

# Dashboard Design

-

## Icing on the Cake

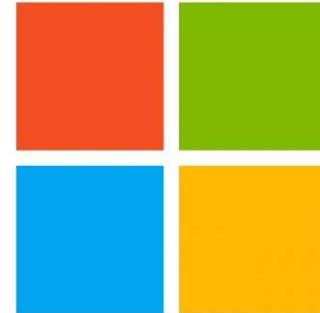
5 Steps to improve your report.



# THANK YOU



Awesome Partner



Microsoft

Platinum



redgate



Gold



b.telligent  
smart data. smart decisions.

Lucient

Bronze



Tabular Editor

paiqo  
The Platform & AI Company



Power BI Camp  
[www.linearis.at](http://www.linearis.at)

# Valerie Junk

## PorcuBI



- Data Visualization & Storytelling
- Change Management
- Trainer

in /valeriejunk/



porcubi



# Why Design?



Easy to follow and understand



Engaging



Time-saving

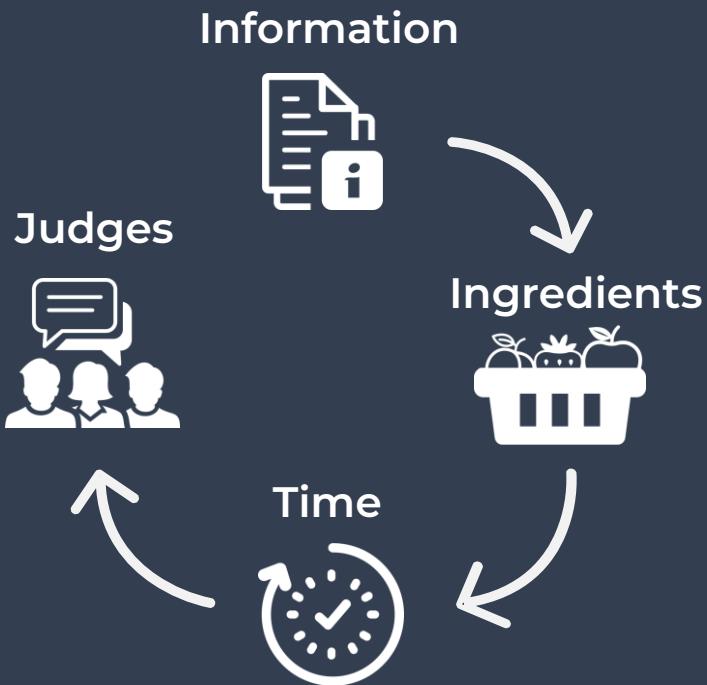


# Creating a report

-

# Taking part in a baking competition

# The competition



# 5 Steps

Research



Organize



Visualize



Aesthetics



Evaluate



# Step 1

# Research



# The audience

- Who is the audience?
- What is the experience level?
- What actions do they intend to take and why?
- What's the process?



Different Audience  
=  
Different Design



# What's the message?

1 key message (sentence)



CONTEXT



INFORMATION



ACTIONS TO TAKE

# Message = Design



Month Short	Product	Discount Band	Sales Difference TY vs LY by Product			Difference LY	COGS LY	COGS TY	Units Sold LY	Units Sold TY	Profit LY	Profit TY	
			Gross Sales	Difference LY	Units Sold								
Jun	Product 1	High	645,300	7,247,10	639,052,90	5,900,00	5,900,00	5,900,00	1,190	1,190	639,350,00	1,297,10	
		Medium	1,270,155	1,307,671,62	679,150,00	10,896,00	59,105,00	59,105,00	59,105	59,105	59,105,00	708,521,62	
		None	37,980	233,531,25	19,890,00	1,890	1,890,00	1,890,00	18,990	18,990	18,990,00	214,541,25	
	Product 2	High	306,180	1,151,140,00	204,860,00	2,048,00	2,048,00	2,048,00	1,447	1,447	1,447,00	-210,140,00	
		Medium	200,499	10,662,40	189,836,00	1,689	1,689,00	1,689,00	28,249,00	28,249,00	28,249,00	-161,587,60	
		None	68,596	8,305,76	74,596	3,889	3,889	3,889	4,493,76	4,493,76	4,493,76	-84,499,40	
	Product 3	High	119,494	8,305,76	119,494	4,477	4,477	4,477	1,13M	1,13M	1,13M	-1,13M	
		Medium	80,691	8,305,76	80,691	3,822	3,822	3,822	2,632	2,632	2,632	-5,198,00	
		None	64,444	8,305,76	64,444	1,13M	1,13M	1,13M	1,13M	1,13M	1,13M	-1,13M	
	Product 4	High	1,245,600	6,784,892	9,129,00	1,812,00	1,812,00	1,812,00	3,040,00	3,040,00	3,040,00	1,236,471,00	
		Medium	36,616	6,784,892	656,750,00	10,716,00	10,716,00	10,716,00	5,602,00	5,602,00	5,602,00	669,720,92	
		None	132,300	123,636,00	154,979,00	53,120,00	53,120,00	53,120,00	8,432	8,432	8,432	-67,600,00	
	Product 5	High	1,246,483	1,705,067,25	-458,584,00	1,104,640,00	5,101	5,101	5,101	141,843,25	141,843,25	141,843,25	600,427,25
		Medium	694,672	1,705,067,25	-355,728,10	639,099,00	7,478	7,478,00	7,478,00	639,372,56	639,372,56	639,372,56	419,700,00
		None	2,123,160	1,705,067,25	-1,628,915,00	1,881,000,00	5,497	5,497,00	5,497,00	303,320,00	303,320,00	303,320,00	-1,429,645,00
	Product 6	High	382,316	75,405,00	306,911,00	269,114,00	3,524	3,524,00	3,524,00	112,200,00	112,200,00	112,200,00	-193,709,00
		Medium	814,997	814,996,86	692,062,00	692,062,00	4,426	4,426,00	4,426,00	122,914,86	122,914,86	122,914,86	-1,13M
		None	3,100,000	3,100,000	2,211,889,00	897,937,00	5,971	5,971,00	5,971,00	1,236,471,00	1,236,471,00	1,236,471,00	-448,628,00
	Product 7	High	370,640	170,347,32	200,292,68	266,195,00	2,551	2,551,00	2,551,00	104,445,00	104,445,00	104,445,00	-95,874,68
		Medium	205,651	205,650,60	215,630,00	215,630,00	4,150	4,150,00	4,150,00	2,975,40	2,975,40	2,975,40	-9,979,40
		None	2,334,100	1,705,067,25	610,837,00	1,705,067,25	1,705,067,25	1,705,067,25	1,705,067,25	1,705,067,25	1,705,067,25	1,705,067,25	1,705,067,25
	Product 8	High	1,169,681	59,933,56	110,747,66	47,620,00	47,620,00	47,620,00	6,680	6,680,00	6,680,00	1,22,061,22	
		Medium	1,607,800	86,677,00	739,036,00	30,660,00	30,660,00	30,660,00	3,066	3,066,00	3,066,00	1,577,140,00	
		None	1,607,800	13,472,770,54	6314,174,67	8,045,140,00	E443,140,00	Tota	19,787,995	13,472,770,54	6314,174,67	8,045,140,00	

# Different Message

=

# Different Design





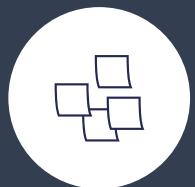
## Step 2

# Organize

# Organizing information



Gather all the information



Sticky Notes  
(easy to rearrange)



Translate pieces to design



Each piece is part of the story



Keep it simple



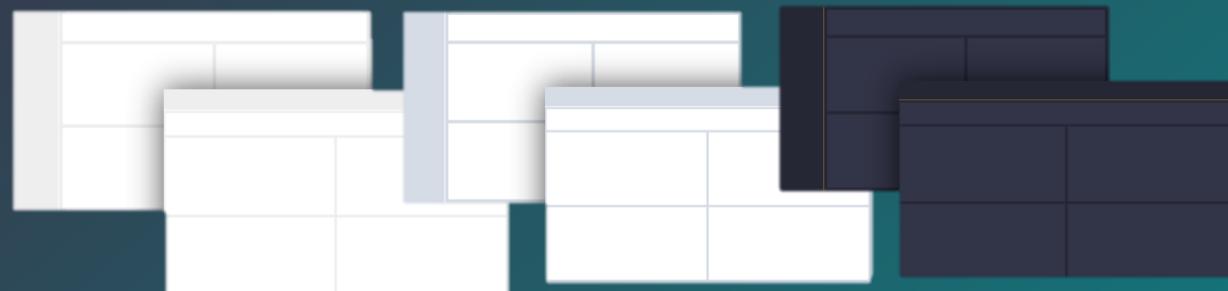
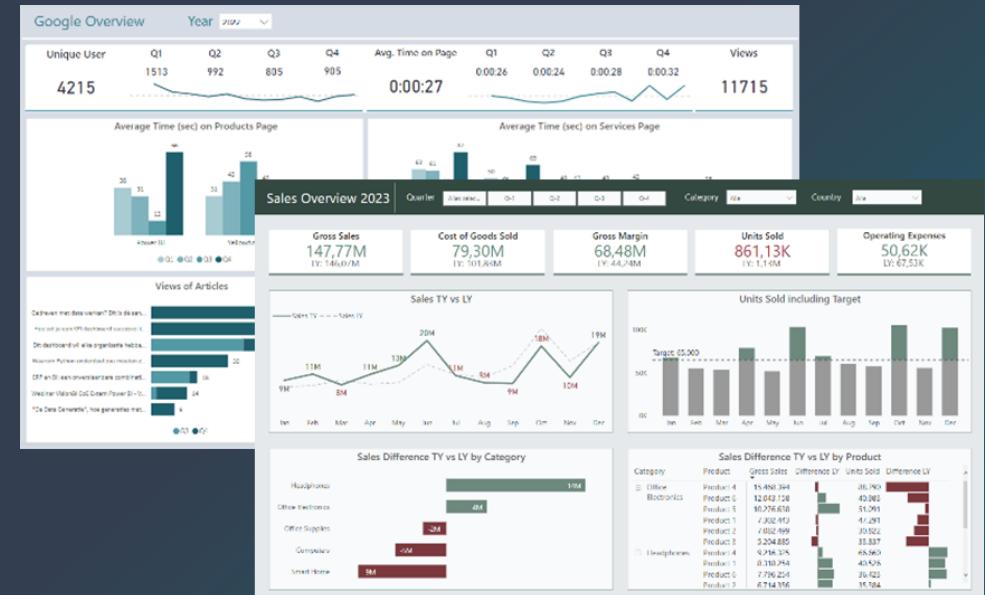
# Using a Grid

- Organize
- Create it in Power BI  
(or Figma or Power Point...)
- Discussion starter



# Using a Template

- Uniformity
- User knows what to expect
- Starting Point



# Step 3

# Visualization



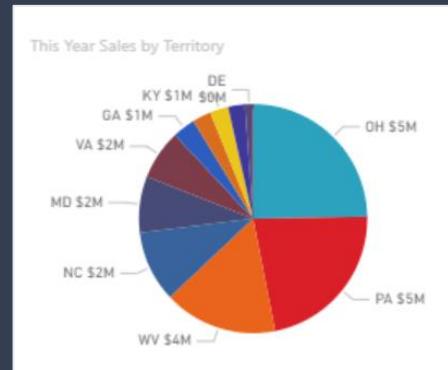
# Some basics

## Visual hierarchy



Elena Drakulevska

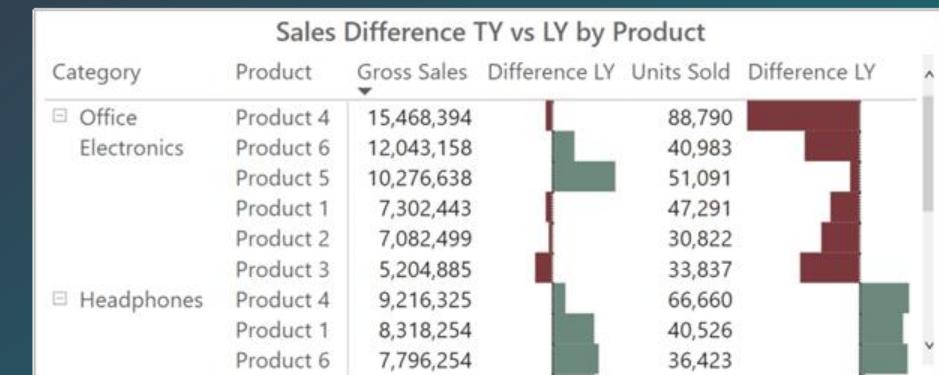
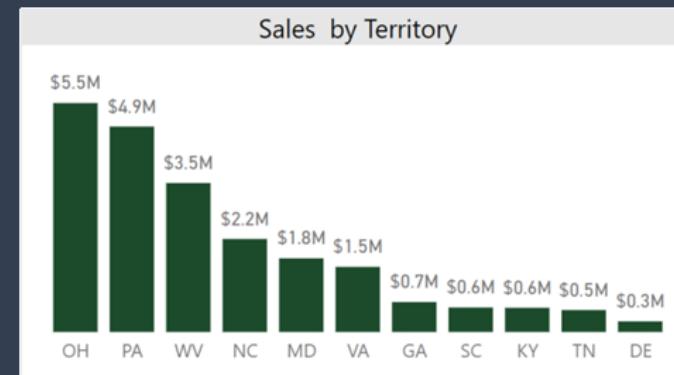
## Ease of Interpretation



## Visual Cues

Sales Difference TY vs LY by Product

Category	Product	Gross Sales	Difference LY	Units Sold	Difference LY
Office Electronics	Product 4	15,468,394.40	-583,396.53	88,790.00	-31,303.00
	Product 6	12,043,158.08	1,804,151.16	40,982.50	-15,084.50
	Product 5	10,276,638.44	5,093,043.05	51,090.50	-2,640.50
Headphones	Product 4	9,216,325.30	1,011,620.77	66,659.50	14,232.00
Office Supplies	Product 4	8,592,488.50	2,584,096.88	27,705.00	-5,007.00
Headphones	Product 1	8,318,254.37	3,318,314.67	40,525.50	12,470.50
Headphones	Product 6	7,796,253.92	3,730,122.58	36,423.00	13,603.00
Office Electronics	Product 1	7,302,442.70	-502,078.43	47,291.00	-8,067.50
<b>Total</b>		<b>147,771,511.24</b>	<b>1,702,062.57</b>	<b>861,132.00</b>	<b>-264,674.00</b>



# Visual Cues - Icons

Month	Sales	Sales LY
January	€ 2.867,46	€ 1.396,35
February	€ 35,73	€ 1.366,04
March	€ 3.886,69	
April	€ 1.014,93	€ 85,17
May	€ 3.133,27	€ 1.055,39
June	€ 1.108,14	€ 195,58
July	€ 1.908,18	€ 480,79
August	€ 4.874,01	€ 141,21
September	€ 1.674,43	€ 2.130,70
October	€ 1.971,15	€ 1.089,94
November	€ 7.324,12	€ 1.053,43
December	€ 812,76	€ 1.419,47

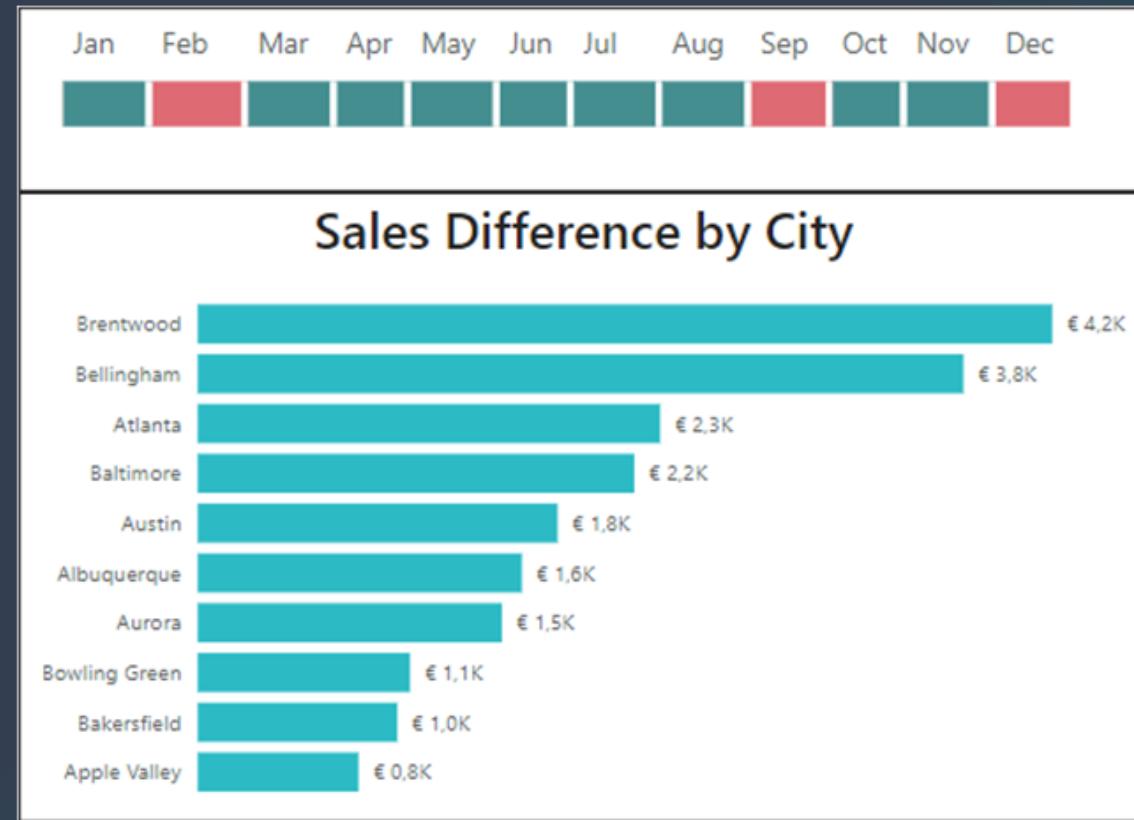
Month	Sales	Sales LY
January	€ 69,38	€ 1.615,93 <span style="color:red">▼</span>
February	€ 359,97	€ 246,65 <span style="color:green">▲</span>
March	€ 205,33	€ 354,90 <span style="color:red">▼</span>
April	€ 908,82	<span style="color:green">▲</span>
May	€ 2.418,83	€ 1.050,30 <span style="color:green">▲</span>
June		€ 1.306,03 <span style="color:red">▼</span>
July	€ 1.194,17	€ 1.306,45 <span style="color:red">▼</span>
August		€ 186,54 <span style="color:red">▼</span>
September	€ 489,1	€ 2.668,24 <span style="color:red">▼</span>
October	€ 1.242,82	€ 1.407,45 <span style="color:red">▼</span>
November	€ 4.496,29	€ 454,12 <span style="color:green">▲</span>
December	€ 699,3	€ 1.819,98 <span style="color:red">▼</span>

Month	Sales	Sales LY
January	€ 5.940,9	€ 3.073,44
February	€ 10.851,19	€ 10.455,49 <span style="color:yellow">☆</span>
March	€ 4.915,07	€ 602,10
April	€ 1.779,06	€ 727,15
May	€ 7.558,25	€ 3.611,28
June	€ 4.397,31	€ 1.569,62
July	€ 5.645,56	€ 3.737,38
August	€ 6.253,56	€ 1.134,45
September	€ 7.477,04	€ 4.722,37
October	€ 7.657,19	€ 4.539,13
November	€ 9.564,96	€ 1.778,50 <span style="color:yellow">★</span>
December	€ 5.965,02	€ 3.970,27

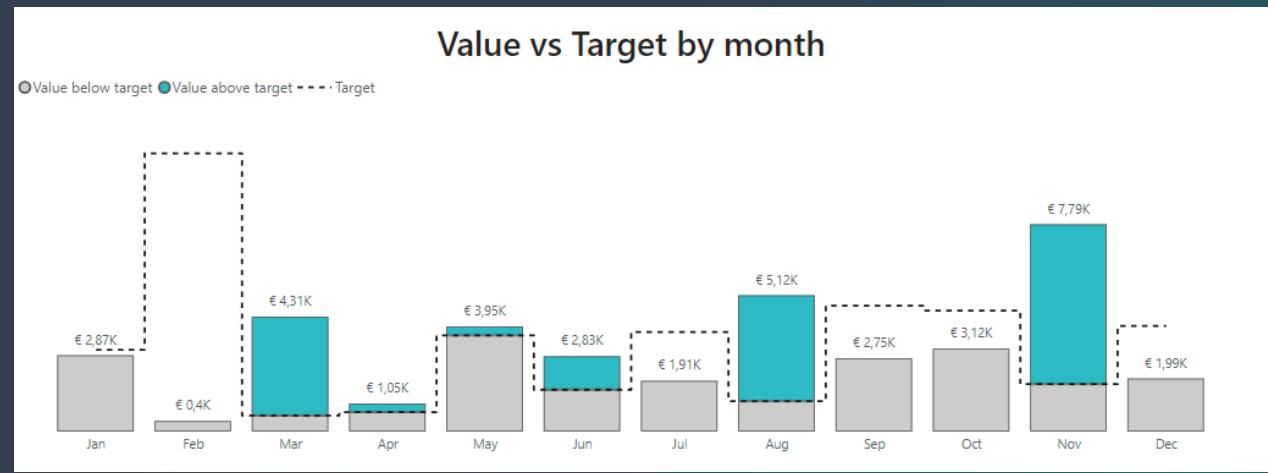
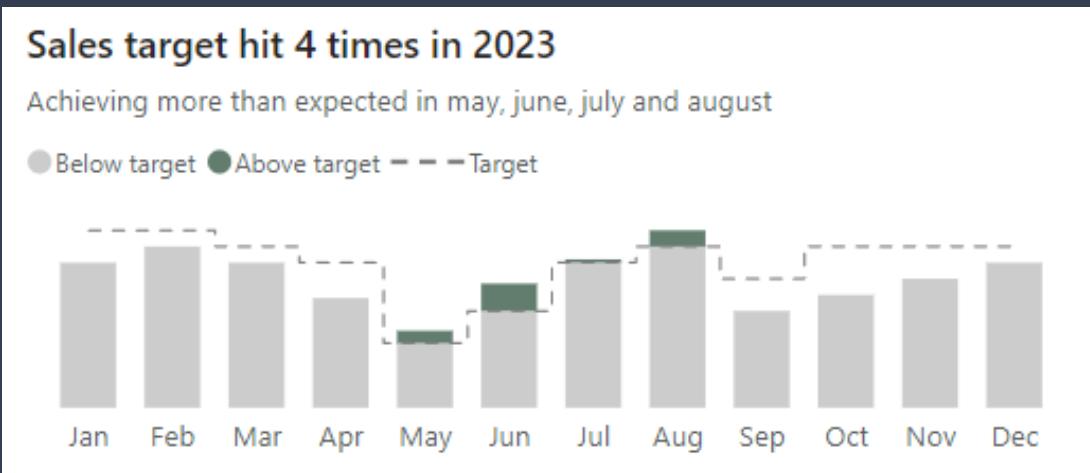
Month	Sales	Sales LY	Sales Difference
January	€ 69,38	€ 1.615,93	1.546,55 -€ <span style="background-color:red">█</span>
February	€ 359,97	€ 246,65	€ 113,32 <span style="background-color:teal">█</span>
March	€ 205,33	€ 354,90	149,57 -€ <span style="background-color:red">█</span>
April	€ 908,82		€ 908,82 <span style="background-color:teal">█</span>
May	€ 2.418,83	€ 1.050,30	€ 1.368,53 <span style="background-color:teal">█</span>
June		€ 1.306,03	1.306,03 -€ <span style="background-color:red">█</span>
July	€ 1.194,17	€ 1.306,45	112,28 -€ <span style="background-color:red">█</span>
August		€ 186,54	186,54 -€ <span style="background-color:red">█</span>
September	€ 489,1	€ 2.668,24	2.179,14 -€ <span style="background-color:red">█</span>
October	€ 1.242,82	€ 1.407,45	164,63 -€ <span style="background-color:red">█</span>
November	€ 4.496,29	€ 454,12	€ 4.042,17 <span style="background-color:teal">█</span>
December	€ 699,3	€ 1.819,98	1.120,68 -€ <span style="background-color:red">█</span>

# Visual Cues - Simplify

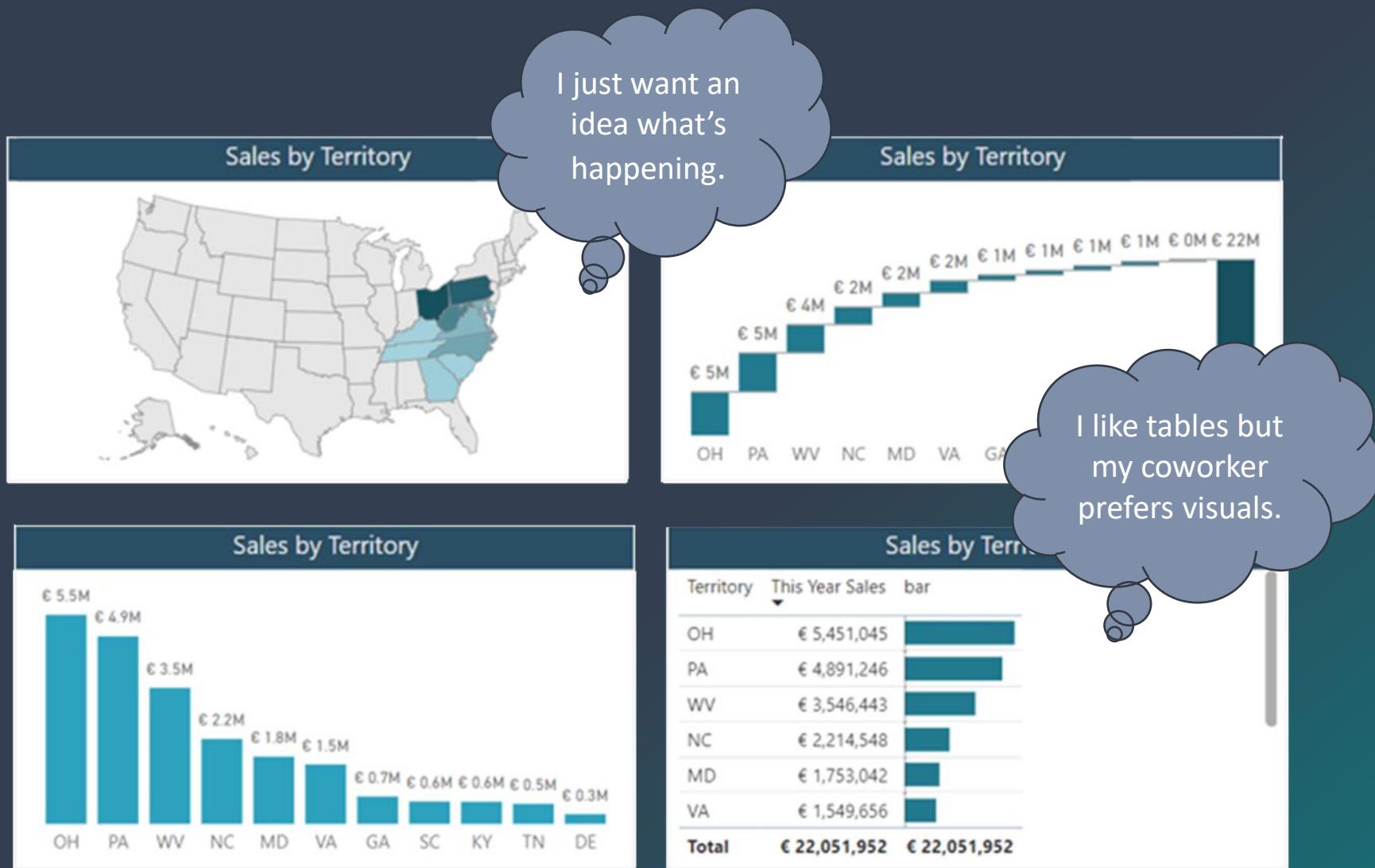
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November	€ 7.324,12	€ 1.053,43
December	€ 812,76	€ 1.419,47



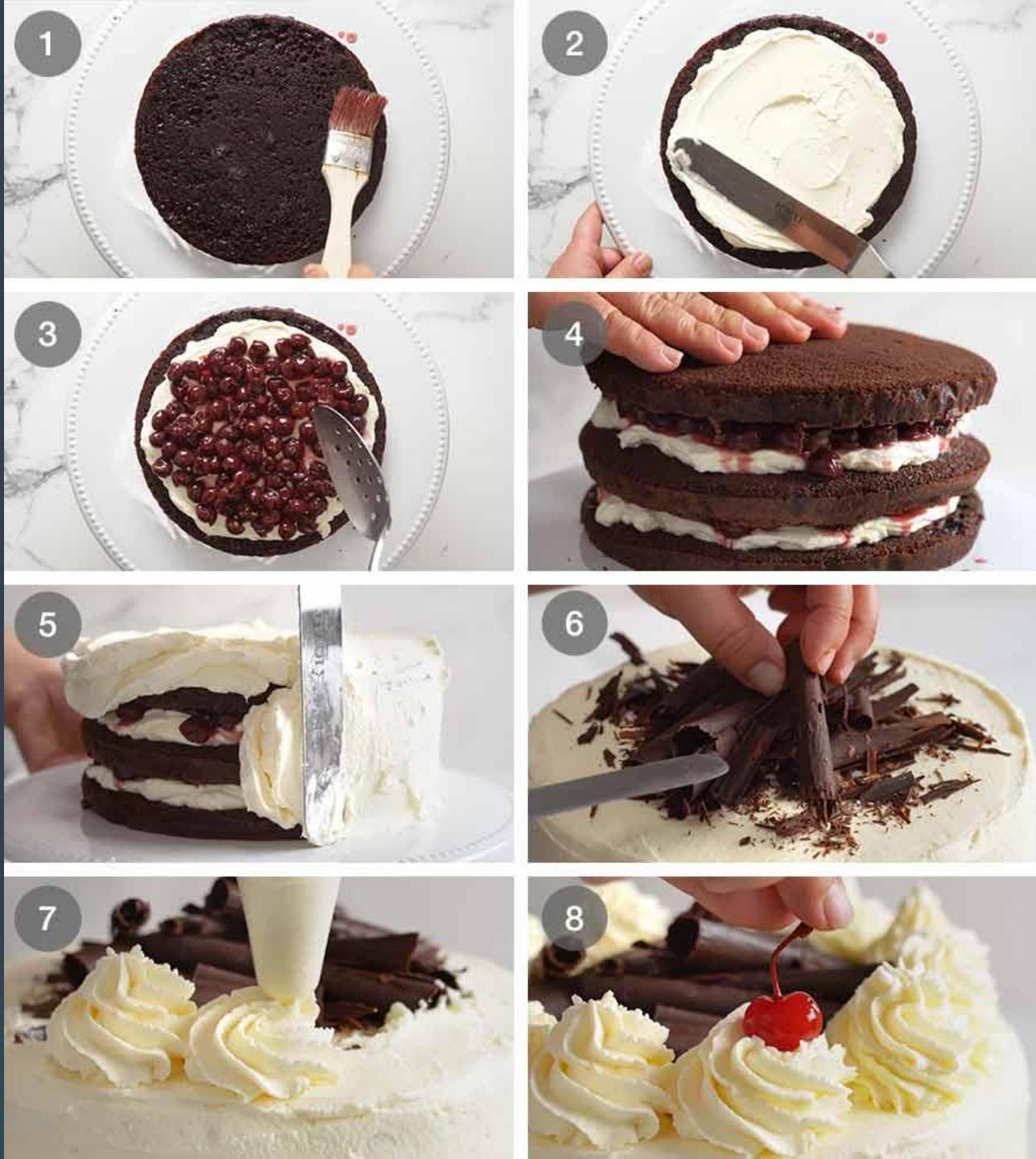
# Visual Cues - Progress



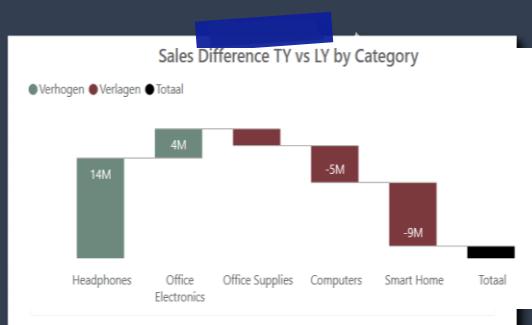
# Best Visual = Goal + End-user



# But how do I start?

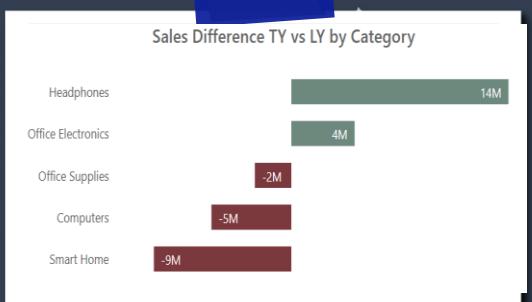


# Step by Step



Sales Difference TY vs LY by Product

Category	Product	Gross Sales	Difference LY	Units Sold	Difference LY
Office Electronics	Product 4	15,468,394.40	-583,396.53	88,790.00	-31,303.00
Office Electronics	Product 6	12,043,158.08	1,804,151.16	40,982.50	-15,084.50
Office Electronics	Product 5	10,276,638.44	5,093,043.05	51,090.50	-2,640.50
Headphones	Product 4	9,216,325.30	1,011,620.77	66,659.50	14,232.00
Office Supplies	Product 4	8,592,488.50	2,584,096.88	27,705.00	-5,007.00
Headphones	Product 1	8,318,254.37	3,318,314.67	40,525.50	12,470.50
Headphones	Product 6	7,796,253.92	3,730,122.58	36,423.00	13,603.00
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<b>Total</b>		<b>147,771,511.24</b>	<b>1,702,062.57</b>	<b>861,132.00</b>	<b>-264,674.00</b>



Sales Difference TY vs LY by Product

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Office Electronics	Product 4	15,468,394	-583,396.53	88,790	-31,303.00
	Product 6	12,043,158	1,804,151.16	40,983	-15,084.50
	Product 5	10,276,638	5,093,043.05	51,091	-2,640.50
	Product 1	7,302,443	-502,078.43	47,291	-8,067.50
	Product 2	7,082,499	3,318,314.67	40,526	12,470.50
Headphones	Product 3	5,204,885	3,730,122.58	36,423	13,603.00
	Product 4	9,216,325	-502,078.43	66,660	-8,067.50
	Product 1	8,318,254	3,318,314.67	40,526	12,470.50
	Product 6	7,796,254	3,730,122.58	36,423	13,603.00
	Product 2	7,082,499	-502,078.43	30,822	-8,067.50



# Step 4 Aesthetics (& Usability)



# Aesthetic-Usability Effect

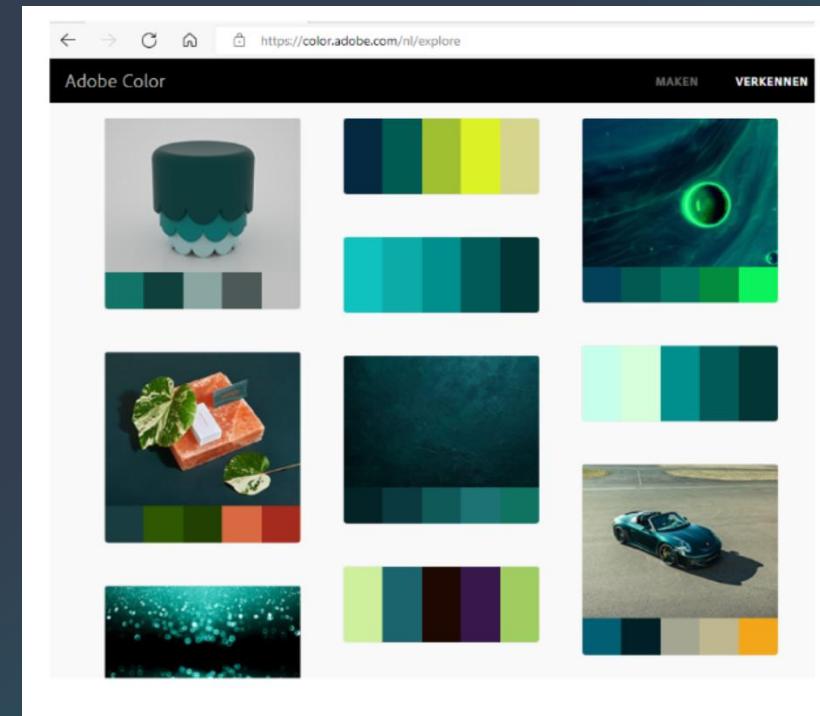
- Users often perceive aesthetically pleasing design as more usable.
- People are more forgiving of minor issues.



# Creating uniformity

## Color schemes

- Easier on the eye
- Use same colors for same categories



Color.adobe.com

# Focus

**Don't overestimate the time users are willing to spend searching for information.**





# Step 5

# Evaluate

# IT'S PERFECT!



# Continuous process

- Involve the audience early on
- Don't stop directly after implementation
- Evaluate with the actual audience



# What if it doesn't work?

- Avoid adding unnecessary data,

filters, or options.

- Provide guidance.

No Conditional Formatting			
Category	Product	Gross Sales	Difference LY
Office Electronics	Product 4	15,468,394	-583,396.53
	Product 6	12,043,158	1,804,151.16
	Product 5	10,276,638	5,093,043.05

Trend (up or down)			
Category	Product	Gross Sales	Difference LY
Office Electronics	Product 4	15,468,394	▼
	Product 6	12,043,158	▲
	Product 5	10,276,638	▲

Conditional Formatting: Bar Charts			
Category	Product	Gross Sales	Difference LY
Office Electronic S	Product 4	15,468,394	
	Product 6	12,043,158	
	Product 5	10,276,638	

Conditional Formatting: Min Max			
Category	Product	Gross Sales	MinMax
Office Electronic S	Product 4	15,468,394	
	Product 6	12,043,158	
	Product 5	10,276,638	
	Product 1	7,302,443	
	Product 2	7,082,499	
	Product 3	5,204,885	

# It's a process

Research



Organize



Visualize



Aesthetics



Evaluate



# Contact



porcu.bi

in /valeriejunk/



porcubi



Feedback Please!

