CRISP

REPORTING FRAMEWORK

WORKBOOK

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How to Use This Workbook

- **Be Thoughtful:**
  This workbook is designed to help you think critically about your measurement/reporting program. Don't rush. Set aside focused time to work through each section.

- **Start with "Why":**
  Always keep your business objectives in mind. Every decision about metrics, segmentation, and presentation should serve these objectives.

- **It's Okay to Not Have All the Answers:**
  If you're unsure about a response, make a note and move on. Sometimes, the subsequent sections will help clarify your thinking.

- **Engage Stakeholders:**
  This isn't a solo activity. Where possible, involve key stakeholders or team members in discussions. They might offer perspectives or insights you hadn't considered.

- **Iterate:**
  Measurement and reporting are ongoing processes. As business needs evolve, revisit this workbook to ensure your program remains aligned and effective.

- **Feedback Loop:**
  Once you've set your program, gather feedback periodically. Are the reports useful? Is there information overload or gaps? Refine accordingly.

Calibration

Ensure your measurement activities aren't just 'busy work' but are tightly aligned with business goals. Calibration prevents the trap of default metrics, guiding you towards data that's not just easy to measure, but crucial for insightful business decisions.

| Significant business objectives This could be overall, or for a specific team, department or initiative that your measurement program will serve.	1. 2. 3.
Key results that support objectives What are the building blocks to achieving the highest priority business objective/s identified above?	1. 2. 3.
Activities that drive key results What are the activities that drive the highest priority key result/s identified above?	1. 2. 3.
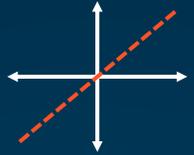
Resolution

Resolution in measurement defines the level of detail in your reporting—both in frequency and altitude. Tailor your reports for the intended audience to ensure timely, actionable insights. Find the 'Goldilocks Zone' where frequency meets the strategic-tactical balance for maximum impact.

Primary audience

Who will be the main consumers of the reports you produce, and how will they want to use it?

1.

2.

3.

Reporting altitude

Does your primary audience require very tactical intel, very strategic insights, or something in between?

Check the best option for your primary audience:

Very Tactical	Somewhat Tactical	Balanced	Somewhat Strategic	Very Strategic
○	○	○	○	○

Reporting frequency

Based on your audience and reporting altitude, what reporting frequency will be best?

Check the best option for your primary audience:

Real-time reporting	Rapid reporting	Balanced	Longer cycle reporting	Very long cycle
○	○	○	○	○

Integration

Integration ensures you don't fixate on a single metric, risking a skewed evaluation. Just like assessing a car's worth isn't solely about miles per gallon, true measurement success marries both quantity and quality for a comprehensive perspective.

Potential quantitative metrics or KPIs
What are some metrics or key performance indicators that showcase the quantity of results?

1.

2.

3.

Potential qualitative metrics or KPIs
What are some metrics or key performance indicators that showcase the quality of results?

1.

2.

3.

Possible integrated metrics or KPIs
What are some qualitative and quantitative metrics that could be brought together to tell a more fulsome story of results?

1.

2.

3.

Segmentation

Segmentation unveils the hidden layers within data. Instead of broad averages, it dissects specific narratives, highlighting unique insights from various groups. Go beyond the overall picture to uncover the intricate tales each segment tells.

|	
Potential consumer-side segmentations Audience subsets based on things like new vs. returning, transaction recency / frequency / size, engagement type or level, cohort, location / region, demographics, psychographics, etc.	1. 2. 3.
Potential business-side segmentations What are possible segmentations based on things like business units, product / service line, campaigns, initiatives, marketing channels, etc.	1. 2. 3.
Other possible segmentations These might include time-series (day, month, quarter, season), before / after, event or time-of-year (winter, back to school), climate zones, external factors (market trends, regulatory changes)	1. 2. 3.
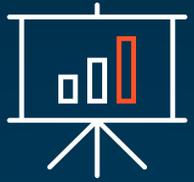
Presentation

Effective data presentation marries professional aesthetics with clear conveyance. An appealing design not only captivates but simplifies understanding, while clarity ensures insights are effortlessly grasped. Avoid the pitfalls and illuminate your findings for maximum impact.

Resources:

https://datavizproject.com/

Canva's Guide to Visual Hierarchy

Potential visualizations for data types	
For example, trend line for time series data, bar / column charts for volume comparison, etc. BONUS: think about compelling visualizations for integrated metrics.	1. 2. 3.

Potential constraints based on audience	
Is your audience comfortable with fancier visualizations like histograms, scatterplots, waterfalls and sunburst charts – OR – do you need to pick simpler, more familiar and intuitive visualizations to best serve this audience? Will they be better served by an interactive dashboard or a written report?	1. 2. 3.

Hierarchy and Sequence	
Do you want to include an executive summary or overview page? Do you just need a simple dashboard with a few performance metrics or something more substantive? How will you emphasize the most important items or insights? How will you convey or group related items?	1. 2. 3.

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