

Dashboard Checklist

This comprehensive checklist is designed to help you make clear, effective and engaging dashboards. Consider the 'Big Picture' section before you begin building, then use the checklist to help you self-assess and improve your dashboards.

Big Picture: Consider this before starting the dashboard

Audience	Question	Data
<p>Who will be using the dashboard?</p> <ul style="list-style-type: none"> • Right Type of Dashboard Design: Executive, Operational, Tactical, or Analytical dashboard • Interactivity: Static, explorable, or customizable • Depth of analysis: Summary, basic statistics, or advanced model/machine learning 	<p>What problem do you want to solve?</p> <ul style="list-style-type: none"> • Decisions: Determine the decisions that need to be made looking at your dashboard • Insights: Determine what insights need to be highlighted • KPIs: Define key performance indicators • Filters: Decide what filtering or comparisons will be necessary 	<p>Do you have the right data to answer the question?</p> <ul style="list-style-type: none"> • Data Quality: Clean, transform, and validate your data. Ensure data is thorough enough for the project • Data Freshness: Determine if static, periodic updates, or (near) real time data is needed

Graphs

Graph Body

- ☐ **Graph is useful:** Ask "why this graph?" – it should convey the necessary information in the most efficient manner to provide insight. No graphs should be for appearance only. Remove graphs that are duplicating information.
- ☐ **The type of graph matches the type of data:** E.g., change over time is displayed as a line graph, categorical data displayed in a bar graph, etc.
- ☐ **Data are properly sorted:** Data should be displayed in an order that makes logical sense to the viewer. This may be by frequency counts (from greatest to least for categories), by time period (line charts), by logical order (e.g., agree, neutral, disagree), etc.
- ☐ **Data are labeled directly:** Position labels are near the data if possible. Eliminate or embed legends when possible because eye movement back and forth between the legend and the data can interrupt the brain's attempts to interpret the graph.
- ☐ **Appropriate level of precision:** Use no more than the precision that you need. Round and abbreviate when necessary. E.g., 7k instead of 7,000 or 3.2 instead of 3.200.
- ☐ **Relevant KPIs:** Carefully choose metrics to find insights, and include comparison numbers to provide viewers with benchmarks.

Axes and other lines

- ☐ **Proportions are accurate:** X- and y-axis scales should be appropriate. For most graphs, that means starting at 0 on the x- and y-axis. Graphs can have a minimum and maximum scale that reflects what should be an accurate interpretation of the data.
- ☐ **Axis intervals are equidistant:** Axis ticks are equal distances from one another, so that the intervals between them are identical in size.
- ☐ **Labels, tick marks, and axis lines only when necessary:** For a modern look, remove unnecessary marks.
- ☐ **Secondary axis used only when necessary:** One x- and one y-axis is preferred. Don't add a second y-axis unless necessary and uncomplicated. Instead, vertically stack the graphs or use a different graph type.
- ☐ **Gridlines, if present, are muted:** If needed, color should be faint gray, not black. Better if no gridlines are used except for moving lines when hovering.
- ☐ **No border line:** For a modern look, remove harsh border lines.

Text

Content

- ☐ **Reducing amount of text:** Reducing the amount of text on a given page helps with understanding the details because it enhances clarity. It also forces you to consider the words you choose and the conclusion you draw.
- ☐ **Use simple English:** Use basic terminology and speak plainly.
- ☐ **Workbook Title:** Short title that quickly summarizes the dashboard topic and takeaway. Upper left hand corner is where most people will look for a title.
- ☐ **Graph Titles/Subtitles:** Titles, subtitles, and annotations prompt the viewer by asking a question or adding explanation or interpretation. Avoid titles that simply state what is in the graph, e.g., a line chart with "Variable Y over time".

Accessibility

- ☐ **Hierarchical Text:** Titles should be in bold or large text to differentiate them from body text. Titles are in a larger size than subtitles or annotations, which are larger than labels, which are larger than axis labels, which are larger than source information.
- ☐ **Readable Text:** Small font is hard to read if you are viewing charts on your computer. The standard size font for online use is 12pt for serif fonts and 10pt for sans serif fonts.
- ☐ **Contrasting Text:** Black/very dark text against a white/transparent background is easiest to read.
- ☐ **Horizontal Text:** Titles, subtitles, annotations, and data labels are horizontal.
- ☐ **Remove excessive formatting:** Generally, it's okay to bold your words, but italicized and underlined words require more cognitive effort to read and process.

Color

- ☐ **Intentional scheme:** Colors should represent the data theme or brand colors. Consider existing color associations (e.g., green good, red bad).
- ☐ **Highlight key data:** Colors should take the viewer's eye to key aspects of the data, promoting insights. Less important, supporting, or comparison data should be a muted color, like gray.
- ☐ **Accessible color:** Ensure that the colors are legible for people with colorblindness or when printed in grayscale. Use technology to help you view the work through a colorblind or grayscale lens.

Design

Zoom out. Take a break and come back to the dashboard with fresh eyes. Ensure that the key insights that answer your main question are highlighted, that the viewer will move through the dashboard with ease, and fine tune any details.

- ☐ **No distractions:** Remove any images or icons that are not serving a purpose or supporting interpretation.
- ☐ **Consistency:** Consistent use of fonts, sizes, labeling, color, etc.
- ☐ **Alignment:** Align text and graphs properly to help the viewer's eye travel.
- ☐ **Layout:** Ensure that objects (KPIs, graphs, text) are laid out so that the viewer flows through information in order of use and importance.
- ☐ **Breathing room:** Use whitespace effectively. Ensure padding around objects to give the viewer's eye a break. Whitespace can also be used to group objects or draw the eye to a key object.
- ☐ **Tooltips:** Use tooltips or popups to add supplementary information without crowding the dashboard.