



geckoboard

The Book of DASHBOARDS

Inspiration for Essential
Business Dashboards

Introduction

When a business is data-driven, it can operate efficiently, perform consistently and grow sustainably. Founders and leaders within the business can only make the best decisions possible if they're informed by accurate and timely data. Teams can spot red flags and course-correct to prevent widespread disruptions in operations. And the company can continue to deliver more of what they know delights their valued customers and partners.

It should be easy for businesses to be truly data-driven. Most businesses generate countless data points that can paint a clear picture of what's working and what's not. But unfortunately, too often that data stays hidden, where the team can't see or act on it – either buried in spreadsheets or scattered across different SaaS tools and databases that only select team members know how to use. And unless a business has access to an

expensive data warehouse solution, a data specialist or a complex BI tool that requires months of setup and training – that's exactly where the data stays – hidden.

Businesses that do have access to these resources face a different challenge: systems that can be slow to update, which leaves them with data that isn't live. At a time when teams are working asynchronously, and doing business across timezones is increasingly the

norm, making decisions based on data that may already be too old can cause serious problems.

Too often that data stays hidden, where the team can't see or act on it – either buried in spreadsheets or scattered across different SaaS tools and databases that only select team members know how to use.

Introduction

That's where dashboards come in. With the right dashboards, your teams can get the most out of your data and overcome what we believe are the three biggest barriers to becoming a truly data-driven business:



Access

Dashboards allow every team member to see the most important data for their area of accountability, as well as for the whole company. When you provide everyone in the organization access to the most relevant data at any given time, they can spend more time on focusing on outcomes rather than updates.



Understanding

When data is effectively visualized through dashboards, your team can understand the business at a glance and make better decisions faster. Dashboards present you with historical trends and highlight important – and sometimes unexpected – changes, so people can spot them and respond quickly.



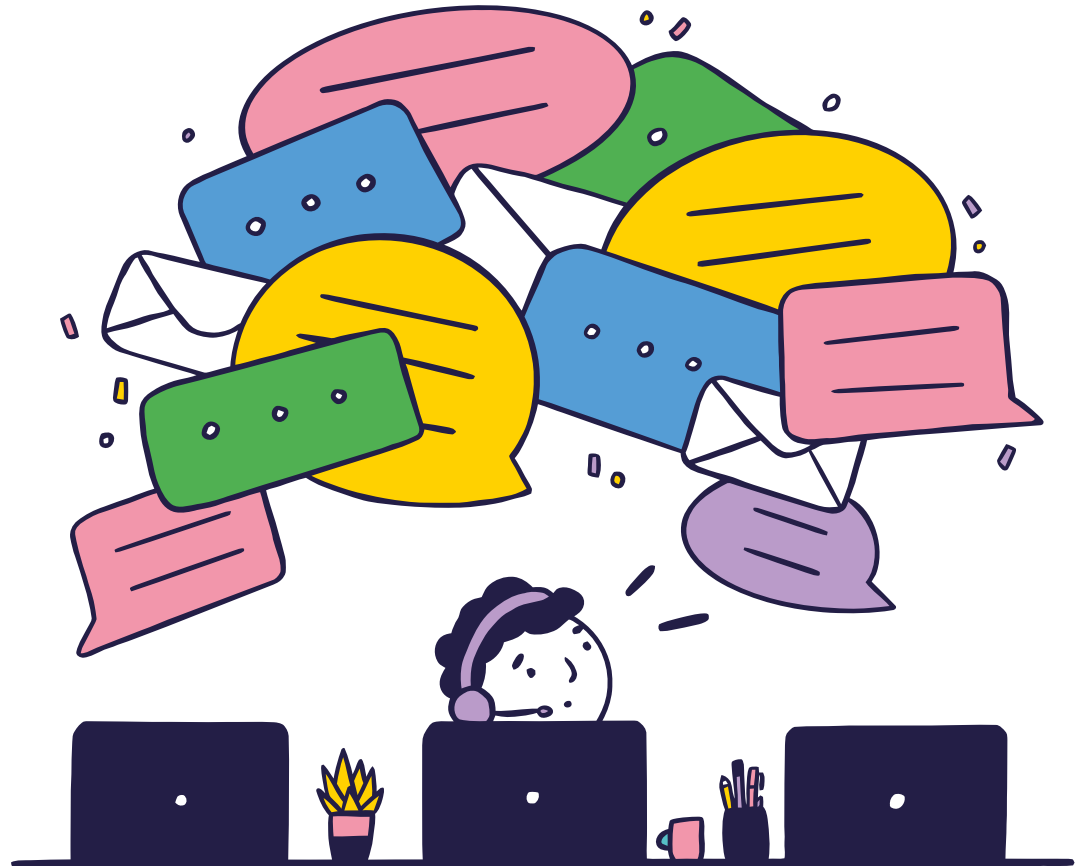
Awareness

Make it easy for your teams to use the data as the jumping-off point for the most important conversations around the business. Whether through TVs at the office or via Slack, displaying and sharing dashboards throughout the company ensures that the right data stays top-of-mind for each team member, and no one gets left in the dark.

Introduction

When it's easy for your team to access, understand, and stay aware of the data, they're empowered to make calculated and informed decisions with the overall business performance in mind.

Our mission is to help businesses like yours put data at the heart of their culture and decision making. In this Book of Dashboards, we're sharing some dashboard examples and best practices to get you and your team thinking about what dashboards you might need and how to set it up for success.



The CEO Dashboard

CEOs need to be able to focus on the big picture while keeping an eye on the details. They're typically busy wearing multiple hats within a single day, working to move the whole business forward while considering every department's needs and performance.

A dashboard can provide a time-poor CEO a high-level overview of the company metrics. Designed right, CEOs can use dashboards to quickly get a clear idea of overall business performance without needing to schedule a meeting, or keep in touch with areas of the company that they may have become less involved in as the business has grown.

CEO dashboards often serve a dual purpose. In addition to communicating data from the business to the CEO, they also indirectly communicate the CEO's priorities to everyone in the business. This frees up the CEO's

time and energy to focus on the most mission-critical activities that'll move the business in the right direction.

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Having these real-time metrics on display encourages and motivates my staff to do a better job. It also democratizes the monitoring of key metrics, which means everyone here feels responsible for the numbers and for improving them.

Alejandro Pérez, CEO

 kometsales

Get a quick update on sales performance

Make it easy to recognize your top performers

Understand your audience and what they're saying about you



Keep an eye on your customer satisfaction

Oversee the business at a glance.
No need to call for another meeting.

The CFO Dashboard

CFOs (or in some companies, Finance Directors) need to maintain a high-level overview of the company's financial health. This involves staying on top of all sorts of metrics, like annual revenue, monthly recurring revenue and overheads.

Having easy access to this data allows CFOs to maintain operational oversight, to ensure that the business is essentially generating more income than it spends. It also allows them to make certain predictions about cash flow and profitability based on historical trends. From this, all other teams can then be allocated a budget that they can use to effectively accomplish the

goals in their respective areas of accountability.

CFOs often need to be able to access their financial metrics at a

glance. At any given moment, the CFO could be needed to make quick decisions about cutting costs or reallocating budgets, and being able to see all the most important numbers in the cashflow at a glance can drastically save time (which, CFOs will be happy to note, often means saving money!).

“

Getting the kind of visibility across the business that a dashboard offers is very important within our tight-knit team.

—
Campbell Brown, PredictHQ



Get an overview of the finances without having to sift through spreadsheets

Keep an eye on spending patterns



Identify undesirable trends before they become an issue

Get real-time updates throughout the day

The CMO Dashboard

Leads generated, campaign performance, ad spend, conversion rates, revenue, audience size – these are just some of the key metrics that Chief Marketing Officers (CMOs) need to keep track of. To make things more complex, gathering this data typically involves multiple platforms that look, feel and function differently.

CMOs can rely on dashboards to maintain a high-level overview of their company's marketing spend, performance and – in the long run – returns. Marketing initiatives move at an incredibly fast pace, thanks to the constantly evolving marketing landscape where new trends pop up overnight and current events can immediately make certain messaging irrelevant or toned deaf.

A well-designed CMO dashboard can make it easy to assess the overall brand health of the company, as well as identify

when to completely cut off an underperforming campaign or reallocate spend on more appropriate messaging – especially when it updates in real-time.

A well-designed CMO dashboard can make it easy to assess the overall brand health of the company

Track multiple categories of data in one dashboard and make informed decisions faster



Know when key metrics are on track

Prevent going over budget with progress trackers

The Digital Marketing Dashboard

Digital marketing is one of the most data-rich areas in a business. Multiple platforms (each with their own respective language and metrics) are involved in capturing the attention and engagement of audiences and potential customers from all around the world. Attention also needs to be paid to things like ad frequency, demographics, click-through rates, new subscribers and even unsubscribes.

But easy access to and visibility of data can be a real pain point for the marketing team. Having multiple platforms' reporting pages open all the time isn't very efficient, and so making the right decisions that considers the full picture can be slow. Being able to see and understand the performance across different channels can be a huge time-saver and growth accelerator.

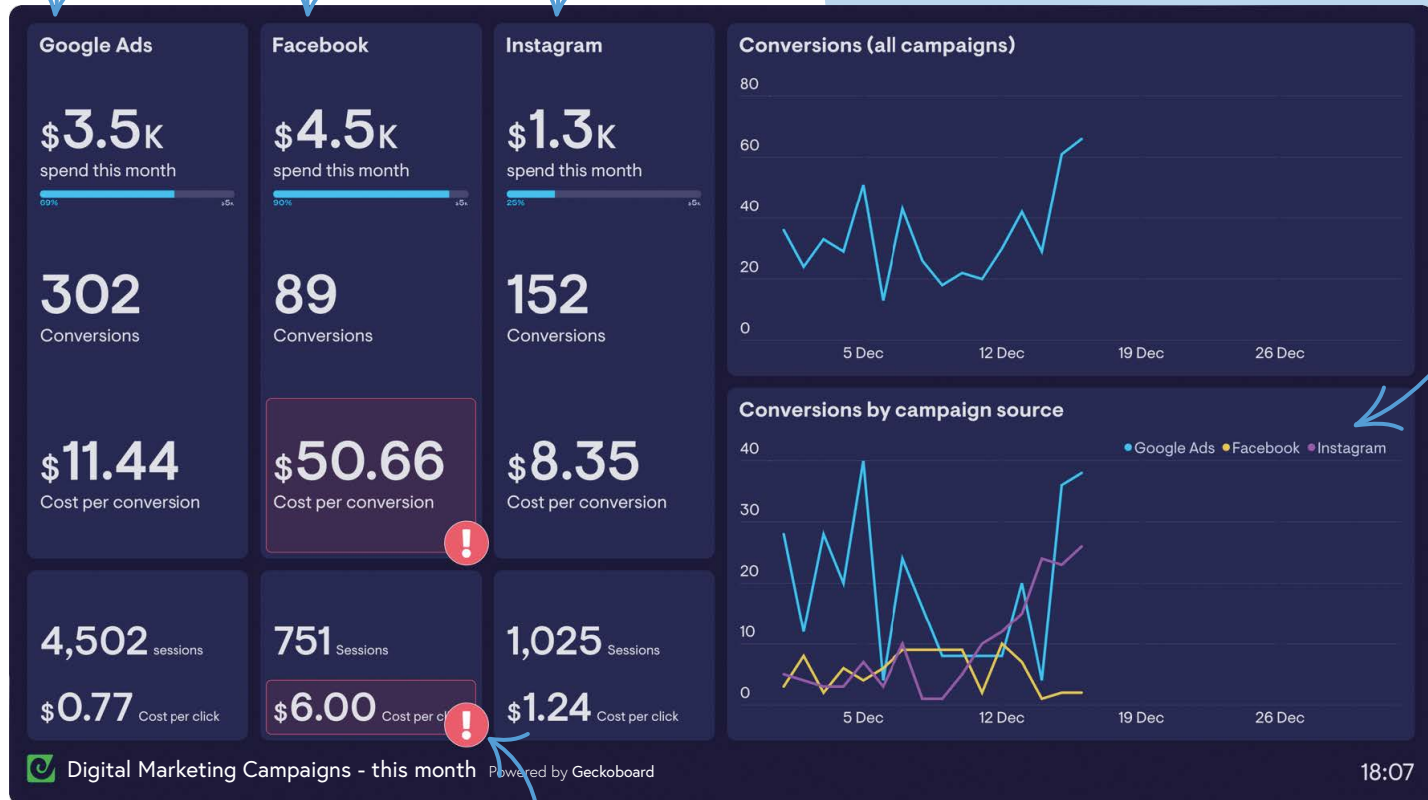
A digital marketing dashboard provides a single view of the KPIs Digital Marketing teams need to see, making it easy

to understand what's working and put more effort and money behind, and what to taper off and phase out.

Being able to see and understand the performance across different channels can be a huge time-saver and growth accelerator.

Keep an eye on multiple channels' performance at a glance

Adjust campaigns and reallocate budgets quickly with real-time updates



Define the thresholds for key metrics and get visual prompts when needed

The Sales Manager Dashboard

On the surface, it might appear that Sales Managers have a simple goal: ensure that the business is generating a steady stream of sales from new and repeat clients. But it's a huge responsibility to drive the incoming cashflow that would allow the company to firstly continue to pay overheads and operational costs, and secondly fund further growth or expansion.

Dashboards enable Sales Managers to easily get a complete overview of the metrics they need to be effective in their role. With the right design and integrations, Sales Managers can use dashboards to assess the performance of each sales team member and encourage friendly competition among peers. They can also be designed to monitor the quantity and quality of the day-to-day activities used by

sales people, such as calls, emails, social-selling and product demos. In one glance, they can keep an eye on win rates so that it doesn't go below the ideal threshold, while also tracking the value of any outstanding deals that have yet to close. And perhaps most importantly, a dashboard can help surface any downward or inconsistent sales trends before it becomes a serious problem that impacts revenue.

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Having real-time data made our CEO so happy. It enabled us to make business decisions based on live data.

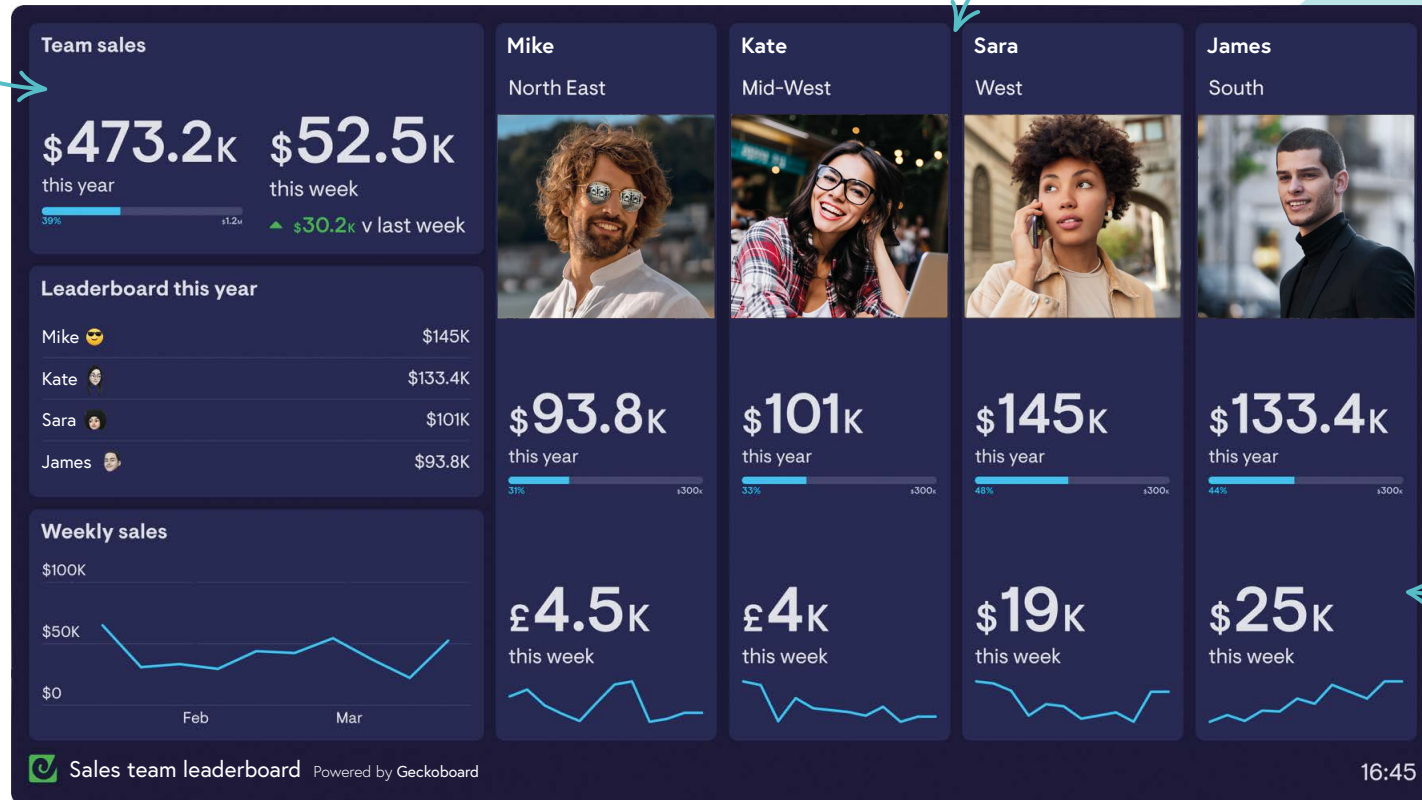
We had increased the effectiveness of the daily huddle, and could start coaching using accurate data.

—
Michelle Jaeger,
Five Doors Network



Encourage teamwork by keeping your team's eyes on the prize ...

... while fostering some healthy competition for more fun!



Increase accountability with transparency and performance sharing

The Account Manager Dashboard

Account Managers are responsible for building relationships with clients, developing a deep understanding of their needs, and presenting them with the full range of solutions that address those needs.

They're responsible for delivering a remarkable onboarding experience, encouraging existing clients to continue or upgrade their purchased plan, and also preventing cancellations from disengaged or unhappy clients. By nurturing these client relationships, Account Managers can increase the business and sales generated by a single client, and extend their lifetime value. It's mission-critical for Account Managers to know how to allocate their attention to the right clients at the right time, and dashboards can be a key tool to help them do this. Dashboards can present Account Managers

with a summary of how they're delivering value to both their clients' satisfaction, as well as to the company's revenue and performance.

“

Because our whole team could see the dashboard, they all cared and felt collectively accountable for the metrics. Our NPS score started at 74. Our goal was to be at 80. We're now scoring 80 for service and 84 for our product.

Nikolay Piriankov,
CEO and Co-Founder



Visual data to easily spot trends and act on them sooner

Stay on top of your accounts so you can focus your nurturing efforts



See how you're progressing with different goals

Surface any pertinent data that may otherwise be overlooked

The HR Dashboard

Increasingly, businesses are recognizing the need to invest in the growth, satisfaction and development of their people. This means that now more than ever, HR teams play a much more active role in ensuring that a business is equipped with talented, motivated and happy teams.

Building high-performance teams involves many moving parts. It's as much about finding and recruiting highly skilled professionals as it is about making sure that employees are engaged, and have clear direction and pathways to progression – especially in this new world of work where remote and hybrid working become the norm. With dashboards, HR teams can

easily track and visualize metrics around recruitment targets, employee satisfaction, and even Learning and Development progress or completion throughout the team. This means less time is spent on reporting and updates, and more time is spent on optimizing internal campaigns and initiatives that positively impact your people.

It's as much about finding and recruiting highly skilled professionals as it is about making sure that employees are engaged.

Quickly see which teams need your attention and address their needs sooner rather than later

Track the performance of training initiatives



Stay on track with recruitment performance targets

The Customer Support Dashboard

Delighting your customers is a daily mission that goes well beyond the onboarding stage. To have people who trust in your company and who are willing to rave about your product or service to others, you need to consistently wow them with how you handle their questions and concerns.

There are many ways for your customers to get in touch, so Customer Support teams often work across multiple channels including phone, email and chat. With so many ways to connect,

the challenge is making sure each customer feels prioritized and that no query gets left unresolved.

A real-time Customer Support dashboard allows you to see the number of open or live tickets, as well as the number of tickets which haven't yet been assigned to an

agent. You can also track other support metrics like Customer Satisfaction (CSAT) and First Response Time (FRT), and even share the latest feedback from customers – both motivating and rewarding to those who are going the extra mile to keep your customers happy.

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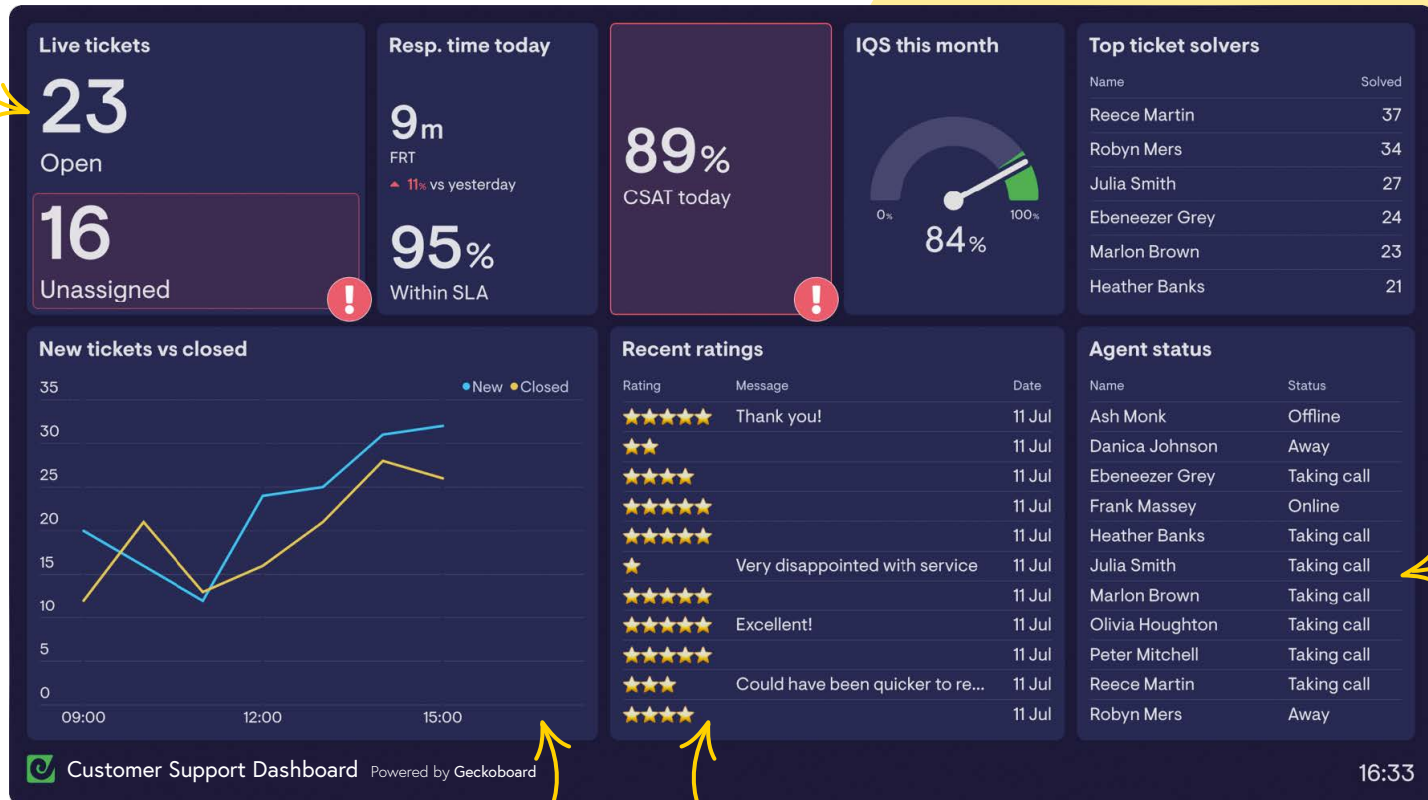
We have Customer Care dashboards up in each of our three offices around the world displaying KPIs on screens right next to the teams. For those who are working remotely, we have dashboard sharing links in the Slack channel descriptions so everyone can always have them open.

Felix Starzer, Head of Customer Care



Make sure no query falls through the cracks

See who's available to assist



Track your team's capacity in real time to keep up with spikes in demand

Share customer feedback and keep your team motivated to maintain or improve their performance

The eCommerce Dashboard

Successful eCommerce businesses need to optimize every stage of the customer journey, from first touch to purchase. It's not just a one-off endeavor, however. More products can be introduced, while underperforming products are phased out. Having multiple distribution channels adds layers of complexity to key activities like paying attention to stock, deal size and sales performance. And, in a very noisy and competitive marketplace, ensuring that your customer service is top-notch can be a major differentiator that determines if you'll have regular buyers or lose them to competitors.

Dashboards help eCommerce teams track and evaluate the most important performance metrics across the business. And it's not just for the accounts team's P&L and the sales team's targets. With eCommerce-focused dashboards, purchasing

teams can better manage product availability and plan new orders, and warehouse teams can anticipate busy periods and meet their fulfillment goals.

For an eCommerce business, visualizing the performance of all the moving parts behind delivering

a remarkable product and buying experience can be a gamechanger, paving the way for growth and profitability.

“

I have Geckoboard permanently open in a browser tab on my laptop, I look at it several times throughout the day to see if I need to jump in and take action. It really helps us spot issues before they explode. Before Geckoboard there was no same-day visibility around agent productivity.

—
Sandeep Jindal

 FURLENCO

Visualize the relevant trends to easily spot any sudden changes

Maintain profitability by highlighting the key figures



Evaluate referral partner performance against overall sales

The Operations Dashboard

Operations teams are crucial to keeping companies running smoothly. They keep an eye on the systems and processes that allow businesses to continue delivering the value that customers pay for. Depending on the nature of the business, this could involve things like health and safety practices, daily IT maintenance and upgrades, team productivity, and management of cross-functional projects.

Ensuring that departments – and therefore the business – are on track with their goals is key for operations managers, and these goals could be in the form of targets to be hit, ranges to stay within, or thresholds to stay below. With multiple teams to keep an eye on, visualizing these goals on dashboards can save operations managers time, effort and money. Building operations dashboards that can give a clear indication of ideal and unacceptable performance means that, at a glance, teams that are falling short of achieving their objectives and key results (OKRs) can

address issues sooner rather than later, before they become costly or irreversible.

“

Are we moving toward our prioritized goals?' has become a common question during our sprint meetings, which then immediately turns heads toward our Geckoboard livestream.

Laurence Jankelow,
CTO and Co-Founder



Track progress towards desired operational outcomes

Highlight the most important metrics with the right layout



Monitor your sign up and engagement rates week by week

The Startup Dashboard

Starting a business can feel like a rollercoaster. One minute you're excited about the opportunity that's unfolding – there's a problem out there that people would pay to solve, and you believe you have the solution. But then you pitch to potential clients and investors, and you're getting more rejections than purchase orders.

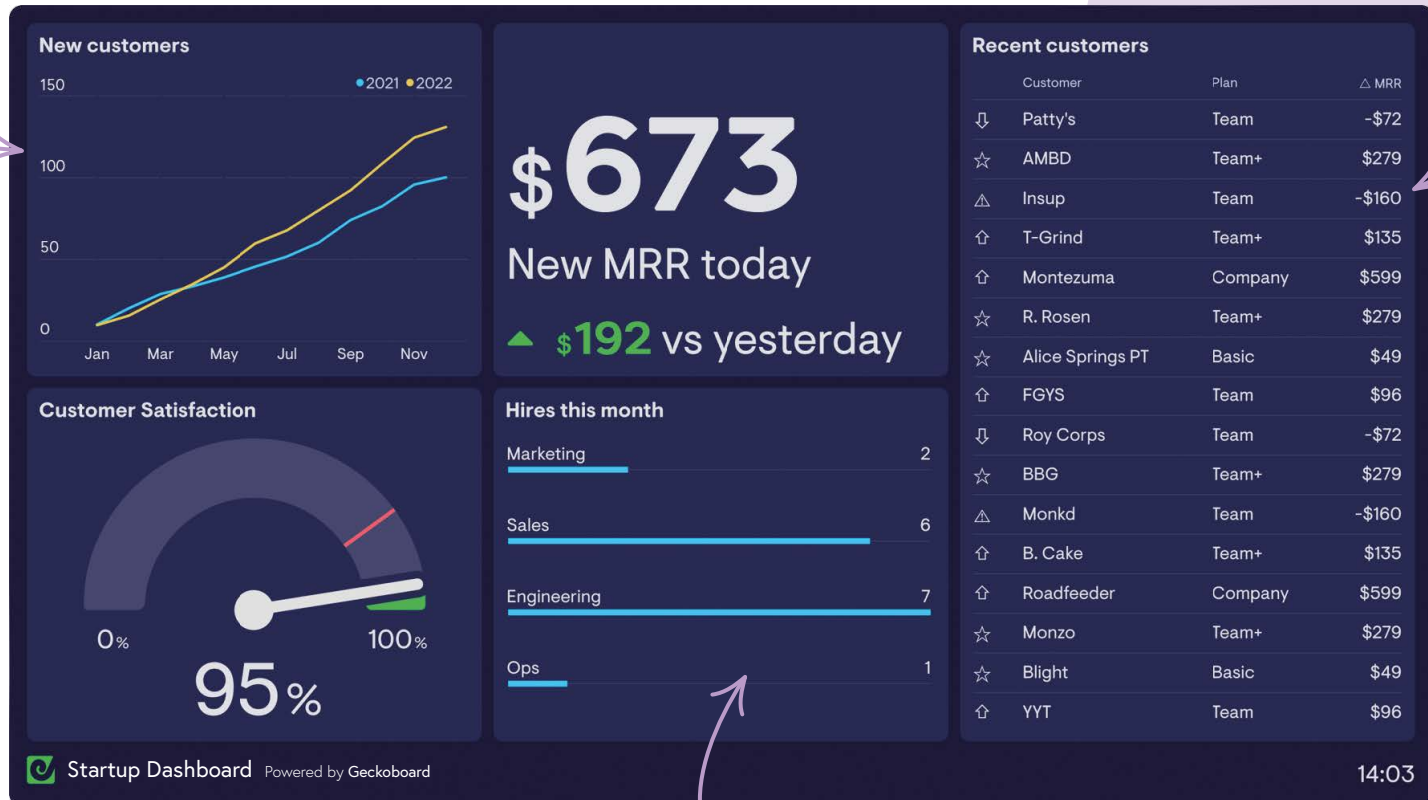
But just as you consider that maybe you were overly optimistic, you close a deal that's big enough to keep you going, and suddenly everything seems possible again. ... Until you face other challenges around generating more leads, developing your product, getting your legal paperwork in order, paying overheads and taxes, and making sales consistently. Dashboards can help startup teams make sure everything moves in the right direction, at the right pace. Seeing the

business's most important metrics for success, as well as the progress towards clear milestone targets, means that nothing falls through the cracks.

Dashboards can help startup teams make sure everything moves in the right direction, at the right pace.

Stay on track to watch or surpass previous performance as you grow

See your most recent customers' buying activity and spot any emerging trends



Oversee hiring activity across teams

About Geckoboard

Geckoboard is a software company that makes it easy for teams to build and share beautiful dashboards. Since 2010, we've been helping businesses put data at the heart of their culture and decision making.

We believe it shouldn't be difficult or expensive for businesses to access their data and visualize

it in a way where everyone can understand what's going on. But with most of the solutions available – it is. Our aim is to level the playing field.

Trusted by 1000s of data-driven organizations

Thousands of organizations use Geckoboard to create dashboards that keep their teams focused on their most important performance

metrics. Our customers come from a wide variety of industries, and range from newly funded fast-growth startups to established corporations with globally distributed teams.

Focus on the metrics that matter

Different teams measure success in different ways. Whether you're working to hit increasing sales

Trusted by 1000s like:



targets, stay within budget or keep customer support response times low, Geckoboard allows you to select the most relevant data and visualize it in a way that makes sense to you and your team.

Less time chasing updates, more time on achieving outcomes

So much time can be wasted trying to access performance data. Understanding your business's current performance shouldn't mean spending hours digging around in different platforms and spreadsheets. Geckoboard's sharing features make sure key metrics get seen by the right

people at the right time, so your team can spend less time sharing stats, and more time focused on strategy.

Better decisions, faster

Business leaders and teams work to make the best decisions they can based on the data they have at any given time. Making big decisions based on inaccurate or outdated data can be a costly mistake. Geckoboard's real-time dashboards mean that you have eyes on accurate performance metrics throughout the day and across timezones, so that you can action any undesired trends before they become serious issues.

Build with best practice

Geckoboard's dashboard creator helps you quickly turn data from different sources into a professional-looking, customizable dashboard that always stays up-to-date. To make sure you make the most of your data and dashboards, we've built a comprehensive library of data literacy resources, goal-setting guides and practical platform how-to's. And if you get stuck, our dedicated support team's available to help – 24 hours a day, 5 days a week.

Data Sources

Geckoboard has pre-built integrations with 80+ data sources, so you can connect quickly and securely to your everyday tools – without coding.

Pull in additional data using spreadsheets, databases, Zapier integrations and our custom API.

	ActiveCampaign		Buffer		Delighted		GoSquared
	AirBrake		Campaign Monitor		Dixa		Google Ads
	Aircall		Chargify		Dotdigital		Google Analytics
	Amazon CloudWatch		ChartMogul		Excel		Google Calendar
	Amplitude		Chartbeat		Facebook		Google Sheets
	App Annie		ClickUp		Facebook Ads		Gorgias
	Appfigures		Close		Flurry		Help Scout
	Asana		Copper		Freshdesk		Heroku Dataclips
	Baremetrics		Databases		Freshservice		Highrise
	Basecamp		Datasets API		GitHub		HubSpot
							Instagram
							Intercom
							Jenkins
							Jira

	Klaus
	Klaviyo
	Linear
	LinkedIn
	LinkedIn Ads
	Mailchimp
	Make (Integromat)
	Mention
	Mixpanel
	Monday
	New Relic
	Orbit
	PagerDuty
	PayPal

	Pingdom
	Pipedrive
	Pivotal Tracker
	ProfitWell
	QuickBooks Online
	RSS Atom feed
	Recurly
	Redash
	RingCentral
	Salesforce
	SatisMeter
	SendGrid
	Shopify
	Spreadsheets

	StatusCake
	Stripe for SaaS
	TeamCity
	Trello
	Twilio
	Twitter
	Vimeo

	Wistia
	YouTube Analytics
	Zapier
	Zendesk Chat
	Zendesk Sell
	Zendesk Support
	Zendesk Talk



Don't see a connection you need?

*Get in touch with our team and let us know.
We're adding new integrations all the time.*

Wins from Our Customers



“

At a glance, everyone in our organization can instantly see how we're doing. And it looks fantastic – large, easy to read, and intuitive!

—
Mike Johnson, President and CEO



“

We have gone from spending a lot of time and effort creating charts in PDFs to communicate our financial data, to a dashboard that is easy to create, update and share. I'm excited to be able to share the information on our dashboard, and our board members love it!

—
Lakisha Miller-Barclay,
CEO



“

Geckoboard has eliminated the frustration of waiting for reports in order to make smart business decisions. Now we have access to live metrics and can act immediately to take advantage of new opportunities. It's reliable, it works, and it's worth every nickel.

—
John Andrews, Founder



“

After looking at many different data visualization tools, I found Geckoboard to be by far the easiest solution to quickly pull together a single view of live metrics like number of people in the queue, number of open tickets, and CSAT score, and then share that across the business with a single link. It was so easy to set up using the built in data sources - it would take me around 30 minutes to build one for a client, and I could then just give them the keys to run it. It's easy to use and my clients loved it. When I finished consulting, I took Geckoboard with me!

Logan Grooms,
Director of Customer Care



MAISONNETTE

“

With Geckoboard, the dashboard is so clean and it's such an easy way to consume this data. I can even send it by text message and clients can pull their dashboard up on their phone in a breakfast meeting.

Kristian Marquez, Managing Director



“

We want to be as data driven as we can and dashboards allow us to share the right data with each team in the clearest way. Geckoboard ensures everyone can see their goals and work towards them.

Emiel van Lenthe,
Chief of Marketing and Operations

Codator Uw recht
Uw expert

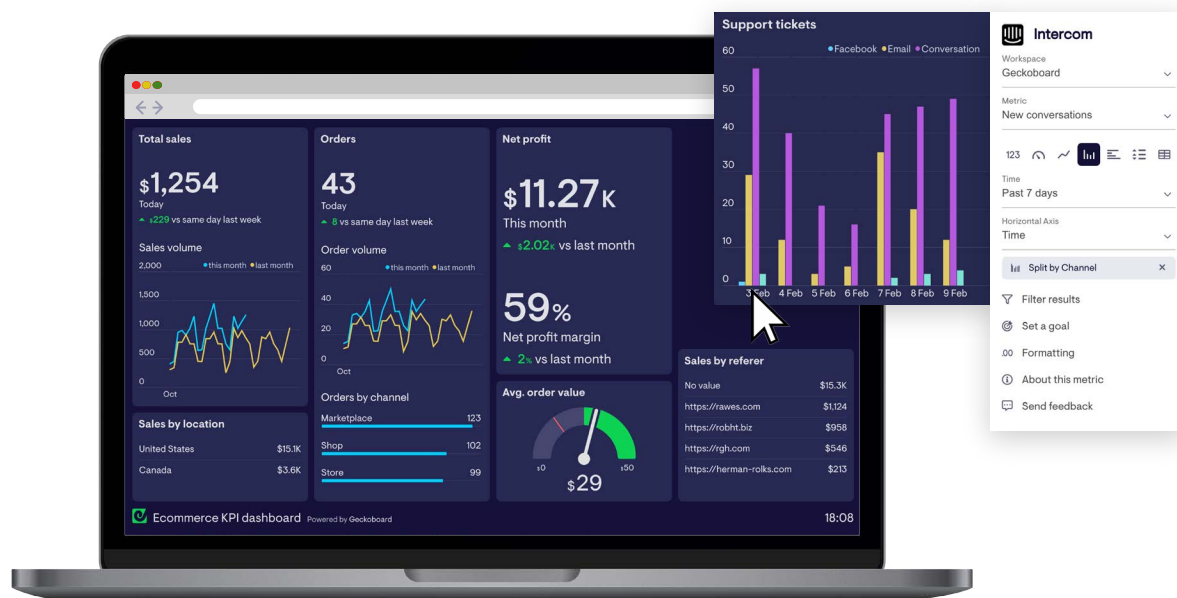


Ready to build beautiful dashboards?

Whether you're a small business, a manager of a team, or looking to share important numbers across your whole organization, Geckboard's online dashboard creator lets you create stunning dashboards from live data in a matter of minutes.

Create a dashboard for every part of your business.

Monitor marketing channels, share sales figures, track product and team performance, and visualize company goals. Then, to make sure your team never misses their key metrics, share it via email, Slack or a TV.



Start with a
14-day FREE trial
by heading to
<https://www.geckboard.com/book>



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