DEVELOPING INTUITIVE
DASHBOARDS

DASHBOARD
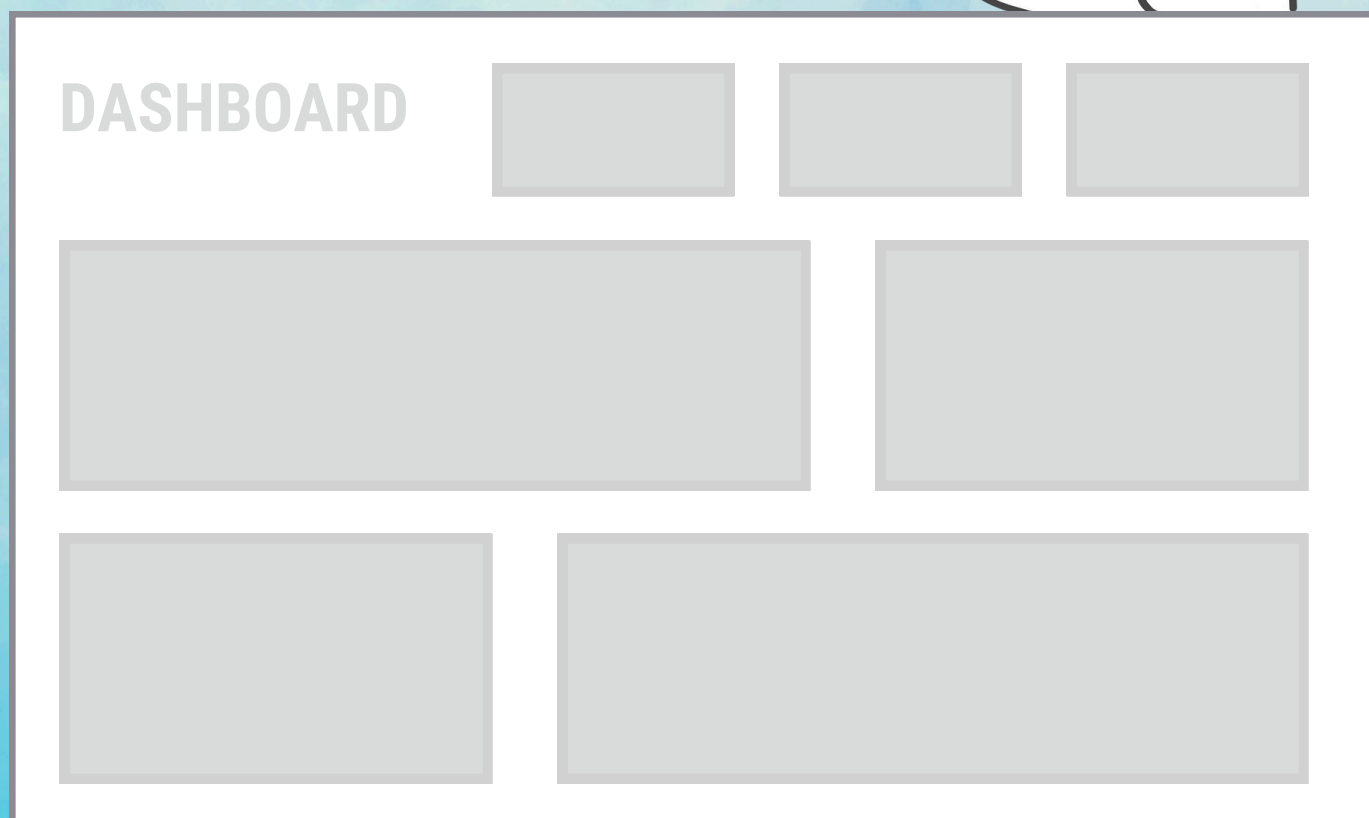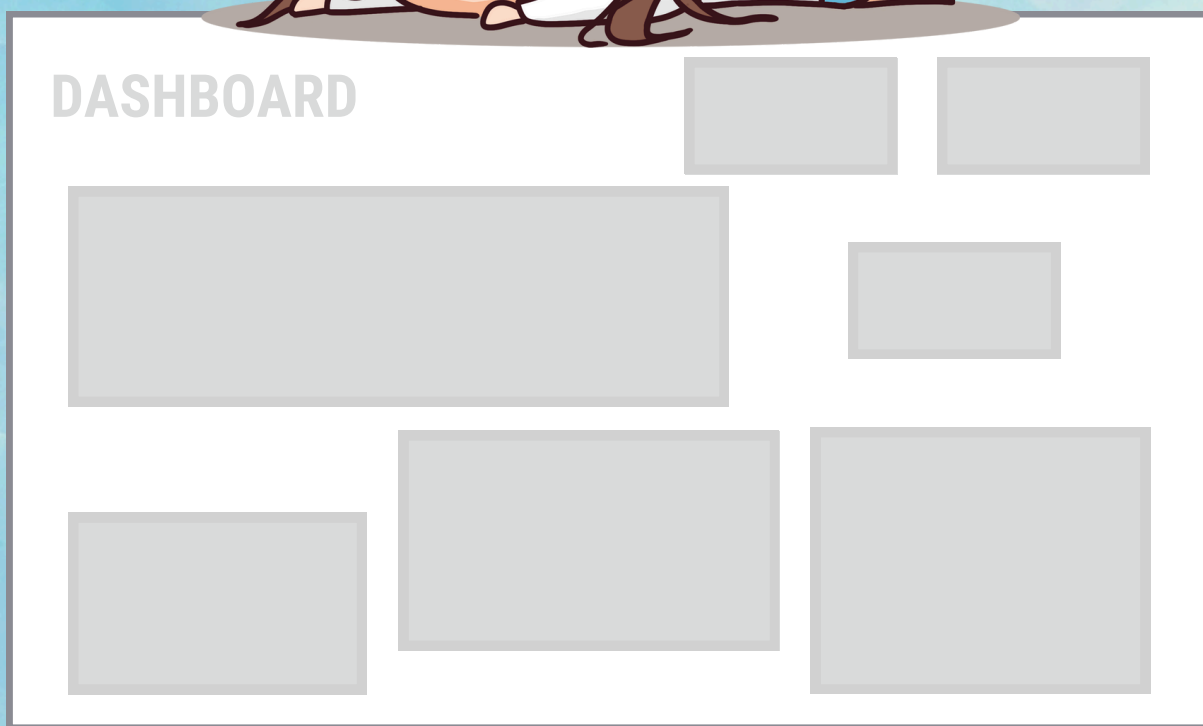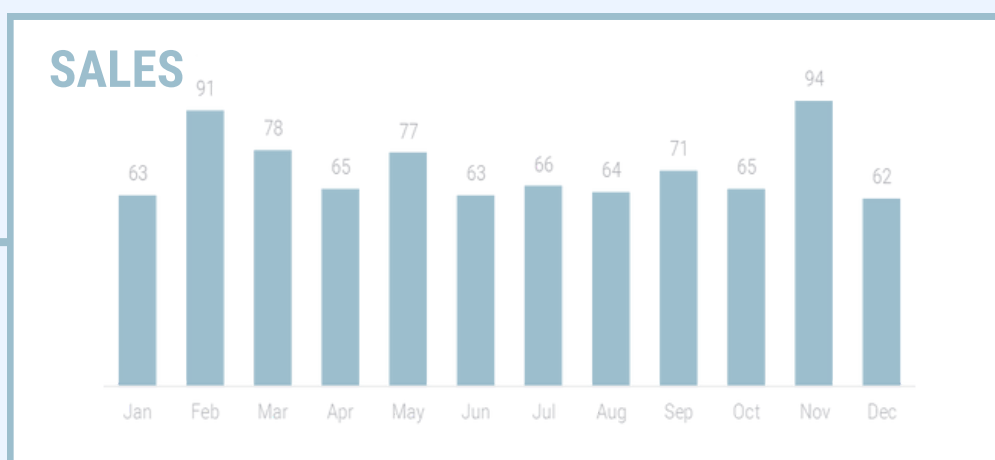
DASHBOARD

1.USE COLOR CONSISTENTLY

THIS PREVENTS YOUR END USER FROM WONDERING:

'WHAT DOES THIS COLOR MEAN?'

Dashboard

SALES

Month	Value
Jan	63
Feb	91
Mar	78
Apr	65
May	77
Jun	63
Jul	66
Aug	64
Sep	71
Oct	65
Nov	94
Dec	62

SALES

Store	Value
Store B	91
Store C	78
Store D	65
Store A	63
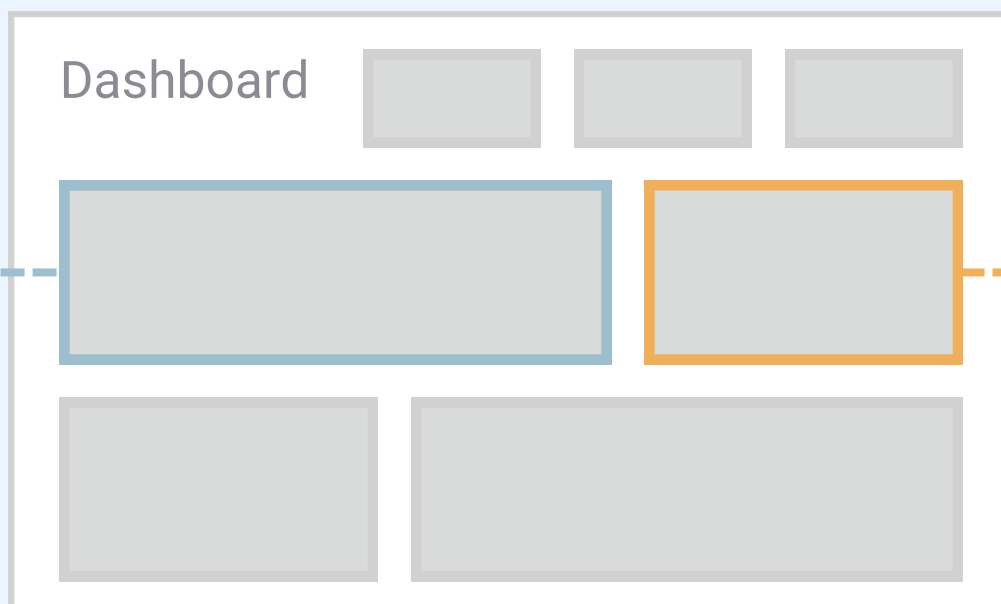
ENSURE COLOR CONSISTENCY ACROSS:

- ## DASHBOARDS

- ## PAGES

+ WITHIN THE PAGE ITSELF

Dashboard

SALES

Jan	63
Feb	91
Mar	78
Apr	65
May	77
Jun	63
Jul	66
Aug	64
Sep	71
Oct	65
Nov	94
Dec	62

SALES

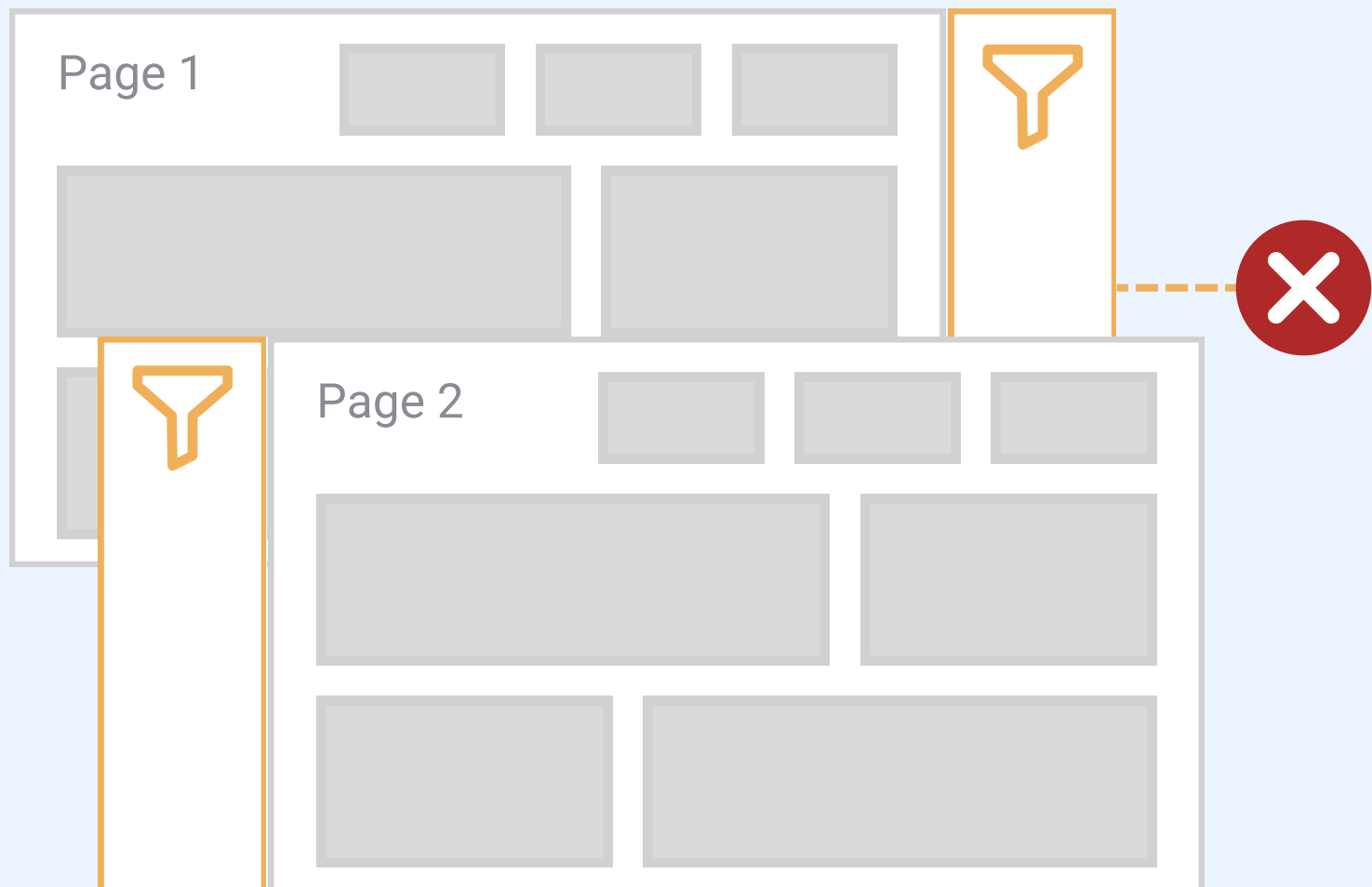|	
Store B	91
Store C	78
Store D	65
Store A	63
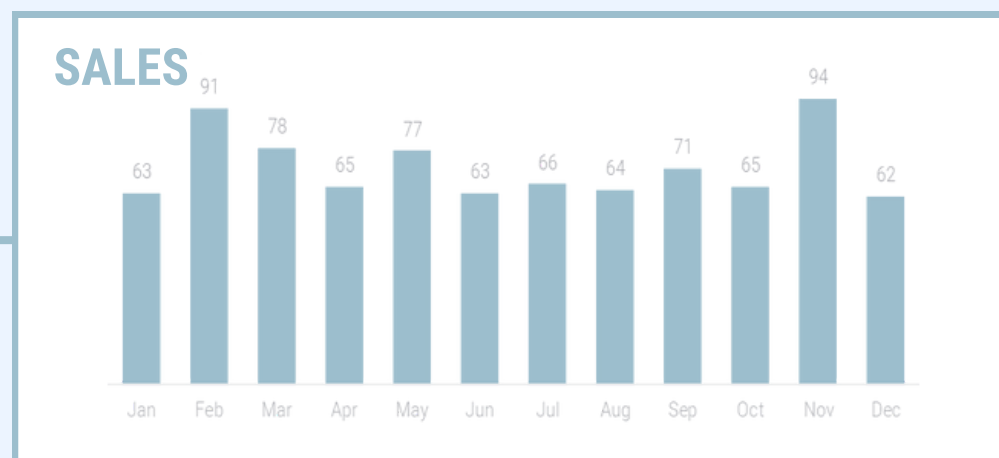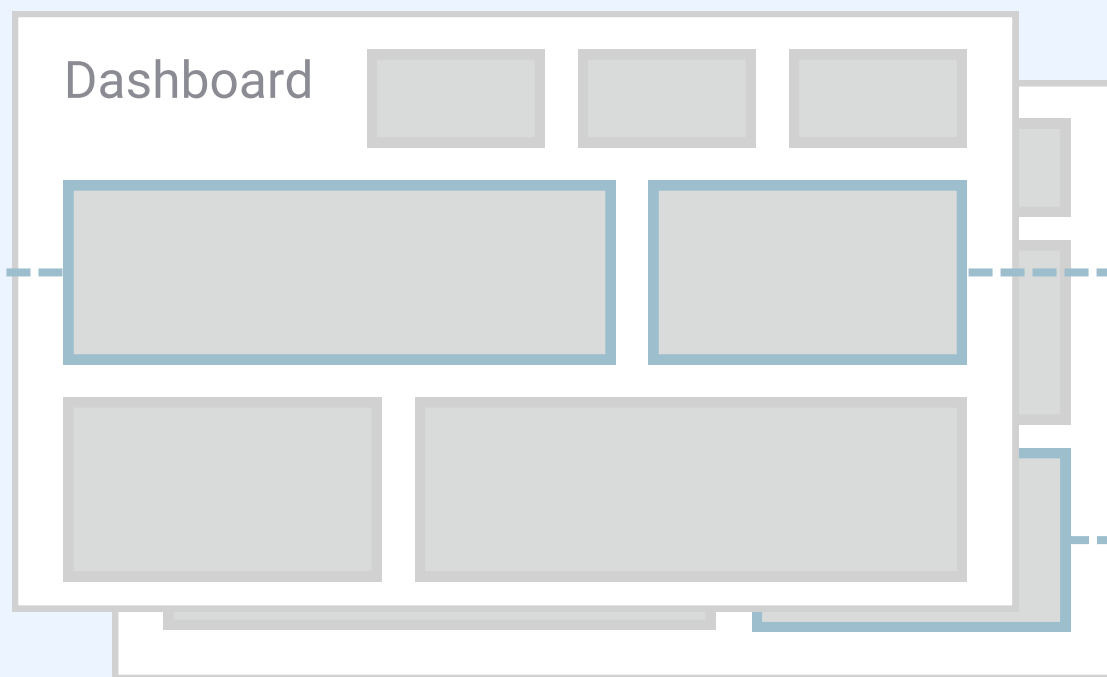
2.FILTER PANE

FILTERS MUST BE PLACED IN THE SAME AREA ACROSS DIFFERENT PAGES.

THIS PREVENTS YOUR END USER FROM WONDERING:

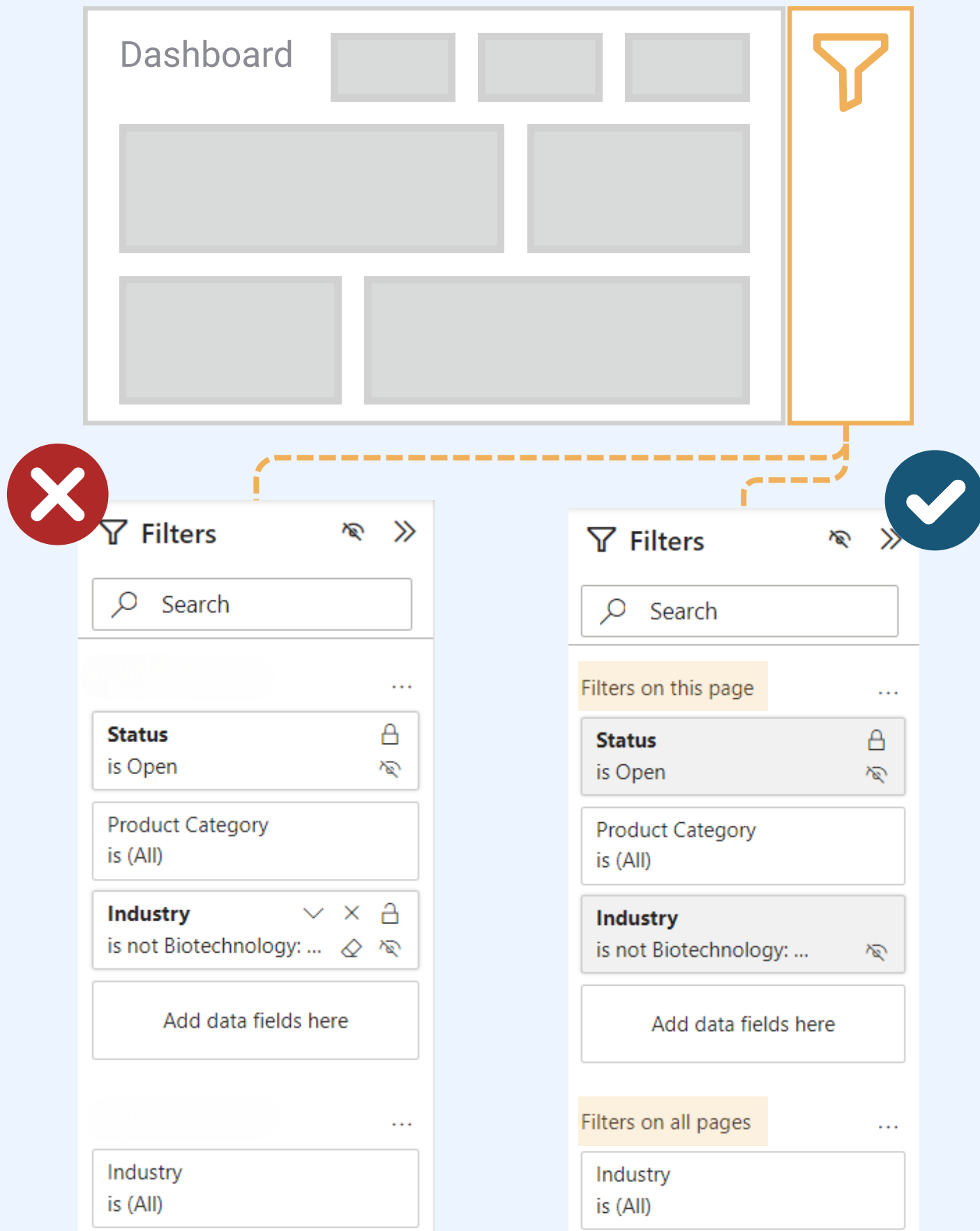**'WHERE CAN I APPLY FILTERS?'**

Page 1

Page 2

FILTERPANE - DEFAULT VISIBLE

FILTER PANES SHOULD ALWAYS BE VISIBLE WHEN THE USER OPENS THE DASHBOARD.
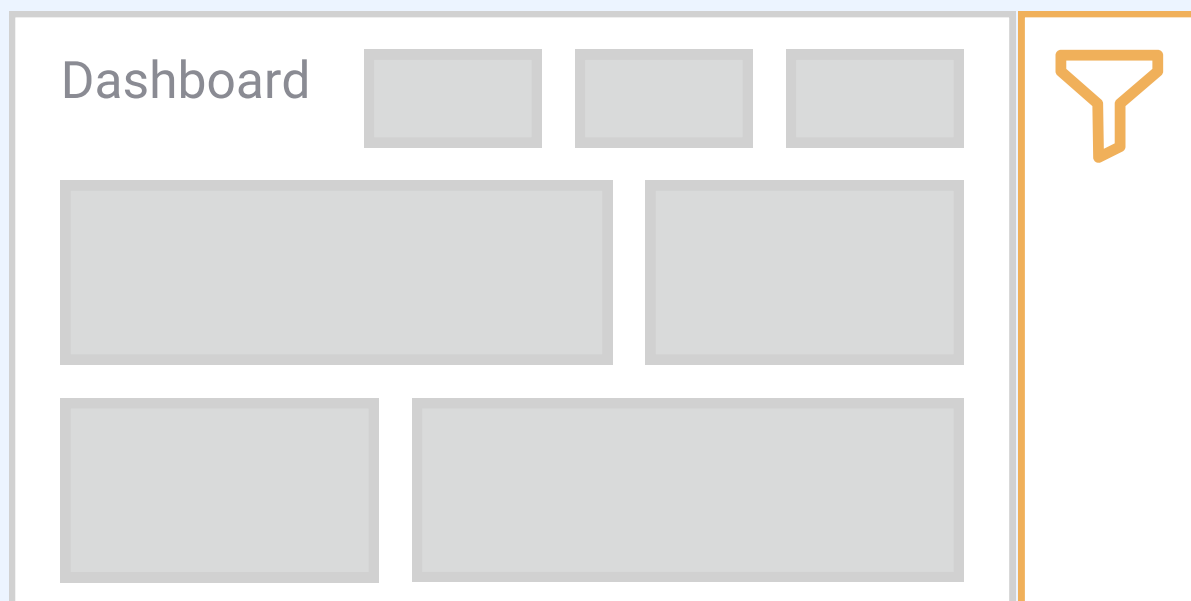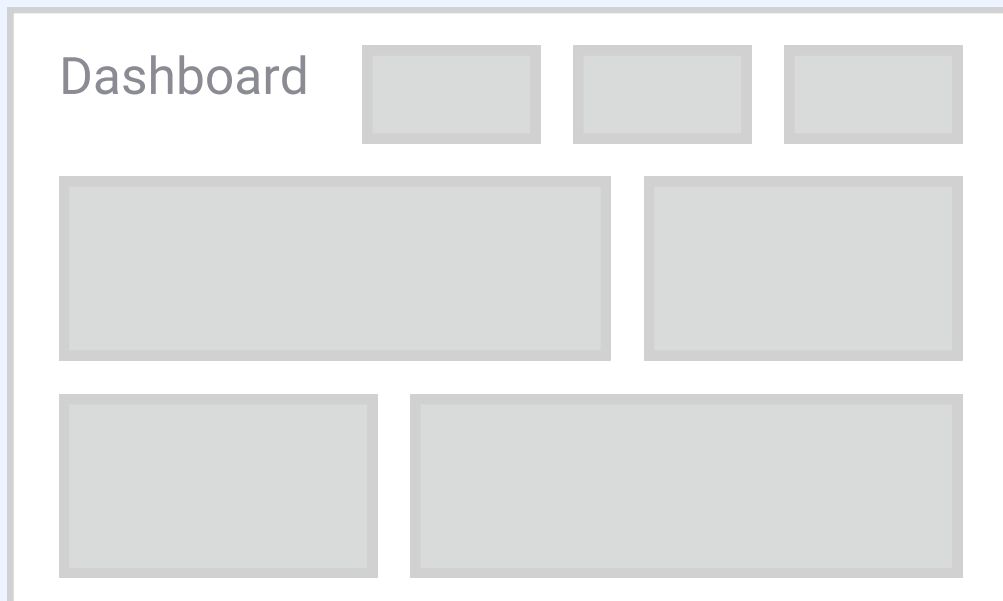
IT MUST BE MADE CLEAR WHICH VISUALS AND PAGES THE FILTER APPLIES TOO & ALWAYS CLEARLY INDICATE IF A FILTER IS ACTIVE.
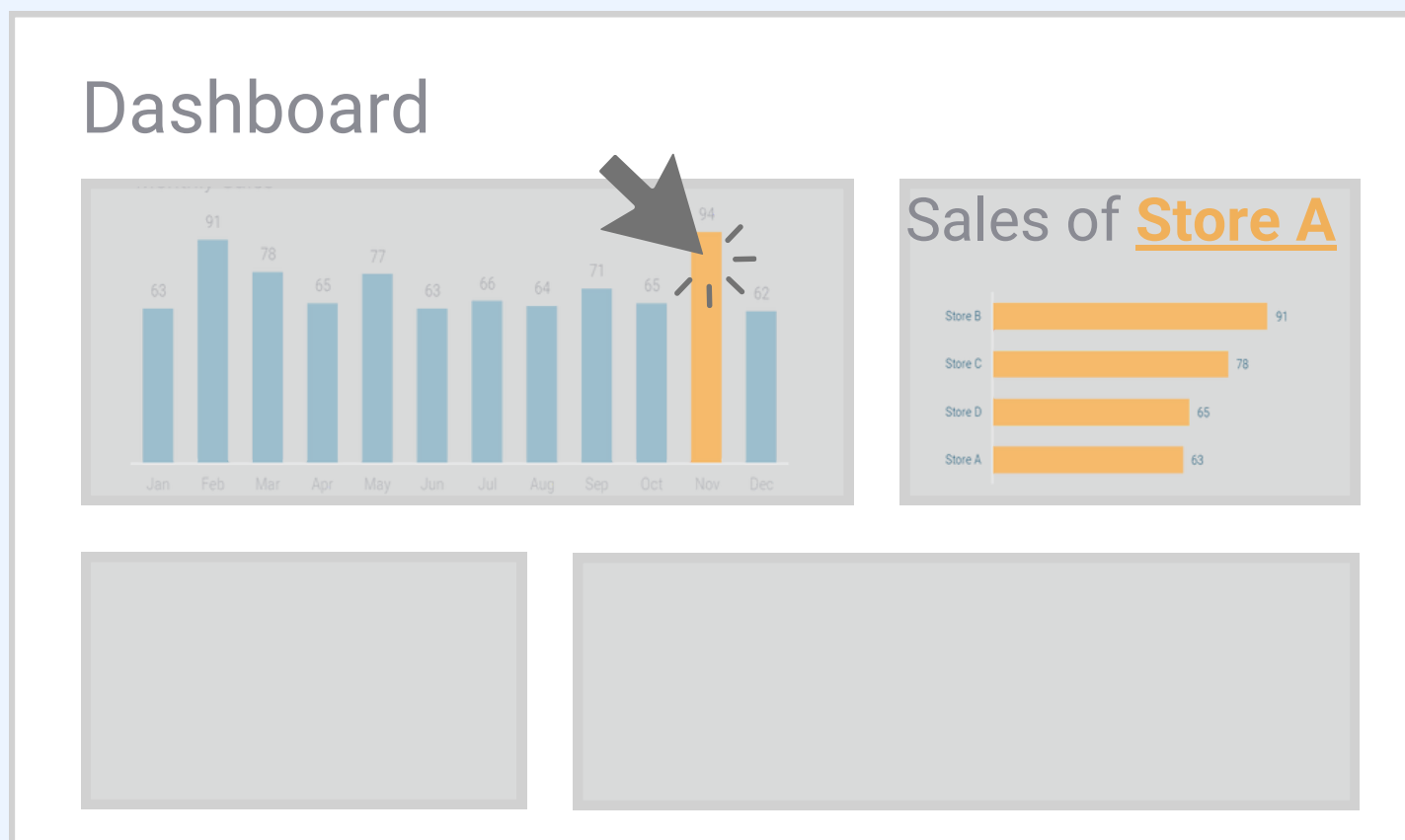
Dashboard

Filters

Search

...

Status 🔒
is Open ⊘

Product Category
is (All)

Industry ⌄ ✕ 🔒
is not Biotechnology: ... ◇ ⊘

Add data fields here

...

Industry
is (All)

Filters

Search

Filters on this page ...

Status 🔒
is Open ⊘

Product Category
is (All)

Industry
is not Biotechnology: ... ⊘

Add data fields here

Filters on all pages ...

Industry
is (All)

3.DYNAMIC TITLES

DYNAMIC TITLES CAN HELP CLARIFY THE RESULTS OF A SPECIFIC ACTION.

THIS PREVENTS YOUR END USER FROM WONDERING:

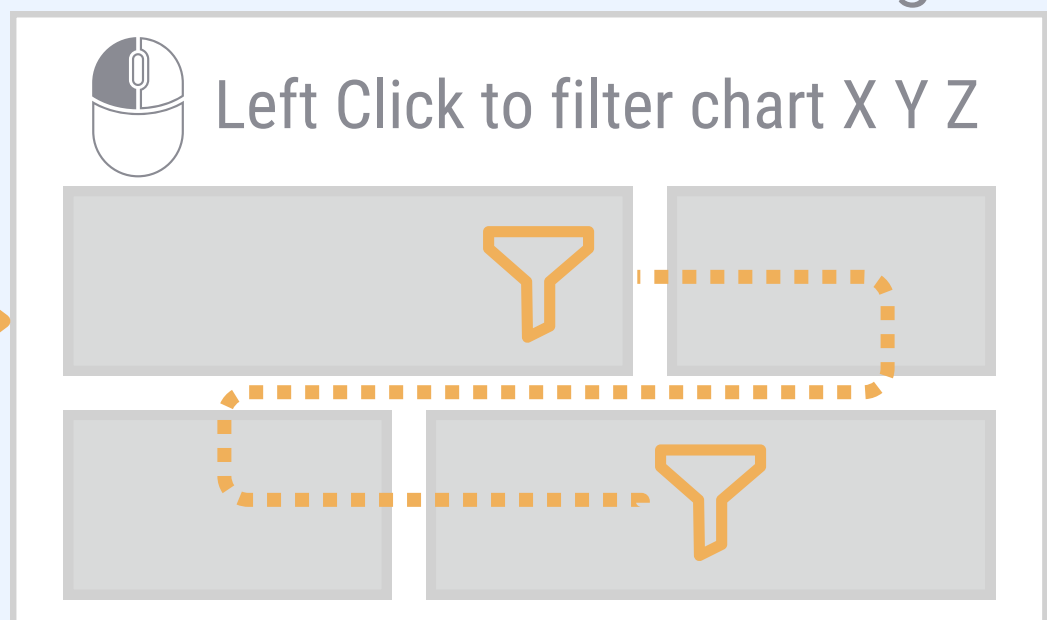**'WHAT IS THIS VISUAL FILTERED ON?'**

4. GUIDE THE USER

ANNOTATIONS AND INFORMATION BUTTONS CAN HELP THE USER NAVIGATE THROUGH THE DASHBOARD

'HOW DO I USE THIS DASHBOARD?'

Landing page

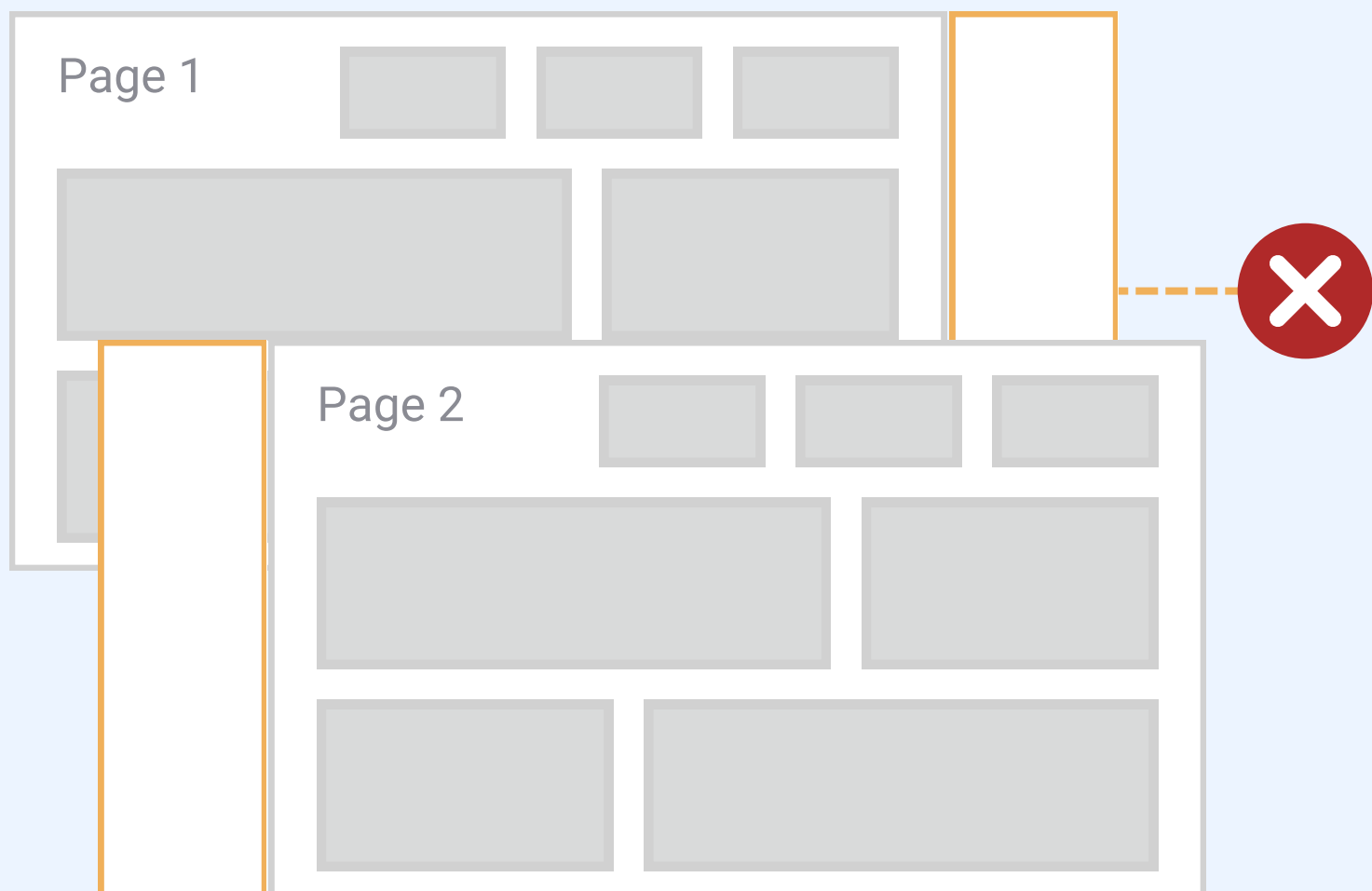Right-click to drill through

Page 2

Left Click to filter chart X Y Z

5.NAVIGATION PANE

THE NAVIGATION PANE MUST BE PLACED IN THE SAME AREA ACROSS DIFFERENT PAGES.

THIS PREVENTS YOUR END USER FROM WONDERING:
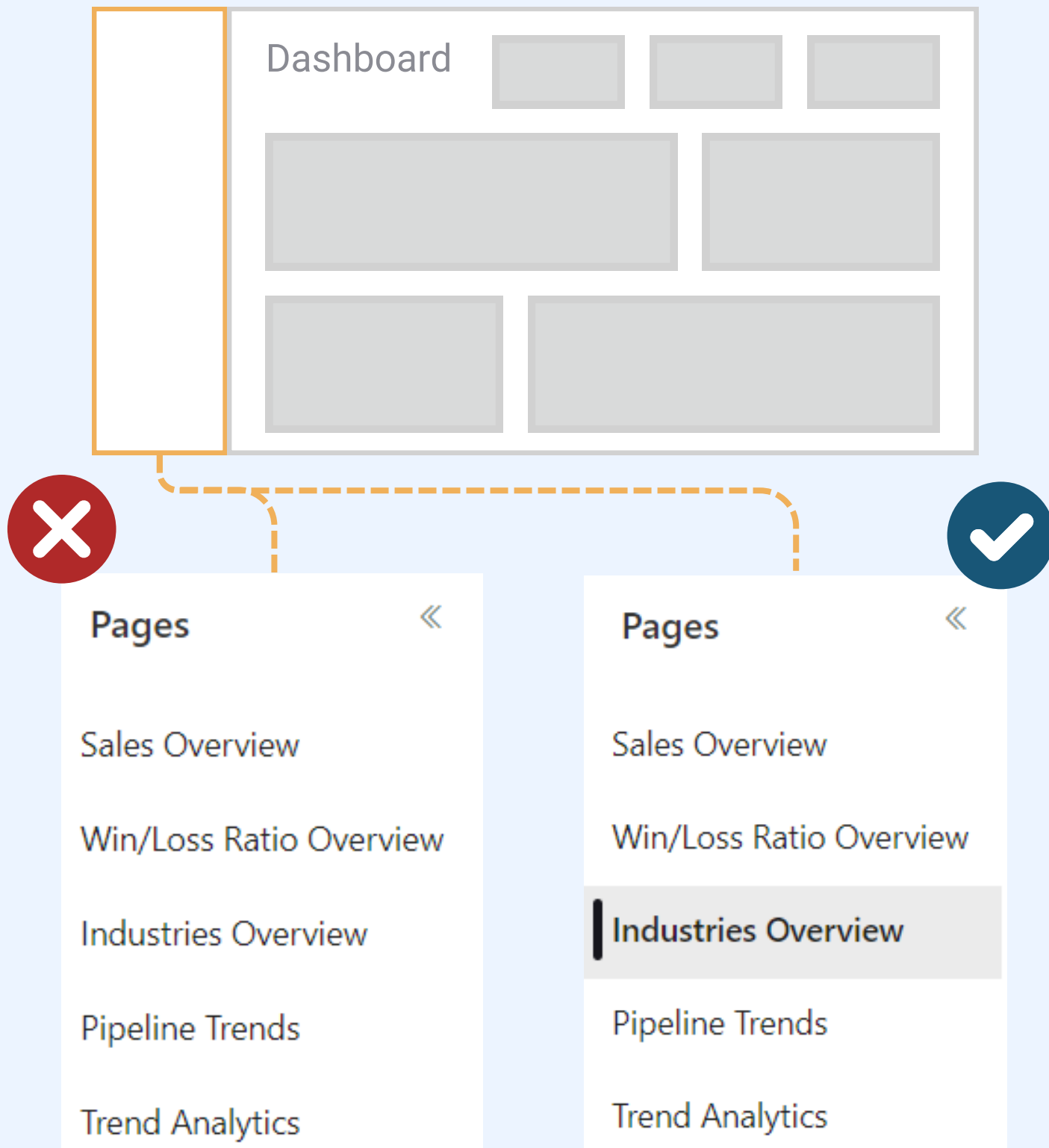
'WHERE CAN I NAVIGATE BETWEEN PAGES?'

Page 1

Page 2

NAVIAGTION PANE - DEFAULT VISIBLE

NAVIGATION PANES SHOULD ALWAYS BE VISIBLE WHEN THE USER OPENS THE DASHBOARD.

Dashboard

Dashboard
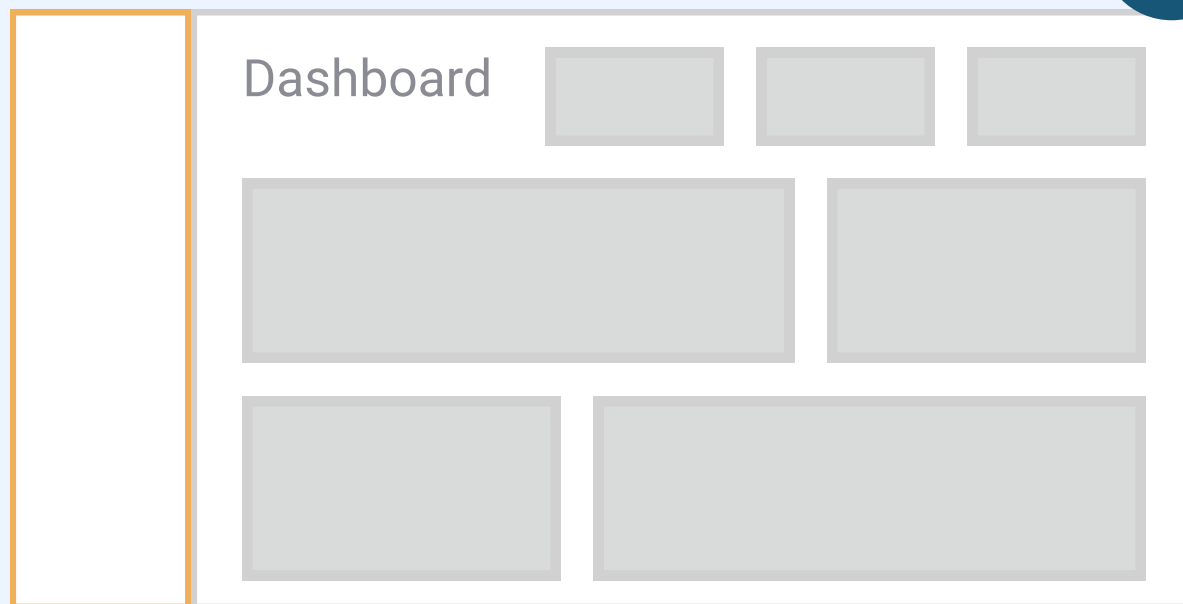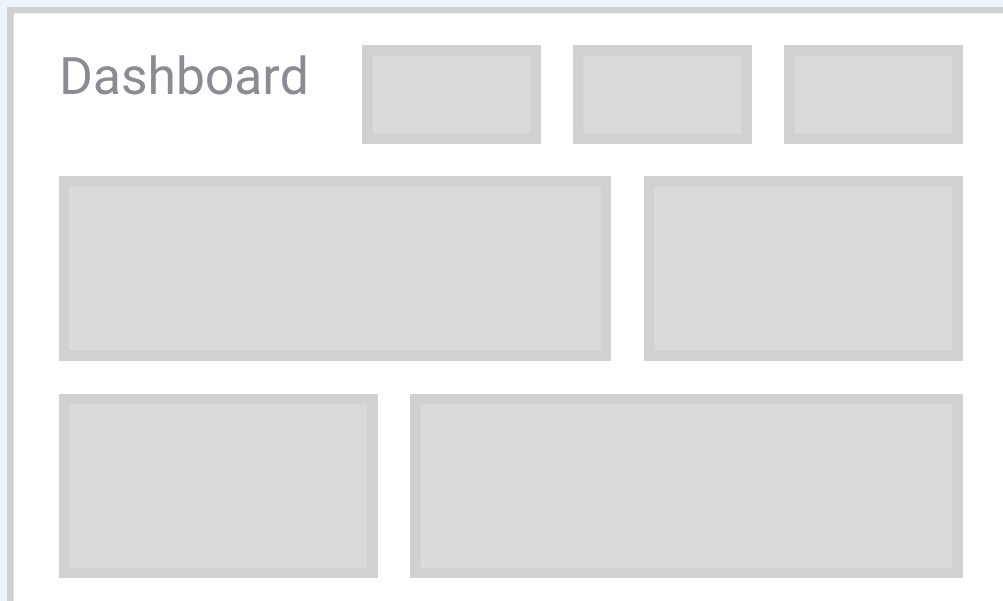
MAKE THE USER'S LOCATION CLEAR AT ALL TIMES & KEEP THE PANE VISIBLE AT ALL TIMES

Dashboard

Pages «

Sales Overview

Win/Loss Ratio Overview

Industries Overview

Pipeline Trends

Trend Analytics

Pages «

Sales Overview

Win/Loss Ratio Overview

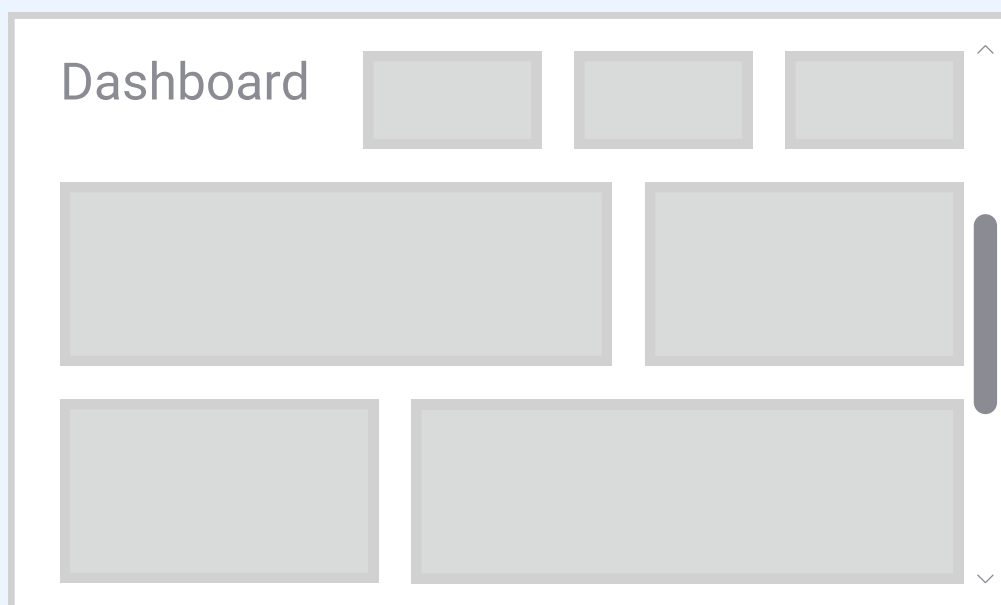Industries Overview

Pipeline Trends
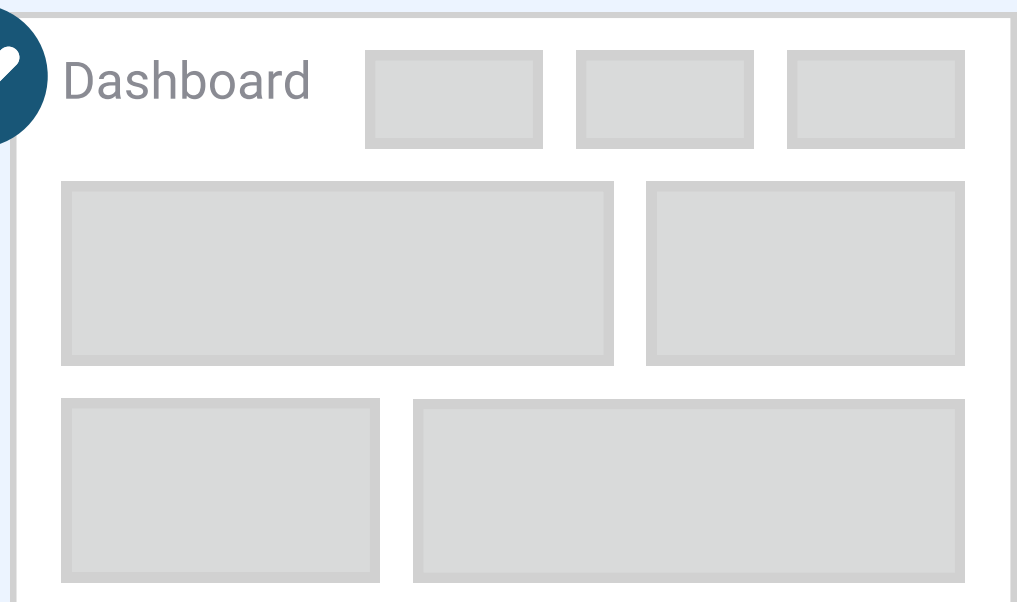
Trend Analytics

6.INFORMATION CONSUMPTION

ENSURE YOUR AUDIENCE HAS ACCESS TO ALL INFORMATION THAT SHOULD BE CONSUMED SIMULTANEOUSLY

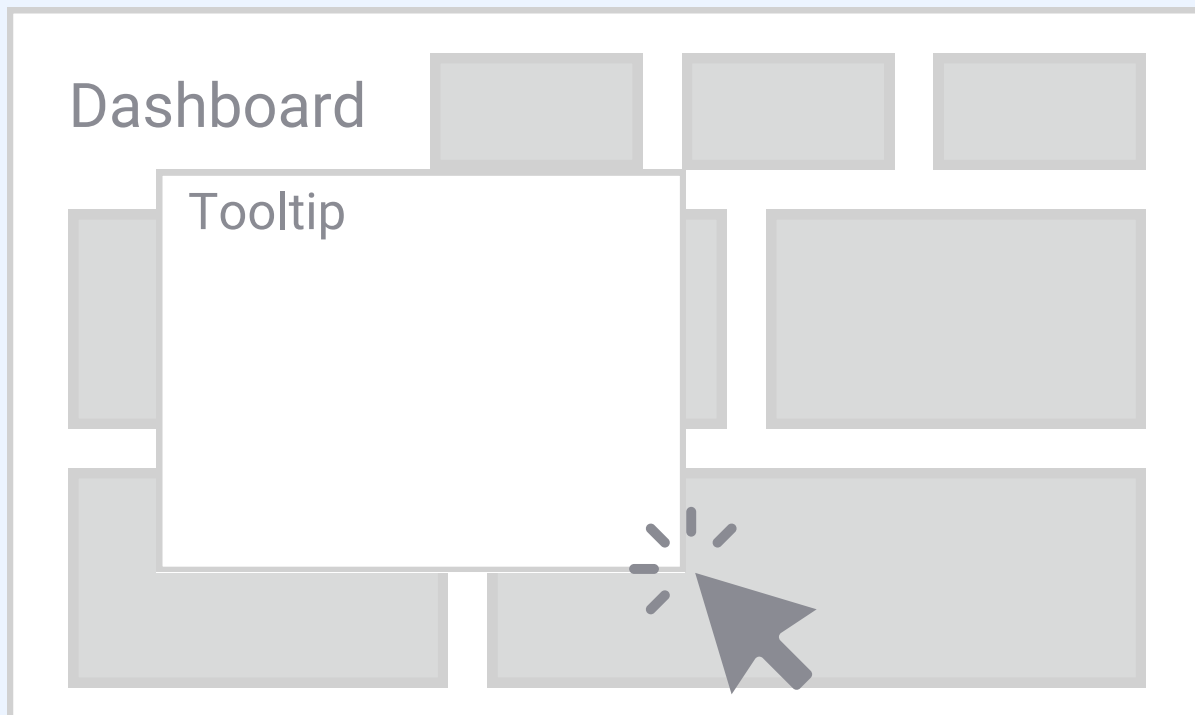**THIS PREVENTS YOUR END USER FROM WONDERING:**
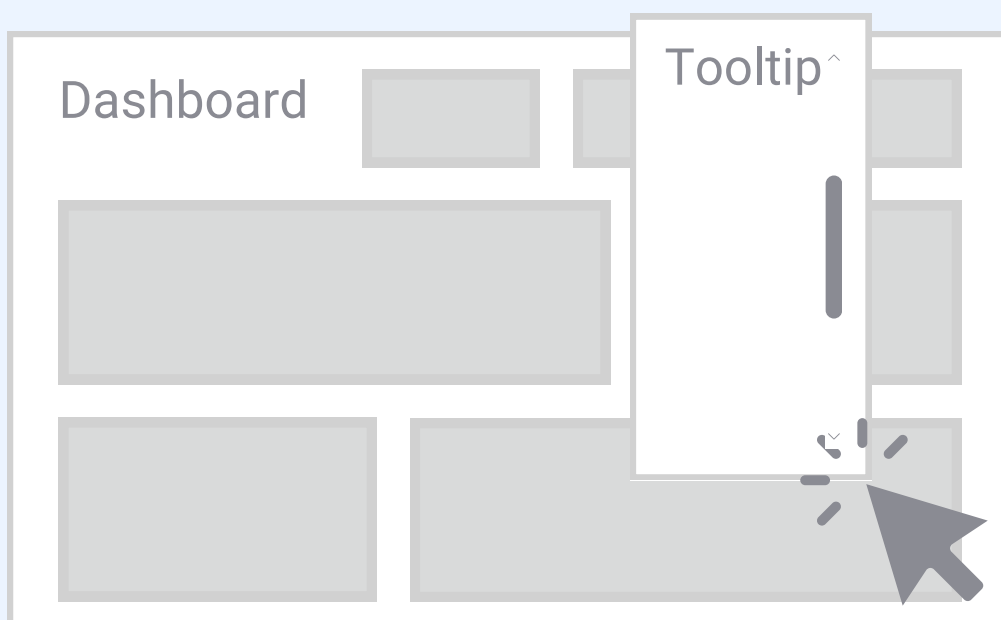
"WHAT DID THAT FIRST CHART TELL ME AGAIN?"

SCROLLBAR

ENSURE TOOLTIPS DON'T HIDE INFORMATION OF OTHER CHARTS THAT SHOULD BE CONSUMED SIMULTANEOUSLY WITH THE TOOLTIP

Dashboard

Tooltip

ENSURE THAT SCROLLING IS NOT REQUIRED WITHIN TOOLTIPS
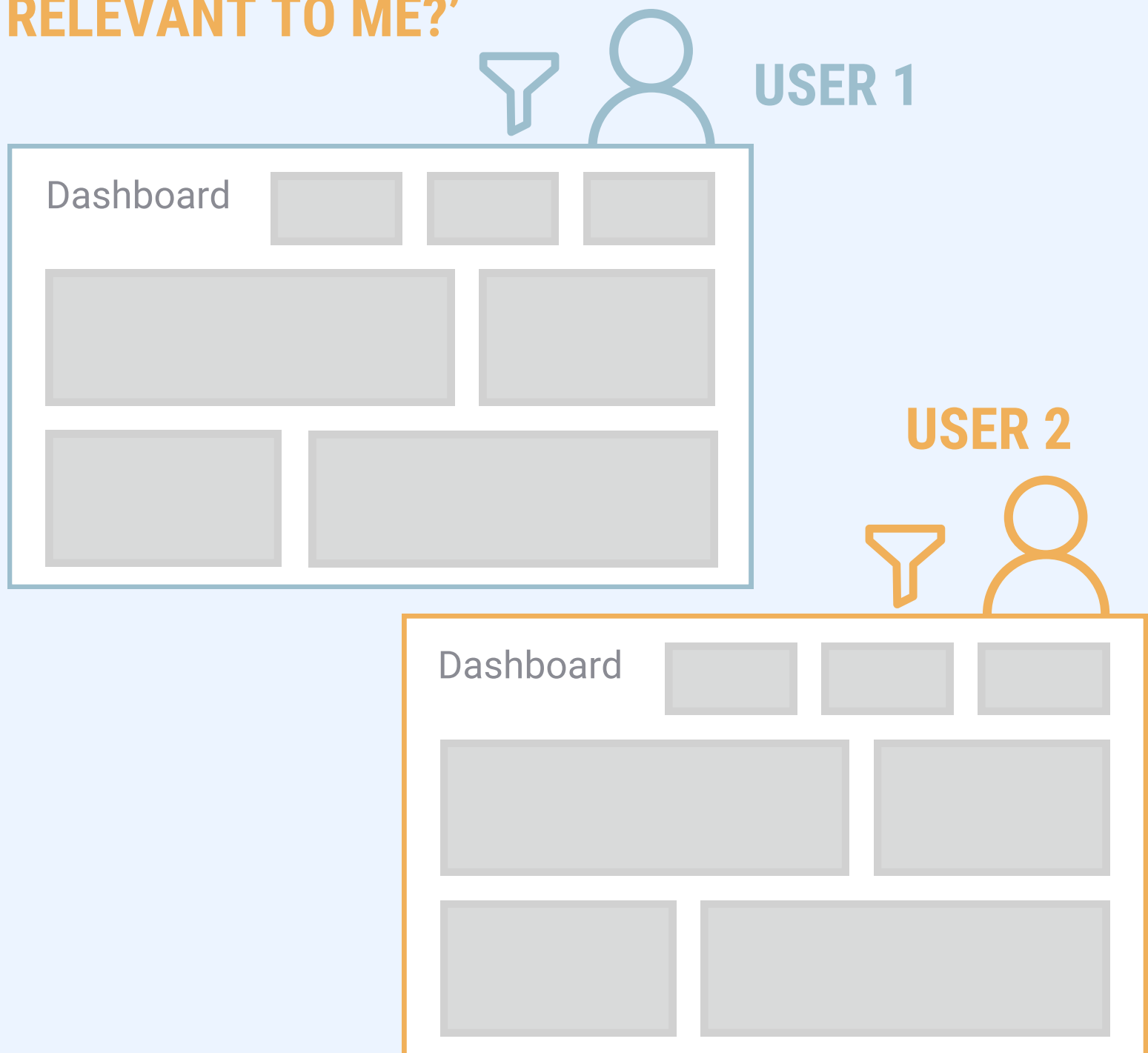
Dashboard

Tooltip^

7. PRE-FILTERING

DASHBOARDS SHOULD BE PRE-FILTERED BASED ON THE PERSON'S NEEDS.

THIS PREVENTS YOUR END USER FROM WONDERING:

'HOW DO I GET TO INFORMATION THAT'S RELEVANT TO ME?'

USER 1

Dashboard

USER 2

Dashboard

HOW DO YOU ENSURE A GOOD USER EXPERIENCE?

LET ME KNOW IN THE COMMENTS