Module 13
Best Practices:
Dashboard and Scorecards

Dashboard best practices

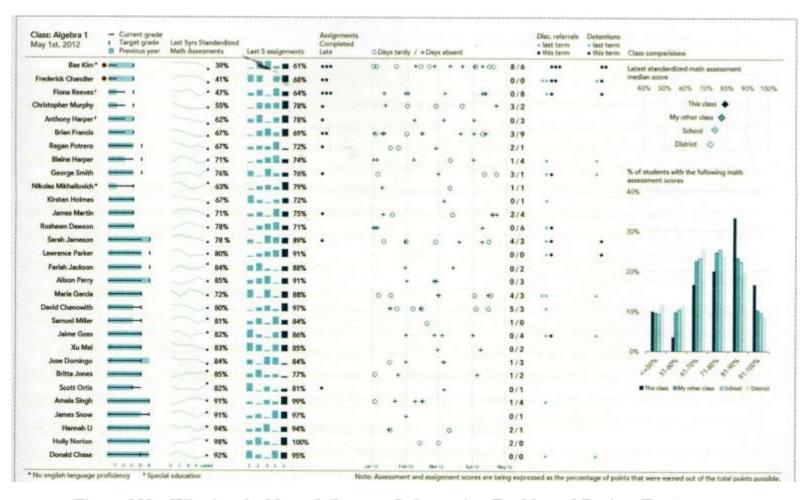- **Provide an effective dashboard**

Figure 121: Winning dashboard (Source: Information Dashboard Design, Few)

Dashboard best practices (continued)

- **Display only what is necessary on the dashboard**

- **Use a single screen dashboard**

- **Begin at the high-level when designing the overall dashboard layout**

- **Dashboard should immediately convey business reality to the users**

- **Pick critical metrics**

Dashboard best practices (continued)

- **Balance usage of leading and lagging indicators**
- **Display context on the dashboard**
- **Limit the text or content to be displayed**
- **Continue to evolve**

Best practices for creating effective dashboards

- Choose metrics that matter
- Make it interactive
- Keep it visual
- Keep it current
- Make it simple to access and use

Scorecard implementation issues

- **Problems listed by managers in companies that have implemented new scorecards:**
  - Time consuming
  - Costly
  - Complicated
  - Misleading
  - Mechanistic
- **All are certainly avoidable**

Scorecard best practices

- **Screen and remove flawed metrics**
- **Leverage consultants**
- **Measure frequently**
- **Keep it simple**
- **Do not over analyze**

Best practices in deploying dashboards and scorecards

- **What you get is what you pay for**
- **Perform long term planning**
- **Plan for real-time**
- **Develop on a single platform**