Dashboard Best Practices Guide
Dashboard
Best Practices

Dashboards are the perfect way to monitor your business and get rapid answers. This guide will walk you through the best practices for dashboard design, helping you deliver personalized and interactive dashboards that your users will love.

What is a dashboard?
A dashboard visually displays multiple reports on a single page, allowing you to monitor your most important metrics at a glance.

Why dashboards?

- **FASTER INSIGHTS**
  All your metrics in one place.

- **STRATEGIC FOCUS**
  Gets everyone on the same page.

- **BETTER DECISIONS**
  See a summarized view of the world.

- **MONITOR BUSINESS SUCCESS**
  Track progress over time.
Purpose

BEST PRACTICE #1

Every dashboard should always be designed for a specific purpose, with a specific audience in mind.

Knowing your audience and building dashboards that help them succeed is what it’s all about.

Ask yourself…
• Who exactly is my dashboard for?
• How will this dashboard help people do their job?
• What is the central thought-line of my dashboard story?

Who is your intended audience?

If you know your question, and have the right data available, there is a perfect dashboard for you.

EXECUTIVES  FINANCE  SALES

MARKETING  OPERATIONS  SERVICES
Summarize

BEST PRACTICE #2

Every dashboard should provide an overview of a single subject area. Avoid the temptation to show people everything at once. People don’t need to see all metrics on a single tab, and too much data can be overwhelming and confuse the story that your dashboard was built to convey. Provide a summarized overview that allows people to find and monitor information at a glance. Then, once users understand the big picture, allow them to drill or zoom from a summary level to a detailed view.

Focus on a single subject area per tab

GLOBAL VIEW
Use KPIs and summary reports for important metrics.

SUMMARY TO DETAIL
Drill to detail.

DON’T OVERWHELM
Dashboard cramming obscures insights and prevents action.
Relevance

BEST PRACTICE #3

The most valuable dashboards provide highly relevant insights to your audience, which help people take action towards a specific business goal.

You can measure the relevance of a dashboard by how frequently it is used. And, because your business isn’t static, keep updating your dashboard content as your business needs evolve. You can always ask better questions.

“Perfection is achieved not when there is nothing else to add, but when there is nothing left to take away.” - Antoine de Saint-Exupery

Ensure insights are relevant to your audience

**ACTIONABLE**
Focus attention on actionable insights.

**CONTEXTUAL**
Match your metrics to business goals.

**EVOLVING**
Keep updating as your business evolves.
Customization

Ensure you have the flexibility to build dashboards that specially match the goals, needs and expectations of your audience. This includes the ability to customize the design, layout and interactions to facilitate user adoption, information absorption and to drive action.
Functionality

BEST PRACTICE #4

Deciding the type of functionality to include on your dashboard depends on your audience and purpose. Make sure you understand the three key types of dashboard use cases in order to understand the types of interactivity and data access that will best suit your users.

What type of dashboard is required?

STRATEGIC
Drive organizational strategy.

ANALYTICAL
Discover valuable insights.

OPERATIONAL
Deliver operational excellence.
Strategic dashboards

Help your executive team keep your business on track with strategic dashboards that monitor what’s important. See all your different data sources on a single page with high level summary reports and KPIs. Then, easily drill into the detail to quickly answer your questions and act fast.

PURPOSE
Measure high level performance with a global view of the business or business function.

DECISION HORIZON
Monitor progression towards strategic goals to support long term decision-making.

DATA
Include multiple data sets on a single dashboard.

FUNCTIONALITY
Use KPI and summary reports that drill through to detailed reports.
Analytical dashboards

Analytical dashboards are highly interactive and link all your data together. Make it easy for anyone to explore data and discover valuable insights in order to optimize performance. Experience truly interactive data exploration and uncover fresh insights with filters, brushing, series selection, drills and more.

PURPOSE
Discover valuable insights fast.
Explore specific topics and understand the what, why, when and how behind high level numbers.

DECISION HORIZON
Supports medium term decision-making.

DATA
All data linked.
Query speed matters.

FUNCTIONALITY
Deliver high levels of interactivity to support data exploration with filters, series selection, brushing and drills.
Operational dashboards

Become a data-driven organization by empowering your people to independently access and understand personalized real-time information. Always know when to take action with proactive alerts that notify you of important changes in your data. Help everybody in your organization make better day-to-day decisions.

Purpose
To deliver operational excellence by supporting real-time business monitoring and immediate decision-making.

Decision Horizon
Supports short term decision-making.

Data
Supports the communication of live data or very regular updates.

Functionality
Should include limited needs-based interactivity to reduce the amount of time spent analyzing and help people take faster action.

Include proactive alerts to prompt action when data falls outside predefined parameters.

Must be able to embed into third-party Web platforms, tools and applications that people use to support day-to-day decision-making.
Visualization

BEST PRACTICE #5

Dashboards visually display multiple reports on a single page. Choosing the right chart type for each report will help you find and tell the story in your data. The appropriate chart will reveal patterns and trends, so you instantly understand the significance of your data, and the action you might need to take.

Ask yourself…

• What would you like the report to show? (e.g. comparison, composition, distribution, relationship, KPI, location)
• Does the visualization allow people to understand important metrics at a glance?

Need more help?
Check out Yellowfin’s data visualization best practice whitepaper and discover the perfect charts for your data.
Layout

BEST PRACTICE #6

How you organize a dashboard can help highlight important information or tell a specific story. Your dashboard layout should be determined by the importance of your reports and an understanding of your intended audience.

Design layout based on the importance of each report

- **GRADUAL REVEAL**: Place reports in an order that tells a story.
- **POSITION**: People read from left to right, and top to bottom (most languages).
- **SIZE**: Give the most important reports more space.
- **GROUP DATA**: Keep related reports together (e.g. demographic & gender).
- **MINIMIZE SCROLLING**: Consider using sub-tabs or associated reports instead.
- **DON’T SQUISH**: Ensure each report has enough space to be readable.
Clarity

BEST PRACTICE #7

Don't let people misinterpret your charts. Make your charts easy to understand by telling people exactly what they represent.

**Chart titles**
Use chart titles to frame the story and purpose of your charts.

**Descriptions**
Use descriptions to add additional context, such as how to use the chart, who created the content, and the source of your data.

Make it easy for users to understand

**TITLES**
Tell people what your dashboards and charts represents.

**DESCRIPTION**
Add additional context, such as the source of the data displayed.

**CONDITIONAL FORMATTING**
Highlight what’s important.

**ANNOTATIONS & REFERENCE LINES**
Provide the human context.
Consistency

BEST PRACTICE #8

One of the biggest challenges of dashboard design and delivery is to ensure different people glean the same understanding from your data. Building consistency into your dashboards helps avoid confusion regarding meaning and definition. Consistency also makes dashboards more intuitive and faster to consume.

If you have multiple people building reports, administrators can leverage a View or Metadata layer to ensure consistent names, calculations and colors across all reports and dashboards throughout your deployment.

Ensure consistency throughout your dashboards

**Metrics**

<table>
<thead>
<tr>
<th></th>
<th>Gross Profit Margin %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Σ</td>
<td>Invoice</td>
</tr>
<tr>
<td>Σ</td>
<td>Sales</td>
</tr>
<tr>
<td>Σ</td>
<td>Revenue</td>
</tr>
</tbody>
</table>

** NAMES**

Use consistent naming conventions (e.g. sales, revenue, invoice).

** CALCULATIONS**

Use consistent metrics throughout the organization.

** COLORS**

Use consistent colors to help users form associations with data.
Trust

BEST PRACTICE #9

Do your users trust your data?
Poor data quality is one of the top reasons why Business Intelligence (BI) projects fail. When users stop trusting the data, they eventually stop using your dashboards. Monitoring data quality is a critical lifetime task, as trust can be hard to repair when broken. Yellowfin Tasks gives business users a feedback loop to report data quality issues directly to the data steward. Ensuring data issues are quickly rectified facilitates a greater level of trust throughout your BI deployment.
Tasks

When users know your data is wrong, they stop using your dashboards. Trust in your data is critical. By creating a feedback loop that empowers your users to flag data quality issues with in-platform screenshots and annotations, you ensure rapid data quality resolution. The result? Your dashboards become more trusted than ever.
Accessible

BEST PRACTICE #10

Dashboards are a powerful way for people to monitor important metrics at a glance. But, not every decision-maker spends each day using your BI platform. With that in mind, it’s important that the business insights within your dashboards can be accessed and shared whenever and wherever they’re needed for decision-making.

Maximize the value of your dashboards by delivering insights to decision-makers anywhere, anytime.

Data is more valuable when shared

MOBILE
Create dashboards once, then consume on any platform or device.

EMBED
Embed insights into the third-party applications people use every day.

BROADCAST
Tell people when to take action with scheduled reports and data-driven alerts.

INFOGRAPHICS
Make complex information eye catching, shareable and easily digestible.
About Yellowfin

Yellowfin is a Business Intelligence platform that makes finding and sharing insights easy. Transform your data into rich visualizations and interactive dashboards. Answer your organization’s most important questions. Then share, collaborate and make better data-driven decisions.

For more information, visit www.yellowfinbi.com

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