Practical Best Practices - Dashboards

Purpose

Define <u>who</u> will use the dashboard (Audience), <u>what</u> they are going to use it for, and <u>why</u> (Use Case). *Purpose should not include <u>how</u> statements.*

- **Example**: The purpose of this dashboard is to allow industry leads to understand the overall sales performance of their team and team members, trends from previous to current periods, and underlying drivers of current performance and trends. This will allow industry leads to provide performance feedback to their team members and make compensation decisions.

Physical Features

Size: Fit to screen or require user to scroll

- Fitting a dashboard to the user's screen is preferable unless there is a specific reason for a user to scroll (e.g. storytelling)

Screen Real Estate: Top left to bottom right

- Most important and highest level information should be at the top left with more granular and less important information towards the bottom right

Colors:

- Ensure colors are pleasing, consistent (i.e. mean the same thing across the dashboard), contrast, and follow the general meaning of colors (e.g. red is bad, green is good)

Functionality

Drill Down: Build trust with users

- Users should be able to get to underlying data either through drill downs, cross visual filters, or pop-ups.

Filters:

- When possible use visuals as filters for other visuals
- Anything below and to the right of a filter should be filtered by it

External Links:

- Where possible, link to source information from row level information

Validation Tests

1. Does this dashboard meet the stated purpose?
2. Does a user need instructions to use the dashboard?
3. Does a user need instructions to understand the population of data?
4. Does the dashboard answer the users initial questions and help develop new questions?