Dashboards 101

Driving Your Message

What Is a Dashboard?

Dashboards track KPIs, metrics, and other data points in one visual, central place. They give you a high-level view of work, helping you make quick decisions and keeping everyone up to date. A dashboard's visual nature simplifies complex data and provides an at-a-glance view of current status or performance in real time.

Dashboards are made up of tables, charts, gauges, and numbers. They can be used in any industry, for almost any purpose. For example, you could make a project dashboard, financial dashboard, marketing dashboard, and more.

Before Building the Dashboard: Research, Questions, & Things to Consider

Before you start building your dashboard, first take some time to reflect on why you need a dashboard, what purpose it will serve, where the data will come from, and what you capabilities you do and don't need.

It might also be helpful to mockup your Excel dashboard on a piece of paper. Draw boxes for each data type to get a sense of the layout and add quick sketches of the type of graphs you want to include. This mockup will help get everyone on the same page and let you get approval from stakeholders before you start spending time and money on the actual dashboard.

Questions to Ask Yourself

- **Why are you creating this dashboard?** Are you trying to prove or disprove a hypothesis? Is this dashboard for a specific task, like showing status of a project, or does it need to achieve a broader goal, like measuring business performance? Understanding why you are building the dashboard will help guide the design and data.

- **Do you need to track certain KPIs?** Your dashboard should only highlight data that adds value. Make sure you understand the most important KPIs and create the dashboard around those metrics. Anything outside those main KPIs aren't necessary.

- **Who needs to see the dashboard?** Is this for a colleague, manager, stakeholder, external vendor, or C-level executive? How do these people prefer to digest information? How much time do they have to look at this dashboard? Think about who you're making the dashboard for and keep their preferences in mind.

- **Where will the data come from?** Do you need to manually import data into your dashboard or will you use an integration or connector to automatically sync and refresh data? What other tools do you use to gather data?

- **How up to date does the dashboard need to be?** Can you update your dashboard weekly or monthly, or does it always need to show real-time, updated information? Depending on what you chose, this will change the way you build your dashboard.

- **What format does the dashboard need to be in?** Are you emailing a static dashboard or providing a link to a dynamic one? Does the dashboard need to be embedded in presentations or decks? Do you want to share read-only access or do you want to provide editing capabilities to certain people?

Things to Consider: How to Design the Dashboard

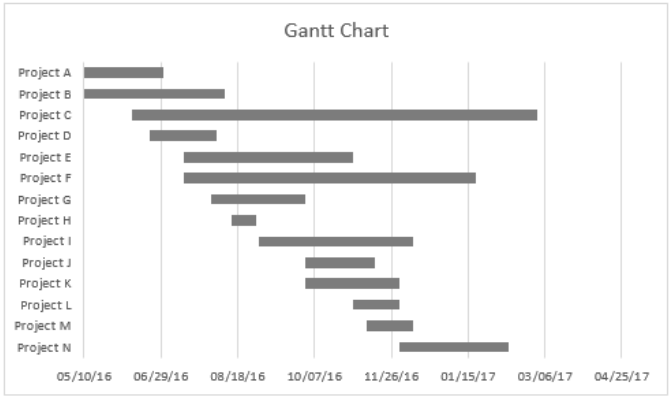
- **Dashboard elements**: What do you want to include on your dashboard? You can choose from static tables, pivot tables, dynamic charts, Excel gauge widgets, or non-charting objects, like auto-shape objects. Do you want to add a lot of small charts or a couple big charts? Identifying the elements you want to add to your dashboard will help you group similar data together and give you an idea of the layout.

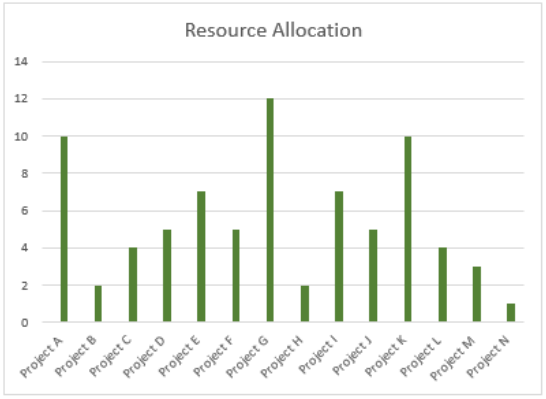
- **Dashboard background color**: How much color do you want to incorporate in your dashboard? Do you want to add a dashboard background color to make the dashboard elements pop? Do you want to color-code similar charts?

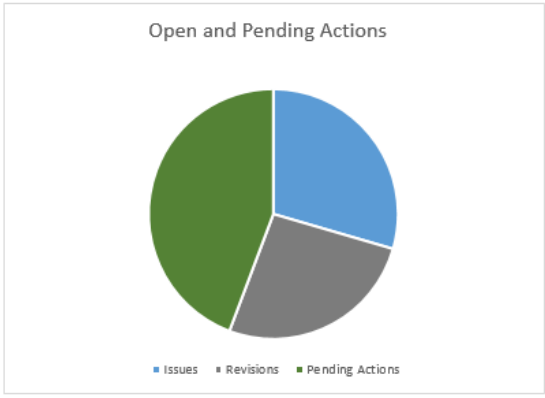
- **Enhancing the dashboard UI**: How important is ease of use? Do you want to spend time enhancing the dashboard UI? You could add hierarchy to the layout for easy navigation, add drop-down lists, add labels to each graph with auto-shape objects, or use freeze panes to prevent users from scrolling.

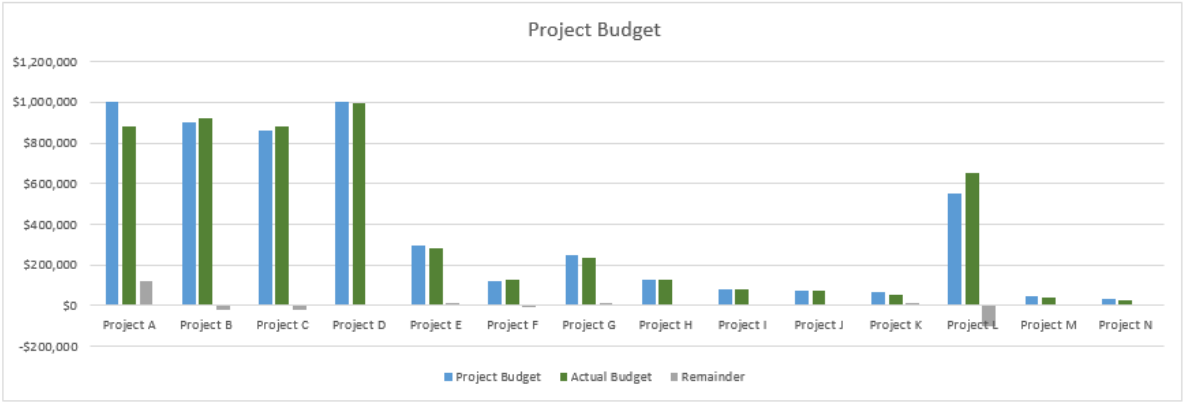
Using Excel

Project Dashboard



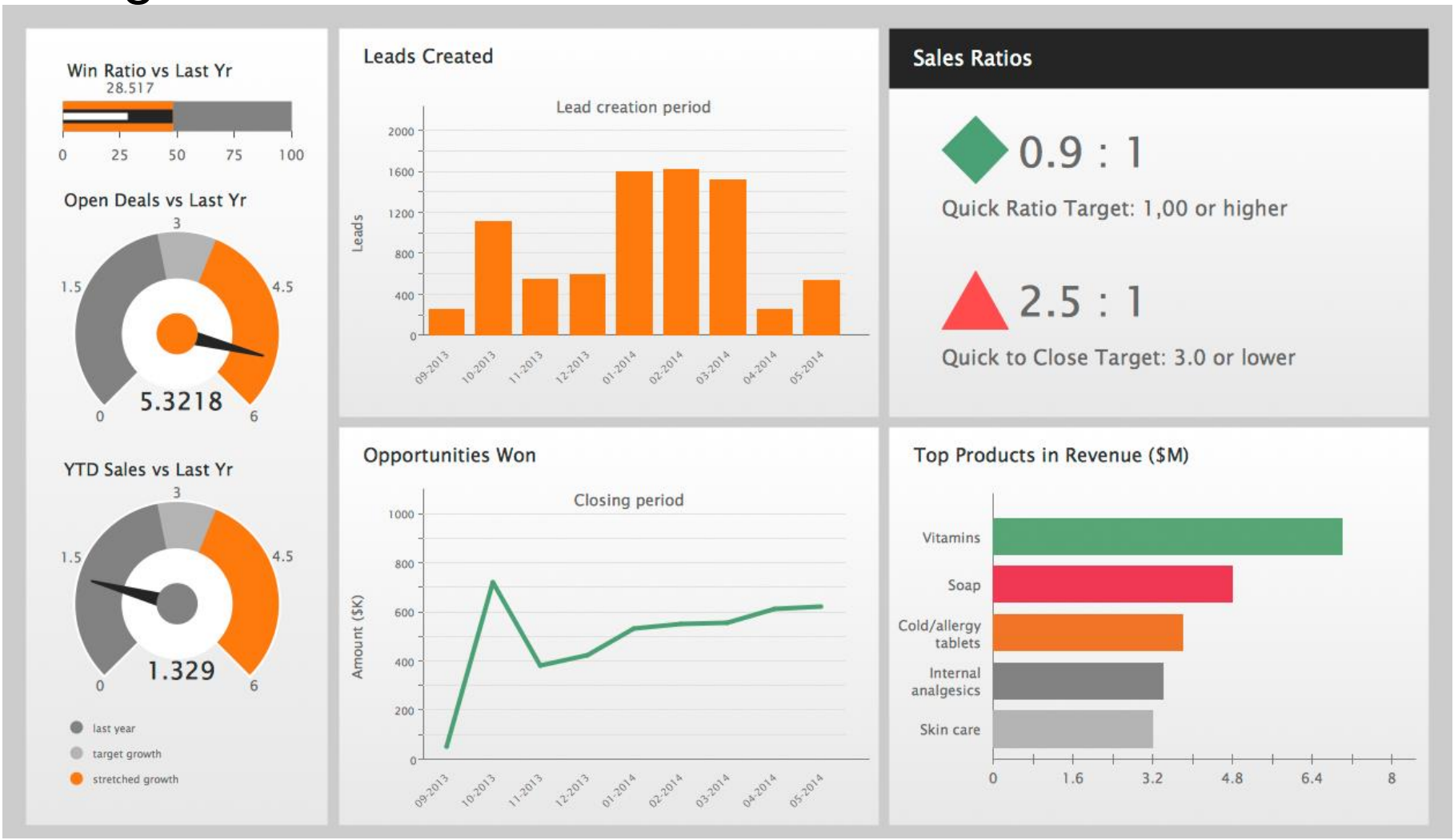






Project Name	Sum of High Risk	Sum of Medium Risk	Sum of Low Risk
Project A	1	0	4
Project B	2	3	5
Project C	3	4	3
Project D	5	8	1
Project E	8	6	4
Project F	5	0	0
Project G	6	4	0
Project H	7	3	3
Project I	0	2	4
Project J	4	4	5
Project K	3	6	4
Project L	2	3	6
Project M	1	1	7
Project N	5	0	2
Grand Total	**52**	**44**	**48**

Using SmartSheet



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Dashboard Dos…

Here are some general dashboard advice and tips:

- **Keep it simple, stupid (KISS):** A simple, easy-to-understand dashboard is much more effective than a "pretty" dashboard. Avoid the temptation to add 3D effects, gradients, extra shapes, and other bells and whistles. Instead, use magazine formatting. Look at the charts and tables from business magazines and adopt their simplicity and readability.

- **Use shapes and charts together:** The layout of your dashboard can get repetitive if you have multiple charts all in the same box layout. You can add visual interest and hierarchy to your dashboard by inserting a shape (like a rectangle, circle, etc) and then putting your chart on top of that shape.

- **Use different tabs**: Keep your dashboard organized by using different sheets for different things. For example, one tab will hold the dashboard itself and another tab will hold the raw data that populates the dashboard.

And Don'ts

- **Bold, bright colors:** Don't add a rainbow-themed color palette to your dashboard in hopes of making it look more "fun." These bright colors distract from the important information. Instead, use muted colors and only add stronger colors to highlight key items.

- **Crowded layout:** Don't include every possible data set or chart to your dashboard. Too much data will overwhelm the viewer and end up hiding the really important information. If you end up with a crowded dashboard, take a step back and reevaluate if everything is necessary. All the data should support the single purpose of your dashboard.

- **Lack of focus:** A crowded layout and lack of focus usually go hand-in-hand. Make sure all your charts are supporting the same purpose or hypothesis and cut out all the extras. The data should tell the same story