

# Welcome!

AS YOU ARRIVE DISCUSS WITH OTHERS IN THE ROOM...

***What would make your  
CEO add resources to your  
department on the spot?***

*(think about metrics, stories, data, etc.)*



# Leading With Your Key Metrics

**BREAKOUT SESSION**

New York | May 23<sup>rd</sup> 2017 | 75 min

# Find a seat

SIT WITH PEOPLE YOU HAVEN'T MET YET

## Quickly introduce yourself to your table:

- Name
- Organization
- Role
- Live
- Born

## Discuss:

*What would make your CEO add resources to your department on the spot?*

Share with the whole group

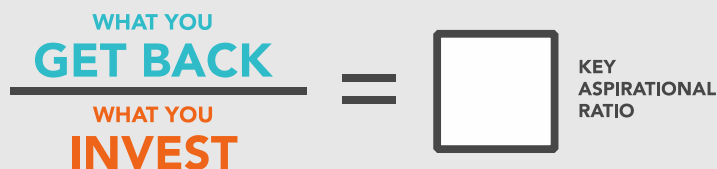
***What would make your  
CEO add resources to your  
department on the spot?***

*(think about metrics, stories, data, etc.)*

## Today's Goal

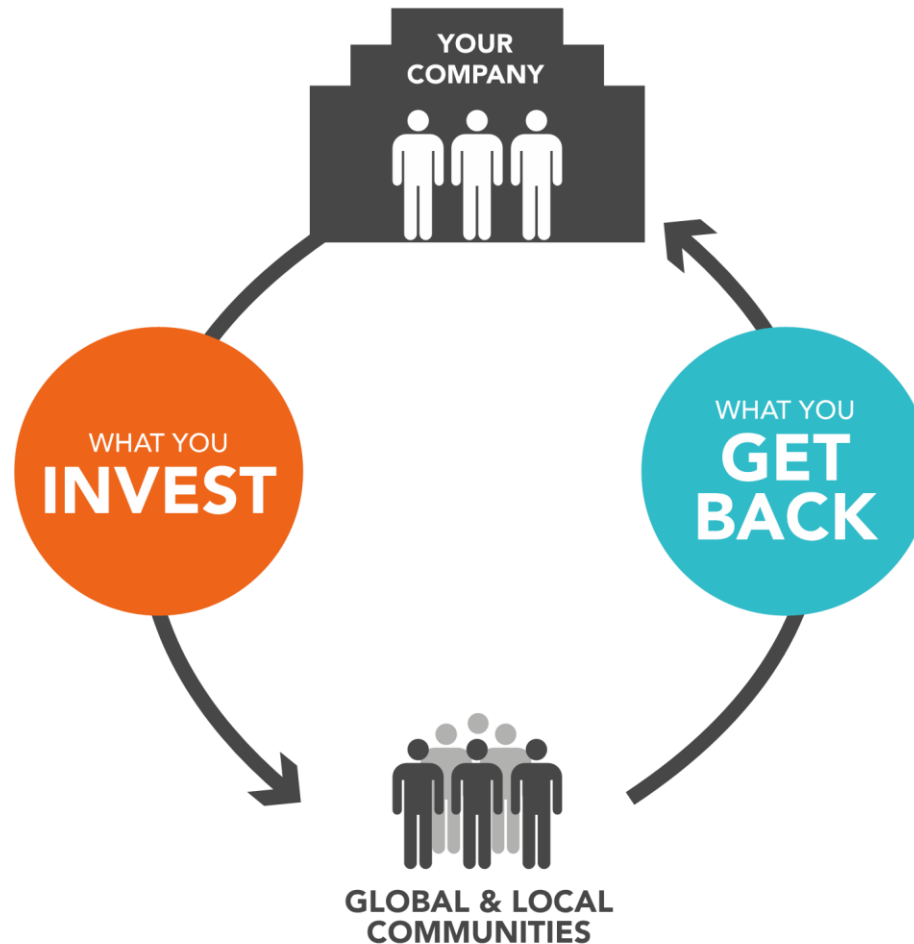
Provide you inputs  
for you to identify  
**your next step** towards  
better measurement.

As we work on things today, keep reflecting on  
your company. We will come back to that at the end.



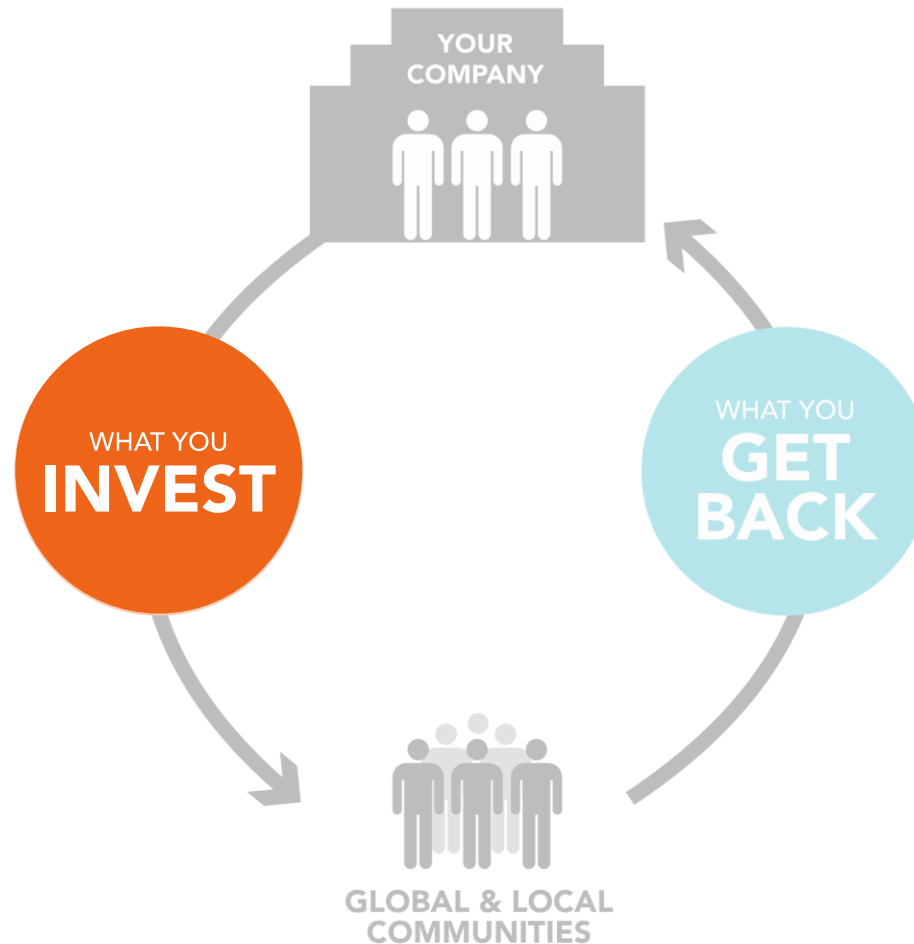
# Invest or Get Back?

A QUICK SHOW OF HANDS WITH COLORED PAPER  
TO INDICATE WHICH INTERESTS YOU THE MOST



# Invest or Get Back?

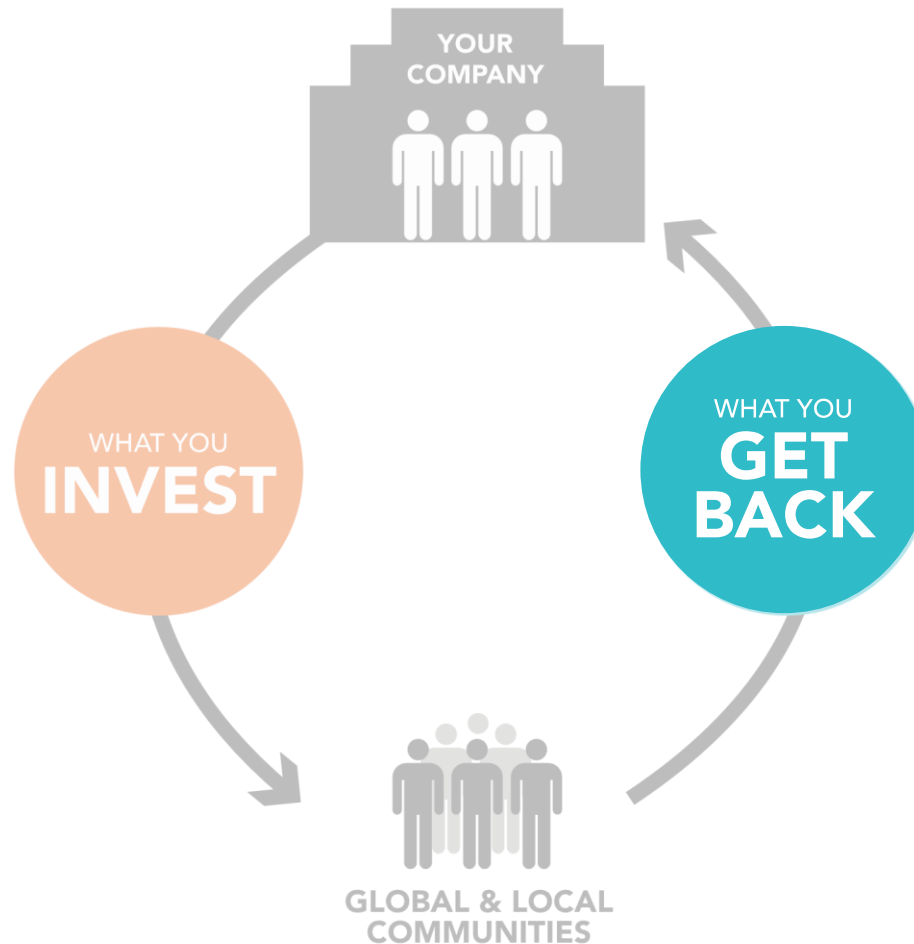
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# Invest or **Get Back**?

A QUICK SHOW OF HANDS WITH COLORED PAPER  
TO INDICATE WHICH INTERESTS YOU THE MOST



# Our 5 Reporting Recommendations

DOES YOUR COMPANY CURRENTLY DO THE FOLLOWING?

## VITAL FEW

We focus on a vital few metrics which are key for our specific audience.

## VISIBLE VALUE

We clearly show and communicate our impact on society and our business.

## NO DUST

We report metrics that are frequently referenced and tied to compensation (don't sit unused).

## PEOPLE COUNT

We go beyond the quantitative and share qualitative metrics of people's stories and impact.

## PURPOSEFUL PIGGY-BACK

We connect to existing measurement efforts in the company.

# Our 5 Reporting Recommendations

TODAY WE ARE GOING TO FOCUS ON THE TOP TWO

## VITAL FEW

We focus on a vital few metrics which are key for our specific audience.

## VISIBLE VALUE

We clearly show and communicate our impact on society and our business.

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## PEOPLE COUNT

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# VITAL FEW

WE FOCUS ON A VITAL FEW METRICS WHICH ARE KEY FOR OUR SPECIFIC AUDIENCE.

## WHY

Those who don't think about your work as often as you do need concise reporting

## PICTURE

What metric is at the top of the page for a 15 minute meeting on with your CEO

**IMPLEMENTATION CHALLENGE** (Don't have enough):

### **Barriers to collection**

- **SOLUTION:** 1 year vs. 5 year goals

**IMPLEMENTATION CHALLENGE** (Have too many):

### **Tough choices to find the most representative**

- **SOLUTION:** Use clues from related sources

# VISIBLE VALUE

WE CLEARLY SHOW AND COMMUNICATE OUR IMPACT ON SOCIETY AND OUR BUSINESS.

## WHY

Presenting total spend alongside outcomes answers the question “what do we get out of this” before it’s asked

## PICTURE

Your CEO responding to a shareholder’s critique of social investments

**IMPLEMENTATION CHALLENGE** (Don’t have enough):

**Barriers of expertise and resources**

- **SOLUTION:** Leverage public frameworks

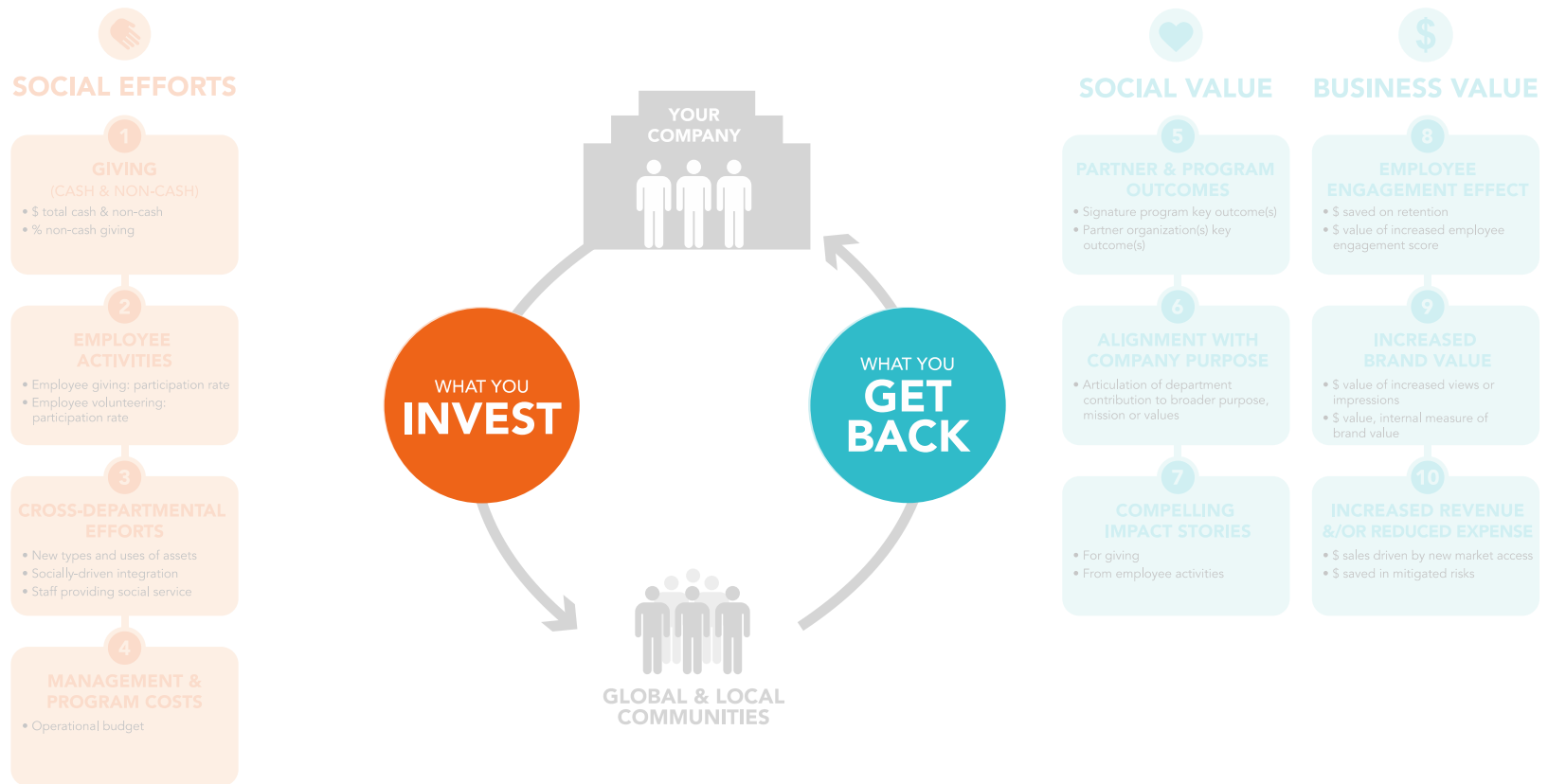
**IMPLEMENTATION CHALLENGE** (Have too many):

**Tough choice to find the most compelling**

- **SOLUTION:** Consider which is most tied to audience’s top need

# Go to the side of the room you chose

EITHER **INVEST** OR GET **BACK**



WHAT YOU  
**GET BACK**

---

WHAT YOU  
**INVEST**

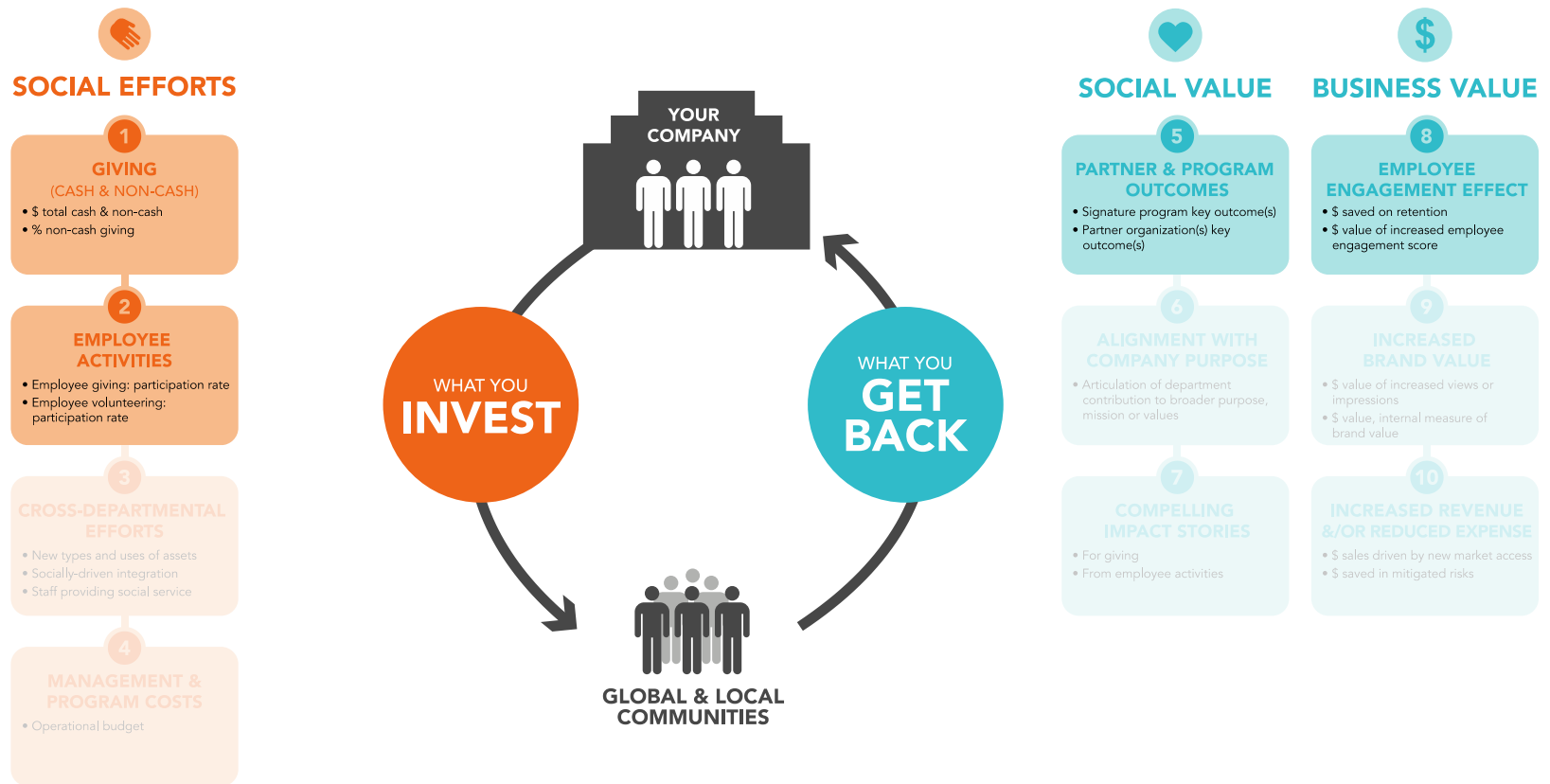
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KEY  
ASPIRATIONAL  
RATIO

# Select a metric to work on

ON BOTH SIDES THERE ARE TWO OPTIONS FOR METRICS...



WHAT YOU  
**GET BACK**

---

WHAT YOU  
**INVEST**

=



KEY  
ASPIRATIONAL  
RATIO

# Select a metric to work on

ON BOTH SIDES THERE ARE TWO OPTIONS FOR METRICS...



## SOCIAL EFFORTS

1

### GIVING

(CASH & NON-CASH)

- \$ total cash & non-cash
- % non-cash giving

2

### EMPLOYEE ACTIVITIES

- Employee giving: participation rate
- Employee volunteering: participation rate



## SOCIAL VALUE

5

### PARTNER & PROGRAM OUTCOMES

- Signature program key outcome(s)
- Partner organization(s) key outcome(s)



## BUSINESS VALUE

8

### EMPLOYEE ENGAGEMENT EFFECT

- \$ saved on retention
- \$ value of increased employee engagement score



# Evaluate Your Company

WHERE DOES YOUR COMPANY SIT ON THE SCALE?



OUR 5 REPORTING RECOMMENDATIONS

## Where's Your Company?

Place a dot where your company is on the scale for these 2 recommendations.

### VITAL FEW

We focus on a vital few metrics which are key for our specific audience.



### VISIBLE VALUE

We clearly show and communicate our impact on society and our business.



A GUIDE TO SOCIAL SCORECARDS

# Write Your Challenge

BASED ON WHICH RECOMMENDATION THE GROUP  
STRUGGLES WITH THE MOST



OUR 5 REPORTING RECOMMENDATIONS

## Where's Your Company?

Place a dot where your company is on the scale for these 2 recommendations.

### VITAL FEW

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A GUIDE TO SOCIAL SCORECARDS

How might we narrow in on the metrics that are key for our specific audience?

# Evaluate Your Company

WHERE DOES YOUR COMPANY SIT ON THE SCALE?



OUR 5 REPORTING RECOMMENDATIONS

## Where's Your Company?

Place a dot where your company is on the scale for these 2 recommendations.

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### VISIBLE VALUE

We clearly show and communicate our impact on society and our business.



A GUIDE TO SOCIAL SCORECARDS

# Write Your Challenge

BASED ON WHICH RECOMMENDATION THE GROUP HAS  
BEST PRACTICES TO SHARE



OUR 5 REPORTING RECOMMENDATIONS

## Where's Your Company?

Place a dot where your company is on the scale for these 2 recommendations.

### VITAL FEW

We focus on a vital few metrics which are key for our specific audience.



### VISIBLE VALUE

We clearly show and communicate our impact on society and our business.



How might I  
improve this process  
or become more  
efficient in it?

A GUIDE TO SOCIAL SCORECARDS

# Brainstorm solutions to your challenge

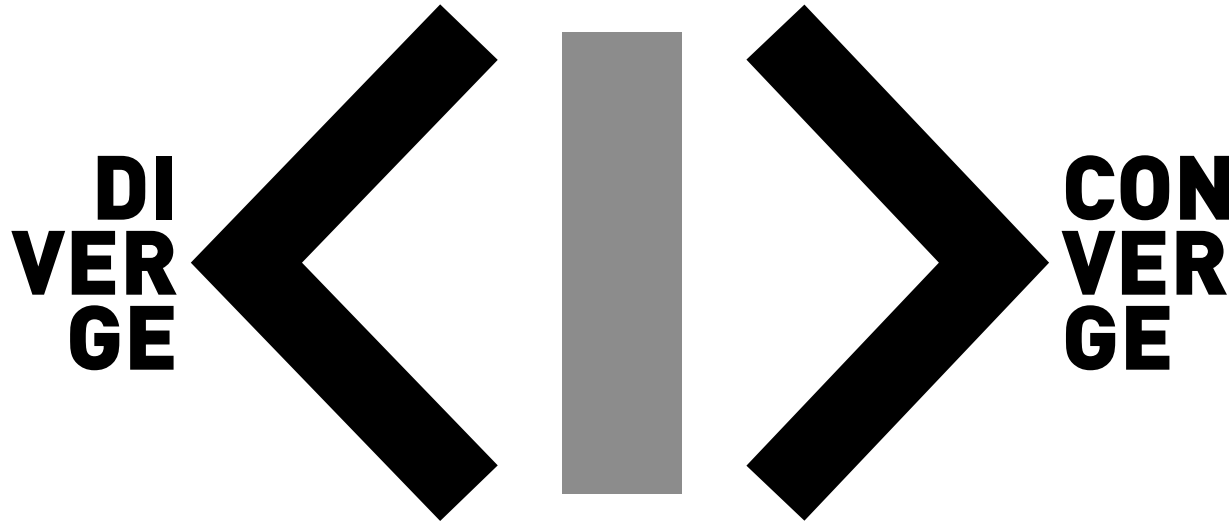
**This is an open exercise, that means...**

No judgement placed on people's answers, anything goes, it's free flowing and people should build off on other's ideas,...

**Keep it concise!**

Focus your points. Avoid long stories.

# Brainstorming Guidelines



## GENERATE

No Logic  
No Judgment  
Open  
Quantity  
Child  
Free  
Flow

## DEFER JUDGMENT

Withholding  
judgment allows  
for open divergent  
thinking to flourish.

## EVALUATE

Logic  
Judgment  
Close  
Quality  
Adult  
Discipline  
Filter

The background of the slide is a photograph of a large number of hats, primarily fedoras and bowlers, hanging on a green wall. The hats are arranged in a grid-like pattern, with some overlapping. They come in various shades of brown, tan, and white. The lighting is soft, and the overall tone is professional and organized.

# Select the top 2 or 3 ideas

**Put on the hat of your CEO...**


What would make your CEO add resources to your department on the spot?

What would have the biggest impact on our business?

# Teams Quickly Share...

***What would make your  
CEO add resources to your  
department on the spot?***

*(think about metrics, stories, data, etc.)*



Keep your company  
in mind...  
what would make  
most sense for  
you...?



# Reflect Individually

FILL OUT A POSTCARD

*Which would have the  
highest impact in your  
company & what is your  
next step?*

*(next action when you leave this room)*

# Reflect Individually

FILL OUT A POSTCARD

*Which would have the highest impact in your company & what is your next step?*

WHAT WILL YOU DO?

HOW WILL YOU DO IT?

BY WHEN?

**THANK YOU**