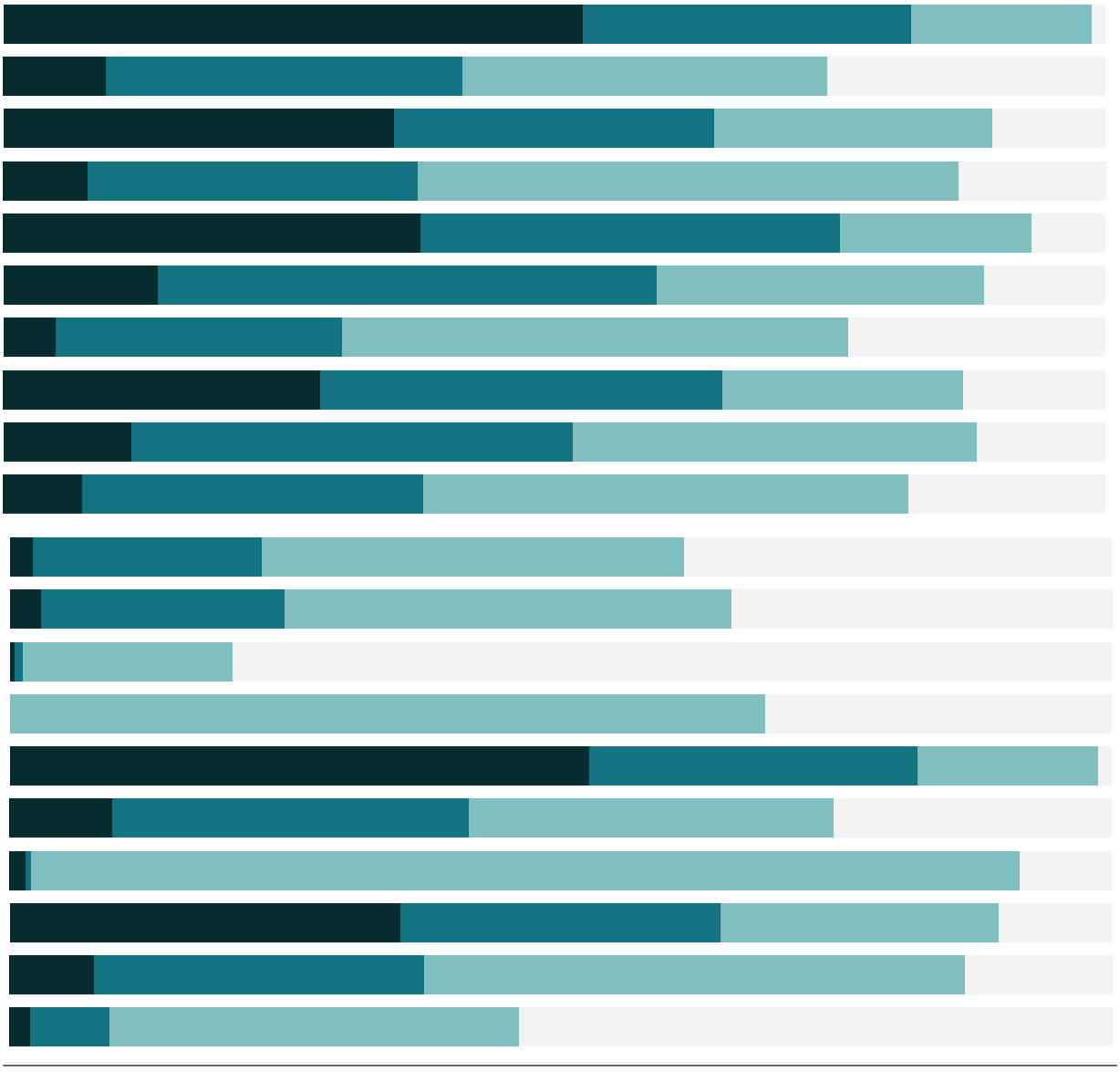

Training Transcript: Planning for a Successful Dashboard

An effective dashboard has a clear purpose, is relevant to its intended audience, and shows users how to interact with its data. To create a great dashboard, you need to plan and develop it carefully and give it rigorous testing. To ensure your dashboard's success, follow these four key steps: Determine the dashboard's purpose and audience. Plan the dashboard thoroughly. As you build it, use design best practices. And finally, test it for usability and performance. Let's look at each of these in more detail.

When you're planning a dashboard, make sure that you clearly understand its purpose, who its audience will be, and the questions this audience wants the dashboard to help them answer. In this dashboard, for an executive VP, the goal is to give a high-level view of the company's sales and profit totals over a broad timeframe. To get a picture of business health, this audience wants to answer questions such as: What our overall customer sales by location, and also broken down by product category and customer segment? And how do the data look when we filter by location?

In another example, let's say our audience consists of product analysts, and they need more specific data. They want to evaluate profitability across the product catalog, to decide which items to keep in the inventory. They need to drill pretty deeply into the data asking: Which products had highest sales, and most or least profit, month by month? And for each product type, what are the specific sales details? If you have any uncertainty about the questions your dashboard needs to answer for your intended audience, determine that before you go further.

Once you're certain about a dashboard's purpose and audience, make a plan for the dashboard's design. Your first consideration should be: How will the dashboard be viewed and shared? Will it be dynamic and interactive, shared on Tableau Reader or Tableau Server? Or, will it be viewed in a static format, as a PDF file, for example?

If the dashboard is shared on Tableau Server, you'll have more flexibility for your views. You'll also have more sizing considerations. Will people view the dashboard on a mobile device, for example, or an iPad? The more you can customize the dashboard to the viewing device, the more you can enhance users' experience. If some will view it on tablets, and others will use desktop monitors, consider creating custom versions for those devices so that information displays correctly.

If the dashboard will be viewed on Tableau Reader, your audience won't be able to edit or view underlying data, and you'll need to be more explicit in providing answers with the data. If the dashboard will be static for its users, design your views to work without interactivity.

Next, in your dashboard planning, decide on the chart types and data you want to use for the dashboard. Think of each chart's purpose and how you'll want to relate the views to each other. Then, organize the views in a logical way, and ask yourself whether they answer the questions this dashboard needs to answer. Is every view essential? Is every view relevant to your audience?

As the last part of your planning, think about how you want users to interact with the dashboard. Do you need to create filters, actions, or parameters? How can you help people get at the data and answer their own questions?

You've developed a solid plan for the dashboard. Now, as you put it together, apply the principles of good design. Think of the design both in terms of the dashboard as a whole and the details of individual worksheets.

Considering the dashboard level: Don't overcrowd the dashboard. You can always build more dashboards and cover other aspects of the data in coherent subsections or even using story points. Streamline your use of legends and filters. For legends, remove those that aren't essential. For filters, where possible, have one filter act on multiple views. Better yet, use actions or parameters to reduce the number of filters. Place important controls, such as global filters, on the upper-left, and arrange views logically, generally following a left to right, top to bottom order. Evaluate color and font choices for clarity and consistency. Remember to use a limited number of colors and carry the meaning of key colors throughout the views.

Considering the worksheet level: Review titles on views, filters, and legends for clarity and helpfulness. Include instructions so people know, at a glance, how to interact with the views and what the data represent. Within a view, remove unneeded headers, labels, gridlines, and tick marks. And remember tooltips: Edit them for appearance, clarity, consistency, and helpfulness.

Once you have a working version of your dashboard, test it for usability and performance. Start by applying the 5-second rule: In 5 seconds, could users tell the dashboard's purpose and get its relevance to them? Is it easy to use, so that a person would be enticed to interact with it?

Now, try the 5-second rule on some targeted users of the dashboard. Observe them in a usability test. Does the data make sense to them? Can they find what they're looking for? Do they need more guidance on how to interact with the dashboard? Do they want data that isn't shown? Revise the dashboard based on their input.

Last, check the dashboard's performance. Does it have an acceptable load time? When you interact with it, does it respond as you'd expect? If you have a sluggish workbook, you can run a performance test on it using the performance recorder on the Help menu in Tableau. This traces your actions and shows which components are causing the lag. You can then determine ways to address the cause of the lag in your workbook. You can find more about evaluating performance issues on Tableau.com.

We've covered four essential steps to creating a successful dashboard: Know the dashboard's purpose and audience. Plan its design thoroughly. Build it using design best practices. And test the result.