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COMPREHENSIVE GUIDE

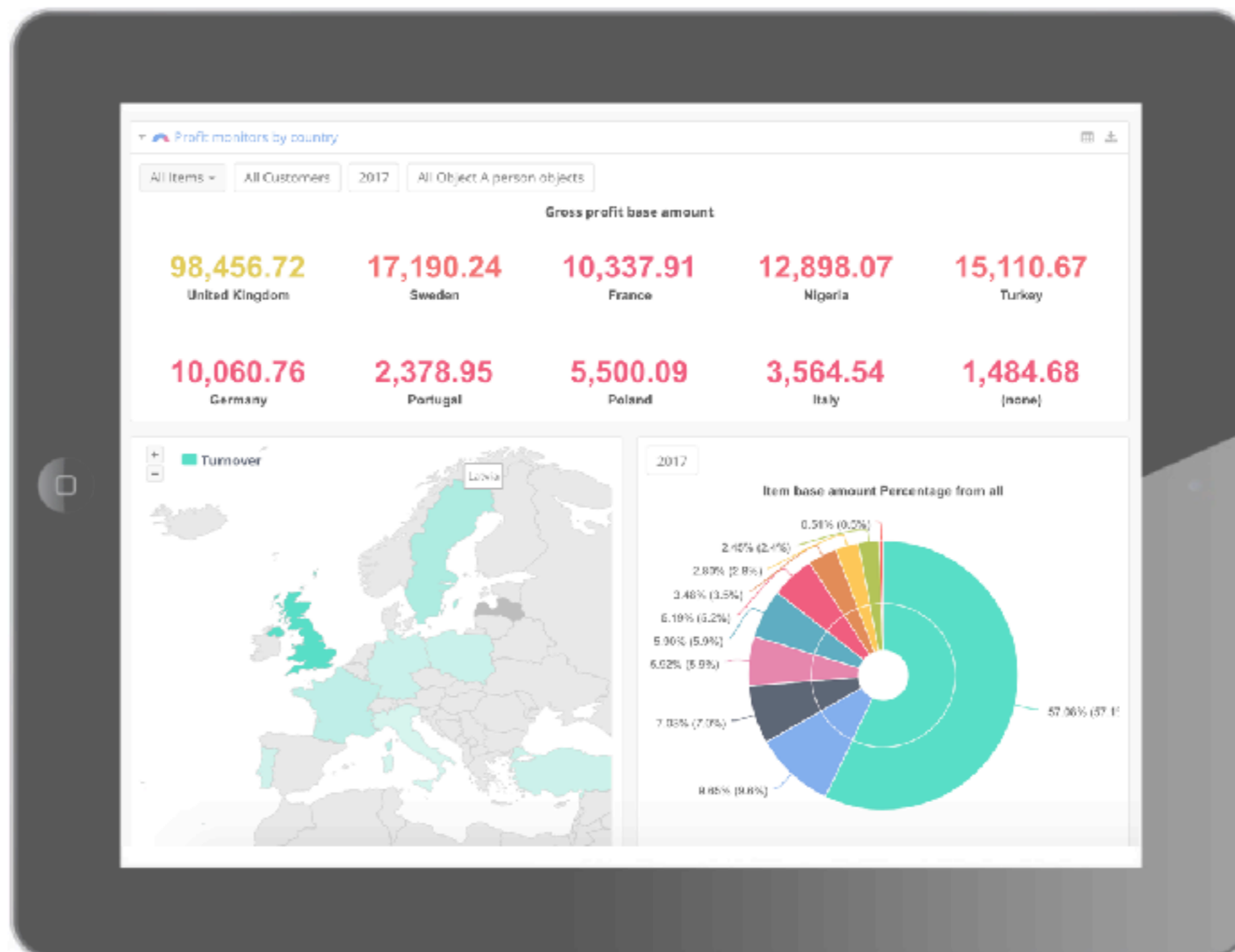# HOW TO CREATE BEAUTIFUL DASHBOARD THAT WORKS

+ WHY DASHBOARDS FAIL?

When you drive a car, you need a few key indicators (speed, gasoline level, lights, etc.) to clearly understand the situation within seconds and simple enough to know what action to take. Dashboards are often built on-the-fly with some data being added just because there is some white space left.

Different people in the company ask for different data and soon you may fall in a trap of creating dashboard full of meaningless non-related information.

Displaying too little is the opposite but also leads to dashboard that is not helping users and actually making their tasks harder and more confusing.

This guide will assist you on your way to flex.bi dashboards that are showing the most relevant information in the engaging manner and actually helps users to save time and make the right decisions.

1. UNDERSTAND THE NEED

Dashboards are designed to help you – and organisations like yours – to solve problems, right? Yes, but you have to understand the nature of the problem before you can solve it.

The first step in organising your dashboard initiative must be to identify what you want to achieve with your dashboard and who are the users.

Before you start you should ask yourself some questions about people you are trying to impress.

Your company CEO, marketing manager, sales people or stock. Knowing the habits of your users will help you to publish the information in the most suitable way.

WHO IS MY USER ?

WHY DO THEY NEED A DASHBOARD?

WHAT ARE THEIR HABITS?

WHAT IS THE BEST WAY TO PUBLISH THE DASHBOARD?

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DASHBOARD PUBLISHING WITH FLEX.BI

Dashboard in web browser

TV Screen – Wallboard

Dashboard in email (PDF)

Phone or tablet users

USERS & DASHBOARDS

Name	Position	Notes	Rules
Ben	Sales manager	Always looking for something new, gets bored easily.	Dashboards must be colourful and dynamic. Not too much information.
		Does not like routine jobs and tries to escape them.	Send Dashboard in email or use TV screens in sales department.
Michael	CEO	Hates to talk about unrelated topics, likes getting answers fast.	Only relevant KPI's he has asked for in a simple overview.
		Plans the future of company.	Future trend dashboard sounds like good idea.
		Makes operational decisions.	Dashboard needs to have simple ways to navigate to detailed view and filter data.
Jennifer	CFO	Always prefers to know where numbers are coming from.	Introduce her to Drill trough, Drill Across, Drill Into functions.
		Excel expert, likes to do things herself.	Teach her how to remove/add new columns and build/modify reports.

2. IDENTIFY DASHBOARD TYPES

Strategic/ Executive Dashboards - track key performance indicators.
Used on periodic basis, to make sure that team is going into the right direction. These dashboards are used to make changes in strategic planning.

Users: executive team

Data: can be updated periodically or on request

MIXING DIFFERENT TYPES OF INFORMATION IN THE SAME DASHBOARD IS CONFUSING FOR THE END USER.

Operational Dashboards - tell you what is happening now

Example: in a business with active sales process it would be amount of leads generated this month, sales calls done and future meetings planned. This type of the dashboard would show the health of current situation taking into account company's long term goals and targets.

Users : All team members

Data: require real time data and have to be seen and used every day.

Analytic Dashboard - **process data to identify trends and** predict outcomes

Users : Specialists, data analysts

Data: usually based on historical data and may be updated infrequently.

SEPARATE TOPICS USING GROUPING

AVOID UNRELATED DATA

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Dashboard name	Business need	Users	User interaction	Access	Dashboard type
Company overview	Company strategic goals and KPI's. Long term planning.	Michael, Jennifer	High	Web browser, phone	Executive dashboard
Sales dashboard	Data awareness and time sensitive data. Up to date company pulse.	Ben, Michael	High	Web browser, phone, TV screen	Operational dashboard
Customer analytics	Detailed lists of indicators.	Ben	Low	Web browser	Analytic dashboard
Company budget monitoring	Future planning.	Michael, CEO, Jennifer, CFO	Low	Web browser	Operational dashboard

3. CHOOSE YOUR KPI'S

"In simple terms a KPI is a way of measuring how well we as individuals or how well entire companies or business units are performing. KPI is short for Key Performance Indicator. A KPI should help us to understand how well a company, business unit or individual is performing compared to their strategic goals and objectives.**"** **See KPI Library**

The wrong KPIs bring the danger of pointing people into the wrong direction and even encouraging them to deliver the wrong things. Always remember, the reason why KPIs are so powerful is that 'you get what you measure'. If a company measures and rewards the achievement of KPIs that are not in line with their goals then it basically asked the crew to sail into the wrong direction! ***Read full article*** ***" What The Heck Is a... KPI?,*** ***Bernard Marr***

Identify your most important goal and several KPIs that support it.
• Start simple, then build on your success with more complex goals.
• Ask stakeholders what metrics are most important to them.
• Focus on collecting data that is actionable and related to each KPI.

START WITH KPI'S THAT DEFINE SUCCESS AND FAILURE

TELL THE STORY

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DON'T CLUTTER YOUR DASHBOARD. LESS IS MORE.

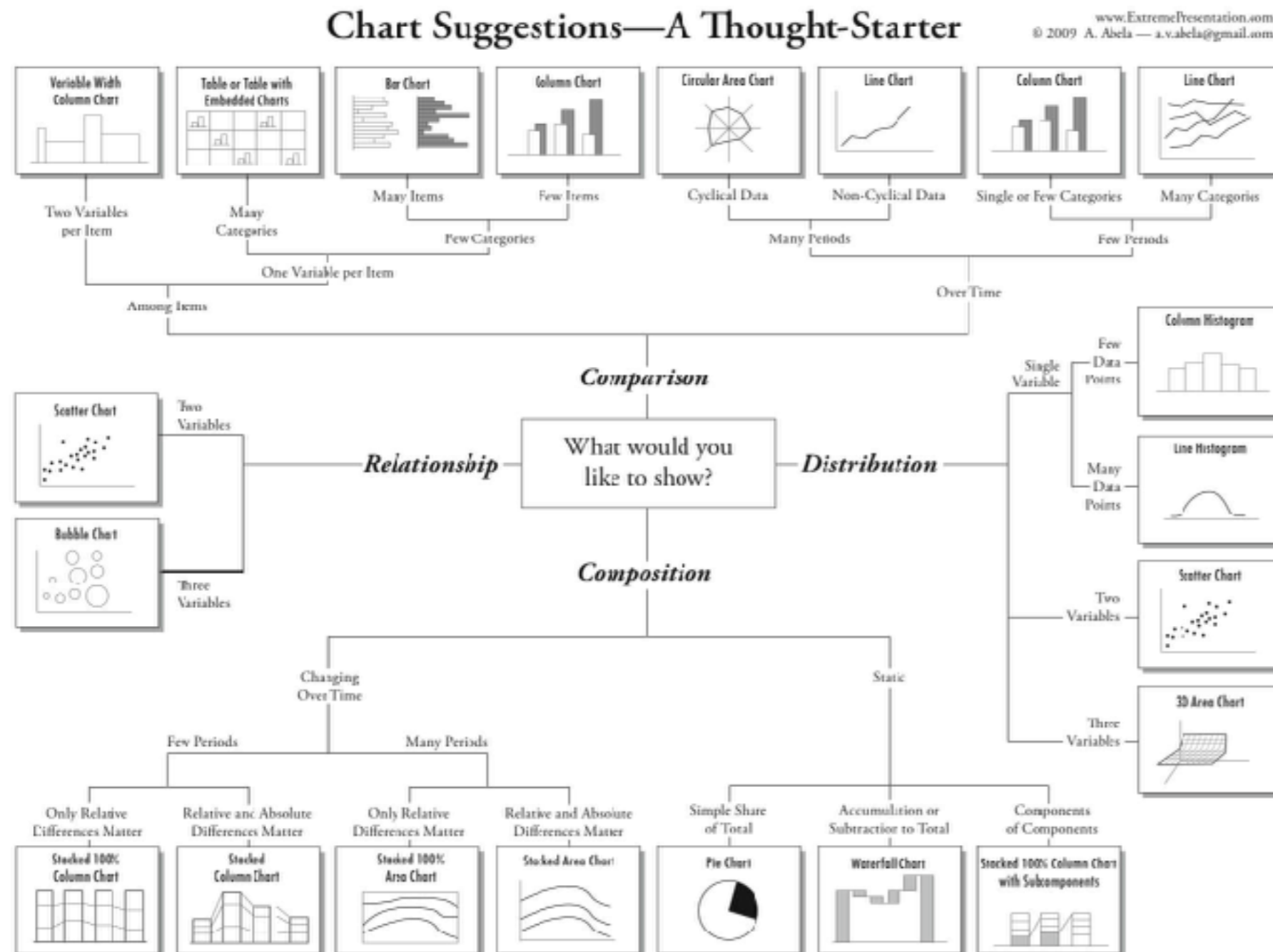# 4. LEARN ABOUT CHART TYPES IN FLEX.BI

Why it is important ? Wrong graph can make data hard to read or give wrong impressions that lead to wrong decisions.

To determine which chart is the best suitable, first you must answer a few questions:

- How many variables do you want to show in a single chart? One, two, three, many?
- How many items (data points) will you display for each variable? Only a few or many?
- Will you display values over a period of time, or among items or groups?

Bar charts are good for comparisons, while line charts work better for trends. Scatter plot charts are good for relationships and distributions, but pie charts should be used only for simple compositions – never for comparisons or distributions.

Read more about How to pick the right chart type , eazyBI

LINE CHARTS – GOOD FOR TRENDS

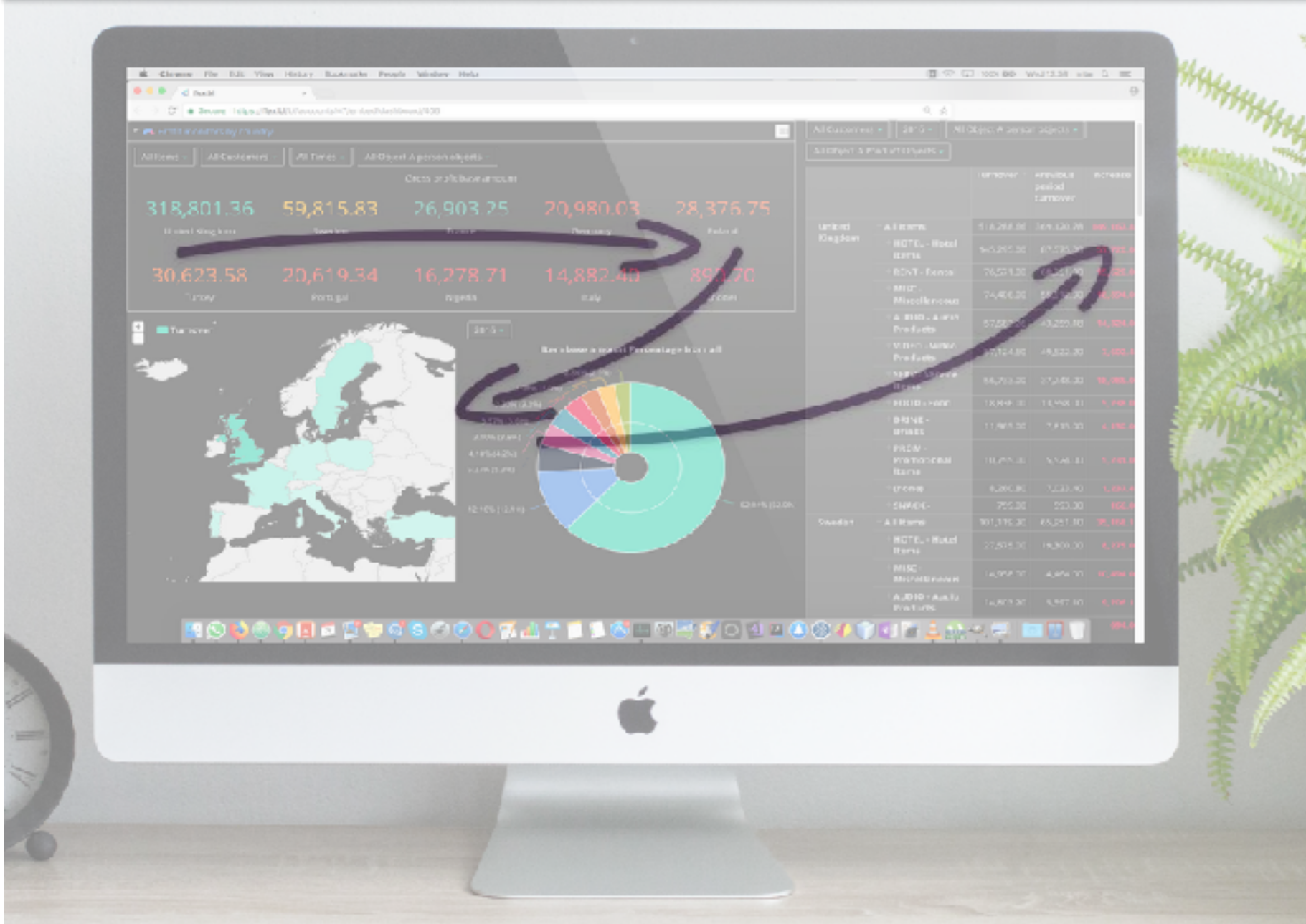**BAR CHARTS – SUITABLE FOR COMPARISONS**

SCATTER, PLOT CHARTS DISPLAY RELATIONSHIPS

PIE CHARTS – USED FOR SIMPLE COMPOSITIONS – NEVER FOR COMPARISONS

5. PLAN THE LAYOUT

Why it is important ? Bad layout will make users loose interest, spend more time reading data or even abandon dashbords. Bad layout dashboards fail to deliver the value.

No matter which layout you choose, structure your information to draw the eye to the things that matter the most. Position the most important information where your audience will look first. People tend to scan a page starting at the top left, read from left to right, and focus on the left side (in Western cultures). The bottom and right side are not as prominent.

UPPER LEFT CORNER – MOST ACTIVE

RIGHT SIDE – SUITABLE FOR DETAILED VIEW

DIRECTION – FROM LEFT TO THE RIGHT

RULE OF THIRDS

GROUPING

6. COLOURS – TYPICAL COLOUR RELATED MISTAKES

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Over-using highly saturated and intense colours
If a dashboard is full of highly saturated colours, *everything* is demanding attention, so users don't know what to look at first. They end up feeling overwhelmed. Choose what is most important and keep emphasis clear.

Using different colours to represent the same item on different charts
In a dashboard, consistency is important. It reduces the mental effort users have to make to understand what they are seeing. If you use blue to show turnover increase and red for lost customers, then do it in all dashboards the same way.

Misusing traffic light colours
If you are using red and green as "bad" and "good" in your dashboard, do not use it for anything else.

10% OF MEN ARE COLOURBLIND

AVOID USING COMPANY COLOURS

TOP 3 FAVOURITE COLOURS FOR WOMEN ARE: BLUE, PURPLE, GREEN

7. LAST BUT NOT LEAST – PLAN YOUR DASHBOARD MAINTENANCE

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DASHBOARD DEVELOPMENT IS NEVER COMPLETE :)

Even if your dashboard initiative can be considered successful, it's never finished. In fact, proper monitoring and maintenance is just as important as setting up your dashboard correctly in the beginning.

During development, you'll need to have a plan to maintain your dashboard once it's launched. This means keeping data up-to-date, monitoring KPIs, and refining your dashboard and data strategy as the initiative moves forward.

• Stay in contact with stakeholders; ask them what's working and what could be improved.
• Set a specific time frame for each KPI, revisit them and modify your strategy if necessary.
• Pay attention to projected data, identify potential challenges and create a plan to avoid them.

HAPPY DASHBOARDING!