Dashboard Types for different audiences

Fully interactive dashboards

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Topics:

- Executive Dashboards
- Tactical Dashboards
- Operational Dashboards
- Analytical Dashboards

Tools:

- Tableau

INTRODUCTION

In a previous project, the dataset SuperStore was analyzed to understand the behavior in company sales.

This project will be used the same dataset but now with a different approach. The objective of this occasion is to show the different types of dashboards that can be built depending on the audience the story has to be told. Furthermore to show how can be designed interactive and useful dashboards for getting relevant business insights, although to use a simple dataset.

TYPES OF DASHBOARDS

Executive (or strategic) Dashboard

Because this is used by leaders in the organization and they do not have enough time to dig deep this is generally the simplest dashboard from layout and content perspective.

The goal is to convey a few key metrics with just enough detail to provide a story but not enough to drown the viewer.

In this case, the dashboard gives the possibility to the audience to control the time period by using a quarterly selector.

The observed period is highlighted with a different color mark (dot) in the main chart to help to visualize the studied period.

Tactical Dashboard

Used for managing departments or broader goals and tend to focus a bit more in depth on a single area.

This requires more detail than an executive level dashboard but not as an operational level. It provides our users with a vital level of control to be able to get under the hood of the data and extract insights.

This dashboard has two options as parameters for the control of visualization, the user can choose the studied period and the level for margin goal reflected in the combo chart.
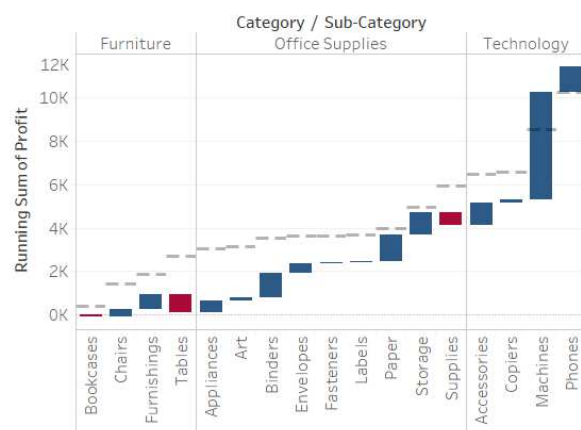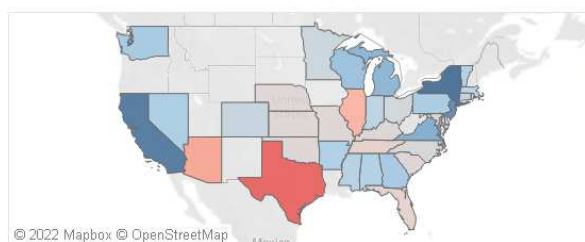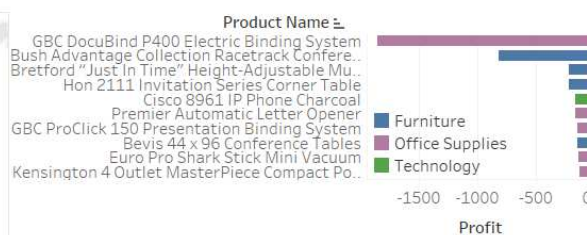
Operational Dashboard

Enable the management and execution of project (or company) fulfillment to assist and to inform individuals and teams responsible for the day to day operations where maintaining situational awareness is key.

In this case, the process of shipping is analyzed. The main dashboard has the option to choose the date of analysis. In the chart Service Level versus Order Quantity, the service level is represented and compared against the target which can change from the parameter Shipping Service Level.
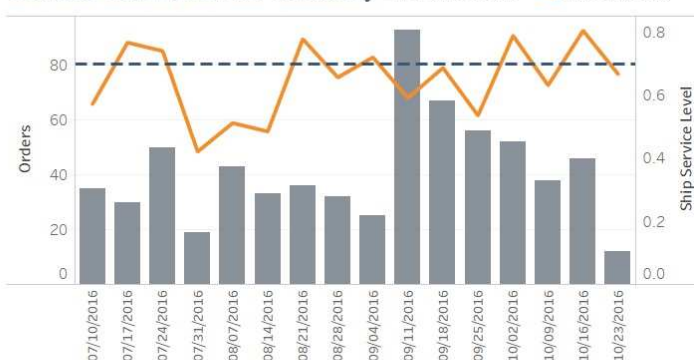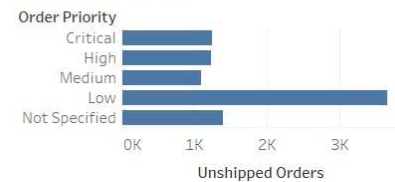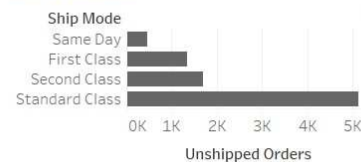
Selecting one of the classes in the section Orders Priority will show another dashboard with better detail about shipping performance.

ORDERS DETAILS - SUPERSTORE

Today's Date
27-Oct-16

Back

Items Not Yet Shipped

Order Priority
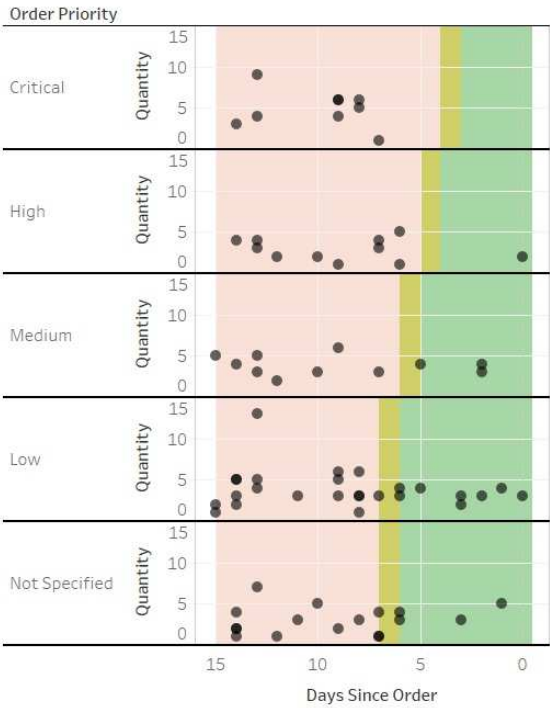
From this dashboard is possible to return to the main dashboard using the Back button.

Another operational dashboard for the shipping process is built.

With this one, the user can analyze the category and subcategories that achieve the goal according to the parameter Ship on Time.

SUPERSTORE - DATE SHIPPED KPI

Days Shipped Sales

Shipped on Time
- ■ Delay
- ■ Minor Delay
- ■ On Time

Avg. Days to Ship

Ship on Time Goal

80%

Shipped Met Goal KPI

Category	Sub-Catego..	
Furniture	Bookcases	85.1%
	Chairs	82.3%
	Furnishings	82.2%
	Tables	83.7%
Office Supplies	Appliances	82.6%
	Art	80.3%
	Binders	80.9%
	Envelopes	80.3%
	Fasteners	83.4%
	Labels	79.4%
	Paper	82.4%
	Storage	81.0%
	Supplies	78.4%
Technology	Accessories	83.1%
	Copiers	85.3%
	Machines	80.0%
	Phones	81.8%

Analytical Dashboard

This type of dashboard is not meant for occasional manager lever use. The level of detail could easily overwhelm the number of options available in this dashboard are best suited for an analyst or analyst team who is regularly interfacing with the data to extract insights.

In this dashboard the user has full control, window of time in the analysis can be chosen as well as: profits or sales or similar variables and their aggregation level (sum, avg, max, etc) or specific filters.

PERFORMANCE - SUPERSTORE

Lines: Profit & Bars: Sales vs Time (Last 15 Months)

TimeFrame — Last 15 Mon..
Report Day — 20-Oct-16

Show Interval In Progress — Yes

DRAW AS LINES
SUM — Profit

Breakout Lines By — Region

Lines Color Breakout
- Central
- South
- East
- West

DRAW AS BARS
SUM — Sales

FILTERS
Customer Segment — (All)

Order Priority — (All)

Category — (All)

Highligth Table (Breakout Lines)

TimeFrame Interval

Lines Col..	01-Jan..	01-Feb..	01-Ma..	01-Apr..	01-Ma..	01-Jun..	01-Jul-..	01-Au..	01-Sep..	01-Oct..	Grand ..
Central	118	295	-274	229	-506	1,246	-4,055	628	1,423	781	-114
East	-39	63	-809	-221	754	980	847	802	4,175	430	6,982
South	2,347	279	48	1,851	1,617	978	420	1,327	-345	678	9,199
West	24	225	1,534	1,629	874	1,772	1,947	2,561	3,076	1,075	14,717
Grand To..	2,450	862	499	3,489	2,739	4,977	-841	5,318	8,328	2,964	30,784