



Step 1. Review the data in your dashboard or report and see if any errors or irregularities pop out. Go back and check and correct. Expect errors: no matter how good you get at analysis, errors will always be a thing.

Step 2. With the data corrected and in the dashboard/report, ask yourself the following questions.

Which data patterns are steady and as expected? (This means no further action is needed)

What data patterns are unexpected or different than usual? This might either be something to and accomplishment to celebrate or a challenge that is disappointing.

What is behind – or what do you think probably caused – the accomplishments or challenges shown in the data?

- External factors in the world or community
- Client factors
- Internal factors in the office or staff

	Data Pattern of focus	External factors	Client factors	Internal factors
1				
2				
3				
4				
5				
6				
7				

Step 3. Plan action

Are we already doing what we need to be doing? Are there changes in how we are doing things that are needed to respond to the changes in the data?

Actions can be focused on:

- Maintaining accomplishments
- Growing accomplishments
- Accommodating or mitigating the challenges
- New processes or structures to counter act the challenges and turn them around

Data Pattern of focus	No Action Needed	Action Planned
1		
2		
3		
4		
5		
6		
7		

Step 4. (As needed) Evaluate the planned actions in the context of the bigger picture. Consider the added value or challenges posed by internal resources, partnerships, organizational policy and local/state/national policy changes on the horizon. Note any issues to factor in to planning and implementing change.