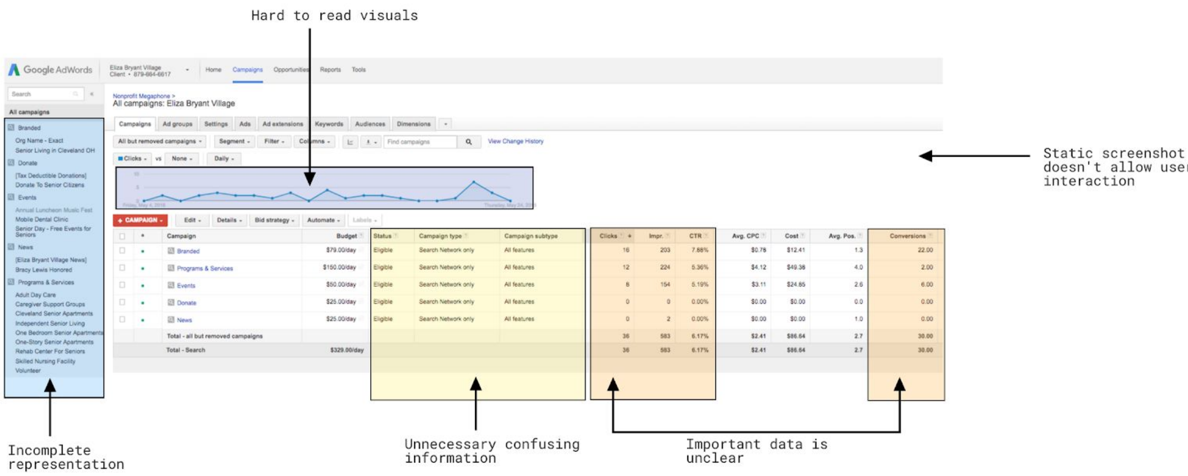
Tools – Figma/Sketch, Google Adwords, Google Analytics, Google Tag Manager

Introduction

Back in 2018, I worked at a really fun startup called NPM. I had the privilege of working with nonprofits across the globe better design, track and analyze their impact on their target audiences. NPM helped NGOs maximize their online presence. It was a privilege to work with these organizations—helping them use data to make decisions that enhanced their work.

Problem

We scheduled monthly calls with our clients to discuss how we were handling their accounts, what was going well, what they wanted to focus on. The main point of these calls were to convey that we were doing a good job (look at the numbers!) and to figure out where we should focus our efforts in the coming month. However, these calls rarely went as planned. I hosted my own calls and shadowed other account managers to do research on where time was spent on monthly calls. The calls I shadowed were spent the majority of the time reeducating clients on basic core concepts. How could we prove our worth as a company if our clients didn't understand basic terminology, much less actual positive outcomes?



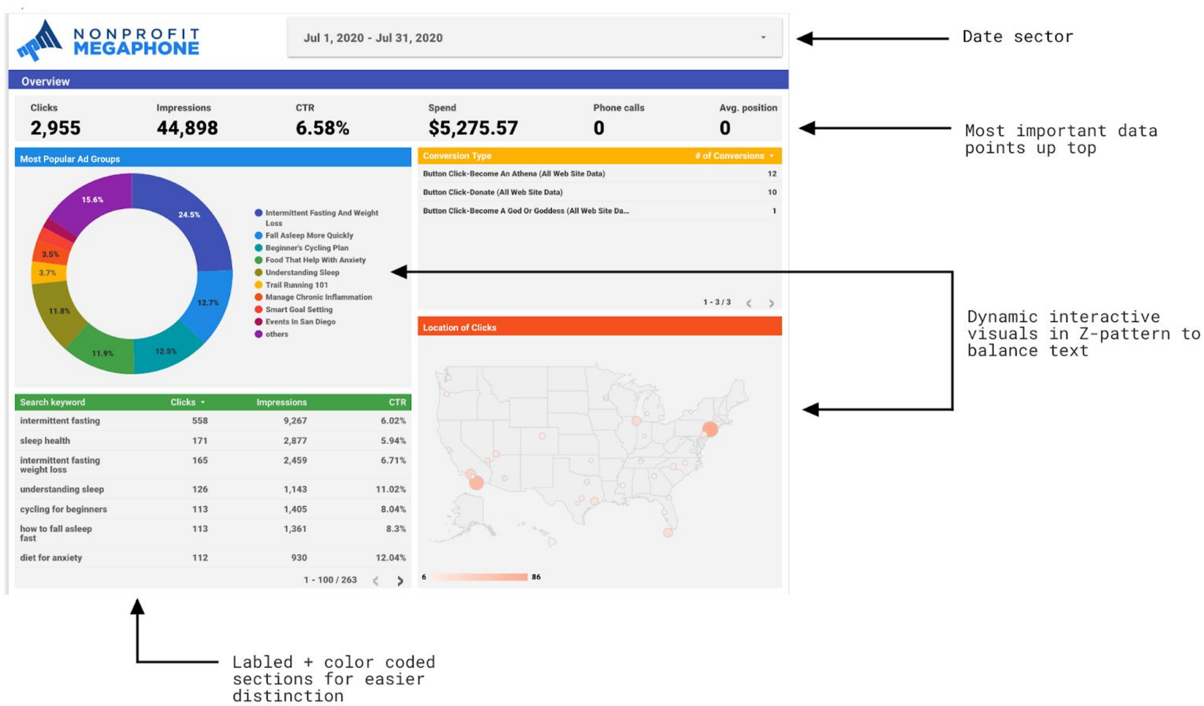
"Most nonprofit professionals are not experts in measurement. But they should, at least, be aware of the basic concepts. Also, fundraising professionals need to be able to talk and write about results. But that is more difficult than it might seem since there is widespread confusion about the basic terminology.."

Methodology

I used a first principles methodology to figure out our priorities. What is the main purpose of our services? How do we want our clients to succeed, and how can we prove that we're helping them do that? These answers from the founder and other management helped serve as a foundation for design decisions as well as a measurement tool for success.

Over the course of several months, I conducted user interviews with clients to better empathize with their pain points and understand their extraneous needs. Our users held a variety of roles - but most reported our findings to someone else. We needed something more polished and professional than a confusing screenshot.

I also interviewed the client managers - the people who were presenting these reports themselves. What questions do they get asked the most during client calls? Where do they spend the most time? This helped me understand our other, less thought of users. How might I design a solution for them as well? After multiple iterations and time spent A/B testing, we had found a solution that met our goals.



Problems Solved

01 / From Constant Client Education to More Time on Value Delivery

Problem

When reporting to clients, they don't always remember what the Key Performance indicators (or KPIs) mean. It should be easy for them to understand basic terminology.

Solution

A short explanation of key terms on the dashboard helped users feel more confident in their understanding. Time spent educating clients decreased, and monthly client reporting meeting times decreased overall by 30%.

02 / From static screenshots to Interactive Dashboard

Problem

Users found it difficult to see their success over time and identify trends on their own.

Solution

Interactive graphs and a date picker allowed users to establish a sense of ownership over reporting. Users were given access to a live link that they may be able to check in at any time. Users can also see associations by clicking on individual data points (a date, a specific campaign, a conversion) to see more detailed individual stats.

03 / From Number Overload to Easy to Understand Visuals

Problem

Clients were being overloaded with several pages of confusing tables and numbers. How might we find a better way to represent the data in an accessible and easy to understand form?

Solution

Creating visual representations of data helped give clients quick takeaways. Combining the reporting from several pages into one centralized page helped users better rely on reporting as an accessible way to see the value over time.

Conclusion

Working in a start-up means wearing a lot of hats, and that can be difficult sometimes. I was thrilled for the opportunity to take complete ownership of the research design and development process. We were able to create a beautiful, automated report that allowed organizations to better understand the value we provided as a company. Clients were able to show these reports to their superiors, at board meetings, and use the data in grant applications. It also had a significant impact on our bottom line. Back in the screenshot days, we had about 102 clients. Today, over 350 clients now work with NPM. We were also able to completely eliminate the previous $75/month reporting tool, saving us $900 in overhead yearly costs. Clients (and client managers!) were surveyed and were overall happier with the new experience.