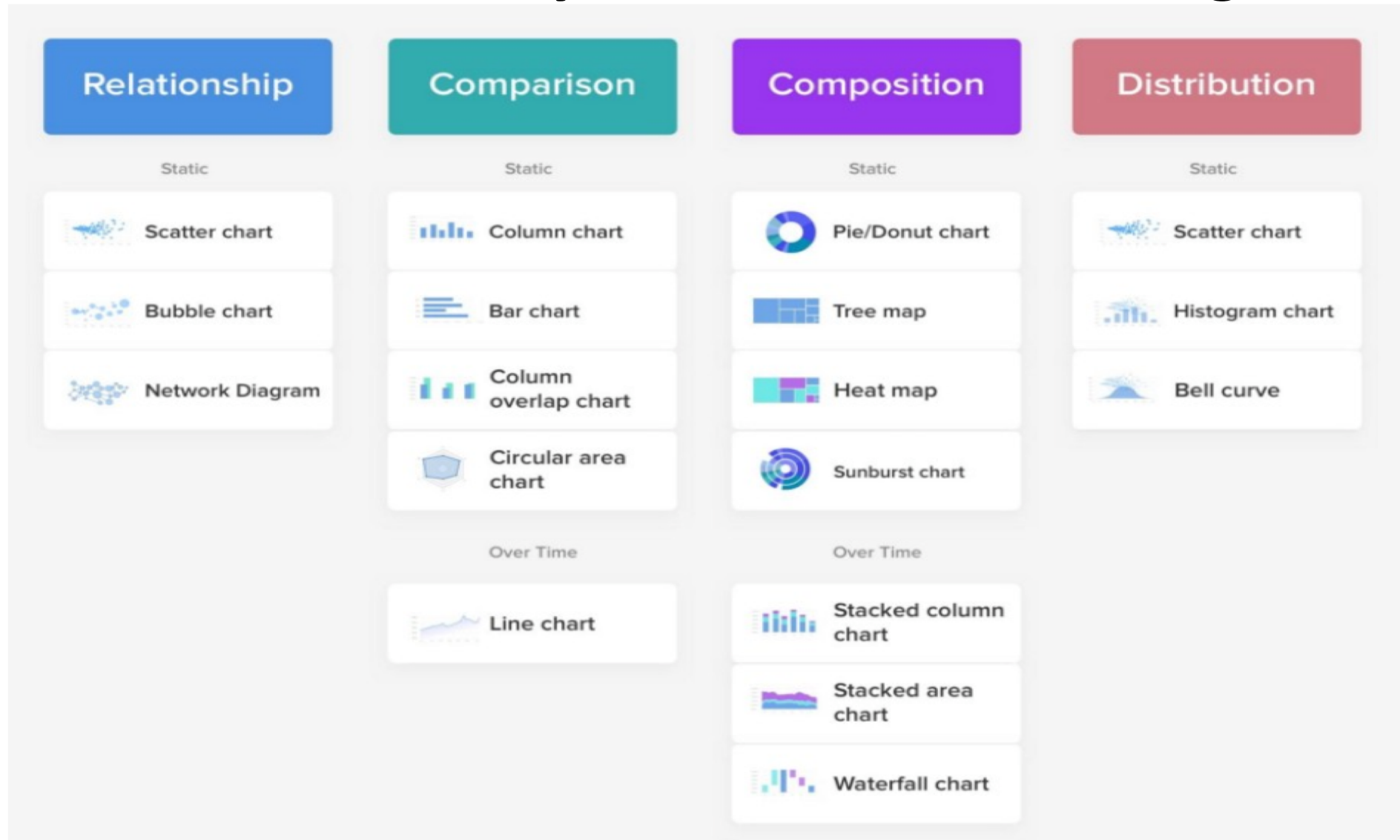


# Good Practices for Dashboard Design

## Know who will be using the dashboard and what they need to be successful:

- **Operational dashboards** help users who are engaged in time-sensitive tasks get the info they need to complete those tasks.
- **Analytical dashboards** help provide at-a-glance information for decision making

# Choose the right chart to convey the information you are communicating

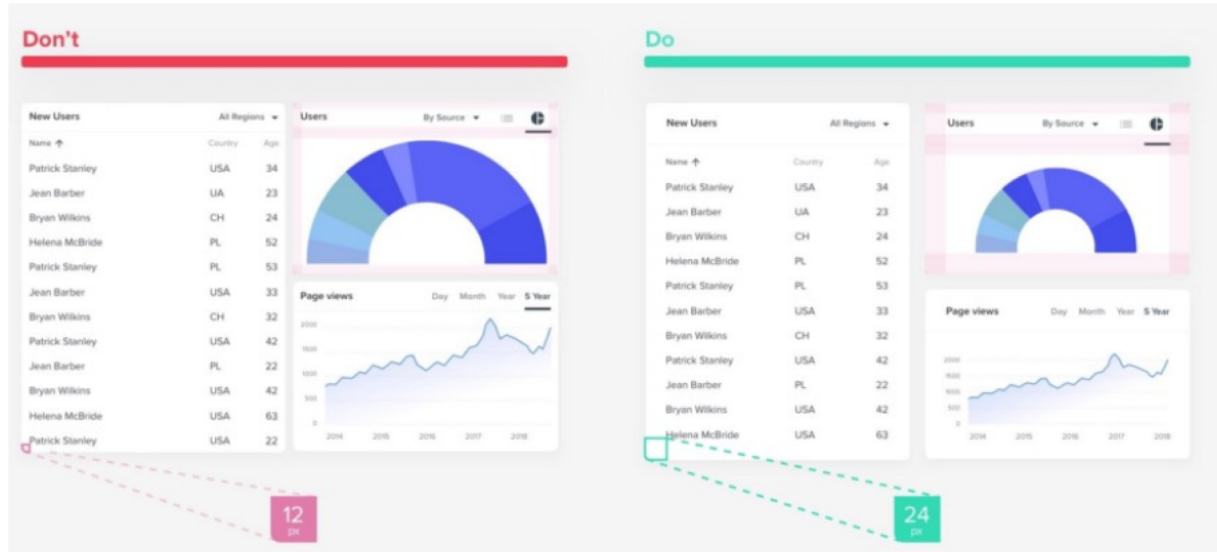


# Be consistent

- Naming conventions
- Date Formats
- Numerical Units and rounding
- Color schemes
- Icons

# Plan the layout *thoughtfully*

- Use plenty of white space between charts and create wide margins



- Aim for content that fits one screen
- Aim for 3 to 5 key values, charts, tables (tables go on the bottom of your dashboard)
- Label clearly (but don't over label)

# Flawed dashboard example

## Segment Sales and Profit Summary Dashboard

Year

☐ 2013

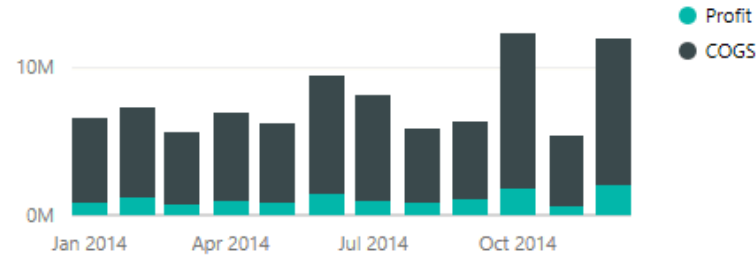
☒ 2014

Campaign

☐ Summer Sale

☐ Super Saver

Trends by Month

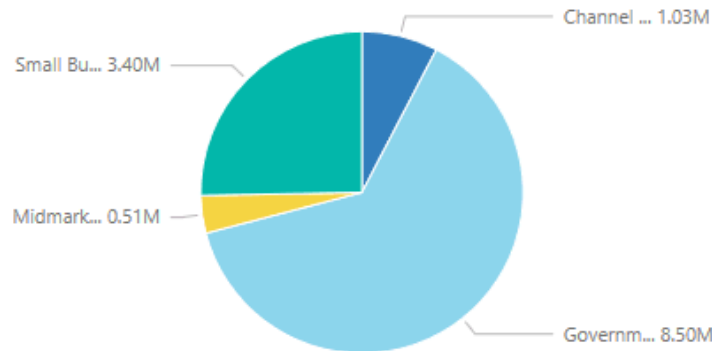


Trends by Month

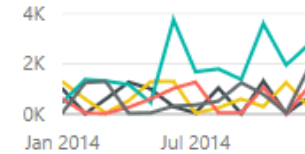
Segment	Profit	COGS
Channel Partners	1,026,913.86	375,589.50
Enterprise	-420,788.13	15,982,920.00
Government	8,501,527.89	30,917,047.50
Midmarket	508,339.63	1,327,300.00



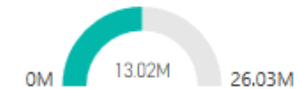
Profit by Segment



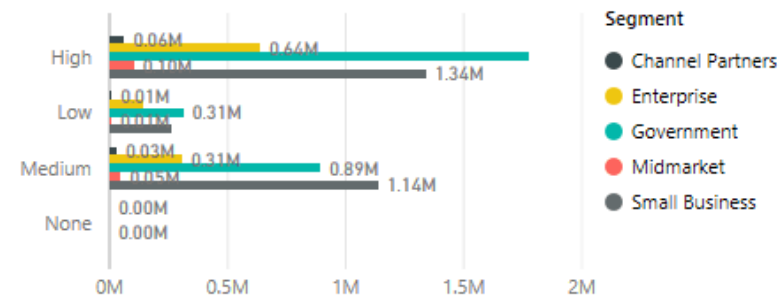
Manufacturing Price



Profit



Discounts by Discount Band and Segment



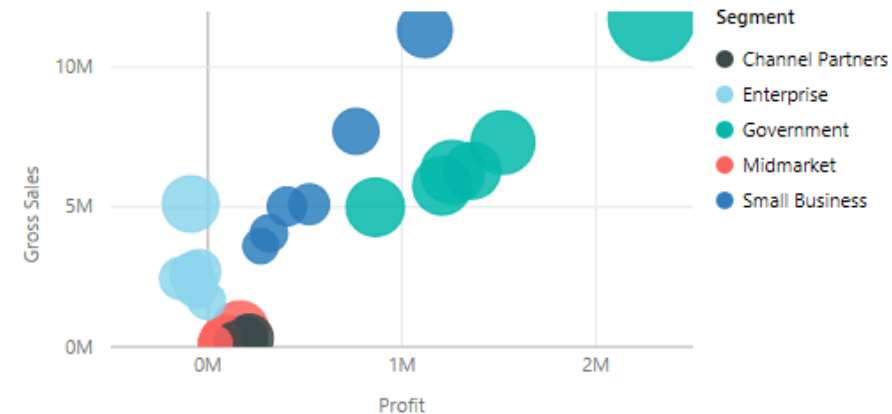
Discounts

7M

Sales

99M

Profit, Gross Sales and Units Sold by Product and Segment



# Better dashboard example

## Segment Sales and Profit Summary Dashboard

September 14, 2015

Trends by Month

Year

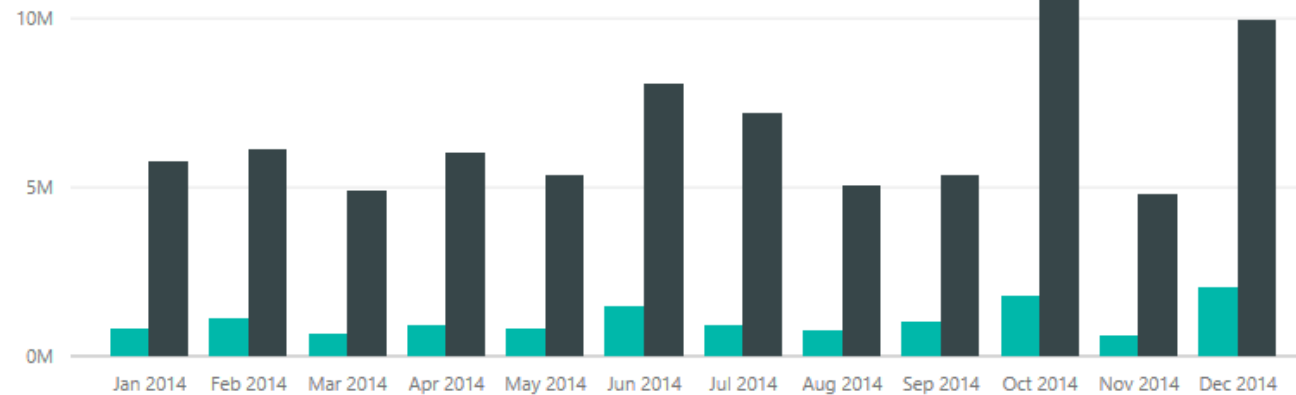
☐ 2013

☒ 2014

Campaign

☐ Summer Sale

☐ Super Saver



Profit

COGS



Year to Date Discounts

7M

Year to Date Sales

99M

Profit by Segment

Channel Partners

1.03M

Enterprise

-0.42M

Government

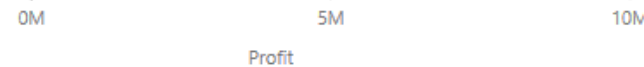
8.50M

Midmarket

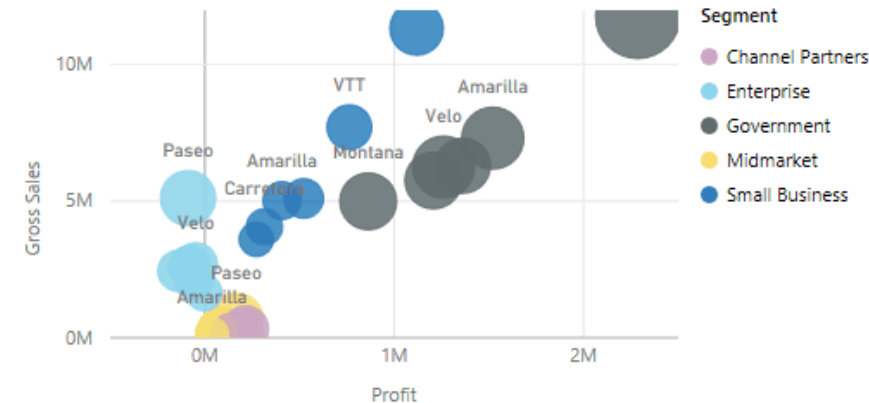
0.51M

Small Business

3.40M



Profit, Gross Sales and Units Sold by Product and Segment



## Selected resources:

<https://uxplanet.org/10-rules-for-better-dashboard-design-ef68189d734c>

<https://powerbi.microsoft.com/en-us/blog/the-art-and-science-of-effective-dashboard-design/>

<https://www.klipfolio.com/blog/10-tips-for-better-dashboards>

<https://www.datapine.com/blog/dashboard-design-principles-and-best-practices/>