

# I SHOW YOU EXACTLY HOW I EVALUATE A DASHBOARD

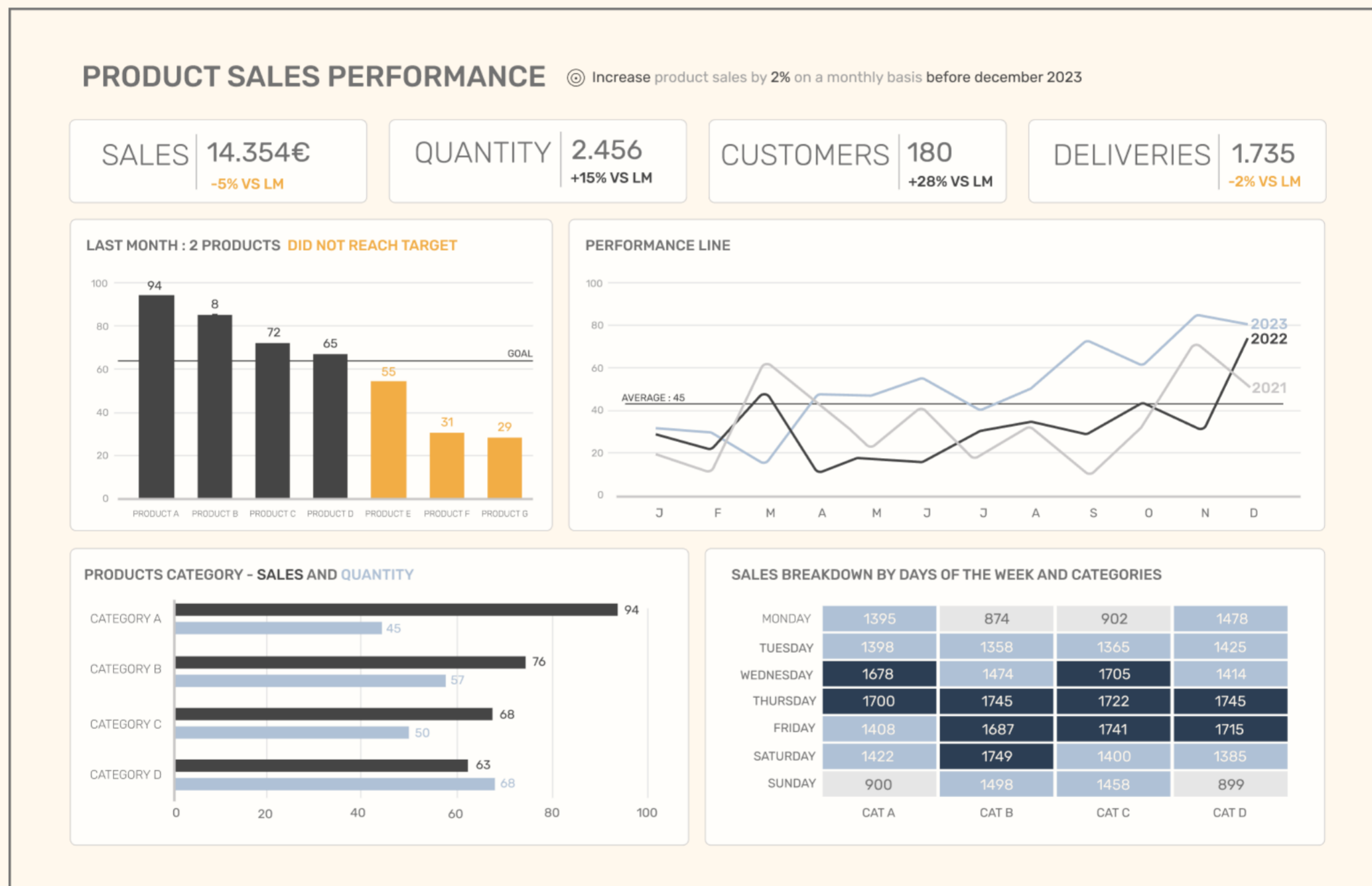


**REJECTED**

*Elegant but inefficient*

# THE DASHBOARD

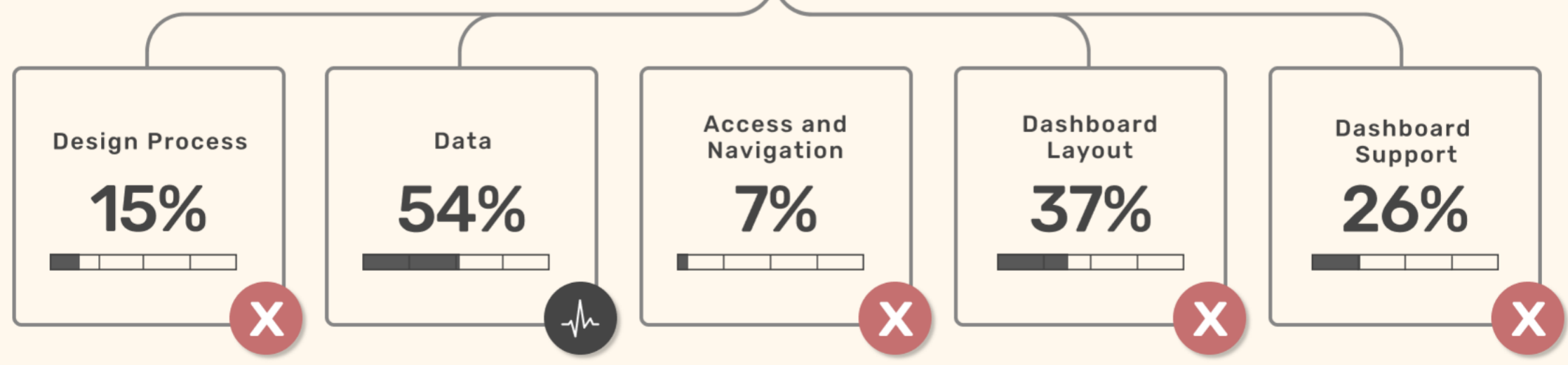
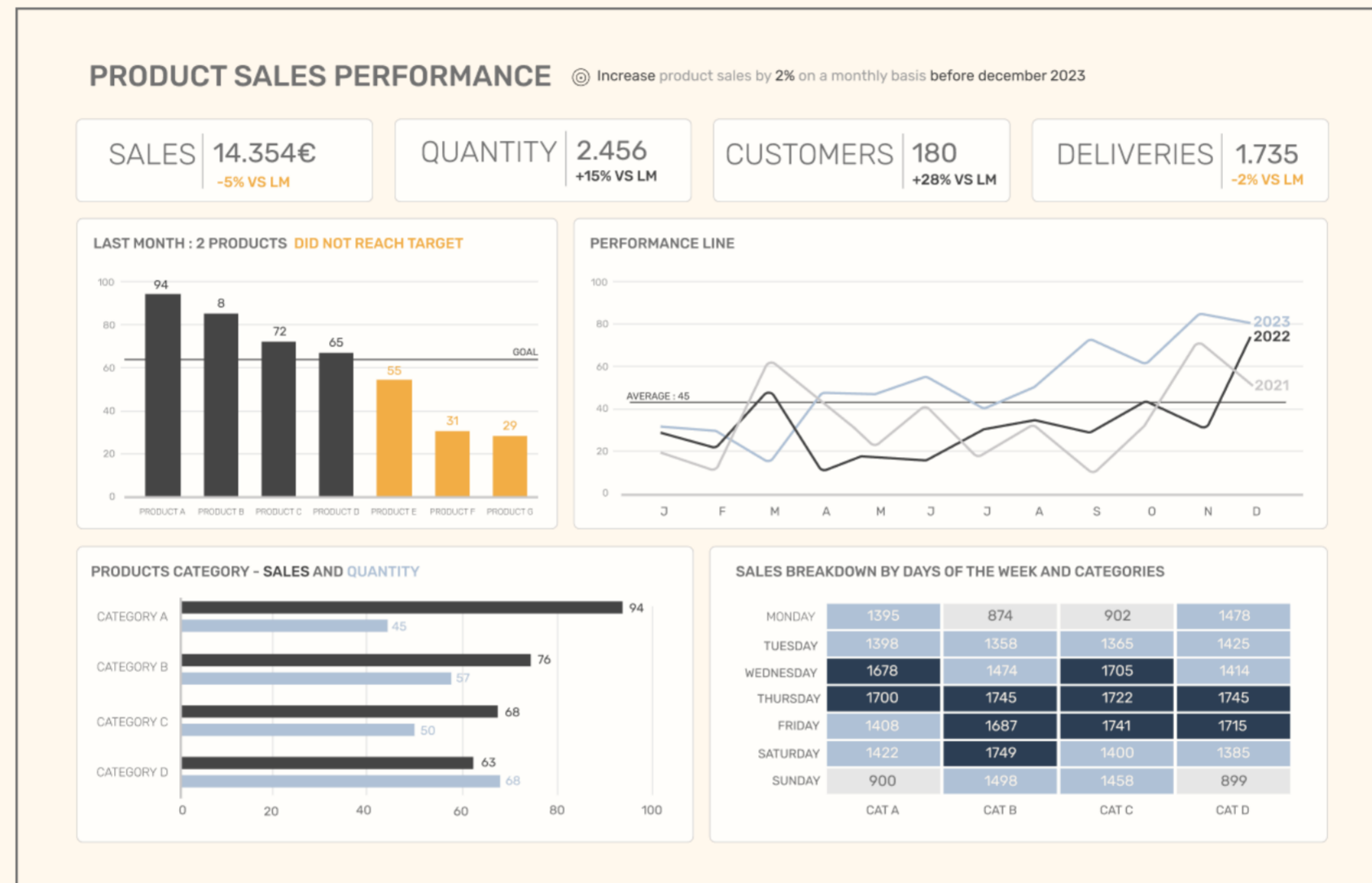
Never judge a book by its cover.



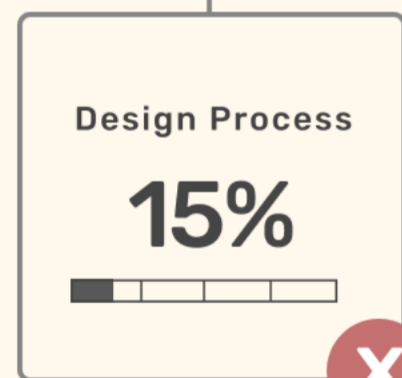
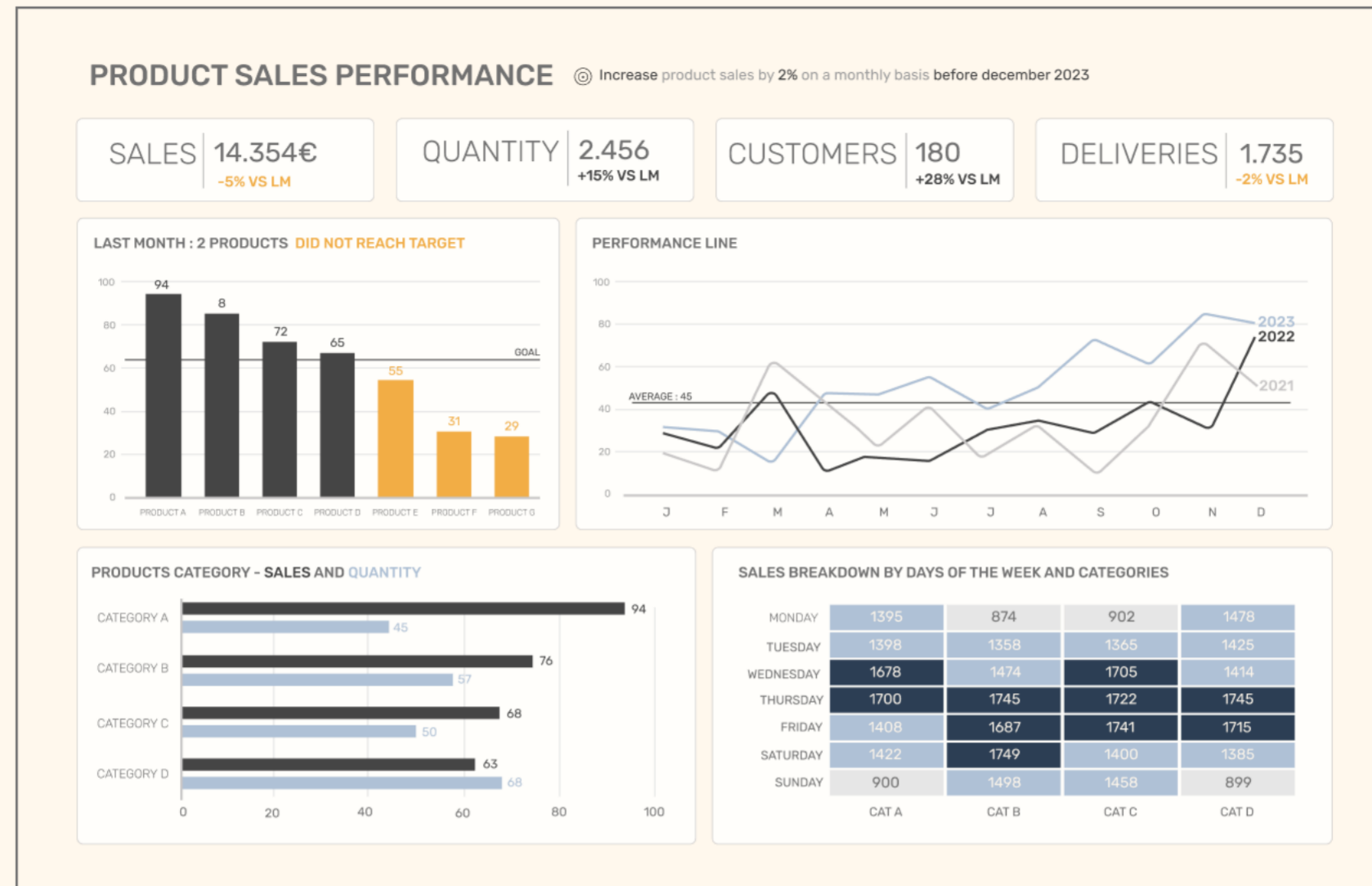
"Looks great!"

# THE DASHBOARD

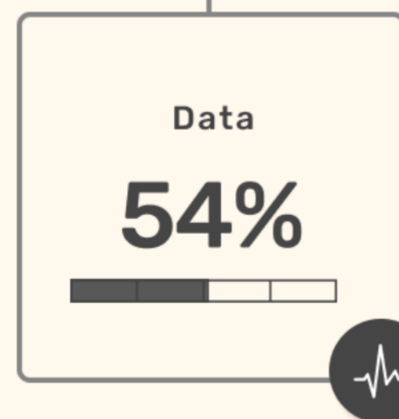
And yet, the scores on the assessment are quite disappointing.



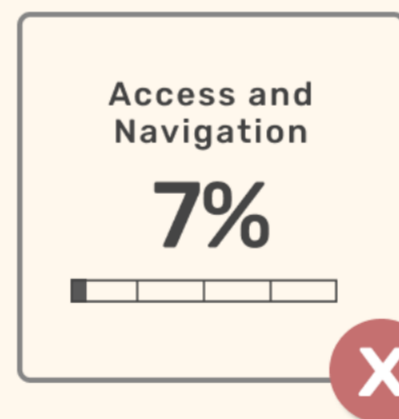
# THE DASHBOARD



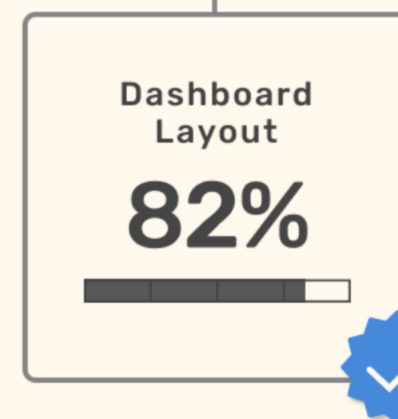
- User needs ignored
- Vague purpose of dashboard
- Disconnected from company strategy



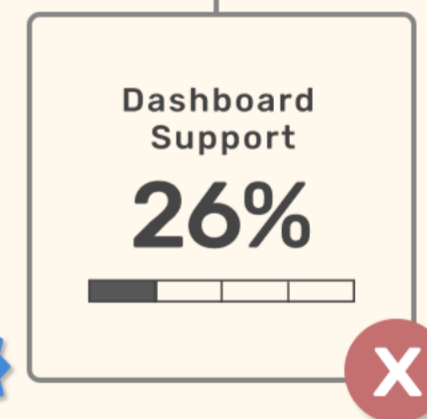
- Excessively high volume of data
- Unnecessary need for deep historical data
- Inappropriate aggregation for the purpose



- Unsatisfactory loading time
- Difficulty accessing dashboard
- Filters lack responsiveness



- Some charts are misleading
- Titles are unclear
- Too many shades of colors



- No user guide
- No contact form
- No satisfaction survey

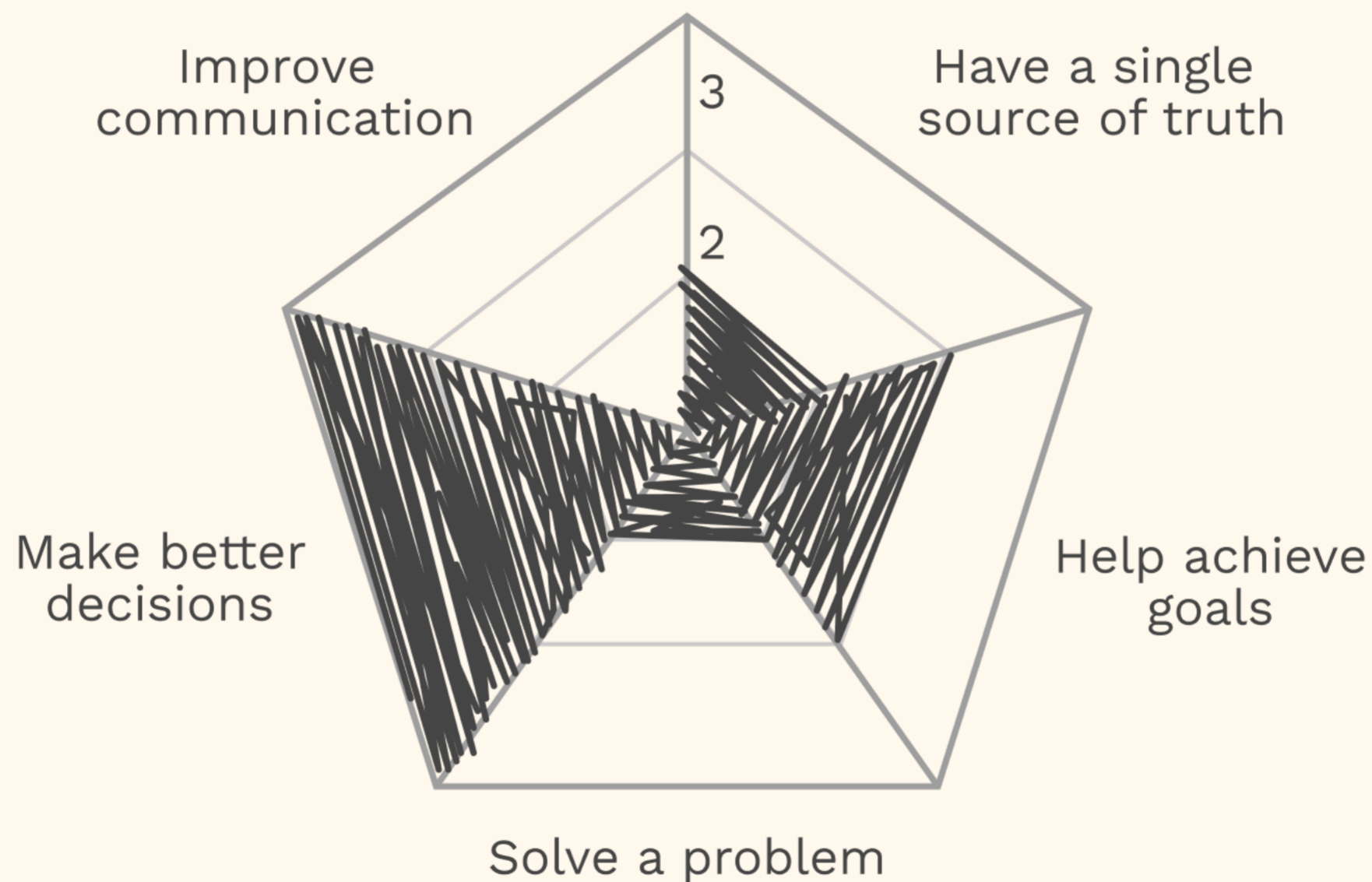
STEP 1

# **UNDERSTAND YOUR AUDIENCE**

I. Understand your audience

# THE PENTAGONE OF PURPOSES

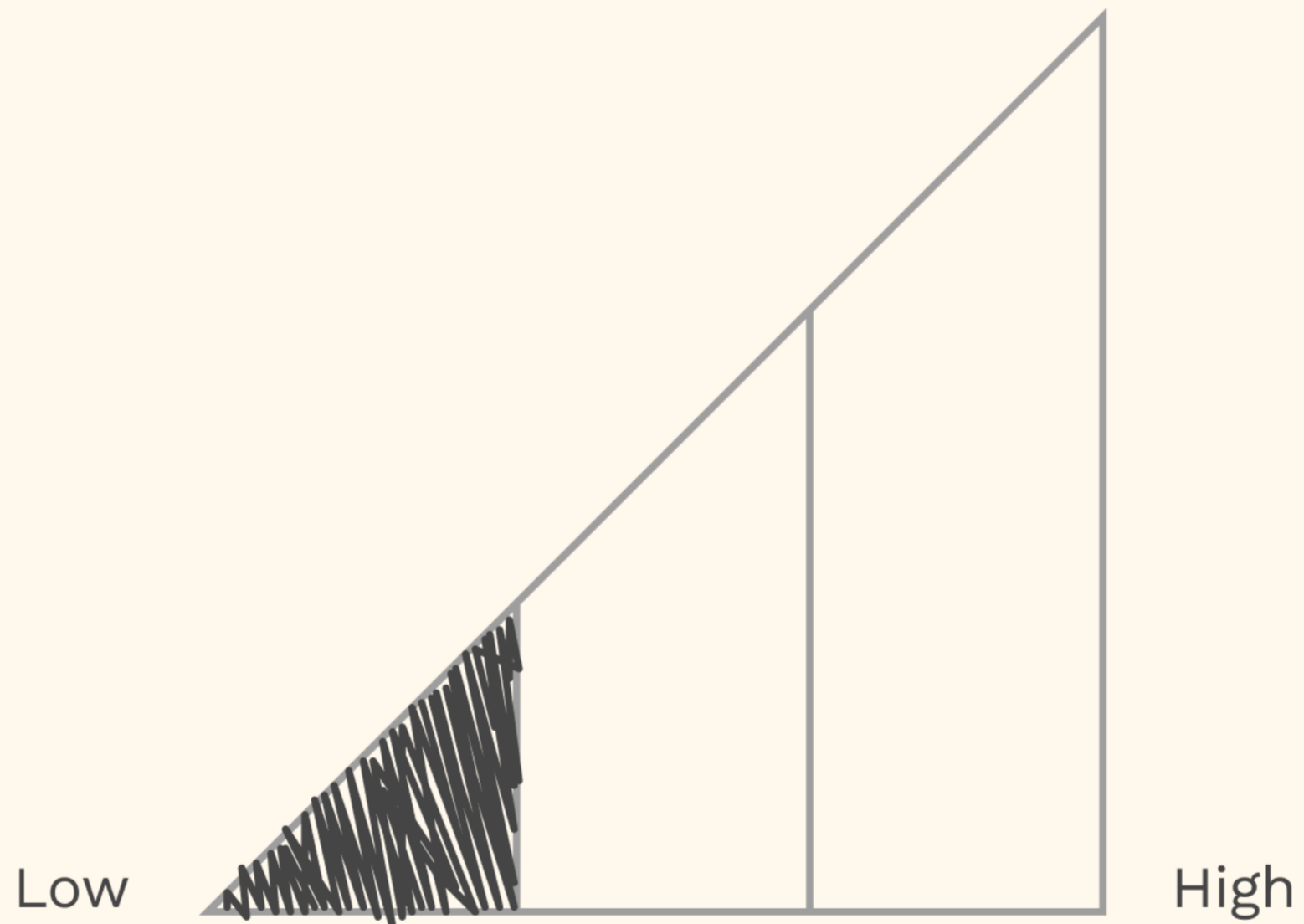
Gives you a better idea of the purpose of the dashboard you are creating and helps you to align yourself with your stakeholders.



I. Understand your audience

# THE DATA LITERACY TRIANGLE

Helps you calibrate your communication to the maturity of your audience with a visual reminder.



STEP II

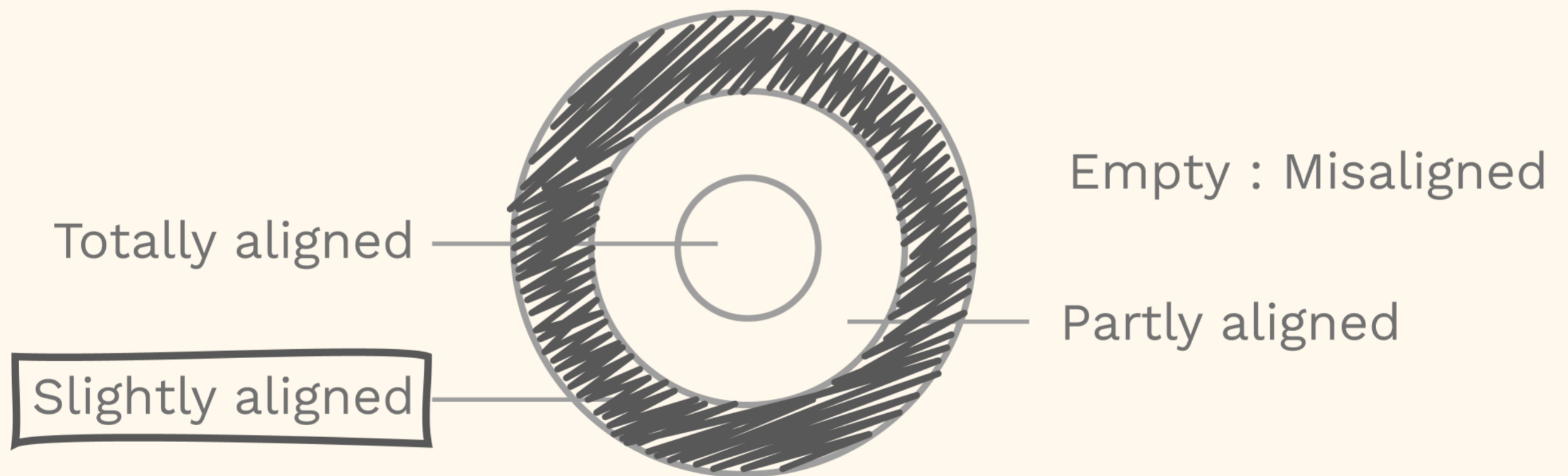
**VISUALIZE THE  
IDENTITY OF YOUR  
DASHBOARD**



II. Identity of your dashboard

## THE STRATEGY DARTBOARD

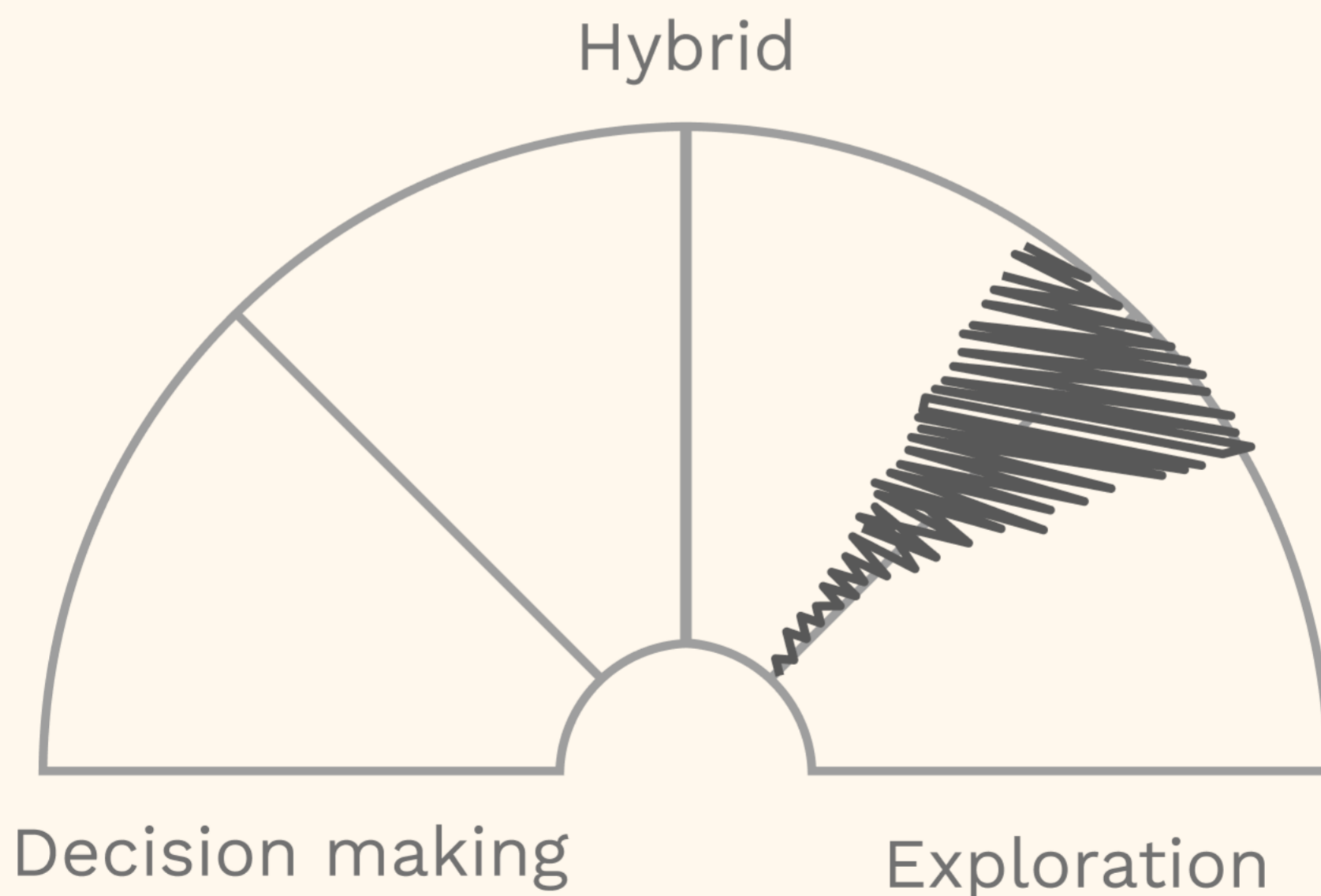
Allows you to track the gap between the company's strategy and the current project.



II. Identity of your dashboard

## THE DASHBOARD SONAR

Helps you settle on a type of dashboard before people play ping-pong with your nerves.



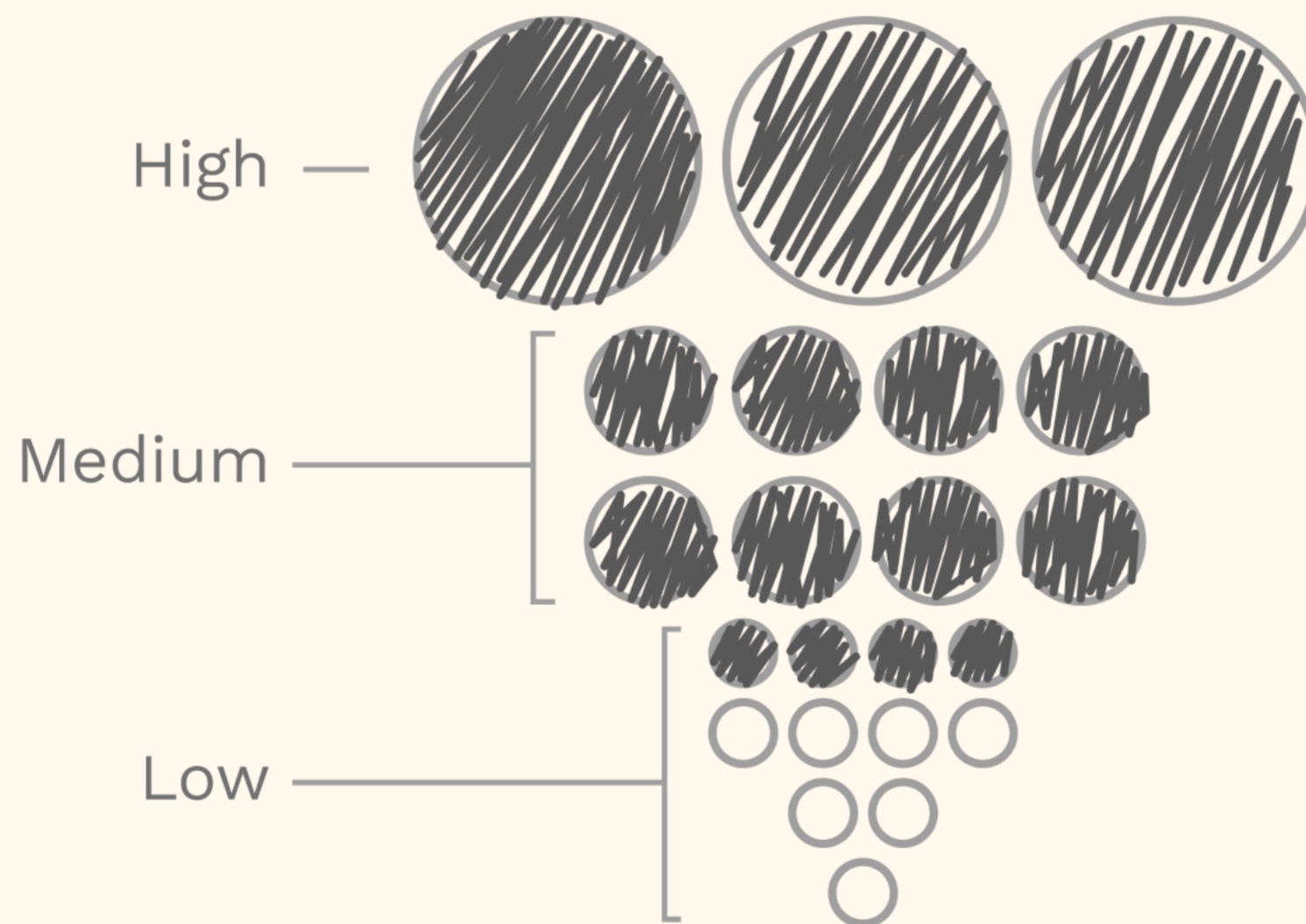
STEP III

**TRACK THE VOLUME  
AND COMPLEXITY  
OF YOUR DATA**

III. Data complexity

## THE AGGREGATOR

Helps you better understand the levels of detail used with the data.



### III. Data complexity

## THE FILTER OF FILTERS

Helps you examine and limit the number of filters.



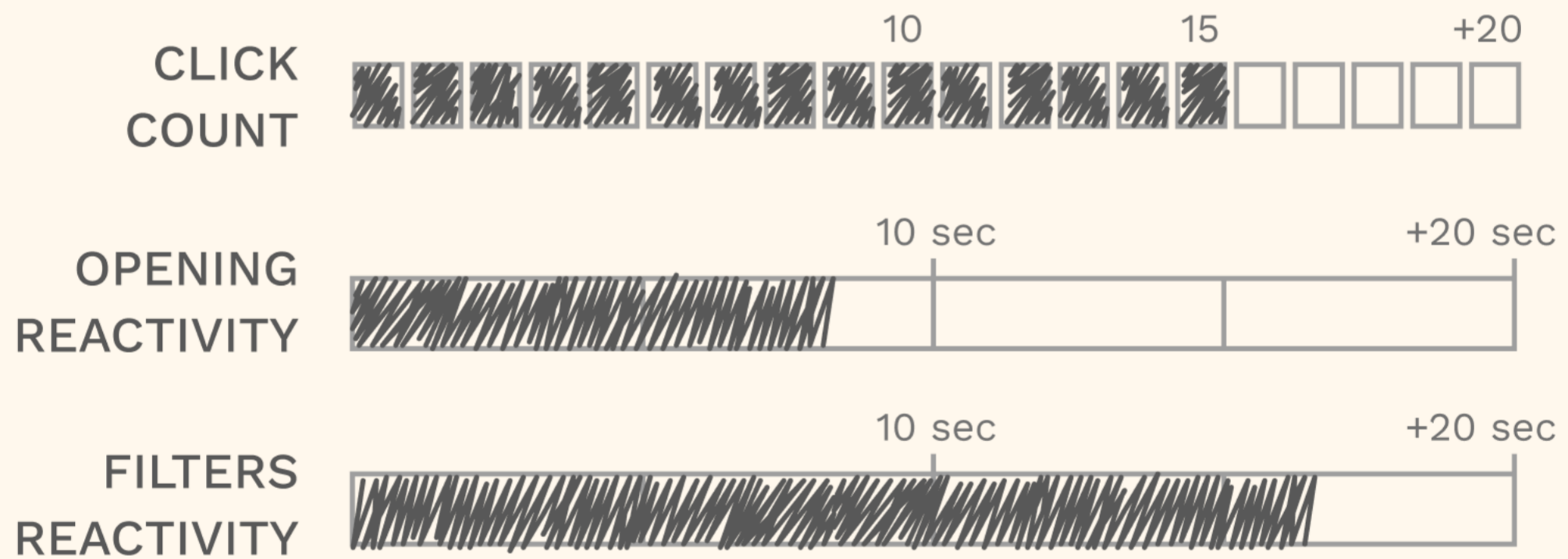
STEP IV

# **ACCESS & REACTIVITY**

#### IV. Access & Reactivity

## THE PATIENCE TEST

Gives you an overview of potential user frustration with dashboard access and reactivity.



STEP V

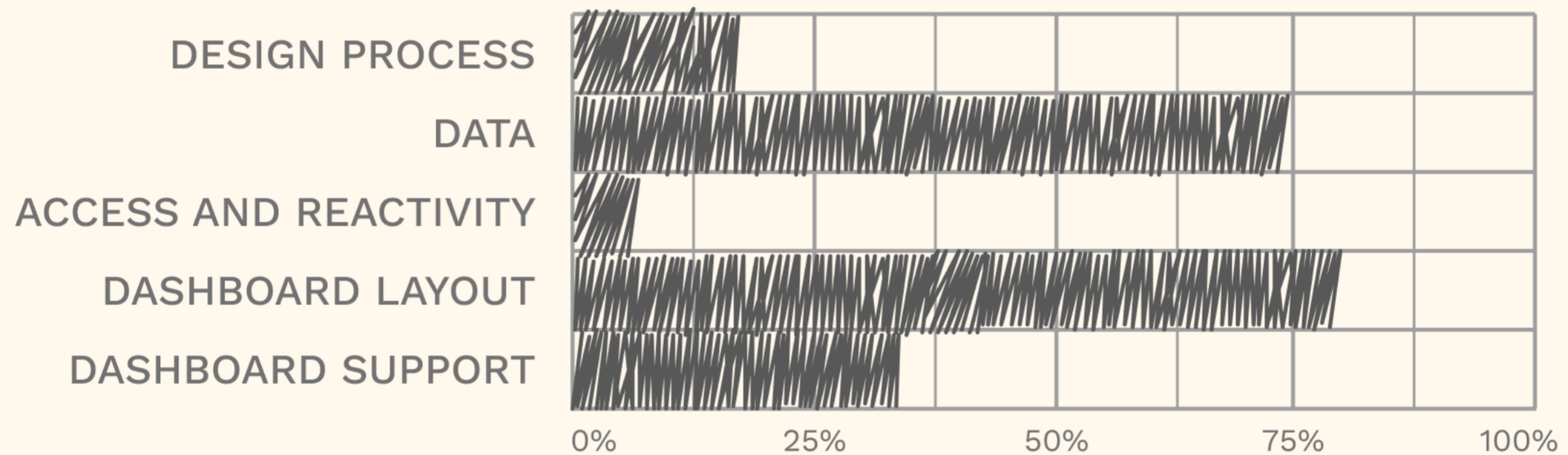
# ASSESSMENT SCORES



V. Assessment Scores

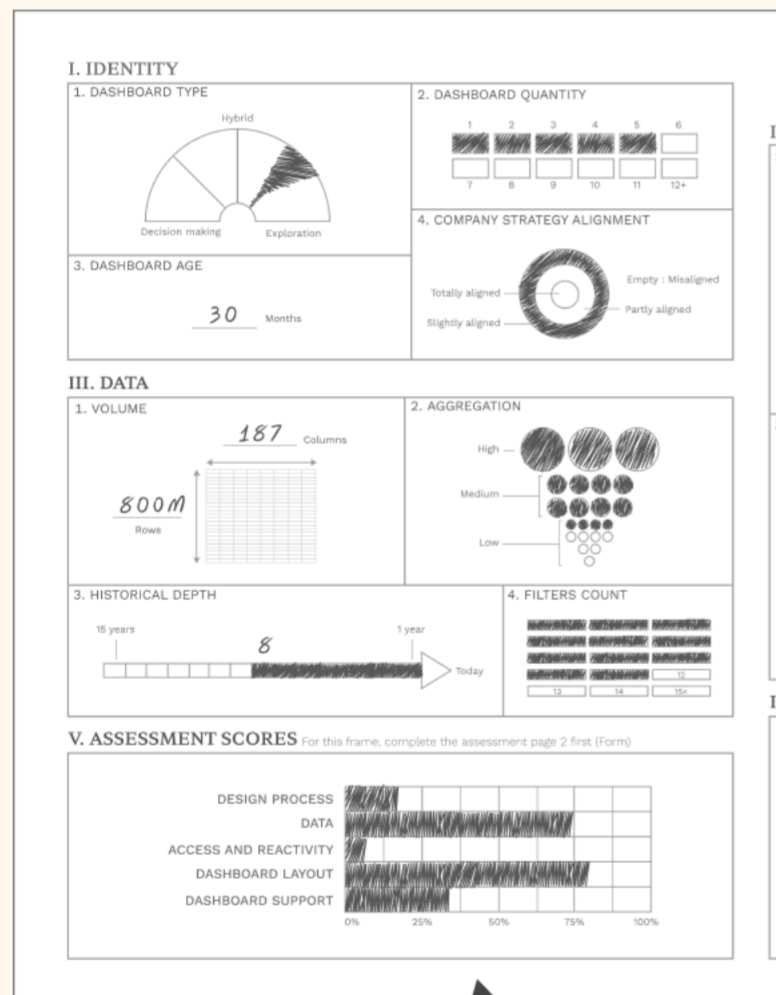
# THE DASHBOARD HEALTH CHECK-UP

Gives you an overview of the health of your dashboard\*



\*complete the checklist first

# VISUALIZE THE STRENGTHS AND WEAKNESSES OF YOUR DASHBOARDS



The overview

## THE DASHBOARD ASSESSMENT

DATAVIZCLARITY.COM

1. Overview 2. Form

### II. AUDIENCE

1. PURPOSE: Improve communication, Have a single source of truth

2. DATA LITERACY LEVEL: [Visual scale]

ANSWERS: 0 Not at all, 1 Partially, 2 Totally, Not Applicable

PROJECT NAME: \_\_\_\_\_ REVIEWER: \_\_\_\_\_ DATE: / /

#### DESIGN PROCESS

- A. The data used in the dashboard is based on validated and up-to-date processes
- B. The audience has been clearly defined (who they are, what role they have...)
- C. Charts are adjusted to suit the usage level of the audience
- D. \*The project is validated by budget owners [1] and stakeholders [2]. None [0]
- E. End users were actively involved in the design process
- F. End users have tested the dashboard and expressed feedbacks
- G. \*The dashboards' purpose has been found [1] and respected [2] until the end. None [0]
- H. The dashboard creates any form of value (profitability, revenue, efficiency...)
- I. The dashboard is created in line with the company or team strategy

Sum of A to I divided by the total number of answers → x50 = SCORE %

#### DATA

- A. \*The data is clean [1], accurate and up-to-date [2]. None [0]
- B. Dashboard data updates automatically based on how users interact with it
- C. The indicators and KPI displayed are aligned with the purpose of the dashboard
- D. The data is offering users the required level of detail neither more nor less

Sum of A to D divided by the total number of answers → x50 = SCORE %

#### ACCESS AND REACTIVITY

- A. \*Navigating to the dashboard requires as few clicks as possible (use score page 1, frame IV)
- B. \*The loading time for the dashboard and filters is reasonable (use score page 1, frame IV)
- C. Responsive design for tablets and smartphones, if necessary

Sum of A to C divided by the total number of answers → x50 = SCORE %

#### DASHBOARD LAYOUT

- A. The charts accurately and honestly represent the data
- B. The most important information is placed at the top of the dashboard
- C. \*Colors are subtle, color-blind friendly [1] and kept to a minimum [2]. None [0]
- D. No effects, 3D, shadows, images, flags have been used
- E. The total mark count aligns with the data literacy level of the audience
- F. Tick marks and gridlines on charts are kept minimal
- G. When relevant, sorting is applied
- H. Axis are not truncated, unless necessary to better understand the data
- I. The dashboard is readable at a glance on a single screen
- J. The dashboard contains a reasonable number of charts avoiding cognitive overload
- K. \*Filters are kept to a minimum and placed close to their target (use score page 1, frame III.4)
- L. Texts are hierarchically structured (Headers, title, subtitle, paragraph...)
- M. \*All texts are horizontal with easy to read font [1] and light black color [2]. None [0]
- N. Margins are large enough and borders are discreet
- O. Pictograms are subtle, harmonious and guide users whenever necessary
- P. The dashboard title and chart titles are concise and convey their purpose

Sum of A to P divided by the total number of answers → x50 = SCORE %

#### DASHBOARD SUPPORT

- A. The dashboard is documented (data, modelling, KPIs, calculations, comments etc.)
- B. Contact form is provided allowing users to reach out developers for any inquiries
- C. A satisfaction survey is accessible to gather feedbacks
- D. The dashboard includes a user guide to provide context and guidance

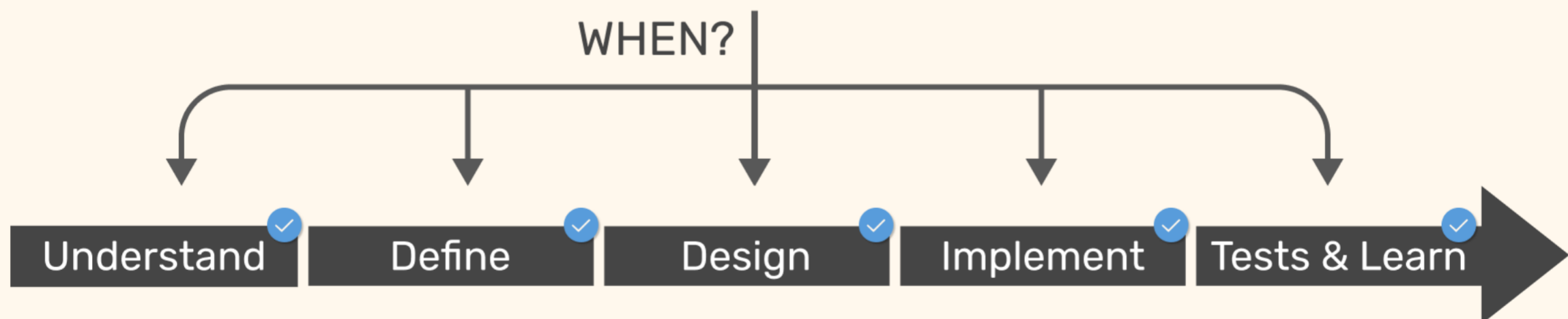
Sum of A to D divided by the total number of answers → x50 = SCORE %

The checklist

# THE DASHBOARD ASSESSMENT CHECKLIST

Gives you an overview of the health of your dashboard during conception, development and after...

The image displays three overlapping pages from the 'THE DASHBOARD ASSESSMENT' checklist. The top page is the cover, featuring the title 'THE DASHBOARD ASSESSMENT' and the website 'DATAVIZCLARITY.COM'. The middle page shows various dashboard examples and assessment criteria, including sections for 'I. IDENTITY', 'II. AUDIENCE', 'III. DATA', and 'IV. DESIGN PROCESS'. The bottom page is a detailed checklist with multiple sections: 'DESIGN PROCESS', 'DATA', 'ACCESS AND REACTIVITY', 'DASHBOARD LAYOUT', and 'DASHBOARD SUPPORT'. Each section contains a list of questions with checkboxes and a scoring system (e.g., 'Sum of A to D divided by the total number of questions = SCORE %').



## WHO IS THIS FOR?

- Dashboard Designers (Data Analysts, BI Engineers, Data Consultants)
- Chief Data Officer
- Business Leaders

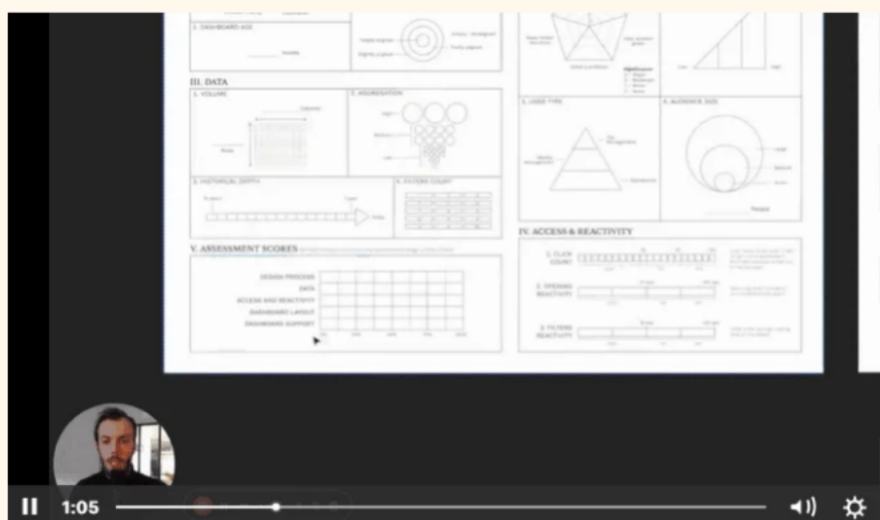
# THE DASHBOARD ASSESSMENT CHECKLIST

Get yours now!

The image shows a preview of the 'THE DASHBOARD ASSESSMENT' checklist. It is a multi-page document with various sections and checkboxes. Key sections include:

- I. IDENTITY**: Includes 'I. DASHBOARD TYPE' (with a pie chart icon) and 'II. AUDIENCE' (with a target icon).
- III. DATA**: Includes 'III.1. VISUALS' (with a bar chart icon) and 'III.2. HISTORICAL DEPTH' (with a line graph icon).
- IV. ASSESSMENT SCORES**: A table with columns for 'DESIGN PROCESS', 'DATA', 'ACCESS AND REACTIVITY', and 'DASHBOARD LAYOUT'. Each column has a 'SCORE' field.
- ANSWERS**: A section for providing answers to the questions, with checkboxes for 'Not at all', 'Partially', and 'Not Applicable'.
- PROJECT NAME**, **REVISIONS**, and **DATE** fields.

The Assessment



90 min "How to" video course

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*for now* ↗