Job Aid: Identify Context, Audience and Goal

Overview: Your work starts when you are asked to create a data visualization. Sometimes, you will be given information about the project to help you understand the requirement better and other times you will have to ask for clarification. In either case, you will need to make sure that you understand the context of the visualization and are able to identify the intended audience and goal of the visualization. While looking at the data visualization and any other information you have been given on the project, it is always helpful to take notes and write down questions as you gather information on context, audience, and goal(s) to help you structure data visualization story.

Directions: Below are the general steps for identifying context, audience and goal. You should use this checklist while you work through the scenario practice. As you go through each step, check the box to the right to show it has been completed. You may take down any notes/comments you find helpful under the comments section. You can print this job aid for your convenience.

No.	Steps		Check	Comments
1	Review any information you have been given about the data visualization you are to create.		☐	
2	Take notes and write down questions you can’t answer as you review and gather information on **context**, **audience** and **goal(s)** to help you plan your visualization.		☐	
3	Identify (in any related project materials) the **context** of what is being communicated and why, by asking yourself the following questions:			
3.1	What background information is relevant/essential for the creation of the data visualization?		☐	
3.2	What important information needs to be communicated in the data visualization?		☐	
4	Identify/clarify the **audience** by asking yourself the following questions:			
4.1	Who is the audience — Executive, Departmental or Analyst?		☐	
4.2	What do you know about the audience and what do you want to know about them?		☐	
4.3	What biases/constraints does your audience have that might make them resistant to the message or design?		☐	
4.4	What information will be important for the audience to understand? (E.g., a budget committee might be interested in how much a project will cost.)		☐	

No.	Steps		Check	Comments
4.5	How will the audience use the information?		☐	
5	Identify/clarify the intended **goal/purpose** of the message/use by asking yourself the following questions:			
5.1	What is the goal/purpose of the data visualization? (Why is it needed at all?)		☐	
5.2	What are the business questions that need to be answered?		☐	
5.3	What information is it trying to relay?		☐	
5.4	What data are available that would help strengthen the message?		☐	
6	If you cannot answer some or all of these questions, then get clarification on the context, audience and goal by researching the domain area you wish to critique and by asking for background information from colleagues or team members.		☐	
7	If you still have questions and/or can't easily identify the context, audience or goal, you will have to get clarification and information from a more senior member of the team working on the data visualization. (This may include requesting for a company information packet, emails, prospectus, business portfolio, etc.)		☐	
8	If the senior team member does not have the information you need, call/email an engagement manager and inform him/her that you will set up a meeting with the client. Be sure to invite the engagement manager to the meeting. (Only after you have gathered all of your unanswered questions on context, audience and goal should you reach out to clients for additional information. Each service line may have their own protocol for contacting clients. Please follow your service line's policies.)		☐	
9	Email/call the client and remember to use the notes you have taken during your communication.		☐	
10	Ask the client the following clarifying questions (as needed):			
10.1	For **context:** Look at your notes and verify all answers you have first and then ask any outstanding questions on**:**		☐	

No.	Steps		Check	Comments
10.1.1	What background information is relevant/essential to what is being communicated?		☐	
10.2	For **audience:**			
10.2.1	Who is the data visualization intended for? (Who is the audience — Executive, Department or Analyst?)		☐	
10.2.2	What does the audience need to understand?		☐	
10.3	For **goal:**			
10.3.1	What is the business need/problem/question to be answered?		☐	
10.3.2	How important is each one of the need/problem/question? (This will be used to identify what information to emphasize in your data visualization.)		☐	
10.3.3	What information is needed to answer these needs/problem/question?		☐	
10.3.4	What are the key information/actions the intended audience should have for each visualization/dashboard?		☐	
11	Review all your notes and background materials to ensure you have answered all the questions you need to identify the context, audience and goal of your data visualization.		☐	
12	If the client cannot answer your questions, you should go back to the individual responsible for the project and explain that without the information on the context, audience and goal you cannot effectively create the data visualization.		☐	

