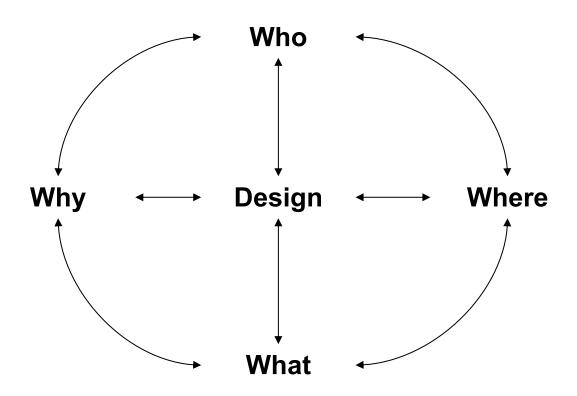


# Data Visualization and Analytics with Tableau

# PART 4: Dashboard Design Principles



#### 1. Who is your target audience?

- Who is the audience?
- What do they already know?
- How much detail to include or exclude?

#### 2. Where will they view the dashboard?

- Where will the dashboard be viewed?
- Large or small screen?
- Mobile or desktop or print?
- · Determine the size of the dashboard
- How many elements can fit?

#### 3. Why are you building it?

- Why are you sharing the data?
- What is the purpose?
- Is it to inform or explore or explain or to measure a goal?

#### 4. What elements do you want?

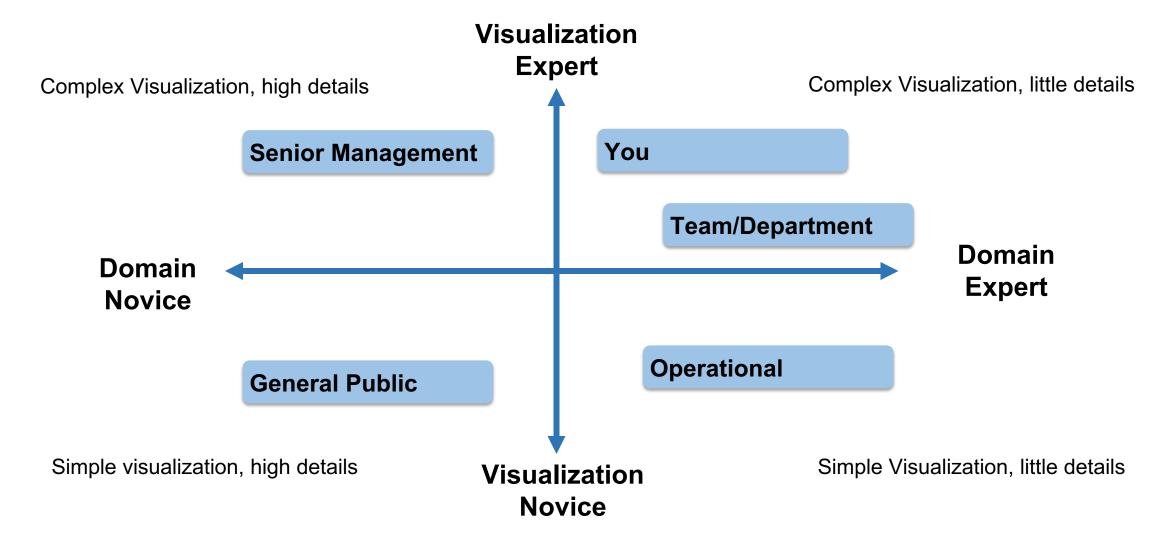
- What information will you show?
- What questions will it answer?
- What do you want the audience to take away?

### PART 4: Who?

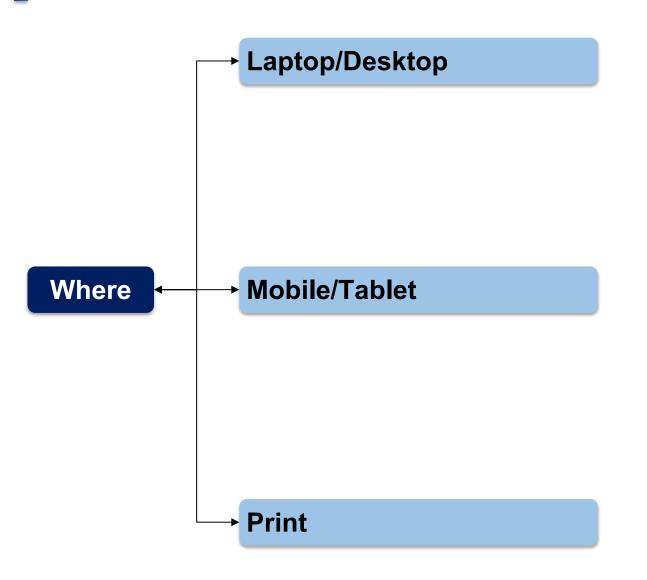


- No explanations needed
- · Can include more advanced charts
- Doesn't have to look as polished
- Consider the visualizations for explanations
- Simple chart types
- Understand the data
- Add more explanations and terminology
- Explain the data
- Much higher level, more data from more sources
- Not as much detail
- Ability to drill down
- Explanations on terminology and data
- Real-time Data
- Filters and interactions to drill down
- Carefully explain the data and what's important
- Consider chart type and explanations

## PART 4: Who?



# PART 4: Where?

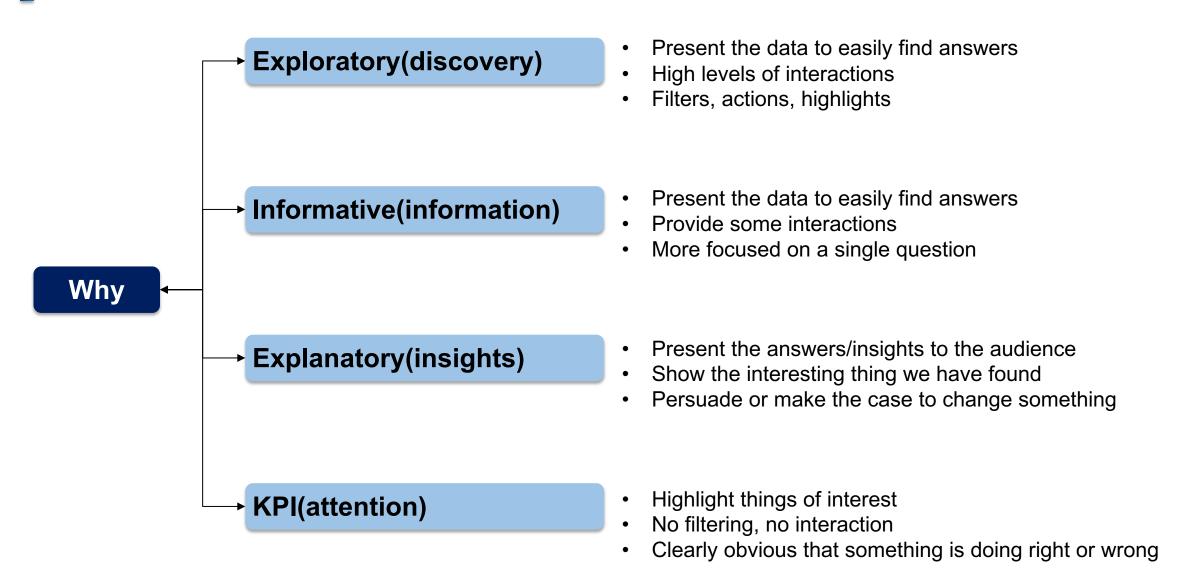


- Great freedom
- Large amount of space
- Lots of interaction
- Filters, parameters, actions

- Smaller maximum size
- Consider the orientation
- Scrolling vs single screen

- Cannot interact
- Everything needs to be on screen
- Large fonts and labels

# PART 4: Why?

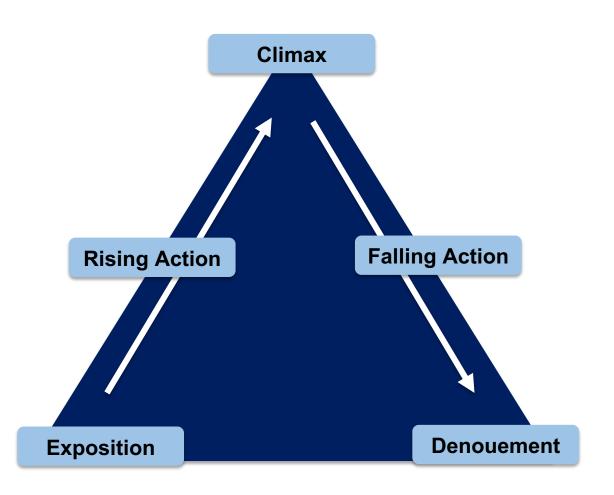


# PART 4: What?

### Less is more!



# **PART 4: Narrative Structure**



#### **Exposition**

What is the dashboard is going to show?

#### **Rising Action**

Show different points of view

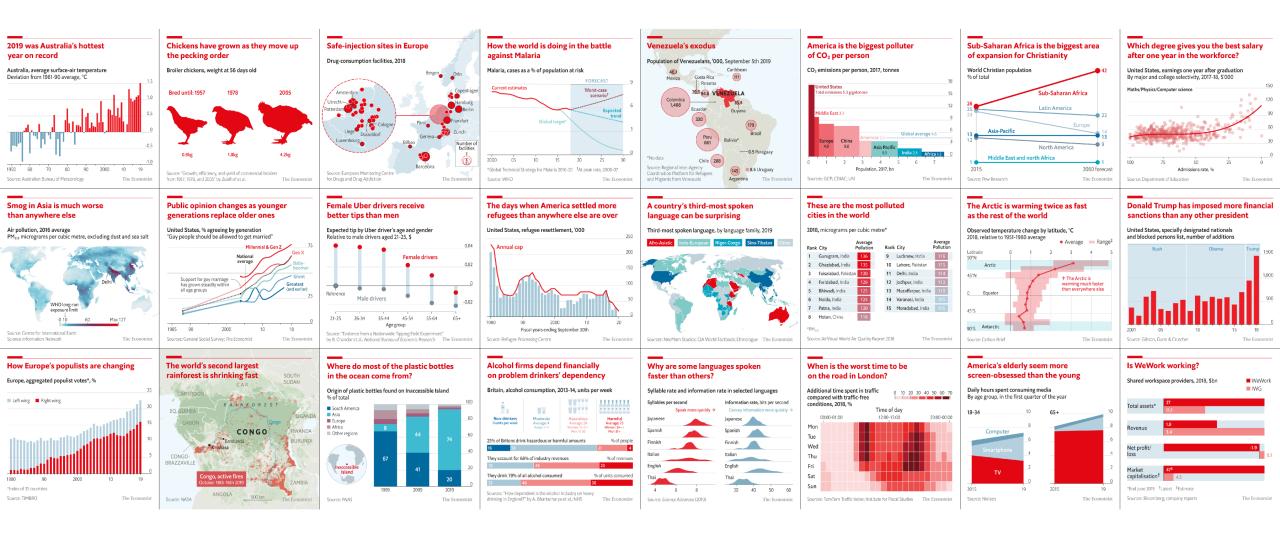
#### Climax

Show what you want the dashboard to do

#### **Falling Action/Denouement**

Leave user with an action based on data

### **PART 4: Visual Best Practices**



### **PART 4: Visual Best Practices**

- 1. Context: Titles/captions/commentary help audience better understand views.
- 2. Chart Choices: Different chart has their own advantages and downsides.
- 3. Layout: Top left to down right layout
- 4. Color: Consistent color, custom color palettes, alerting vs highlighting
- 5. Title/Subtitles: Add context to titles and guide viewers through the dashboards
- **6. Tooltips:** Highlight important information
- 7. Fonts: Define a clear hierarchy for your typography
- 8. Interactivity: Make interactivity (highlight/filter/parameters/sets etc.) obvious to your audience

# PART 4: Dashboard Design Checklist



#### INK

- Color
- Weight
- Lines
- Shading



#### **WORDS**

- Fonts
- Alignment
- Labels/Axes
- Tooltips



#### **LAYOUT**

- Zones
- Balance
- Negative Space
- Flow



#### **FOOTHOLDS**

- Title
- Keys
- Instructions
- Patterns

THE DASHBOARD DESIGN CHECKLIST

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