Paths to Conversation and Action: Real-time Data-sharing with Qualtrics Reports

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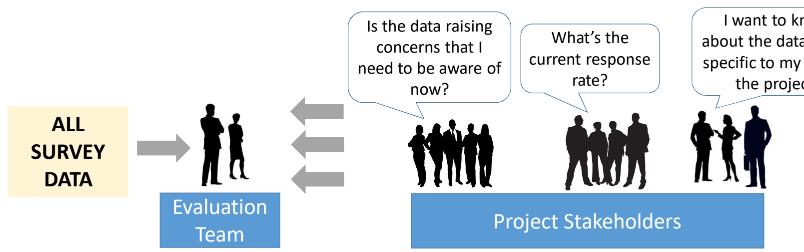
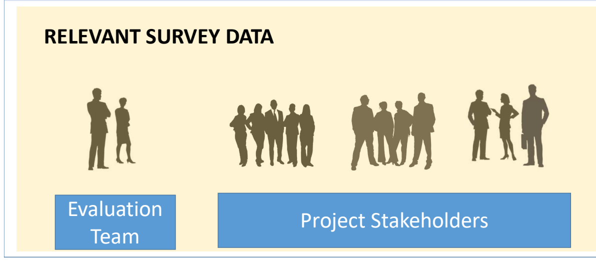
Which Situation Would You Rather Experience?

The evaluation team is stuck between the data and the stakeholders who are wondering about it



OR

Stakeholders have access to real-time data that is relevant to what they need to know



How to Design and Create Customized Real-time Data Reports in Qualtrics

Step 1: Identify the Need

- Talk to stakeholders about what they want to know from the data and how it will be used

Step 2: Create a Report Template

- Plan out the information you want to present and how to format that data in a way that is most useful to the audience
- Test your template and make adjustments as necessary

Step 3: Customize the Report

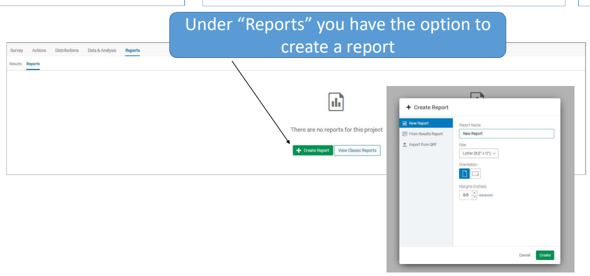
- Make a copy of the report (File>Copy) and customize what can be seen using filters
- Repeat as needed to create additional reports for different stakeholders or to meet different needs

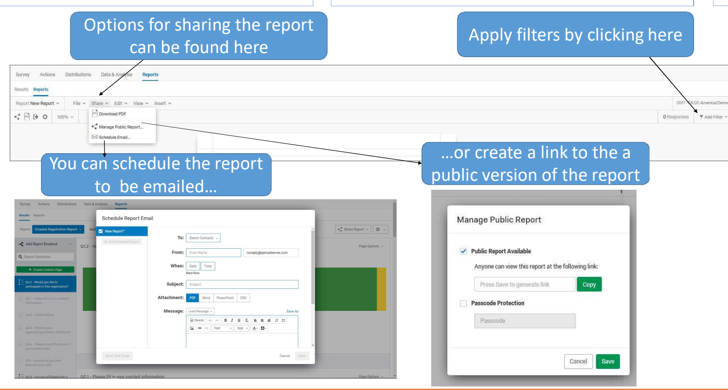
Step 4: Share the Report

- Reports can be shared by creating individualized links or scheduling emails to be sent on a recurring schedule

Step 5: Check-in with Stakeholders

- Occasional check-ins and reminders can help and also let you know whether the information is being used and if any adjustments need to be made





TIP!

Ask how stakeholders would prefer to receive the information. Do they want constant access to the results or periodic updates? Do they have a preferred format (PDF, Word, PowerPoint, or CSV)?

Two Examples from the Field

The Need: Evaluators were working with representatives from 18 different State Library Agencies (SLAs) who needed access to survey results from libraries in their state only to (1) help **monitor survey returns** and (2) **be aware of any potential issues** the results raised.

The Plan: Create **customized links** to individual reports using state as the filter. Put the most important information at the top of the report for ease of use (e.g., what library completed the survey, questions most likely to raise potential issues).

The Outcome: SLAs used real-time reports to **stay informed and act on what they were seeing** (e.g., to prompt libraries to complete the surveys). Being able to see the number of survey responses prompted SLAs to reach out to their libraries to complete the surveys and the response rate increased over time.

In both examples the use of Qualtrics reports **reduced the effort required of the evaluation team** to individually update stakeholders

The Need: Management and webinar teams wanted **updates on registration data** (e.g., total number of registrants, how registrants heard about the webinar) to better **facilitate dissemination** of webinar information and update stakeholders on registration.

The Plan: Originally, the evaluation team created a viewable web report that was accessible via a link, but the webinar and management teams **did not use it** and reached out to the evaluation team when they wanted an update. In response, the evaluation team created a **report that could be scheduled to automatically go out to stakeholders**.

The Outcome: Both teams **followed through with disseminating** webinar information to interested audiences. Additionally, the webinar team was **better able to adapt** presentation technology to fit audience size.