

## Stakeholder Management

Impressed with your category performance dashboard, more data hungry teams are approaching you and the BI Team for data insights.

You want to **establish guidelines** how best to approach the creation **of new dashboard and data projects** with business partners to make them a success.

### TASK:

Describe your considerations and the approach you will take to establish best practices on 1-2 slides **to best enable our business partners**.



# 5 Steps to create an effective BI Tableau Dashboard

## REQUIREMENT GATHERING

- Understanding the Objective & Goals of the dashboard & Stakeholders' usage.
- Discuss KPIs, Sources, Timeline and Granularity level of the data required.
- Refresh Extract/Incremental Frequency of the Dashboard.



## DATA EXPLORATION

- Evaluation of the Data on the basis of Dimensions/Metrics.
- Identify the data gaps and collaborate with the Tech team.
- Make Data Sketches on the paper for acute clarity on outcome.



## DESIGN & DEVELOPMENT

- Create relevant KPIs, Calculated fields, Parameters etc.
- Develop the table with necessary Dimensions and metrics.
- Look for predictable patterns, valuable insights.
- Reconnect with stakeholder to update on timeline or clarification, if needed



## DATA VISUALISATION

- Selection of graphs, layouts, colours that enables easy & fast data comprehension
- Organise and present the data in organic way, easy to follow.
- Conclude your insights & provide Glossary at the end.



## QUALITY CHECK

- Sanity Check (Filters, Consistency, Readability, Colour coding, Connections etc.
- Pick few samples and Check the formulas, numbers to validate the accuracy.
- Review the Data Analysis & Insights based on the Requirements, Refine if needed.



# CONNECT WITH THE STAKEHOLDERS



- Once the dashboard is published and delivered, connect with the Stakeholders to take their feedback on the below:
  - Ease of using the dashboard
  - How easy is it follow the flow and comprehension of the data
  - How relevant are the findings and insights
- Keep an eye on the number of users are using the dashboard, higher the users the higher the priority. Always take the opportunity to improve and update it with time.

# **GRATITUDE**

**Thank You for the  
opportunity!**