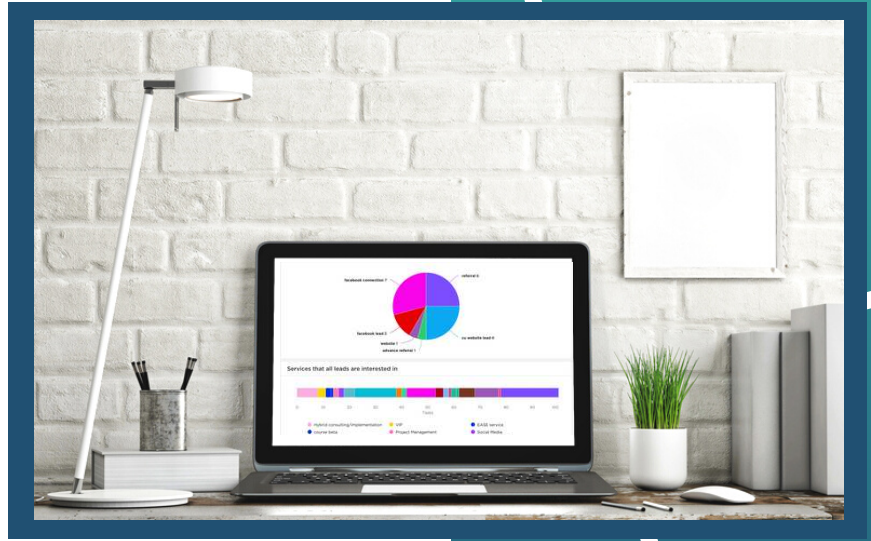




New Leaf
Digital



CLICKUP WORKSHOP SERIES

Dashboard Planning Workbook

ClickUp Data-Driven Dashboards Workshop

Given by Meagan Beltekoglu,
Vetted ClickUp Consultant and
Certified Director of Operations

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A B O U T
Meagan

I'm a vetted ClickUp Consultant and Certified Director of Operations and I love helping women-owned businesses create simple systems in ClickUp so that they can scale faster and save time and money. I've helped many businesses streamline their operations which has resulted in them increasing their revenue, saving time, and working more productively.



"WORKING WITH MEAGAN WAS LIKE BEING
GIVEN A FLASHLIGHT IN A DARK MAZE."

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Welcome!

This workshop will teach you how to create strategic ClickUp dashboards. More than just client portals, the data presented in ClickUp dashboards can be used to guide focused and impactful decision making based in data.

ClickUp dashboards are powerful and flexible. They can be used to get a close look of your leads and active clients, to help you breakdown a feedback survey, or measure team productivity.

This workbook will guide you through the creation of these dashboards. First, I'll share a little bit about how dashboards work inside of ClickUp. Then, I'll explain the widgets you'll use the most frequently. After that, I'll give you a list of simple KPIs you can track in ClickUp. Doing this in ClickUp, which is already the hub of your business, allows you to use all that data you've already been collecting to create functional dashboards where you can quickly and easily see where things are in a certain area of your business and make a decision which moves the needle. I'll show you exactly how I do this in the live workshop and we'll have time for Q&A.

To get the most from this workshop, please read and complete this workbook beforehand and have it with you so you can easily refer to it. Note that it is a fillable PDF so you don't have to print it.

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01

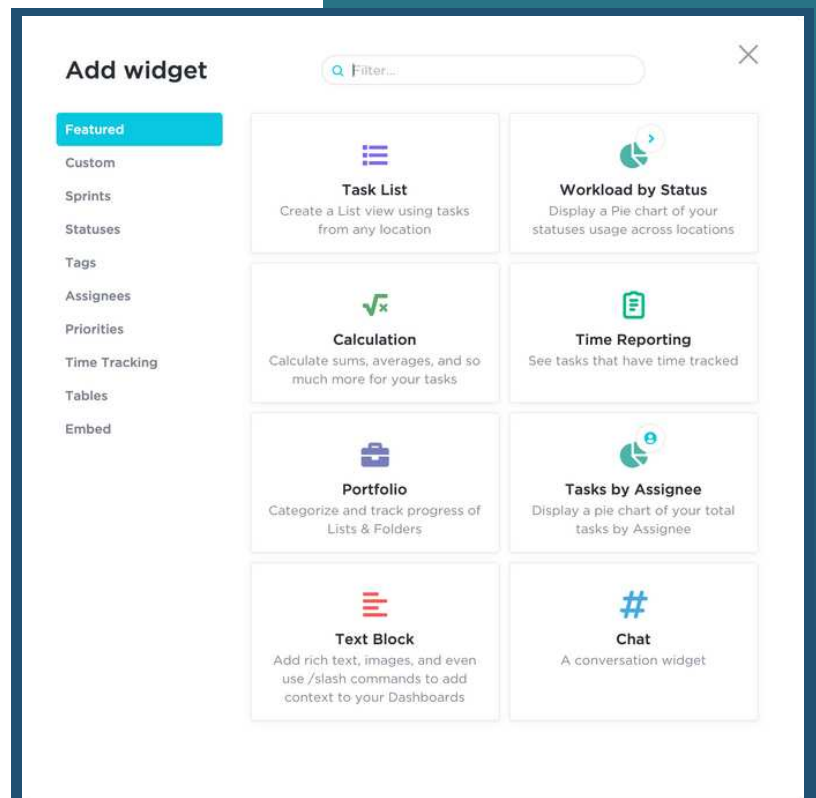
What are Dashboards?

Instead of being high-level overviews of everything in your workspace like a regular dashboard, **data-driven dashboards** are tightly focused overviews of a certain area of your business.

Dashboards consist of **widgets**, which are the building blocks of dashboards.

The widgets are organized into 10 different categories, which you see on the left side of the image.

Each widget has its own settings, so you can choose which space, folder, or list the widget is used for. Some (but not all) widgets also have to ability to filter and sort the data presented.



02

KPIs and Data

Before you dive deeper into setting up your data-driven dashboards, it's important to first STOP and ask yourself – what is important for my business to track so that I know we are achieving a key goal or target? In other words, what are your KPIs?

What's a KPI? A KPI is a key performance indicator used to track your performance in achieving a key goal or target. KPIs help you determine how well you're performing in the areas that matter the most to you. They are quantitative, specific, and have a desired outcome.

In order to track how you are progressing toward this strategic goal, you use a performance indicator like a KPI. Since you probably either have a lot of this data in ClickUp already (or you can start tracking it there), a ClickUp dashboard is a great place to take a quick glance and see how you're progressing toward this goal.



Here is a list of 17 simple and powerful metrics you can track in ClickUp. Add in a specific measurement and you've got yourself a KPI!

Check off the ones you're interested in tracking in ClickUp.

S A L E S

- Number of new leads in a specific period
- Number of leads from a specific platform
- Number of leads from a specific industry
- Customer lifetime value
- Lead to client conversion rate
- Daily total sales
- Services bought in a specific period/Deals over time

C U S T O M E R S E R V I C E

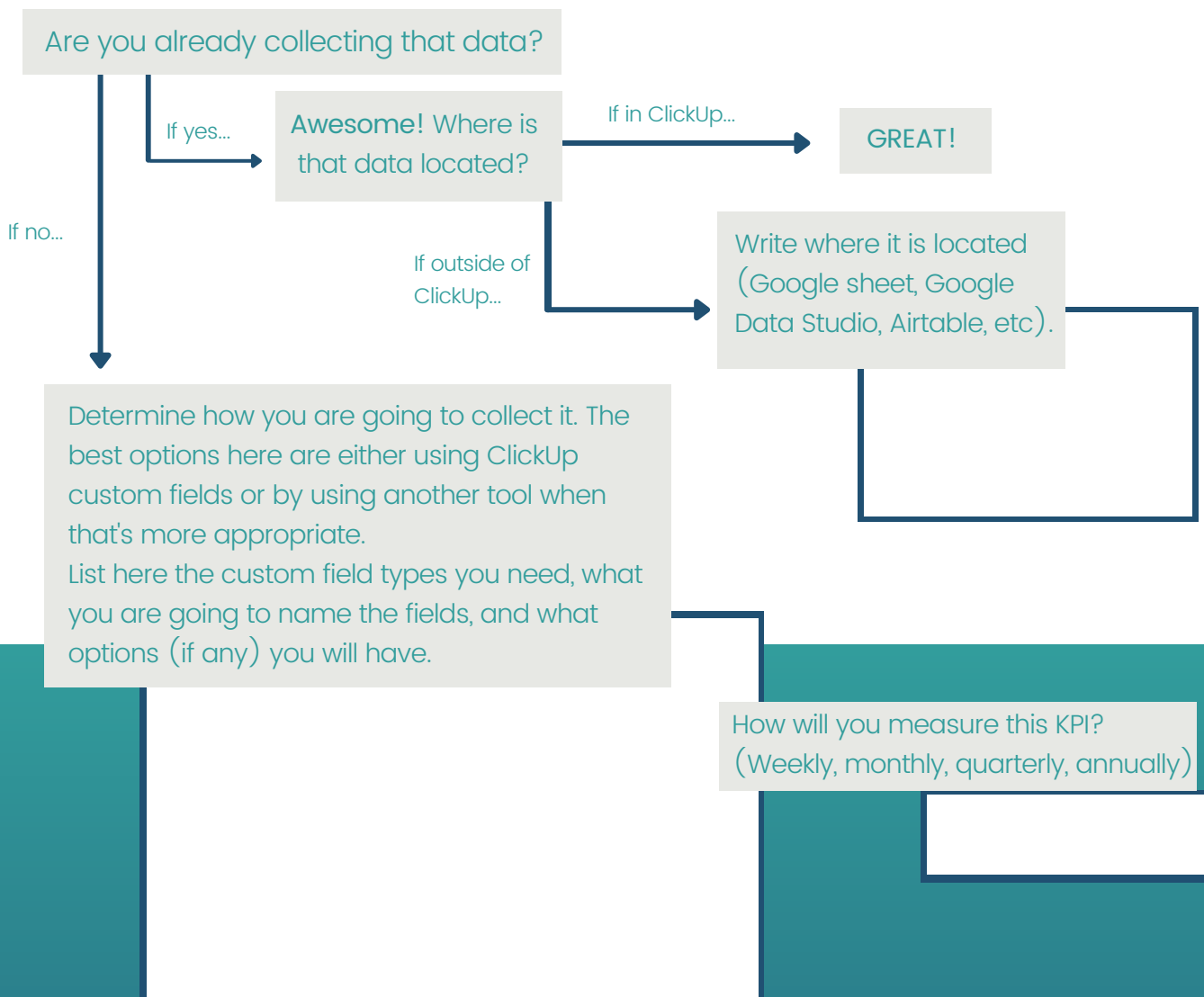
- Number of customer issues
- Total tickets vs open tickets
- Unsolved tickets per employee
- Customer satisfaction

T E A M

- Number of completed tasks/Completed Report
- Who's Behind
- Number of tasks worked on
- Workspace points for gamification of certain activities in ClickUp

Now, on to data collection...

What data do you need to collect to track your KPI performance?
Using one of the KPIs you selected on the previous page, list the data you need to collect below.



03

VIWs

These are the VIWs (Very Important Widgets) widgets which will be the cornerstones of your dashboard.

- Line Chart
- Bar Chart
- Pie Chart
- Battery Chart
- Calculations

Write here what widgets you expect your dashboard to need. Try to visualize how it would be best to see the data.



Line Chart

Custom line chart with any data



Bar Chart

Custom bar chart with any data



Pie Chart

Custom pie chart with any data



Battery Chart

Custom battery chart with any data



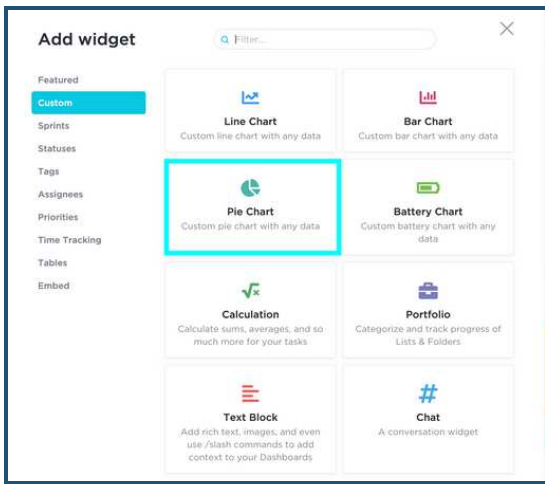
Calculation

Calculate sums, averages, and so much more for your tasks

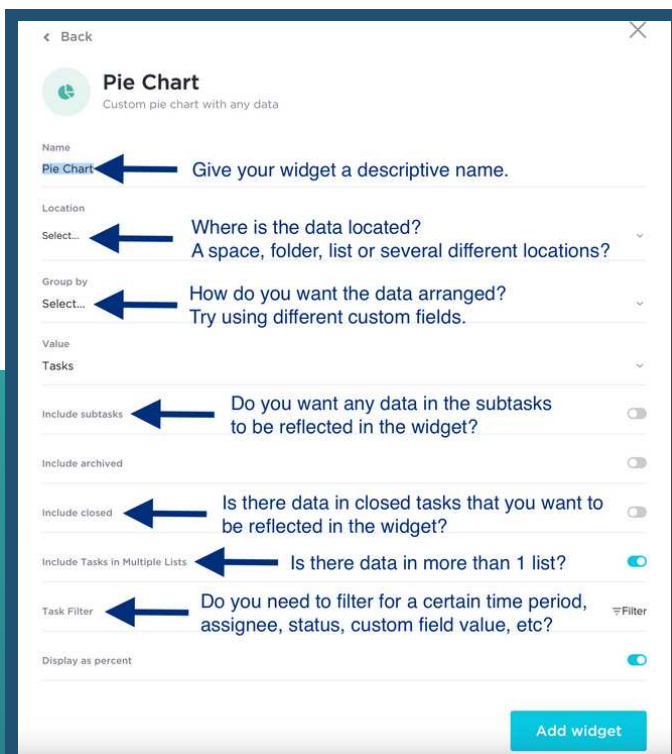
Setting Up Your Widgets in Your Dashboard

If you are tracking a lot of data, you may want to create one dashboard for each department. If you are focusing on a few KPIs, you may want to put them all in one dashboard. Do whatever makes the most sense for your unique business!

STEP 1: Create a new dashboard and then go to + ADD WIDGET. Most of the widgets we will be using are easily found in the custom section. Click on the widget you'd like to add.



STEP 2: Configure the widget settings



STEP 3: Repeat this for each widget you add

- Configure the settings
- Add a filter (optional and not available for all widgets)
- Sort (optional and not available for all widgets)

You may wish to add a text widget which includes the following:

- KPI Description
- KPI Owner
- KPI formula
- KPI data

04 Conclusions

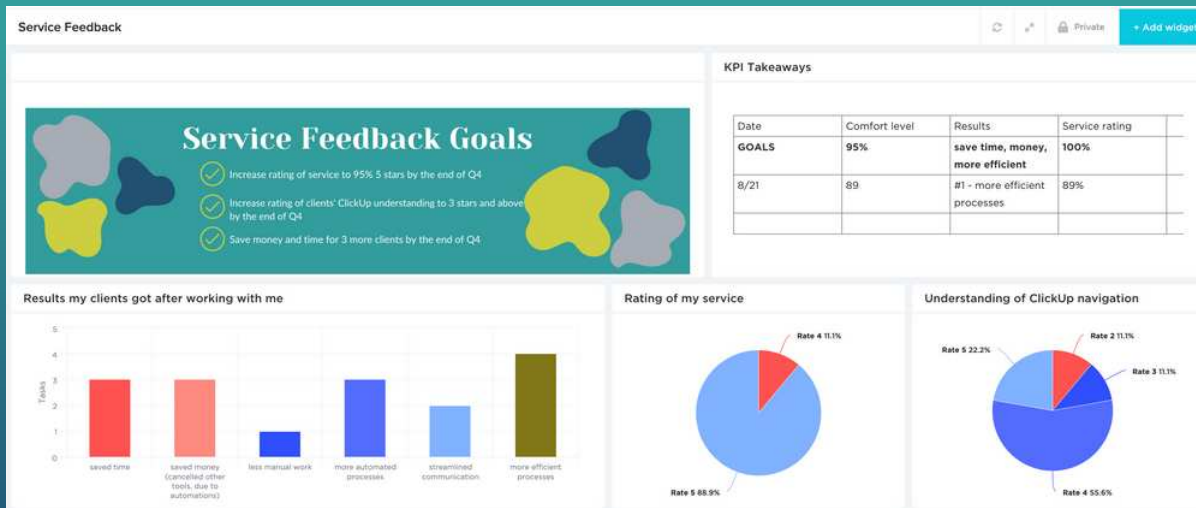
What conclusions can you draw from your dashboards?

"60% of our leads come from LinkedIn." ---> From this you may be able to conclude that you should spend more time marketing on LinkedIn but you should check the data for the won leads to confirm.

Did you meet your goals?

For example, "we reached our goal of selling 3 consulting packages in Q3."





Bonus!

Use this [Canva template](#) (this link is clickable - or check your email for the link) to create a KPI focus board! Simply access the template, customize it to your branding, and add in the KPIs you're tracking. This will help you stay focused! And you can go back and create a new one whenever you need to.

Then, download it as a png file. Add a text widget to your dashboard and drop the png file in to create a branded, focused dashboard!