Case Study

Project   Program Analysis

Client   McAfee

About the project

In 2017 the Information Development group I was a part of transitioned from a PDF delivery method to an online solution. A long time coming, this change was heavily influenced by a lack of visibility into content usage. Yet for two years, no one was assigned to look at the available data.

By the end of 2018, the department was under pressure to report on site usage. Was anyone using the new site? How many people used the site and what were they viewing? Could users find what they were looking for? Was the content helpful?

Proving our value.

I was assigned the task of figuring out what to measure and how to report on key program metrics. There were several challenges to overcome and many lessons to learn.

Top 50 Pageviews and Count of Comments by Guide Type

Helpful Rating ● n/a ● no ● yes ● Pageviews
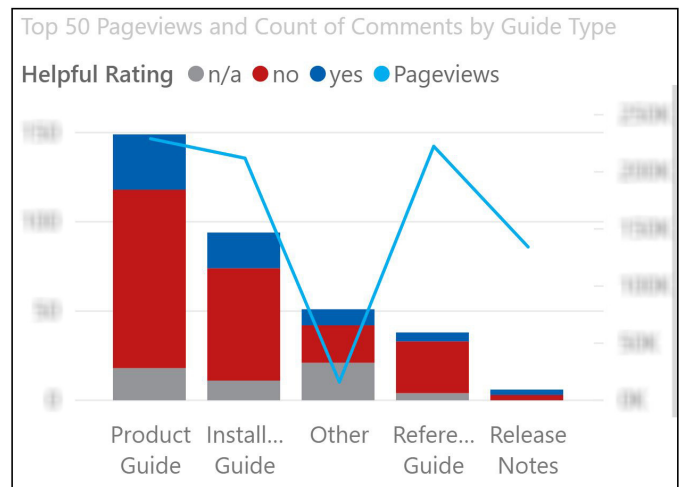
Challenges

Create reporting capabilities for Information Development.

Challenges included:

- Siloed organization where democratizing scattered data was difficult and sometimes impossible.
- Management didn't have strong opinions or ideas about what data to collect.
- Limitations of a free Google Analytics account with no data warehousing meant ongoing, manual data pulls.
- Learning curve for the entire department.

1

Gather Requirements

Determining what to measure was the first challenge. I was unable to convene a meeting with managers. Ideally, I would host an open-ended whiteboard meeting and gather any and all questions from participants. These initial questions would be organized, reviewed, and refined to begin shaping a direction for measurement and experimentation. Instead, I gathered input as I could and created a plan that I then reviewed with management.

2

Create Measurement Plan

The Measurement & Implementation Plan is a matrix of existing and future metrics that map to KPIs, goals, and audiences. This plan clarifies the what and the why of the reporting and is the foundation for future analysis work. I walked managers through the plan and gained general approval. The plan was posted in a shared location and as I added metrics to reports, I updated the plan to reflect current status.

3

A First Start

I built the first reports in Google Data Studio. The direct connection between Google Analytics and Data Studio made for a simple workflow with easy delivery via web link. I created an overall report for the program and individual reports for each documentation set. Initial report reviews led to more complex questions. To answer those questions I needed a mix of internal, confidential data in a more secure location.

4

Learn Power BI

When the limitations of Data Studio became obvious, I pivoted to Power BI. The company was already using the software, so it was an obvious choice. I watched training videos on LinkedIn and began building reports. The real turn came after I read Gil Raviv's *Collect, Combine, and Transform Data Using Power Query in Excel and Power BI*. I was able to clean and transform nearly all data in PQ. I used DAX to create measures on the front-end as needed.

5

Publish Reports

After several months of iterative designs, I landed on an idea. I transformed the reports into an app-like experience, with a landing page and links to specific reports. This was met favorably by users, who had previously been confused in the Power BI UI. I was approved to publish the Power BI reports in an app. As a published app, anyone in the company could view the dashboards.

6

Review & Refine

I continued to learn how to use Power BI. I gained access to new data and rolled it into new reports. As the business pivoted to meet new challenges, the reports were evolving to answer new questions. Other challenges I was looking forward to solving include setting up a data warehouse to pull and store site analytics and researching recent slowing in report performance.

Published Reports

Reports, in detail.

The collection of operational reports, published as a Power BI app, has a main landing page. This gives users a familiar app-like experience, with links to specific reporting areas.

A branded, app-like experience.

The reports follow branding guidance, made simple by editing the theme file. The home page also has space for links out to special projects.
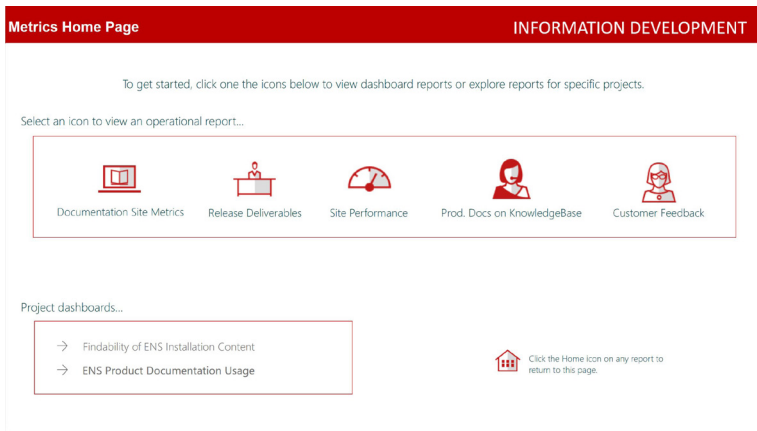
The Documentation Site Metrics report provides details about website usage over time.

At-a-glance site performance visuals.

The three main visuals show users, sessions, and pageviews over a two year time-frame. This shows steady adoption of the website. On the right, month over month, quarter over quarter, and year over year calculations provide time-based metrics with visual indicator. Additionally, there are clickable icons that lead to deeper dives of each of the areas. The person icon drills into a report about users that includes location data, new vs. returning visitors, acquisition information, and more.

The website has a feedback option to allow users to answer a simple question with an optional comment area: Was this helpful?

User experience feedback.

Ratings and comments were originally stored in a .json file. Before I was involved, the tools team transitioned to an email mechanism that sent feedback to everyone in the group—convenient for awareness, but not for data collection. A VBA script pulled data from a special folder in Outlook, which I then uploaded regularly to Power BI and transformed in Power Query.
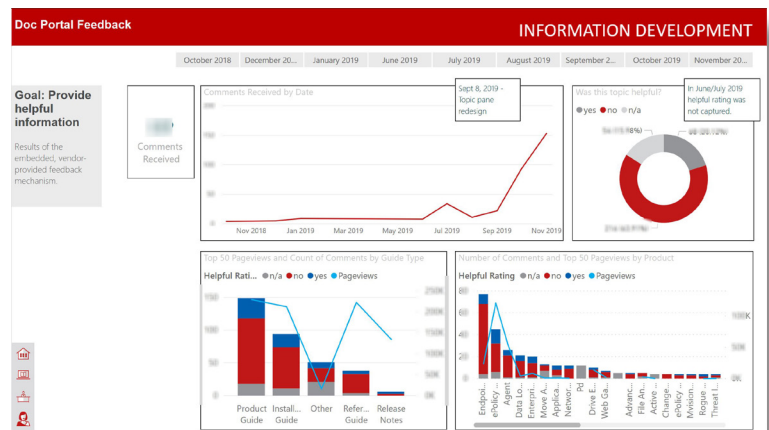
Because of legacy content delivery mechanisms, we continued to deliver PDF documents to the knowledge base. Usage data comes from Adobe Analytics. This report gives information about content performance on the knowledge base.

Content performance in the ecosystem.

From this report we learned that customers mainly viewed Release Notes on the knowledge base. We observed that views in this environment were roughly half of views on the HTML site, thus justifying the effort to move from PDF to HTML.
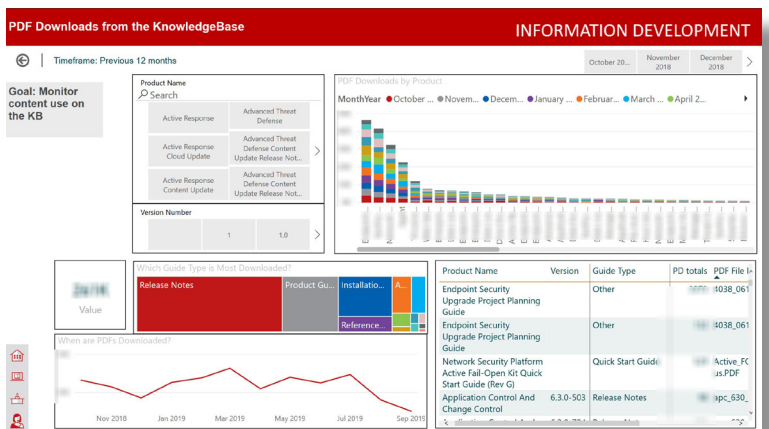
Get Insights into Your Data

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