Dashboard Pointers: Guidelines for Driving a Dashboard Project towards a Successful End

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A dashboard, by its nature, requires a concise, usually graphical, representation of information. As such, it becomes necessary to pare down all of the fields of data you COULD present into the most important, informative, and relevant items. Accomplishing this is not a simple task – however, these are proven guidelines to help:

1. Determine who, very specifically, is going to use the dashboard. A dashboard requires a specific audience. If you're told that it's going to be used by a large number of general personnel who have little in common, then you're probably better off using a non-dashboard reporting tool. If you're told that it's is going to be used by the Director of Sales and by the Director of Finance, you are advised to start planning on AT LEAST two dashboards, because you have at least two different audiences. If you're told it's going to be used by several different people in the same organization (Sales, Finance, Operations, etc), again, you're probably going to be building more than one dashboard. Find out who is the primary audience for the dashboard.

2. Once you have an audience, determine what value the dashboard will provide, as opposed to a different tool. Specifically, you need to know what "kind" of dashboard you are building. Is it to provide status at a glance? Is it to help make a decision?

3. With audience and value in hand, attempt to create a one sentence value proposition for your dashboard. This may sound simplistic; however, it is one of the most important things you can do! Once done correctly, this one sentence will provide clarity for the rest of the project.

    Bad examples:
    This is a marketing dashboard.
    This is a dashboard analyzing <insert metric here – e.g., Inventory Turnover>.
    This is a Salesman Dashboard.

    Good examples:
    This is designed to help all of the Marketing Campaign Managers track and monitor <these key measures> against <company/industry standards> so they can determine which campaigns are providing the best return on investment as measured by <some measure>. *(Status at a glance)*
    This dashboard helps the Purchasing Manager determine when and if to change the standard buying processes by monitoring <these metrics which have proven to be indicative in the past>. *(Helping to make a decision)*
    This is for Sales Management to track performance of <these Salespeople> <as measured by these metrics> to help determine if Salespeople need assistance, or need to be terminated. *(Helping to make a decision)*

4. Once you have the one sentence value proposition, you need to talk to people who can help you to understand (at least a little bit) about the nature of the subject matter. If at all possible, talk to the people who are doing or have done the role of the user of your dashboard. There is no substitute for this! If you find yourself saying "If I were trying to do …", or are talking to people who are talking that way, then you are doing little more than speculation. Find Subject Matter Experts (SME's)

5. When interviewing SME's, start with the one sentence value proposition and validate it. It may not be 100% wrong, but it's probably not going to be 100% right until you've revised it a few times with your SME's. If you find a divergence between SME's, don't panic – you may find that you need to understand the subject matter better to understand how everything fits together, or they may be using different ways to describe the same thing, or you may end up building two slightly different dashboards to handle the divergence, or, in the end you may have to modify your value proposition to exclude some conditions. All of these are preferable to producing something that is a complete compromise satisfying no one.

6. When talking to your SME's, focus far more on the nature of the situation, rather than the data.

    For example, don't ask,
    "What KPI's do you want?"

    Rather ask,
    "What decision are you trying to make? "
    "What options are available to you?"
    "How do you know whether to go with <Option A> or <Option B>?"
    "How do you make this decision now?" (This is extremely important!)
    "If I were to show <these measures>, do you have what you need to <whatever the dashboard is for>?"
    "Do you need to consult other systems to get information that's helpful?"

7. Working through the questions, you should be able to start compiling a list of data items. At this point, assume you CAN get ALL of the data. Once the list is complete, you can work with the appropriate parties to find out where this data is. (Knowing what tools are used currently to address the situation is particularly helpful —if your SME's handed you a series of reports and circled the items they need, then you have your list already; you just have to trace back from the reports.)

8. If you find that there is a gap in the data, DON'T PANIC. Several options are possible:

    - The subject matter is important enough that the data gap will be filled properly.
    - The optimal data is not available, but a reasonable substitute or proxy is.

- Some stop-gap measure will be employed (usually data entry) for a short time.
- The dashboard project is put on hold (which isn't the worst thing).

9. Get some reasonable real-world sample data to start your prototype. It doesn't matter where it comes from, just as long as it is a reasonable approximation of what you will ultimately be providing.

10. Build a version or two with the sample data and re-validate the design with your SME's. You may find that you missed something important or subtle, or, just as importantly, THEY may have missed an important item—it's better to find this out in the prototyping phase than after the release of the dashboard.

These guidelines are not exhaustive, but they should help in driving a dashboard project towards a successful end.