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Dashboard Design (CRM Sales Dashboard)

A screenshot of a sales dashboard

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**Define the purpose (Step 1):**

**1a. Who will be the end-users of this dashboard?**

The end-users of this dashboard will be the different sales managers of Maven Tech. Each sales manager oversees a team of sales agents in a given region.

**1b. What are their key business goals and objectives?**

Key business goals are improving team-wide metrics such as revenue generation, total net revenue generated (revenue per deal – COGS per deal), customer satisfaction, and team efficiency (relating to the deal pipeline).

**1c. What are the most important questions they need answers to?**

They have key questions relating to each aspect of overall team “performance” (revenue generation, efficiency, and customer satisfaction).

High-Level: Where is the team at with each performance aspect (total revenue generated, average customer satisfaction, efficiency metrics) and how does that compare over time (QoQ, YoY, etc.). Are those metric trends over time improving? What are the main factors (relative to my team) that are driving those trends? What are areas for improvement or focus?

Note: Perhaps the manager would also want the ability to view individual team members in a separate view? (or maybe compare multiple employees?)

**1d. How frequently will the dashboard be reviewed?**

Based on the requirements, this dashboard will display quarterly data. It can be reviewed at the end of each quarter but also during a quarter (weekly or bi-weekly) to understand trajectory to meeting certain goals (or outcomes of implementing strategies during a quarter).

**Choose the right metrics (Step 2):**

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**Present the Data Effectively (Step 3):**

Now it’s time to choose the ideal charts to best visualize the above metrics.

Note: A general sketch could be done beforehand, but unless all the necessary data is available to calculate those metrics, you would probably have to revisit this step and update the plan.

In this case, I performed Data QA and Aggregation after Step 2 to confirm what metrics we could actually satisfy using the data. Below is the result of those steps.

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As can be seen above, quite a few metrics can’t be calculated with the current data. This step only includes choosing the right charts and not arranging them on the dashboard but in my opinion, those choices can be impacted by the data you want to present so I saved this step for after data collection, QA, and aggregation.

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After planning out the potential visuals, it’s clear that the dashboard might get a bit crowded. We’ll try our best to fit everything in but this would be a great opportunity (after creating a rough visual draft) to touch base with the end-users and see if anything should be cut out or any input they may have. Making a dashboard need not be a strict “waterfall” process and can instead be treated “agilely” in certain parts. It’s better to loop in stakeholders during the process not just before and after the dashboard construction.

Update: After performing Data QA and Aggregation, we realized the close dates of deals only span within a single year so as of right now, the YoY calculations wouldn’t work. That is not reflected in the table above because it was done during a later step.