

Developing a Data Dashboard

The Art and Science of Making Sense

By David Hunnicutt, PhD



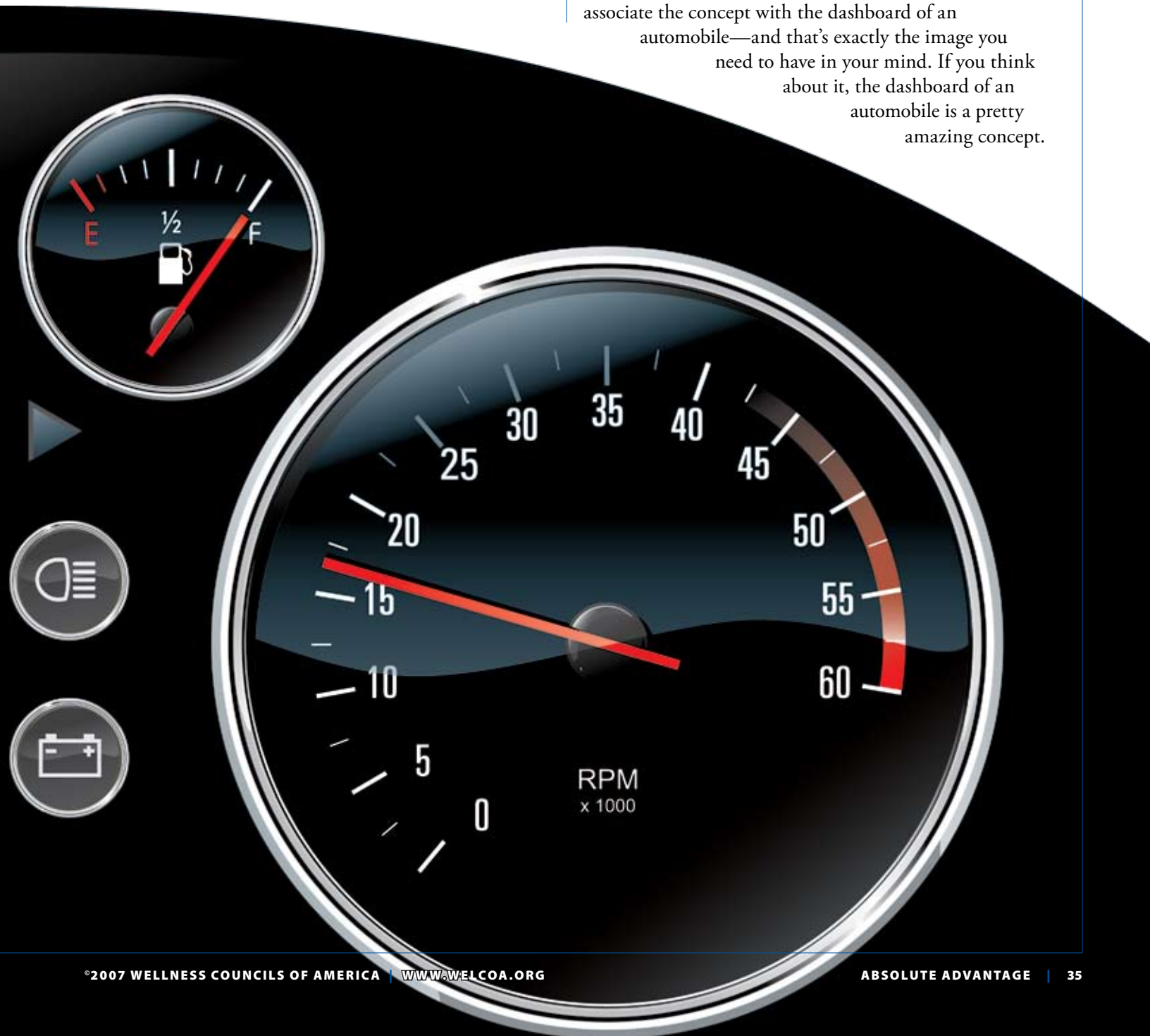
If you're looking to build a results-oriented wellness program, you'll need to collect data—a lot of it. Therein lies the challenge. It's a big job to put data collection mechanisms in place within your organization. But, believe it or not, once these systems are actually in place, it can be an even bigger job communicating the findings to those who need to be kept in the loop. Thus, once you have your data in hand, your challenge is to develop a communications methodology to make sure that stakeholders throughout the organization know what the numbers are and what they mean.

Perhaps the best way to ensure that everyone is kept in the loop is by developing a data dashboard. This article will discuss the art and science behind the concept of developing a data dashboard.

Defining The Data Dashboard

Data dashboards have been used in the business world for decades. However, the concept is still relatively new in the arena of worksite wellness. If you're unfamiliar with this concept, it should be reassuring to know that it is pretty straightforward. Here's a quick overview.

When most people think of a data dashboard, they associate the concept with the dashboard of an automobile—and that's exactly the image you need to have in your mind. If you think about it, the dashboard of an automobile is a pretty amazing concept.



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After all, even the most modest of motor vehicles have thousands of parts. All of these parts need to work together in order for the automobile to function properly. The interesting thing about the dashboard is that it provides you with the important information you need to know about how your automobile is functioning at a single glance—without having to understand how each of the individual parts work together.

For example, when you're driving it's not uncommon for you to glance at the dashboard dozens of times during even the shortest of trips. That's the power of the dashboard. In a single glance you can get the information you need to make sure that your vehicle is operating safely and legally. And, while it may take you some time to get your bearings when you're first learning to drive, with a little practice, you don't even notice how often you're processing the information contained on your automobile's dashboard.

If we zoom in on this concept a little further, we find that most people can operate this very complicated piece of machinery for years without ever having to understand anything about mechanics or automotive technology. In fact, with five pieces of information, it's possible for people to drive safely with little worry. Indeed, if you know how much gas you have in the tank, how fast you're going, how many miles to your next service, what gear you're in, and whether or not your lights are on, you're pretty much good to go.

A data dashboard for your worksite wellness initiative will work in much the same way.

Developing Your Data Dashboard

We recommend that every organization develop a data dashboard using the metrics associated with your particular worksite wellness program. Systematically, one of the first challenges in developing your data dashboard is choosing which metrics you're going to focus on. While there's no standard answer to which metrics you should use, we do have some suggestions.

► Health Risks

One set of metrics that lends itself beautifully to the data dashboard concept is the risk status of your employee population. Now here's where simplicity must rule the day. There's no question that your employees have diverse health histories and numerous modifiable and non-modifiable risk factors. Trying to communicate all of this information with a huge amount of detail is virtually impossible. However, if your employee population can be categorized into three basic groups—low-risk, moderate-risk, and high-risk—you've got the beginnings of a great data dashboard.

For example, imagine how easy it will be for your stakeholders to obtain a snapshot of the overall health of your workforce by looking at these three simple pieces of information. In a single glance, it will be possible for your company's decision-makers to know exactly what percentage of the employee population is at low, moderate, or high-risk.

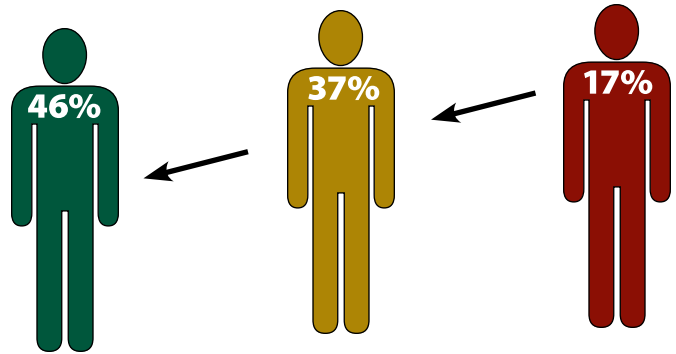


ABC Company Data Dashboard

1

High-Risk To Low-Risk

The first section of your data dashboard should be an overview of your employee population concerning what percentage is considered to be at high-risk, moderate-risk, and low-risk.



2

Modifiable Healthcare Expenditures

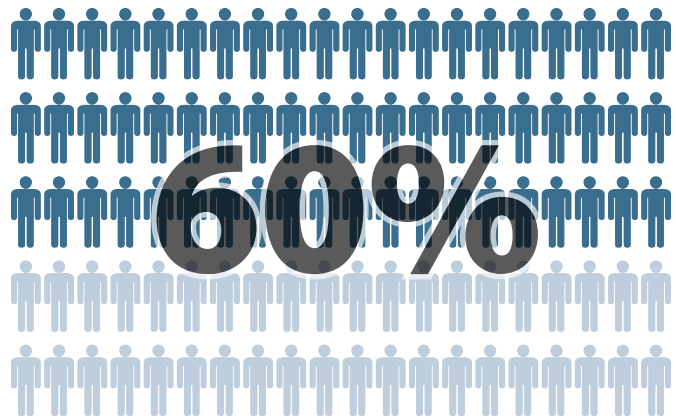
The second section of your data dashboard should be a summary of the modifiable healthcare costs your organization is incurring.



3

Participation Rates

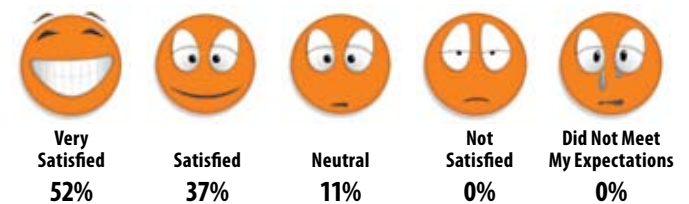
The third section of your data dashboard should present the participation levels as it relates to your company's health promotion initiative.

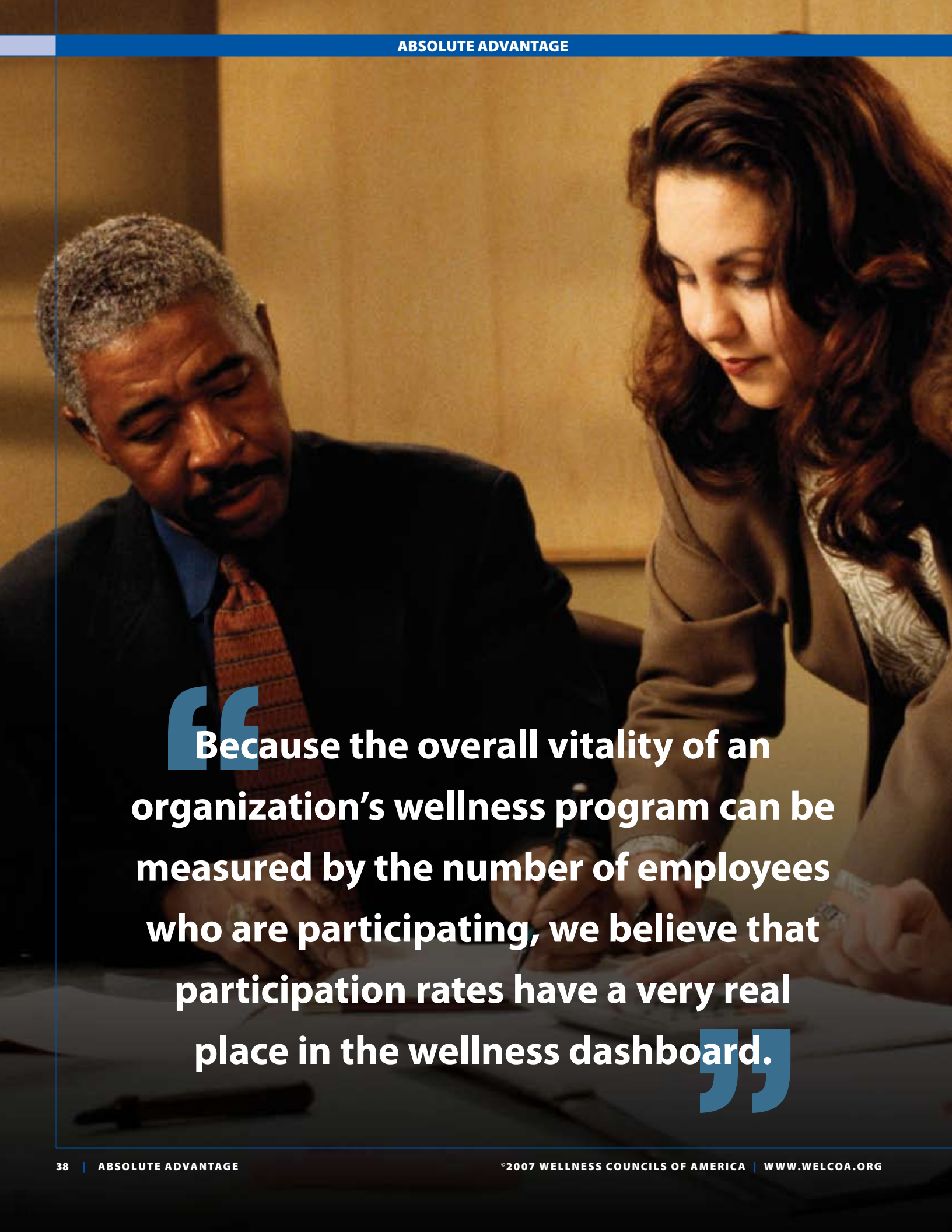


4

Participant Satisfaction

The fourth section of your data dashboard should communicate the percentage of employees who are very satisfied and/or satisfied with your company's wellness program offerings.



A photograph of a man and a woman in business attire. The man, on the left, has grey hair and a mustache, wearing a dark suit, blue shirt, and patterned tie. The woman, on the right, has long, wavy brown hair and is wearing a brown blazer over a patterned top. They are both looking down at a document on a desk, with the woman holding a pen as if writing or pointing at something. The background is a plain, light-colored wall.

“ Because the overall vitality of an organization’s wellness program can be measured by the number of employees who are participating, we believe that participation rates have a very real place in the wellness dashboard. ”

▶ Modifiable Healthcare Expenditures

Another excellent metric for your data dashboard is the dollar amount of your modifiable healthcare expenditures. Although this is a little more of a sophisticated analysis, you need not be intimidated by it. Specifically, a modifiable healthcare expenditure analysis examines your existing medical care claims. Using specific algorithms, this analysis will determine what percentage of your company's overall healthcare claims are potentially modifiable. While not going too deep, it's not uncommon for 30-60% of an organization's total healthcare expenditures to be potentially modifiable. Nine times out of 10, your CFO will find this number very compelling. In fact, in our experience, we've found that this metric can be extremely valuable to an organization because it provides leaders with a specific dollar amount that can be reduced through comprehensive worksite health promotion initiatives.

Now imagine how this modifiable healthcare metric can be used within your data dashboard. In addition to understanding what percentage of your employee population is at low, moderate, or high-risk—by including this metric—your executives will also be able to see what percentage of the organization's total claims are potentially modifiable through comprehensive health promotion programs.

▶ Participation and Participant Satisfaction

Another metric that lends itself wonderfully to the data dashboard concept is participation and participant satisfaction. Because the overall vitality of an organization's wellness program can be measured by the number of employees who are participating, we believe that participation rates have a very real place in the wellness dashboard. And by providing participant satisfaction data (perhaps in the form of those who were satisfied or very satisfied), executives can have an even better grasp on how well your program is functioning.

▶ Other Potential Metrics

We've suggested four potential metrics that can get you started with your data dashboard. Needless to say, depending on your organization's industry and specific health concerns, your data dashboard may contain additional and/or different metrics. These metrics could include absenteeism rates, healthcare utilization, employee engagement, health culture audit results, just to mention a few.

Formatting Your Data Dashboard

Once you've defined the metrics that will be included in your data dashboard, it's time to concentrate on formatting. This is where you're going to want to spend some time to make sure that your dashboard is streamlined and elegant in its appearance—much the same way your automobile's dashboard is presented. Specifically, your dashboard should fit on one page and it should include more graphics than metrics. Remember, if people want more detail, they can read the wellness program's annual report or dig deeper into aggregate reports and excel spreadsheets. The dashboard provides a one-page visual of the overall health of your company's wellness initiative, and you should be able to read it in less than 15 seconds.

To develop a dashboard that's both informative and visually attractive, we suggest spending some time sketching your ideas. Again the concept here is to present a visual that everyone knows what it is when they get it, and they can read it in just a few seconds. If you're fortunate enough to have a graphic design department, they can help you with this. If not, we've provided a snapshot of what a data dashboard could look like in this article.

Once you have a working prototype of your dashboard, it's time to get some feedback. I would suggest running it by a sample of the people who are going to actually be reading it. Be prepared to listen carefully and take some serious feedback. Your executives can help you immensely by giving you their overall impressions. You've got to be willing to take the feedback constructively and use it to make your document better.



Communicating Your Data Dashboard

Once your wellness dashboard has been defined and formatted, it's time to start communicating the metrics to the organization. To ensure that executives understand how the dashboard works and what information is contained in it, it's ideal to have perhaps a 30-45 minute orientation session. This can be accomplished by getting on the agenda at senior staff meetings or incorporating this presentation into an annual strategic planning retreat. If you feel like you don't have the power to get on these agendas, it's time to start working closely with those who can get the job done. It may even mean handing the dashboard concept off to a senior-staffer who can carry the ball from there. Remember, the dashboard is all about communicating a shared understanding of how the wellness program is doing. It's not important who shares the information with the organization's stakeholders, but the important thing is that the information gets shared. In fact, in our experience, we've worked with dozens of astute wellness practitioners who have brilliantly

“Keeping to an unalterable schedule is a critical concept in successfully developing and promoting your wellness data dashboard within the organization.”



developed top-notch ideas and empowered others to get the job done. While many times people don't see it, this is the idea of managing upward and it is a critical talent for wellness practitioners—especially if you want your programs to take hold within the organization.

Promoting Your Data Dashboard

The final step to fully integrating a wellness dashboard into your organization's culture is regularly promoting the data dashboard. By promoting, we are referring to the notion of disseminating important information so that stakeholders can be updated often enough but not too often. For many, data within the dashboard is communicated quarterly with more comprehensive information occurring on an annual basis. This seems to be a very good interval as a lot of other important business data is communicated on a quarterly basis.

If you make the commitment to communicating on a quarterly basis, it's important that you get the job done. If you want to be taken seriously, you'll have to follow through with the information on time. Indeed, just imagine how the company's shareholders would react if the company were late with the earnings report. We can assure you that this would only happen once. Keeping to an unalterable schedule is a critical concept in successfully developing and promoting your wellness data dashboard within the organization.

Summary

In this article we have discussed the notion of developing a data dashboard for your wellness initiative. To accomplish this task, it's important that you address what metrics will be included, how the dashboard will be formatted, and how often the metrics will be communicated. We're convinced that a data dashboard is the way to go. If you'd like to learn more about developing data dashboards, we encourage you to look into the mainstream business literature as well as contact practitioners who are leading the charge in some of America's healthiest companies. ★



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