Udacity Data Visualization Nanodegree

Project 3: Design a Data Dashboard Final Project

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Introduction

Our first tactical dashboard was a hit, which means we have attracted some attention. Now the full executive team wants a more strategic view of the business.

You need to create a dashboard that allows the team to see:

- Top-level revenue, profit, average profit ratio and units sold
- YoY performance by segment (segment refers to Corporate, Consumer, Home Office)
- Monthly trend of the current year by segment (segment refers to Corporate, Consumer, Home Office)
- View category performance
- Best performing sub-category within each customer segment

The difference between this dashboard and the previous, besides the content, is the emphasis on performance. Your executive audience does not have the time to make all the comparisons themselves. They need you to emphasize the main points of interest they will relay to their team leads for further investigation and discuss among themselves regarding strategy.

Project Overview

In this project, you will incorporate the new skills you have learned around dashboard designed to grab your audience's attention. We will be emphasizing key elements of the dashboard that continue acknowledging the audience's level of graphicacy, conscious management of color to avoid confusion, and our innate ability to identify patterns so those who find your dashboard are drawn to the key points.

Project Steps

Ensure your audience can access the information below:

- Top-level revenue, profit, profit ratio and units sold for 2018
- YoY performance by customer segment (customer segment refers to Corporate, Consumer, Home Office)
- View sub-category performance by the active metric
- Best performing sub-categories within each customer segment for the chosen metric
- Demonstrate a clear use of alignment so users can easily navigate the UI
- Use color to clearly call attention to the marks that matter most
- Create a text hierarchy to further organize the information on the screen in a separate document
- Add information to areas of the screen users may have questions about

Who is our client?

Audience

Executive team at Sales Rocket seeking to make the best strategic business decisions to improve future business performance. Some less data-savvy individuals.

Motivation

The Executive team needs a dashboard created that focuses on performance and requires quick access to key insights that will contribute to the decision-making process with regard to business strategy.
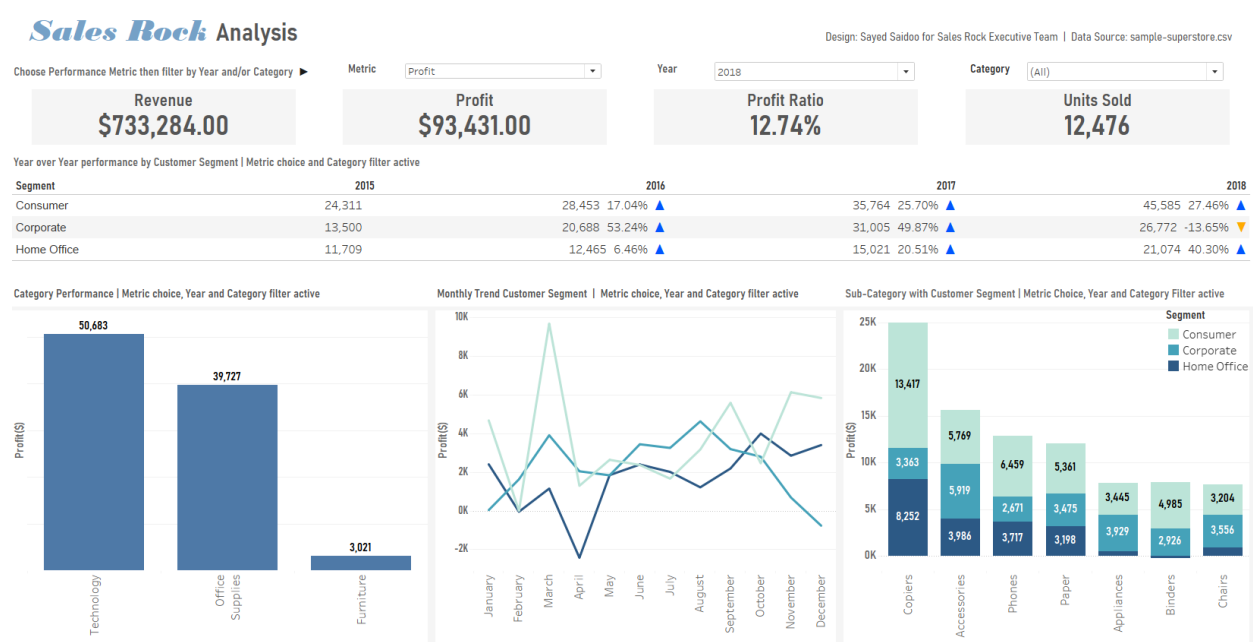
Data

sample-superstore.csv

Summary

Provide production ready interactive Dashboard that meets all requirements of the Executive team.

Project Specifications:

Tableau was used for Data transformations as well as all Visualizations.

Overall Dashboard Screenshot

The intention here was to create a user-friendly dashboard with appropriate use of color, annotation and clear use of alignment. Colour was used to distinguish and draw attention to insights, while keeping within a specific subtle palette that takes colour blindness into consideration. Annotations were used to guide the user and increase comprehensibility. Alignment was also considered for visual professionalism.

1. Top-level revenue, profit, profit ratio and units sold for 2018
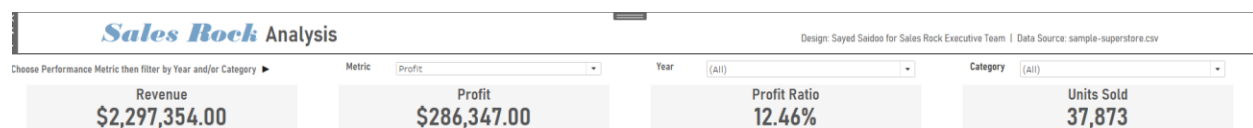
~ Filtered by Year (2018)
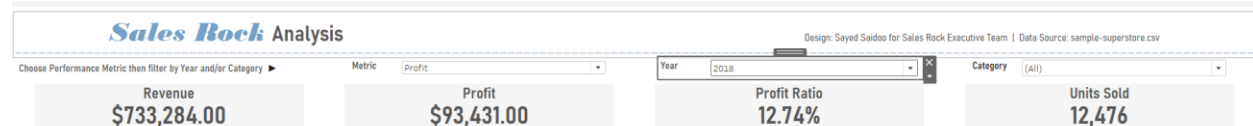
2. YoY performance by customer segment (customer segment refers to Corporate, Consumer, Home Office)
~ Filters are active so user can explore data by metric choice and category

Year over Year performance by Customer Segment | Metric choice and Category filter active

| Segment	2015	2016	2017	2018
Consumer	24,311	28,453 17.04% ▲	35,764 25.70% ▲	45,585 27.46% ▲
Corporate	13,500	20,688 53.24% ▲	31,005 49.87% ▲	26,772 -13.65% ▼
Home Office	11,709	12,465 6.46% ▲	15,021 20.51% ▲	21,074 40.30% ▲

3. Monthly trend of the current year by segment (segment refers to Corporate, Consumer, Home Office).
~ Colour to distinguish Segment. Tooltip active for more information.

Monthly Trend Customer Segment | Metric choice, Year and Category filter active
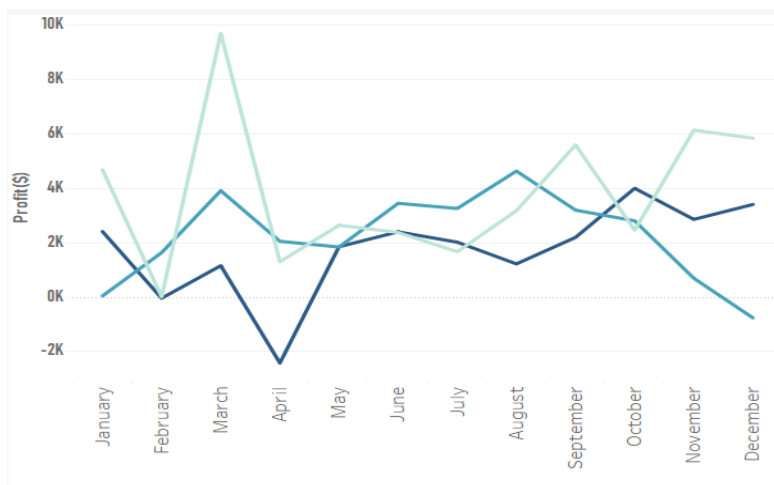
4. View sub-category performance by the active metric
5. Best performing sub-categories within each customer segment for the chosen metric
~ Colour is consistent with Monthly trend Visualization for Segment
~ Legend and tooltips used to assist user to distinguish segment

Sub-Category with Customer Segment | Metric Choice, Year and Category Filter active
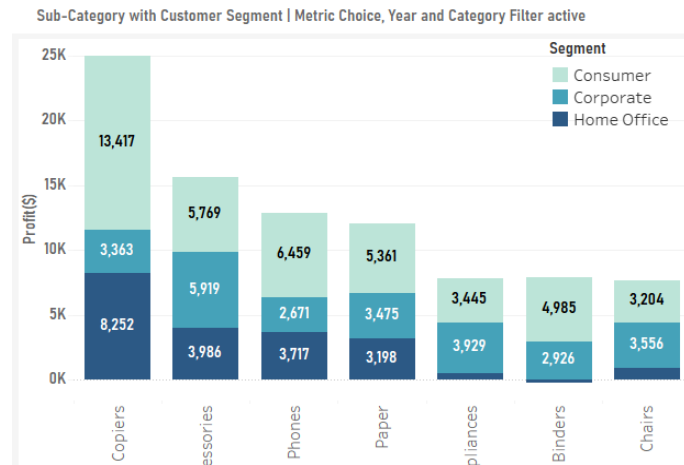
~ Active metric changed to Units Sold
~ Ordered to display best performing items

Sub-Category with Customer Segment | Metric Choice, Year and Category Filter active
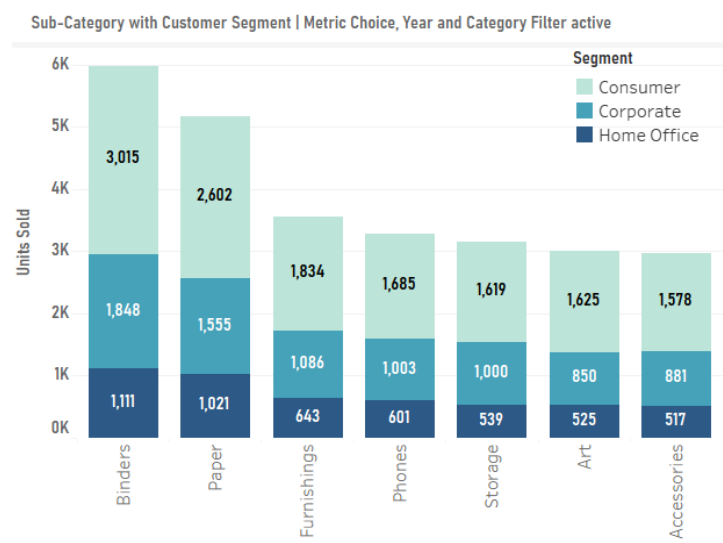
Text Hierarchy

Title Section:

Section 1 Font: Bodoni MT Black – Size: 24

Section 2 Font: Bahnschrift SemiBold SemiConden – Size: 20

Section 3 Font: Bahnschrift SemiLight SemiConde – Size: 9

KPI Section:

Section 1 Font: Bahnschrift SemiBold SemiConden – Size: 14

Section 2 Front: Bahnschrift SemiBold SemiConden – Size: 22

Filters, Visual Headers, Axis, mark and legend labels:

Section 1 Font: Bahnschrift SemiBold SemiConden – Size: 9

Section2 Font: Tableau Book – Size: 9

Tooltips Section:

Section 1 Font: Bahnschrift SemiBold SemiConden – Size 14

Link to my Tableau Dashboard:

https://public.tableau.com/app/profile/sayed.saidoo/viz/P3_SalesRock_Sayed/FinalDashboard?publish=yes

Please view Dashboard on Full Screen Mode

References:

Website, *Tableau Tutorial Videos,* URL: https://www.tableau.com/learn/training/20204

Website, *Tableau Community Forums*, URL: https://community.tableau.com/s/

Thank You