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.