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7 tips and tricks from the dashboard experts

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ANDY COTGREAVE

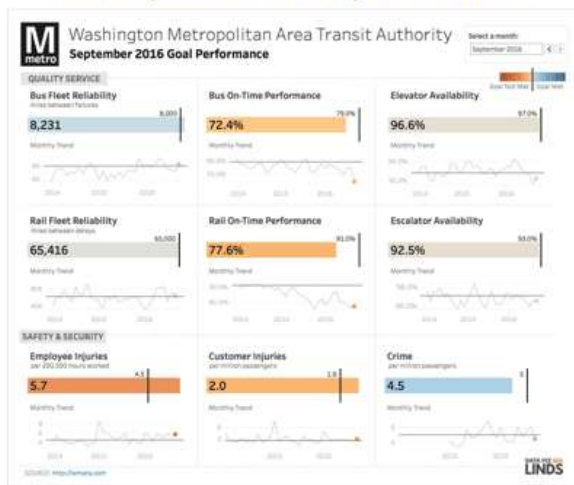
OCTOBER 19, 2017

Do you build dashboards for people in your organization? In our book, *The Big Book of Dashboards*, we show 28 different examples that succeed in data storytelling and delivering insights. Each is a complete case study with ideas you can implement in your own work.

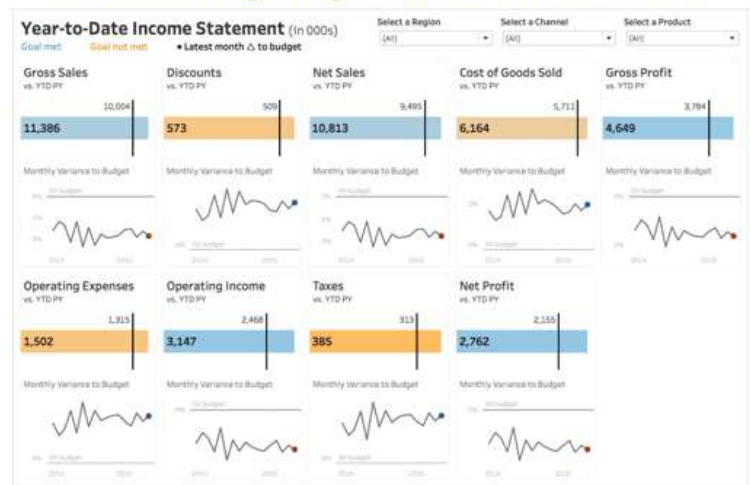
In this post, we've highlighted seven best practices you can apply right now to make your dashboards more effective. And for even more tips and tricks, be sure to join our [webinar series](#) to dive into the art of dashboarding.

1. Steal like an artist

From public transport data...



... to reimagining financial statements



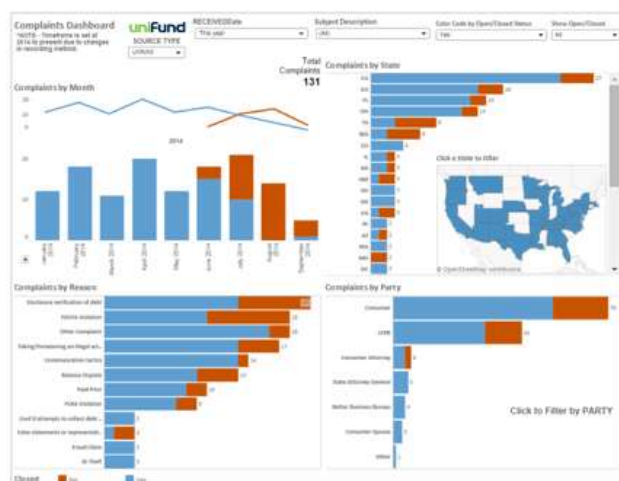
Austin Kleon, author of *Steal Like an Artist*, encourages us to embrace the influence of others. This holds true in designing dashboards as much as in any creative endeavor. Don't create your work in a vacuum: Take inspiration from as many places as you can.

A great example is Andy Kriebel's *financial statement dashboard*, based on the work of Lindsay Poulter. Lindsay's original design was applied to public transport data, and Andy redesigned a financial statement using that idea.

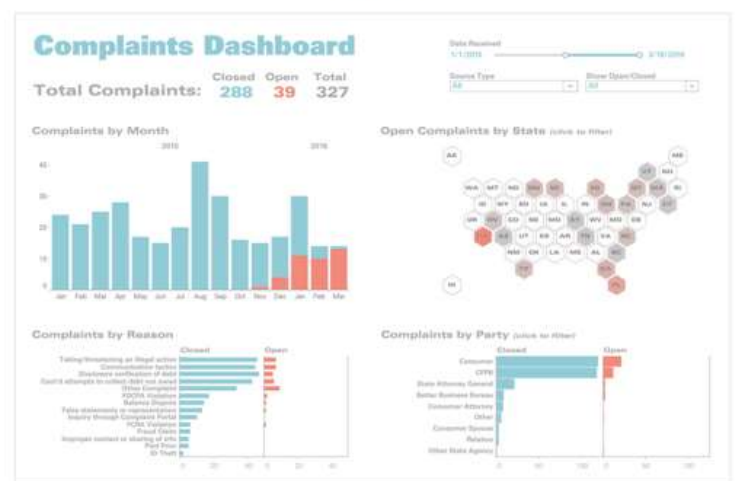
When you see a great visualization, examine it and consider any aspects that would benefit your own work.

2. Avoid clutter

Before



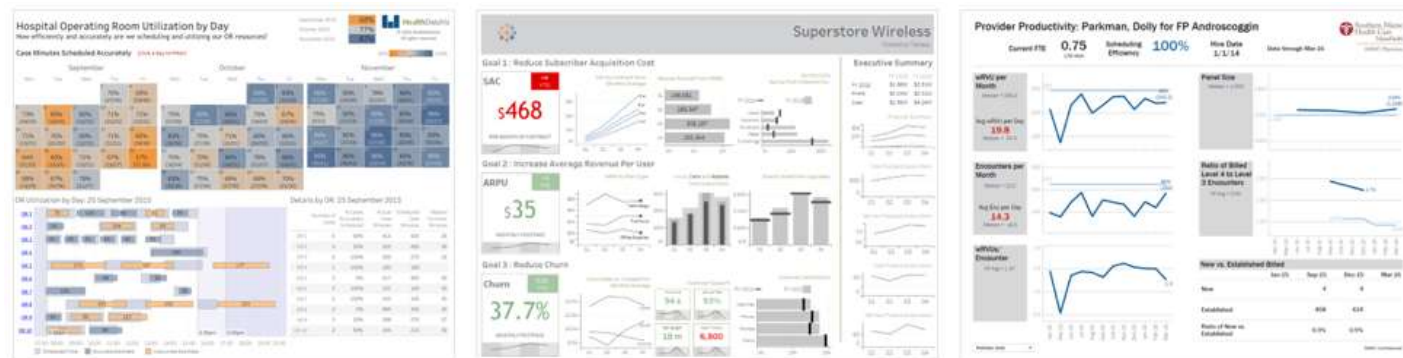
After



When you first start building dashboards, it's tempting to throw every possible applicable chart or graph onto them. Don't fall into that trap.

The trick is to remove as much as you possibly can while ensuring the end user gets the right insight from your dashboard. This is often an **iterative process**, as you can only discover the "better" version over time. Go take a look at the latest dashboard you created: does it have too much on it? Is there anything you can remove or rearrange to add clarity?

3. Use a grid layout



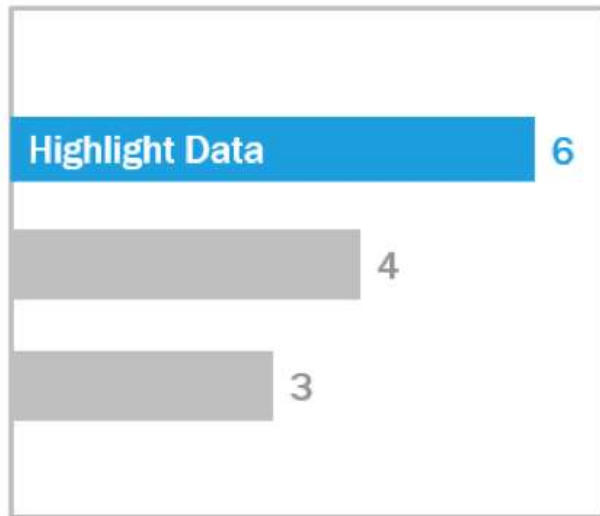
When placing objects on a dashboard (views, filters, titles, etc.), consider a grid format.

A grid helps you provide a reading order for your dashboard, allowing your users to guide themselves through the dashboard in a predictable and logical way. You can use a columnar- or row-based flow to create a narrative that leads users from overview to detail.

4. Use the right fonts

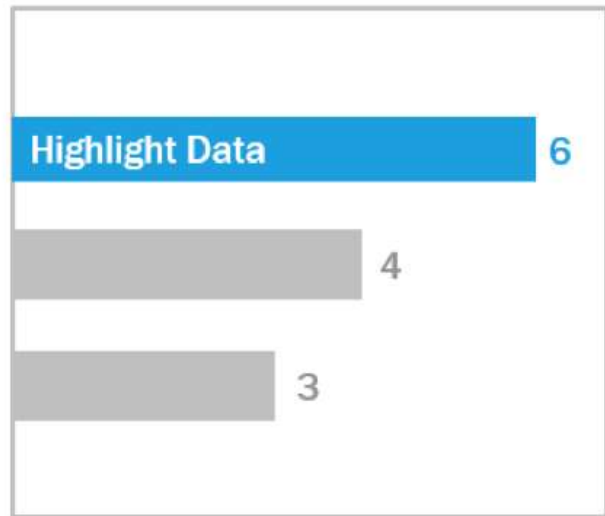
Top Level Font

Mid Level Font



Low Level Font

Mid Level Font



Low Level Font

Typography is important. It can be tempting to use too many font types and sizes in a dashboard. Don't do that; instead, define a clear hierarchy for your typography.

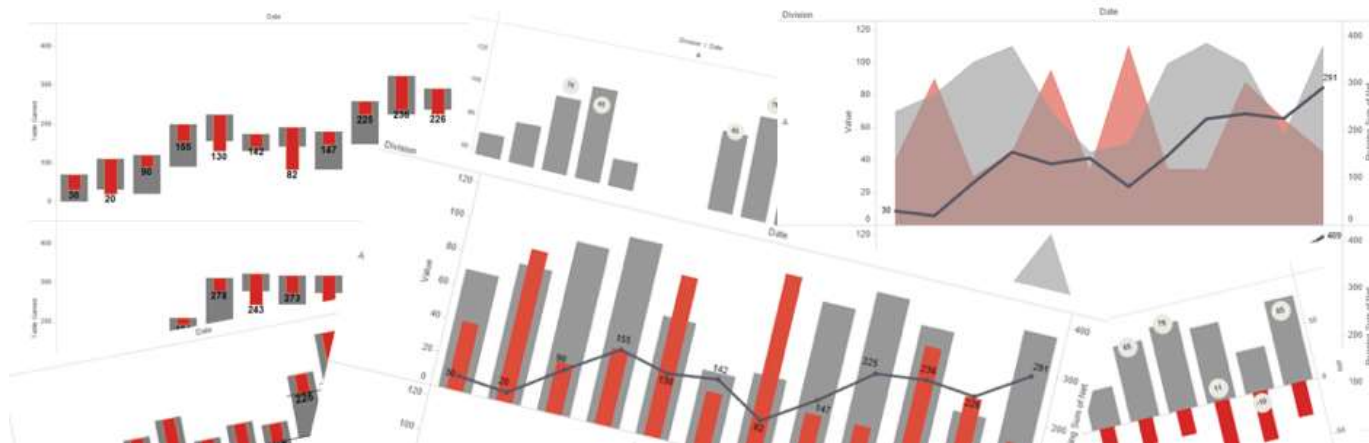
In the example above, there is a top-, mid-, and low-level font. The mid-level is blue to focus viewer attention. Color draws the eye to the most important level (which needn't necessarily be the top-level font).

Reducing the levels of hierarchy to only the most necessary reduces confusion for your users, and **color is one of the best ways to attract viewers.**

5. Simplify your use of color

This technique hits users with the most vital information immediately, and charts provide further context. At Tableau, our research team has been studying the impact of BANs using eye-tracking software. Check out their [top 5 key learnings](#).

7. Collaborate and iterate



If you take one tip away from this post, it's this one: no dashboard is right the first time. Time and collaboration are the only ways to hone in on the best representation of your data. Other people's opinions will bring you fresh perspectives.

All the dashboards in our book went through many iterations. Even now, [we are still evolving them to make improvements](#) and adapt to changing business questions.

Don't know where to start? Here are some ideas:

- Attend a [Tableau User Group](#) (or start your own).
- Join [Tableau Community](#) to ask and answer questions on the forum.
- Get involved in [#MakeoverMonday](#).
- Set up an internal Tableau group at your company.

Dive into dashboarding

I hope this has gotten you thinking about how to optimize your own dashboards.

To learn more, check out our resource page dedicated to helping you create optimized dashboards for any industry:

Dashboards Solutions:

Showcasing the best in business dashboards

And don't miss our webinar series, featuring the Tableau Research team, and the authors sharing tips and tricks galore:

Register for the webinar series:

Building dashboards that inform and inspire

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Comments

Submitted by Nagaraj Koranthota on October 26, 2017 - 11:56pm

can we get the workbook for all the above Viz shared ?

[Reply](#)

Submitted by kolla sandeep (not verified) on October 30, 2017 - 3:22am

Very good information

[Reply](#)

Submitted by M (not verified) on October 31, 2017 - 3:05pm

This is great! Thank you!

However, Point 3 and 4 in a way contradict each other. Providing a grid landscape actually

creates clutter. Correct me if I've misunderstood the tip.

[Reply](#)

Submitted by citybythebay (not verified) on January 5, 2018 - 9:41am

i took avoiding clutter as avoiding redundant charts. if it doesnt need to be there, dont include it. then the grid is to organize what does need to be there, making it easier to navigate.

[Reply](#)

Submitted by Kevin Taylor on November 14, 2017 - 10:20am

Andy I love #1 beyond words! Sage advice on all points.

[Reply](#)

Submitted by Mai (not verified) on February 20, 2018 - 8:30am

Thank you so much because of the useful information

[Reply](#)

Submitted by Lee (not verified) on March 17, 2018 - 12:36am

Totally agree with all of these but #7 in particular. I go a step further and advocate a Prototype step so that iteration and ironing out wrinkles happens before day zero release. Not all project pressures allow for a prototype but if you have the breathing space it's invaluable.

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