



# Dashboard Design Checklist

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.



## 1 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 high-level business metrics and long timespans (e.g., financial performance over the past 12 months).	Contain detailed business metrics for a particular team. (e.g., digital marketing spend dashboard)	Contain granular details for a particular business problem (e.g., customer service ticket dashboard)
<b>TARGET AUDIENCE</b> C-suite and executive leadership	<b>TARGET AUDIENCE</b> Team lead or manager	<b>TARGET AUDIENCE</b> Operational analyst
<input checked="" type="checkbox"/> Contain a small number of metrics and plots <input checked="" type="checkbox"/> May contain auto-generated insights or recommendations <input checked="" type="checkbox"/> Use minimal or no interactivity	<input checked="" type="checkbox"/> Contain many metrics and plots related to a single area of business <input checked="" type="checkbox"/> Use minimal or no interaction	<input checked="" type="checkbox"/> Contain many metrics, plots, and data tables related to a single business problem <input checked="" type="checkbox"/> Include lots of interactivity

### Dashboards by use-case

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

## 2 Know your audience

Knowing what your audience wants is key to creating a successful dashboard. Here are a few requirements to think about before designing your next dashboard.

<input checked="" type="checkbox"/> What questions is the audience looking to answer?	<input checked="" type="checkbox"/> How much technical knowledge do they have?	<input checked="" type="checkbox"/> How often will they look at the dashboard?
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## 3 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.

<input checked="" type="checkbox"/> Start with high-level metrics and plots at the top, then let your users drill-down into more details as they move downwards	
<input checked="" type="checkbox"/> Create a storyboard by splitting your dashboard into panes or tabs	
<input checked="" type="checkbox"/> Point your audience's attention with color and text	

## 4 Guide your audience with text and color

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

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

## 5 Reduce cognitive load

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

	<input checked="" type="checkbox"/> Repeat the same colors, sizes, and other design elements throughout
	<input checked="" type="checkbox"/> Collapse or hide parts of the dashboard to minimize how much is shown at once
	<input checked="" type="checkbox"/> Remove or deemphasize borders, background images, and other elements that don't convey information
	<input checked="" type="checkbox"/> Choose easy to read fonts, with text large enough to improve readability
	<input checked="" type="checkbox"/> Format numbers with just enough significant figures to be useful
	<input checked="" type="checkbox"/> Arrange elements vertically—vertical scrolling is more natural than horizontal scrolling

## 6 Choose your dashboard layout

Single column	Multi-column layout
Grid layout	Report layout

## 7 Provide context for more complex visualizations

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

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