



Leading Indicators in Higher Education: Is What You Are Measuring Complete?

What is harder, strategy or execution? This on-demand complimentary webinar, inspired by content from the 4 Disciplines of Execution, as our data and analytics team breaks down how to think about key performance indicators (KPIs), what to measure, and ultimately how to help drive execution.

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Here is a transcription of this session:

Troy Hollings: Hey, everyone. Welcome. Thank you for attending. This is Troy Hollings and we got Sam Bleyle and Dave Jacobson as well tuning in to Leading Indicators in Higher Ed is What You Are Measuring, Complete. Before we jump in, I figured we'd do quick intros. Who are we? I'll go first. Troy Hollings, I'm a director in our data analytics practice. When we say data analytics, really there's three buckets that we help clients with. One is business intelligence, so think dashboarding, reporting. Another is, you'll call it data engineering. A lot of times we have data in this system, data in that system, data in this system.

We have to go collect it and make it all play nice with each other. Then, the last is data science. If you tuned in to a previous webinar, we talked about machine learning, artificial intelligence. Today, we are talking about a concept that weaves through all of those different buckets. Before I go to Sam and Dave, I've prepared them all that we are going to have a fun fact. I'll go with my fun fact. Long ago, growing up I moved around a lot and one summer I moved to Indiana. That's where I live now, in fifth grade, and didn't know anybody because we moved in the summer. I thought, "You know what's a really good way to find friends? Unicycling." I learned how to unicycle and turns out actually wasn't a great way to find friends, but I still know how to unicycle. That's me. Maybe Sam, say hello.

Sam Bleyle: Thanks, Troy. I love that story. I don't think I knew that one. That was good. Hi, everyone, I'm Sam Bleyle. I'm a senior on the data analytics team. I fall under two of those buckets Troy mentioned, with business intelligence and data engineering. Helping create visualizations, extracting your data from different sources, and pulling it together to be able to tell a story with your data as well as helping with data automation and processing. Fun fact for myself. I did my undergrad at Butler University in Indianapolis, and during my time there I was the mascot. I had some fun experiences with going to mascot camp, dancing with the dance team, getting to travel with the basketball team, all fun things that I miss.

Troy Hollings: Great. You can tell we're a very, very cool bunch on the call already. Dave?

Dave Jacobson: Yes. Thanks, Troy. Hi, everybody. I'm Dave Jacobson. I am a principal with CLA in our higher education group. I am located in our Philadelphia Pennsylvania office. Been in public accounting a little over 20 years, specifically focused on higher ed for about the last 15 or so. My background is a little bit different than Troy and Sam and that I'm not a data analytics person, although I probably spend most



of my time on the financial side of things. My background's in audits, so I've done a lot of higher education audits over the years, working closely with business offices.

But I will tell you, over the last couple of years, I have had much more collaboration with folks like Troy and Sam on the data analytics and digital side of things as real. I think we're going to get into a lot of good conversation today about that topic because I know the clients, the institutions that I work with, and really all institutions sit on a ton of data and trying to identify ways to make that data work best for them. My involvement has been from the audit side, but bringing folks like Troy and Sam into our engagements, our clients have really been looking for that information to basically understand how they can make their data work better for them.

A fun fact for me, and I don't know if something can be a fact if it hasn't happened yet, but I'm going to go with that. Please go along with me here. My fun fact is I will be attending game three of the NLCS tomorrow night between the Phillies and the Padres. As a Philadelphia sports fan, we've been starved for some post-season baseball for 11 years now. Now, having knocked off both the Cardinals and the Braves, we're eager to take the next step and get to the World Series. I'm taking my two sons to the game tomorrow night. I couldn't convince my daughter to go, but we're looking forward to that. That's my fun fact. Troy, I'll kick it back to you.

Troy Hollings: Great. Thanks, Dave. Okay, so what are we going to talk about today? If you've tuned in to any of these webinars in the past, sometimes it's a tactical project of, this is an example, or maybe it's more of, "This is why you need a data warehouse." Or, that one I brought up about machine learning, that was, how to use machine learning to help predict students that were at risk of leaving. But I think we're going to do something a little bit different today. Rather than honing in on a specific example, though we will have one, our goal is to provide you all with a mental model to think about data analytics and you can use it broadly, but also hopefully in your specific situation.

For us, for Sam and I especially, digital data analytics, data science, it's such a fast growing field that everybody is half formal education, half self-taught. We're always looking for resources and things that would be helpful, be interesting that we could weave into projects that we're on. Sam and I both are big fans of this resource, the four disciplines of execution. There's actually a book that goes with it. Highly recommend, we'll send out the slides. There should be some details in the slides, but today, we're going to talk through some of those principles.

A lot of you, maybe some of you have heard about that before, give our color as we apply that to data analytics projects. Then, going to all use our imaginations a little bit and have an actual higher ed example of how one might think about some of this. With that, let's jump in. Okay, so the problem, which is harder, strategy or execution? Now, if we were in a class, everybody would shout out execution. Why? Well, as the great American philosopher, Mike Tyson has been known to say, everybody has a plan till they get punched in the face. Any strategy has to work in the real world.

These four disciplines of execution, if you're one of the cool kids, you shorten it to four DX names the real world the whirlwind. Any strategy you come up with sitting in the boardroom, in an offsite, that still needs to work six months later when you have five fires to put out and your day is busy, you start early, you're staying late. Any strategy must work within the whirlwind. That's why execution is much harder. It's easy to come up with a plan, really hard to execute on it. As we were talking about this, I think Dave had some light bulbs go off specifically for some higher ed examples. Dave, maybe you want to share what we were talking about before?



Dave Jacobson: Yeah, and Troy, you talked about the execution being probably the more difficult piece of it. Really, I think when I look at it, I really truly believe they go hand in hand or need to go hand in hand. Although the strategy is really those broad decisions where you're trying to establish direction for the institution, the execution, those are those tactical skills and actionable items that are going to lead you to meeting those strategies, those goals. Once you set that strategy, I think it's okay to change your tactics, but you're not going to change your strategy.

The strategy is what everybody's going to agree on. What I've experienced in higher ed, and I guess I'll come at this from maybe a couple different angles, one, I work with the number of institutions as I mentioned primarily on the audit side of things. But I've also sat on higher education boards, non-profit boards, where we have a lot of strategic discussions, decisions, conversations around strategic planning. Those topics that you see on there, the execution is critical. But many times what I've learned from my own personal experience is sometimes there can be so many pieces to executing on a strategy, that if you're not just focused, and we're going to get into this a little bit more, you may not be making the progress that you otherwise would.

When we talk about then the monitoring and the accountability, has been a lot of struggle there because when you talk about some of these tactical skills and actionable items, some are quantitative. Quantitative ones are fairly easy to measure and monitor, but the qualitative ones sometimes are difficult and we struggle with that. Institutions I think have struggled with measuring the progress that you're making on a particular strategy when you can't identify how to measure it. I think we're going to get into that a little bit more with data and making some of this data work for your institution.

But I've been in these conversations where management will say, "Well, we feel like we're making progress." But what does progress mean? Are we 20% of the way there? Are we 80% of the way there? How do you gauge whether or not you're actually following through on some of these execution items? Troy, that's maybe just a little bit of context and we'll continue that conversation as we go on.

Troy Hollings: Great. No, that's perfect. As you could tell from the title Four DX, Four Disciplines, so I'm going to walk through four core ideas, give some commentary, and then we'll move into higher ed examples. The first discipline here is focus. I'd say that if there's any feedback I give to the Four DX book, it's a little bit consultancy. You have to prepare yourself for that, but focus on the wildly important goals. But these are the critical things that if you failed that one or two goals, everything else is irrelevant, less is more, like what Dave was saying.

I just think this is such a good example that just illustrates it really well. If you look at NASA, so NASA in 1958 had eight goals. Those were their big strategic pillars. I'm not going to read even all of that, but just to get a flavor of it. The first one is expansion of human knowledge of phenomenon in the atmosphere and space. Well, how do you know if you're doing a good job at that? How do you measure that? You guys can read through that second one, but preserving the US as a global leader, that's unclear, that is ... and six other ones. Then, if you look at NASA in 1961, before the decade is out, we will land a man on the moon and return him to safety.

When we're thinking about, and in some of this we're all doing strategic planning, some of this is also good in theory and we also recognize that, "Hey, the strategic plan's a complicated multi-year document." But I think it's more the principle, if you try to focus on 10 things, you're not going to do any of them well. Pick those couple few things and then focus on that. Discipline one is focus on the wildly

important. We're going to move into a quick polling question here. I'd just love to hear some comments from the audience across higher ed. Many universities are trying to focus on too many goals at once.

Is that, hit the mark, strongly agree, neutral? Maybe your university or across higher ed, you don't think that's an issue. We'll give everybody 15, 20 seconds to vote, and then, I'd be curious to see what everybody's saying.

Dave Jacobson: Troy, while our audience is answering that question, another thing that comes to mind as you're talking about really narrowing the focus on a few key goals, and I think about when you have the more goals you try to juggle at once, the less likely you are to reach. Like you just said, if you have 10 goals, how successful are you going to be at each one? The other thought is, and as institutions you have your staff, they're all focused on a number of different things depending on what departments they're in or what their areas of focus are. I read a statistic one time that roughly only 15% of an organization's employees actually know what the most important goals are.

I think of it in that context too. When you spread these goals so thin and you have folks that are all trying to move these various initiatives in order to meet the goals, how aware are they of the big picture of what they're trying to achieve. I think that comes down maybe more to a communication perspective, but I think ... That was just something that came to mind as you were talking about narrowing the focus, how to have your staff and faculty and employees in terms of where the organization is heading with some of these initiatives?

Troy Hollings: Yeah, I think a private sector analogy of that is, if you go to, example, a random employee, how many of them can name the company's core values? Yeah, great point. We've got a bunch of responses coming in, so I appreciate all the participation. It's interesting. We've got the highest responses, agree. Second is strongly agree, a few neutral, only a couple people disagreeing. It was, I will say, one of those leading questions, but that's good to see that we're on point here. Broadly across higher ed sounds like a lot of universities are trying to focus on a lot of different goals and maybe running into that lack of focus situation.

Appreciate it. All right, so that was discipline one. Let's focus, we focus on the one or two really critical things. Now, when we get to discipline two, that's finding the leading indicators, and so that's what the title referenced. We're going to spend a little bit of time on this because it's pretty important, first 80-20 principle. I think a lot of you have probably heard of this, but the universe hates balance. It's counterintuitive because we assume that everything's going to be a 50-50 relationship, that 50% of inputs is going to spit out 50% of outputs. A lot of times intuition's good. If you think about it in a different presentation.

I was talking about some of the machine learning things we're doing using computer vision, which is trying to look at a picture and figure out what's going on in that. If you think of intuition of, you're driving, you see somebody turn their head and you think, "Oh, that person's changing lanes. They're not signaling." You just get out of the way. That's an example where that's really hard to simulate with a computer, but that's intuition, really good. But a lot of times intuition is dead wrong. I looked up highest grossing movie directors. Steven Spielberg, he's the number one highest grossing movie director and he's grossed over 10 billion from his movies.

The 300th highest grossing movie director is a little over 500 million, which is still a fair amount. But if you think about that 10 billion for number one, a little over 500 million for number 300, and that's the way the world works. This is the discipline of leverage. Find those fantastically effective things and



do more of them, and then discard the rest. Part of how we do that is by figuring out what are leading versus lagging indicators. Let's define that and then I'd love some comments. Sam's doing this all day every day, love some comments from him. Defining that though, the lagging indicator, that's what happened. That's the enrollment number, that's the revenue, that's the, how successful were we at fundraising.

Okay. Graduating students, how did you like going to DePaul University? That's where I went. The leading though, those are the things that come before that. If I'm a recruiter, those are the number of calls I'm doing, number of emails, number of career fairs I'm attending. I think the critical part of finding these leading indicators is they need to be predictive and influenceable. What we mean by that is, predictive, if you're thinking about, I'm in Indiana, got corn all over, if you're thinking about what influences successful corn growth, well rainfall, that's clearly one. Is that a good leading indicator? Well, no, because I can't influence that. Versus in that recruiting example, and we'll flush out this example through this talk.

Number of career fairs attended. Well, that's a leading indicator for ultimately number of students recruited, but I can control that. I can drive myself to five career fairs way more than I can control the rain. The whirlwind is real. These things have to happen even in spite of that whirlwind. Sam, I don't know if you have any comments. We found this material a few years ago, about the same time. Anything you want to share?

Sam Bleyle: Yeah, once I read this, I just started seeing almost everything, be leading versus lagging indicators when it came towards my job, but also just what I do with my free time, whether that's exercising, or cooking, or learning an instrument. I think a point going off of the first discipline of focus is, one of the differences between those two that NASA had set up was the original ones were more opinionated. You could argue whether or not one of those was achieved or not. Even if a group set out to achieve that. Versus the new one in 1961, where they were going to land a man on the moon by a certain date.

It's indisputable. If it happens, it's a fact. That's how I see when I set my focus goals, is I want to be a better runner. Well, what does that really mean? I set my goals to be ... I want to be able to run a certain marathon at a certain pace by a certain date. Then, once that's set, then I can backtrack to figure out what my leading and lagging indicators are off of that by knowing what type of workouts I need to do to get there. Or, even cooking, I want to be a better cook. It's like, well, you could argue that just me saying I'm a better cook now isn't necessarily true, right?

Troy Hollings: Right, it's not good enough. Yeah.

Sam Bleyle: Right, but if I say, "All right, I'm going to watch the Food Network for five hours a week and I'm going to cook four new recipes a month." If I hit those marks, the odds of me achieving a goal of becoming a better chef are more reasonable. I think those apply to the smart goal principle being specific, measurable, attainable, relevant, and time bound. Yeah, just honestly I think once I, like I mentioned earlier, once I read this book, you just start seeing everything in leading versus lagging indicators. I think those lagging indicators stop feeling as important as they do initially if you're paying attention to your leading ones.

Troy Hollings: Yeah, because it's not, "Let me really, really think about how hard I'm going to run in this race coming up in six months." It's, "Did I do five runs a week?" Or whatever the example. No, I appreciate you sharing that. That is discipline too. I think if we're thinking about this whole principle, I



think that's one of the critical things. In anything, if you can focus on what are those leading indicators, the lagging indicators, you still want to measure them, we'll talk about that, but they almost take care of themselves.

Moving into discipline three, keep score. I guess I'm just revealing how cool I was as a child, but growing up, I like playing ping pong. We had a ping pong table. When I played with my mom, she's like, "Oh, let's just play for fun." When I played with my dad, we put \$5 on it. The night and day difference of just hitting it around versus these knockdown, drag out, I made a hole in the drywall one time diving to hit. I think I got the point, if I remember right. But what's the difference? Well, there's a power in keeping score. I think a critical part of this is, you can't just know what the leading indicators are.

You actually have to keep track of it. This has to be both the leading and lagging because you want to be able to see, "Okay, if I did those runs, am I getting faster?" But it also has to be simple. You could easily fall into the trap of, "Okay, well, I'm going to measure 25 different things and I've got this perfectly optimized, leading versus lagging." Sam actually created a sample dashboard that we'll run through, that is a sample scorecard. But this is just a quick screenshot of a wire frame of a dashboard. But as you can see, hey, what are the six things?

If that's the only thing you could focus on in the upper left, some leading, some lagging, that's all you could focus on. A few charts, few graphs to see progress. But this is where, and I think the book talks about how a football scoreboard is a great example, where anybody sitting anywhere in the stands can look up at a football scoreboard and know what's the score, how many timeouts, what quarter. If in doubt, simple, and this should lead to adoption.

Dave Jacobson: Hey, Troy, if I can maybe just add a little commentary on this. Maybe I'll spin it a little differently. You're speaking to it from a leading and lagging indicator perspective, but I'll maybe turn it a little bit. A lot of times when we talk about, you mentioned dashboard reporting, and this has been a conversation, a topic that has come up more and more frequently in conversations with many of our higher ed clients, is being able to show that scoreboard to a committee, a finance committee, an enrollment committee, a board.

I think of my own personal experience where you attend a board or a committee meeting and maybe there's a 50-page packet of information that's got budget versus actual. It's got a lot of detail, and it may have some narratives as far as why certain things are over budget or under budget or increased or decreased from the prior year. You may need the CFO or some other individual to walk you through and explain that. That is important information, but when you think about that dashboard example or that scoreboard, it's how quickly can somebody essentially determine how you're doing.

You look at a football scoreboard you know immediately who's winning the game, what quarter it is, how much time is left. That only took a split second to figure that out. When you think about developing dashboards, anytime we hear this concept of KPIs, key performance indicators, and KPIs can vary from institution to institution, but it's really looking at what are those key metrics for your institution. Again, they could be financial, they could be non-financial. If we were able to just do a one-pager or a dashboard and that somebody that was not involved in putting that together could look at it quickly and assess how the institution's doing on whatever that metric is, that's valuable.

I think that we're starting to have more and more conversations about that because I think institutions are struggling with, again, sitting on all this data. Data means different things to different people, but how can you boil it down to a few KPIs, put it on a dashboard so that anybody could look at

it and say, "Yes, we're doing good. We're achieving our goal. We're making progress towards the goal. Here's how much progress we're making." I just thought I would add that, Troy.

Troy Hollings: Yeah. No, that's a great example. Actually, one of our leaders in the data analytics practice, Ryan Merriman, had been with the CLA for 10, 12 years, something like that. But he tells the story of when the light bulb went off for him, he presented to a board committee and was going through some financial information, but he put it in dashboard form. Two, let's say grizzled old veterans approached him, and this was 10 years ago and said, "Son, this was the first board meeting that we didn't fall asleep in. Great job." It is, you want to have that exhaustive, all the information at the fingertips, but ultimately you also want to be able to look at it quickly.

Great point. Let's move to a quick polling question. If the answer's other, try to think through a few reasons that maybe people could have challenges to creating a compelling dashboard, but it probably isn't everything. If the answer's other, maybe throw it in. I think there's a place you can throw it in the chat, but why does your school have challenges not having a dashboard? Or, maybe you do have a dashboard. We'll give everybody a 15, 20 seconds to respond here. It's interesting, we got some responses coming in. Fair amount of people. This talk we're doing right now is a little bit on the assumption that you just can access the data.

When I introduce what CLA digital does, that second bucket data engineering in my Indiana summary, that's making system A talk to system B. A lot of times we do find that you have to spend some critical thinking and time on how to even get the data. It looks like most people are saying, the data's hard to get, maybe multiple system's inconsistent, maybe it's really manual to get it. Then, a close second is, a lot of times people have a strategy, but operationalizing it, if that's a word, and that probably ties into the second one of data just being hard to get.

Sam Bleyle: Troy, and somebody who's gotten to work on projects across multiple industries, I think you'd agree that this isn't just tied to higher ed. This is the common struggle for any industry, private, public sector, profit, non-profit, whatever it may be. The data visualization, the pretty pictures, that's just the very tip of the iceberg. It is all mainly being able to gather the data and be able to tell the story that you're trying to get out of it with it.

Troy Hollings: Yeah, and I think it's like the football scoreboard, the pretty pictures maybe even convey the most important parts, but to get that it's garbage in, garbage out. I think just to comment on that, I agree with you, Sam. I think in the past the thought was, "Okay, we're going to have this one central monolithic system where it's going to do everything that our business could ever need." I think now, especially with software as a service, with all these really specialized softwares, think of a CRM. If I'm a team of recruiters or fundraisers or sales people, I don't want to use my accounting packages, little CRM add-on.

I want to use a CRM like HubSpot or Salesforce. I think the world is shifting to this more best in breed, where HR has their own softwares, sales has their own softwares. I think just to comment on, yeah, we're seeing that across industries. Okay, appreciate all the responses everyone. This is the last discipline and this is the simplest in my mind. I don't think this is prescriptive. It's more of the concept and it's create a cadence of accountability. It's just the, what gets measured, gets managed. Even if I know what my goals are, if I know what my leading indicators are, if I have a scoreboard, but I never look at it and I know that my boss is never going to look at it.



I know that no one at the university is ever going to know if I go to this career fair or not, hypothetically, that's just a way different situation than even just knowing that. Whether it's weekly, whether it's every other week, whether it's a team meeting. You all know your organizations better than we do, but just the concept that if you want it to get done, just double check it and manage it. Any comments, anyone, Sam, Dave, on that?

Dave Jacobson: I would just add that many times when I think of accountability, I need to think of it just in our own business or in my own group. Many times when you have somebody who the leader or whoever the boss is that's saying, "Here's what we're going to do and we're going to hold people accountable." Many times if it's team based and you feel like the individuals are committed to the team, I've just found that from an accountability standpoint, nobody wants to let the team down. It's different than you were tasked to do something and you're not sure exactly why. We talked earlier about people don't always, only 15% of employees know what the most important goals are.

You're told to do something and you're saying, "Well, I'm just doing this because somebody told me to do it." But many times if it's team based and you're part of a team, there's a building accountability there because people generally don't want to let their team down. They're committed to the goals of the team. To the extent, you're able to shape it in a team based way. I've always just found that there's some built-in accountability from that perspective.

Troy Hollings: Yeah, I think that's a great point and good segue into this example. Ultimately, we're going to lay out this real situation, though some of the names and details have been changed to protect the innocent, but this is a project based on a project that a bunch of us worked on. But then, yeah, great point, Dave. We're going to walk through building a sample scorecard, what that might look like. Then, Sam actually created a sample living power BI dashboard that we'll quickly go through just to illustrate. But even further than that, sometimes if you're in leadership, you're just not close enough to the problem.

If you come down and just mandate, "Oh, this is what you need to do." You might just be wrong too. I think, yeah, collaboratively created is very important. That's a good point. Alrighty. Okay, so higher ed example. Again, this is based on a real school, but then we're going to use our imaginations for parts of this too. Imagine, I'm in Indiana, so is Sam, Community College in the Midwest. They've got eight different campuses and the problem that they're trying to solve is at each of those campuses they have teams of recruiters and some of those recruiters are doing really well. Some of the campuses seem to have it figured out, others don't.

Others maybe have one star performer and a bunch of recruiters that can't really get it figured out, and they're trying to figure out what's going on, why. The standard answer from some of these folks is, "Hey, we're a community college. We follow the economy. The economy's good and we're not really ... It's out of our territory or it's out of our hands." In other words, bad territory. Another answer that these people have been giving as well, "It's just unclear roles and responsibilities. Am I supposed to go to all these career fairs? What am I supposed to do as the recruiter?" A few others that you can read. That's the situation.

You're a community college with a bunch of different recruiters, eight different campuses, and it's really inconsistent and you want to figure out, how can we recruit better? Imagine in that situation, you first have to do a little bit of analysis, okay? Because eight different campuses, we'll say, across the State of Indiana, there's going to be some that are really rural. A really rural campus is probably going to



have different recruiting events or different recruiting activities than a campus in downtown Indianapolis. You do a deep dive. You do an analysis. Let's just pretend that some of those takeaways are that first thing I just said, different types of campuses.

Some things that work fantastically well at one, don't work at all at another. Another thing you'd find from this situation is, unclear measures. Now, what are those recruiters actually supposed to be doing on a day to day basis? Another is, no accountability. Maybe even hypothetically someone might have asked the question, if they don't hit their goals, what happens? The answer was, nothing. Again, to echo data in multiple systems, it's hard to collect. Multiple types of activities could lead to recruitment. That's where we're at, that's the problem. Then, let's walk through how thinking about data analytics through the lens, through the mental model of Four DX might be able to shed some light on this.

Let's say that this community college system goes through this effort, each campus commits that, "You know what we need? We need to identify our goals, which is recruit more students, but then we need to figure out what are those leading indicators. For us, specifically, that we'll turn into increased recruitment." Maybe you lead a workshop or maybe some workshops get led. Then, ultimately, let's walk through building a scorecard and what that might look like. All the while keeping in mind, none of this is going to work unless there's that continued accountability. Sam, I'm going to jump to the next slide, but anything you want to add on that?

Sam Bleyle: No, I think that's great.

Troy Hollings: Okay, so this is where we got to put our imagination hats on. But let's just think through a hypothetical example of, I'm a recruiter at XYZ community college campus, and my target that I might or might not have been hitting is five new students recruited per month. Now, I know that maybe it comes in lumpier outcomes and it's not an average every month, but just imagination. What are some of those activities that could turn into that? Well, in this really simple example, let's just say that there's two activities, high school visits and sending emails to the email list of people who have been interested over some period of time.

Now, I think what Sam was talking about with the running example, I think that part of the key here is you actually have to do the math and do the assumptions of what you think. If your goal is five new students recruited, well, okay, how many students that apply end up going there? Okay, let's pretend eight students have to apply. Okay, well, if you have eight students apply, how many opportunities in your CRM do recruiters have to create? Okay, well, let's just say it's about half of the people who become opportunities in the CRM actually apply. Let's just say it's 15.

You can read that, but you got to walk it back to, okay, well, how many leads? Ultimately, walking it all the way back to, what are those leading activities on a per week or per month basis that me, Troy, the recruiter needs to take? I think Sam and I were chatting about this before this talk, but I remember long ago my first job out of college, I was an intern and I had about 10 hours of work to do per week over a 40-hour work week. I'll tell you, there's nothing more stressful than showing up, not having enough to do, but pretending to work. It's way better, it's a way better situation to know, okay, per week what do I need to do to be successful?

Then, you can adjust the metrics if they're not working, this whole iteration concept. That's how you might think about setting it up, but let's jump to Sam, if you could share ... Or, maybe what does something like this look like? Before you do that, I think the only caution that I just want to throw out to everybody is, this is not supposed to be, "Hey, this is a dashboard that CLA can sell you today." We could

probably help, but this is more of an illustrative example that we're using recruiting. But you could apply this to fundraising, you could apply this to multiple other problems broader than this. Think recruiting, but also think what's the principle. Take it away, Sam.

Sam Bleyle: Thanks, Troy. That coming through?

Troy Hollings: Yup.

Sam Bleyle: Troy, is that coming through

Troy Hollings: I can [inaudible] myself, but yes.

Sam Bleyle: All right, great. Thanks. Yeah, so just to go off what Troy said, don't get lost in the data too much as it is just for show and tell here. To walk through how we usually approach dashboards like this. When it comes to data visualization, it's similar to how we read a book or the newspaper. We read top to bottom, left to right. That's why we want to keep those KPIs, those leading and lagging indicators up in the top left. Moving over to the right, you get more of a detailed view of your data that you can look at more granular level.

Down in the bottom left, it's good to have something that's trending over time so you can see trends or irregularities in your data. Not only from a perspective of performance, but also it could be poor data entry. Then, over in the bottom right, looking from a, this is similar to a pie chart, but it just has multiple layers to it. Just to explain on that more. The size of the box is based on how many students a recruiter reached out to, Fernando reached out to 395, but the darkness of the box is based on how many students they were able to recruit.

As you can see, as you would expect, the more students they've reached out to, the more that they were able to recruit. But we can see that's a little different for Rhiannon, who reached out to less students but was able to recruit more. Same with Daniel.

Troy Hollings: Let me ask a quick clarifying question, Sam.

Sam Bleyle: Yeah.

Troy Hollings: If I'm summarizing what we're looking at broadly right now, so we're looking at leading and lagging indicators. On the leading side, from that slide I just had, we're actually looking at month to date high school visits across all the recruiters. Right now, this view would be, I'm in leadership and I want to look at, "Okay, how are all the recruiters doing across my whole campus?" I can see how many high school visits, how many emails they've sent. Because again, in our made up example, those are the two inputs. But then, I can also see, "Okay, what's the team doing from a lagging perspective.

Your month to date, how many have they recruited? How many leads do they have in the system? How many opportunities?" But then, I also can maybe drill down to specific students or specific recruiters. That's great and that's helpful. But let's say you've got ... Yeah, maybe pick a recruiter or show the ability to drill into a top performer and then someone who's struggling and let's look at that data.

Sam Bleyle: Yeah, let's look at Fernando, the top performer here. Now, this is broken down into the high schools that he was able to recruit from and we can now compare his leading indicators to the prior



year. He's doing more than he did last year, but month to date, just one less student recruited. But you know that can fluctuate.

Troy Hollings: If I'm Fernando's boss, I'm looking at this and I'm saying, "Okay, he's done the activities." Because there's always that fear of, "Well, they're getting the lagging results, but is it luck? Is it a flash in the pan?" But I'm seeing, "Okay, he's doing the activities, he's visiting the high schools, he's sending out the prospecting emails. He's on pace, he's the top performer. These are the schools that he's recruited from. I'm pretty confident he's on track." Is that a fair summary?

Sam Bleyle: Yeah. When you use the trending analysis, like we have down here on the bottom too, you can still be able to tell that story. Right? Like, "Okay. Yeah, he's behind on month to date students recruited compared to prior year, but overall for the year, he's way above where he was last year."

Troy Hollings: Got it. Maybe compare that to someone who might be struggling a little bit.

Sam Bleyle: Take a look at Eileen.

Troy Hollings: Let's see. If I'm understanding this, so she's ... because this is also partly diagnostic too. You could see someone who's doing all the leading indicators and you know that, "Hey, Fernando's doing them and he's having results. Eileen is, I think, she's actually visited more schools month to date, but she's less successful." That would be a clue of, "Oh, okay." I think she's even sent more emails there, but she's not having the results. It's like, "Okay, well, let's coach her on the training and technique." Is that fair or what am I looking at?

Sam Bleyle: Yeah, absolutely. Yeah. I think what's good about having more than just the leading and lagging indicator values is that you can then identify, "Okay, well, what do you think is the reason driving that?" Maybe you have that conversation with them. Are they a new employee that's still being trained up or are they having to spend more time on administrative tasks now that they moved up to more of a leadership position of training other individuals who are coming on as new hires? Not only does it help you track performance, but it also helps identify when to reach out or who to reach out to to identify possible issues that are leading into not driving the results. Even though you're hitting those leading indicators.

Troy Hollings: Right, and it could be, let's say you're trying to get faster in your running example and you're doing all these runs every week well and you're not getting faster. Well, that could be, maybe your leading indicators wrong, maybe what you thought was the leading indicator, maybe you're over training. But if you know, like in this example we just talked through, if you know that Fernando's doing this and he's having results, a bunch of other people are doing this, they're having results, that maybe suggests that it's more of this technique for this recruiter. I think that's good stuff. Anything else you want to call out on this? I want to make sure we leave enough time for questions.

Sam Bleyle: Yeah, when it comes to the scorecards and comparing individuals to one another on performance of leading and lagging indicators, I know there can be mixed feelings on whether or not that creates a hostile or competitive environment, that causes people to burn out or feel uncomfortable. But with experience I've had from an internal company perspective and from a client perspective, I think it actually has helped clear views for what the company goals are. Back to what Dave said earlier, about the 15% knowing what the company's goals are. When it becomes clear of what benchmarks you're trying to hit.



I think when it comes to annual reviews, performance reviews, it will remove the surprise if you say, "Hey, you weren't doing what we quite expected you to do for the year." But if you're able to track on a daily, weekly, or even monthly basis of these indicators against your coworkers, it takes away that worry of, "Am I doing enough or am I doing too much? Can I step back a little bit? Am I pouring in way more than I really need to be doing, or do I need to step up what I'm doing?" That's just something I wanted to toss in there when it comes to comparing folks and having the transparency.

Troy Hollings: No, I think that's a good point, because I feel like there's a feeling that with increased data analytics, you're putting people in buckets. You're making efficient decisions with people as opposed to with process. I actually agree with you that it's the opposite because whenever I hire somebody, I tell them that, "Hey, all I need you to do is have a good attitude. Try your best and be coachable. We can figure out the rest." If you go look at this and you see somebody's doing all the activities but not having the results, now you actually have more insight into, "Okay, well, look, they maybe need a little bit more training."

Or, "Have you thought about this? Have you thought about that?" As opposed to if you don't have any of that, it's just a surprise. No, I think that's a good point. Before we get off this, Dave, anything you want to add here?

Dave Jacobson: No, I think you guys covered it really well. I guess just for our audience, I think as Troy had said, I think at the onset, don't get hung up on this is just an example from a recruiting perspective. This could be applied, the theory and the logic and this even dashboard design could be applied to so many different things and either challenges or initiatives that you have in your institution. You have to think a little bit outside the box in terms of how these leading indicators versus lagging indicators maybe apply to some of the things that you're doing at your institution. Hopefully, you found that helpful. But Troy, I don't have anything specific to add on that. I think you guys articulated it really well.

Troy Hollings: Great. Appreciate it. Then, I think from us, I think the real goal here was to just give you a behind the scenes look at how we think about data analytic projects. Obligatory, CLA can help, so if you are trying to figure out what are those KPIs or you don't even know what you don't know, it might be helpful to have someone lead some discovery sessions, build some dashboards, happy to help. But I think with that, maybe we've got eight minutes, any questions from the audience? We got a comment here of, they use WebFocus for reporting and very few people on campus understand the language. Complicated, not user friendly.

Yeah, I think it's not exactly a question, but I can comment on that. I built some dashboards for some people on my team and I told them, I said, "Hey, if you're not using the dashboards, that's actually the dashboard's fault. Tell me and we'll adjust and we'll change it." Because yeah, the whole point in all of this, is it user-friendly? Is it like that football scoreboard as opposed to the 50-page audit committee presentation? Thanks for the comment. Let's see.

Dave Jacobson: Hey, Troy, maybe I'll even throw out something.

Troy Hollings: Yeah, go ahead.

Dave Jacobson: A question for you just based on experience that you have or that Sam has. Because this question comes up periodically is, if an organization's looking at developing a dashboard, are there ways to restrict the usage of the dashboard to certain individuals? Or, how do you define who the potential users are of a particular dashboard if that's built either within a system or outside of the system?



Troy Hollings: Yeah, so maybe let me give a quick answer and then, Sam, you can comment on this too. What the dashboard Sam showed was built in Power BI. Power BI is a Microsoft product and so it will natively integrates to your Office 365 licensing. You actually can tie in user permissioning into the dashboard, so Dave and I and Sam could all look at the same core dashboard. No programming change is necessary, but just based on the user provisioning I'm going to see something that leadership thinks I should see. Dave maybe gets the whole view, Sam, maybe he's allowed to see one thing.

Yeah, that's a great point. It's really build the structure but then filtering is how you end up getting this down to those granular, repeatable views on specific problems but also by people, so good point. Anything you want to add on that, Sam?

Sam Bleyle: Yeah, Troy, I think you described that well. I think there's two pieces that you can do with Power BI when it comes to what they call row level security. When you publish a dashboard like this, you publish it within a workspace. A workspace, think of it as just like a folder. Yeah, you can actually choose who you want to have access to that folder. You could have one for different departments that only have access to that, but then within that dashboard itself you can apply row level security based on a table that has whatever type of hierarchy you would like. If it's five employees roll up to 10 different managers each, then those five employees can only see their own view of it.

But then, at the manager level, they can see all the folks that report up to them and then the vice president who's above that manager can see all the managers that roll up to them and then so on and so forth.

Troy Hollings: Even in your previous example of, because it is a case by case basis and the institution probably needs to use their judgment, but let's just pretend that rather than being able to see, Troy the individual recruiter being able to see Sam the recruiter's performance and activity and all the other recruiters. Maybe make the decision, "You know what? You're just going to see your own, you're not going to really see everybody else is." What you are saying is that can be baked into the dashboard with row level security. It's not like you're building 20 different dashboards for each recruiter, it's just setting up the permissions. Is that a fair summary?

Sam Bleyle: Yeah, absolutely. Right on.

Troy Hollings: Great. A couple other questions here. I just want to make sure, we got three minutes, so I'll try to knock these two out. Let's see. One is dashboards can be difficult because we tended to do multiple things. I think we focused on lagging indicators. Yeah, it's a great point. Those are the ones that you're praying and hoping that fundraising comes in at the number you need, but you don't feel like you have as much control. Good point. Go Phillies. Thank you Mary Beth. Last question, what dashboard systems do you see most commonly in higher ed? I think it depends. Everybody's trying to figure this out.

Totally, honestly, I see a lot of schools trying to use their student information systems report writer to do dashboarding, which can be a decent idea except for you can only really report on the data in your student information system. If you're pulling data from multiple systems, it's really difficult. Let's take that aside. I'd say, and Sam, you can add some of these, but Power BI I'd say is probably the number one, Tableau, Qlik, Domo. Anything else come to the top of your mind, Sam?

Sam Bleyle: I know Salesforce is becoming a bigger player in the higher ed space. They, I would say, have more advanced data visualization capabilities than some of the other ones that are out there



currently. But yeah, just to hit on your point of what holds you back with utilizing those visualization tools is that you're limited to the data within that system. Maybe you have the ability to import small amounts of data from other sources into it, but most likely you won't. Using a tool like Power BI or Tableau gives you the ability to pull in from different data sources to be able to tell a story beyond just possibly student information.

Troy Hollings: Yeah.

Sam Bleyle: That's something to think about when you're using those tools. When it comes to the average project timeline, I think that really depends on what piece of the project we're talking about.

Troy Hollings: Yeah, and actually, we've got like 20 seconds and then I know we'll get the hook. If you want to know the answer, there'll be something that pops up that says, do you want to be contacted by CLA? Happy to have an actual conversation. There's a couple other questions in there too that ... we all had questions right at the end. Really appreciate everybody's time. We pretty much had full engagement. Everybody's stayed the whole time, so I feel the love and thank you very much.

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