Power BI Dashboard Planning Guide

Introduction:

This guide provides practical instructions for designing effective Power BI dashboards, suitable for various domains including sales, healthcare, finance, HR, education, logistics, and marketing.

Choosing Visuals by Data Type:

- Time Series Data -> Line Chart, Area Chart

- Categorical Data (e.g. Region, Department) -> Bar Chart, Column Chart, Tree Map

- Proportional Data (e.g. Contribution %) -> Pie Chart, Donut Chart

- Trend Comparison -> Combo Chart (Line + Bar)

- Aggregates/KPIs -> Card, Multi-row Card, Gauge

- Geographic Data -> Map visuals

- Tabular or detailed breakdowns -> Table, Matrix

Example Dashboards by Domain:

1. Sales:

   - KPIs: Total Revenue, Sales Growth, Conversion Rate

   - Visuals: Line (Revenue Trend), Bar (Top Products), Funnel (Sales Pipeline)

2. Healthcare:

   - KPIs: Patient Count, Bed Occupancy Rate, Avg. Treatment Time

   - Visuals: Donut (Department Load), Line (Patient Trends), Gauge (Capacity)

3. Finance:

   - KPIs: Net Profit, Operating Margin, Expense Ratio

   - Visuals: Line (Profit Trend), Pie (Expense Breakdown), Cards (Totals)

4. Education:

  - KPIs: Enrollment Rate, Graduation Rate, Dropout %

  - Visuals: Column (Department Stats), Line (Yearly Trend), Matrix (Student Data)

5. HR:

  - KPIs: Attrition Rate, Time to Hire, Employee Satisfaction

  - Visuals: Bar (Dept-wise Headcount), Gauge (Attrition), Word Cloud (Skills)

6. Logistics:

  - KPIs: Delivery Time, Cost per Shipment, Delay Rate

  - Visuals: Map (Routes), Bar (Delays), Table (Shipment Logs)

Layout Best Practices:

- Keep KPIs on top in cards

- Place filters/slicers on the left

- Use white space to avoid clutter

- Group visuals by theme (e.g., customer vs. product)

- Use clear titles and labels

General Tips:

- Avoid too many colors; use them to highlight only

- Ensure responsive layout for different screen sizes

- Use bookmarks and tooltips to enhance interaction

- Maintain visual hierarchy and alignment

Final Notes:

This guide is not domain-specific and supports a wide range of data insights. Users should analyze their dataset structure and match fields to appropriate chart types using these principles.