

Dashboard Design Checklist

datacamp

Dashboards are one of the most useful tools when communicating data stories. Here is a handy checklist to keep in mind when designing your next dashboard.



Know your dashboard type

There are a variety of ways to classify dashboards. Dashboards can be classified by the level of detail they contain, or can be classified by whether their purpose is to explore or explain data.

Dashboards by level of details

Strategic dashboards **Tactical dashboards Operational dashboards** Contain granular details for a Contain high-level business metrics Contain detailed business metrics for particular business problem (e.g., and long timespans (e.g., financial a particular team. (e.g., digital customer service ticket dashboard) performance over the past 12 months). markeing spend dashboard) TARGET AUDIENCE TARGET AUDIENCE TARGET AUDIENCE C-suite and executive leadership Team lead or manager Operational analyst Contain a small number of metrics and Contain many metrics and plots related Contain many metrics, plots, and data to a single area of business tables related to a single business plots problem May contain auto-generated insights or Use minimal or no interaction recommendations Include lots of interactivity Use minimal or no interactivity Sales Expenses Radha Gupta: 15 Apr 148 12% 🔺 **7%** 🔻 Alice Burke: 21 Apr Jun 2015: \$436,070 Jun 2015: \$125,480 Jun 2015: \$273,259 Sales vs Expenses Trend

Dashboards by use-case

Exploratory dashboards Explanatory dashboards Used to explore a dataset to generate questions for discussion Used to display key results or insights. Typically used as part or further analysis. Typically used for exploratory data analysis. of a data story or presentation. Contain a small number of metrics or plots Contain many metrics or plots related to business problem Include minimal or zero interactivity Allow for interactivity

Know your audience 2 Knowing what your audience wants is key to creating a successful dashboard. Here are a few

1. While sales continues to grow at a healthy clip, there was a sharp dip in May. This was mainly due to a dip in sales in Europe. We have to watch closely how the markets in Europe perform

2. There was an abnormal increase in expenses too in May. This has to be studied in detail. 3. The number of customers continue to grow, though we can grow at a faster pace. New acquisition channels have to be identified, and bad performing channels need to be clipped.

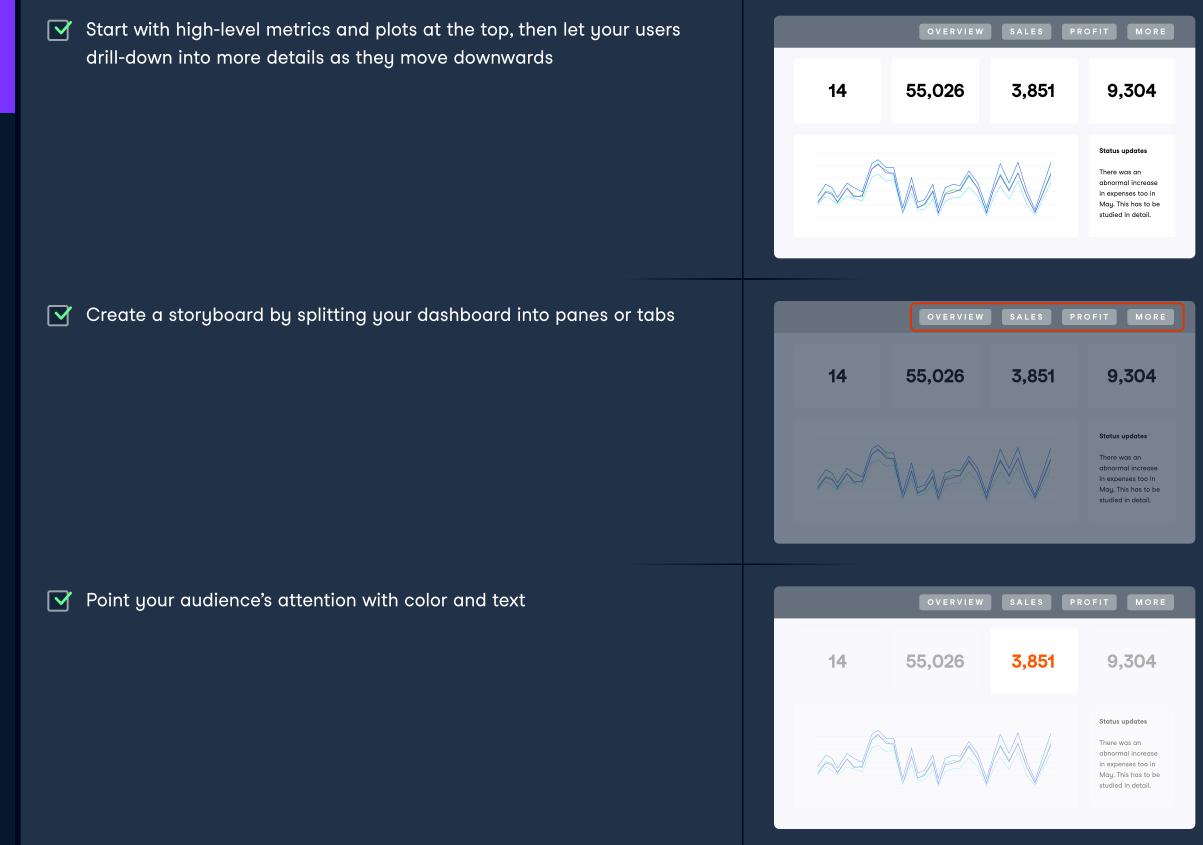
over the next few months, and evolve a new sales strategy for Europe.

requirements to think about before designing your next dashboard.

What questions is the audience How much technical knowledge How often will they look at the looking to answer? do they have? dashboard?

Design your dashboard with a narrative in mind Make sure your users are looking at parts of the dashboard in the right order

by designing a narrative or flow.



Focus your audience's attention by emphasizing or de-emphasizing elements within your dashboard.

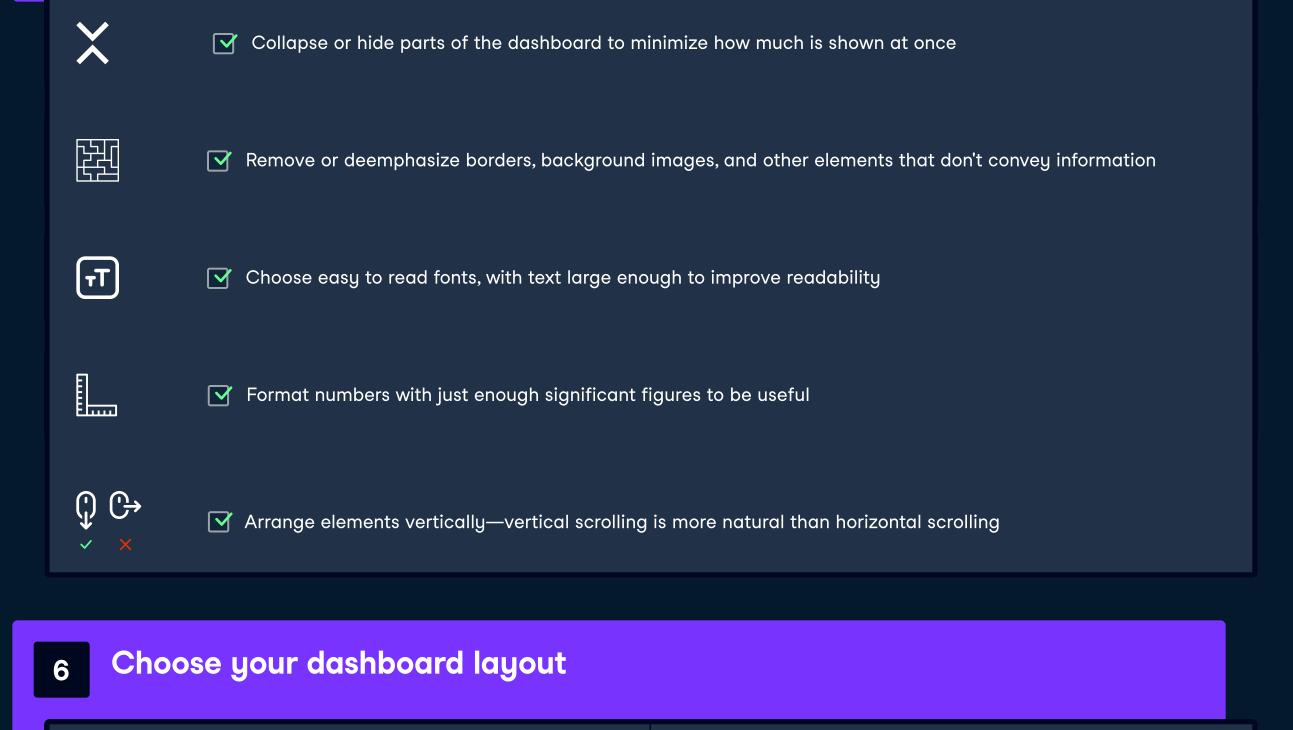
Guide your audience with text and color

Emphasize De-emphasize

	Emphasize	De emphasize
	Bright colors	Pale colors, grays or muted colors
	Highlights and Lowlights	No background color
	Big text	Small text
	Bold and italic text	Regular font
Reduce cognitive load		

Make the dashboard easier to understand by reducing the amount of thinking your audience has to undertake to get data insights.

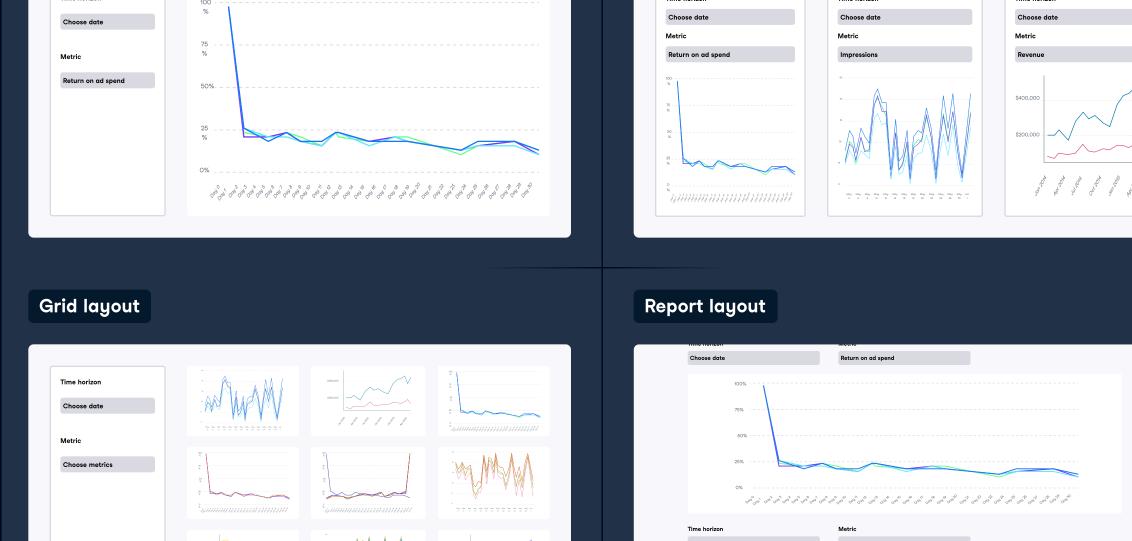
Repeat the same colors, sizes, and other design elements throughout



Multi-column layout

Single column

necessary



Provide context for more complex visualizations It can be helpful to annotate more complex visualizations and provide context for your audience.

labels

When applicable, label axes and Provide useful context around When applicable, try to answer titles for clarity common audience questions with insights within the title or subtitle labels Label important data points when Adjust font size when highlighting Plot tables and visualizations side specific messages within your by side