

Designing a Data Dashboard: Key Questions

Question 1: Who is the audience?

- a. Role- Structure the information to make it easy to answer basic questions
 - i. What decisions do they want to make
 - ii. What questions do they need answered
- b. Work Flow-The form and display needs to fit an existing work flow. Mobile vs. desktop monitors
 - i. In what context will they be viewing the dashboard
 - ii. What information are they using on a daily basis?
 - iii. How much time do they have to review numbers?
 - iv. How do they get it out and in what form?
- c. Data Comfort and Skills-The dashboards level of detail and analytical capabilities match the comfort zone
 - i. Are they proficient in excel or database design?
 - ii. Do they enjoy digging around in the raw data
 - iii. How sophisticated are they with using data?
- d. Content Expertise-This determines the need for embedded explanations and use of natural language
 - i. How familiar are they with performance metrics
 - ii. Do they understand where the data comes from?
 - iii. Are they comfortable with the terminology or acronyms?

Question 2: What kind of value will the user get from it?

- a. Help define what is important
- b. Educate people in the organization about the things that matter
- c. Set goals and expectations for specific individuals or groups
- d. Help executives sleep at night because they know what's going on
- e. Encourage specific actions in a timely manner
- f. Highlight exceptions and provide alerts when problems occur
- g. Communicate progress and success
- h. Provide a common interface for interacting with and analyzing important business data

Question 3: What type of Dashboard am I creating?

- a. Scope
 - i. Strategic/Broad-Displays information about the entire department or system
 - ii. Operational/Specific-Focuses on a specific function, process, or population
- b. Time
 - i. Historical-Looking backwards to track trends
 - ii. Snapshot-Showing performance at a single point in time
 - iii. Real time-Monitoring activity as it happens
 - iv. Predictive-Using past performance to predict future performance
- c. Customization
 - i. One size fits all-I am trying conveying a specific narrative with the data, or fitting it to another document.
 - ii. Customizable
- d. Level of detail
 - i. High level
 - ii. Person or Officer Level
- e. Point of View
 - i. Prescriptive-dashboard tells the user what it means and what to do
 - ii. Exploratory-User can interpret results as they see fit.