



Activity Overview

In this activity, you will create a low-fidelity mockup based on a scenario. This will help you practice preparing to build a dashboard. Making a mockup can help you narrow down general visual details of your dashboard. When you share your mockup with your stakeholder, you can get early feedback before you invest a lot of time making a more detailed digital tool.

Be sure to complete this activity before moving on. The next course item will provide you with a completed exemplar to compare to your own work. You will not be able to access the exemplar until you have completed this activity.

Scenario

Review the following scenario. Then complete the step-by-step instructions.

A private medical practice asks you to create a dashboard to help them better understand their patients. Specifically, they want to know more about patient retention and how they can best serve their patients' medical needs.

Your contact at the private practice wants to answer the following questions:

- . What is the frequency of visits from returning patients? For example, how many times do the same patients visit in a year? How many times do the same patients visit in five years?
- . What is the average length of time between visits per patient?
- . How many patients are visiting a specialist for a specific condition? How does their visit frequency differ from patients who are only at the practice for general visits and aren't visiting a specialist?
- . What are the results of the five-question surveys that patients are asked to complete after each visit? How many patients complete them? Do the patients who complete them have anything in common?

Considering that the goal of the dashboard is to help improve the way this practice treats its patients, draw a low-fidelity mockup to represent the visual approach you'd take.

Step-By-Step Instructions

Follow the instructions to complete each step of the activity. Then, answer the questions at the end of the activity before going to the next course item to compare your work to a completed exemplar.

➤ Step 1: Set up with a paper and pencil

To get started, get a piece of paper and a pencil. Although you can make a mockup in a drawing program like MS Paint or Adobe Illustrator, many BI pros recommend starting with non-digital tools. Using paper and a pencil allows you to make drawings quickly and move on to new ideas faster. Paper prototypes can feel more flexible, so they can encourage you to be more creative and explore many approaches.

➤ Step 2: Draw a mockup

Begin drawing an idea for how you want to arrange your dashboard. Use the details from the scenario to guide your thought process. What you focus on in your mockup might depend on the details your stakeholders share with you.

If two questions can be answered with the same data, you might position their visualizations close to one another. You could also use a funnel format in your mockup by representing the main takeaways in the largest chart at the top, then going into further detail, or “funneling,” in the following charts .

➤ Step 3: Draw at least one more mockup

Draw at least one more mockup on another piece of paper. Even if you are very confident in the layout of your first mockup, try another approach. Challenge yourself to explore as much as possible during the mockup stage of creating a dashboard. The more drafts you create, the more feedback you can get from a stakeholder.

➤ Step 4: Scan or photograph your mockups

Scan or take photos of your mockups. In your job, you might work remotely or be unable to visit your stakeholder in person. In this case, you'll need to digitize your paper prototypes. You can recreate them in a digital drawing program, but keep in mind that this can become time-consuming if you create lots of sketches during your mockup brainstorming stage.

➤ Step 5: Write follow-up questions

Building a mockup is part of the planning phase. While creating your mockup, you might find you don't have enough information and think of questions to follow up with your stakeholder. These questions should be about anything that seems incomplete in the scenario

notes, such as “Is there a number of charts you expect me to create?” or “What kind of chart should I use to represent the average time between visits?”

Beneath your mockup or on the back of your piece of paper, write 2–3 follow-up questions about this scenario that could help you improve your mockup.

What to Include in Your Response

Be sure to address the following criteria in your completed mockups:

At least one drawn (paper and pencil or digitally illustrated) mockup

At least four charts or visuals in each mockup to represent the four main requests from the stakeholder

Write 2–3 follow-up questions to your stakeholder

1. Did you complete this activity?

1 / 1 point

☒ Yes

☐ No

☒ Correct

Thank you for completing this activity!
Building a mockup is an essential first step in designing a visualization. It helps you describe your intentions to your stakeholders and get feedback to improve your approach. Please complete the following quiz questions and review the feedback. Then go to the next course item to compare your work to a completed exemplar.

2. What is the purpose of creating a mockup for a stakeholder prior to building a dashboard?
Select all that apply.

1 / 1 point

- ☐ Provides the stakeholder with all of the relevant data
- ☒ Helps you narrow down the general visual details of your dashboard
- ☒ Correct
Creating a mockup helps you narrow down the general visual details of your dashboard. It also gives the stakeholder an opportunity to provide early feedback and helps you avoid potential errors in your dashboard.
- ☒ Helps you avoid potential errors in your final dashboard
- ☒ Correct
Creating a mockup can help you avoid potential errors in your dashboard. It helps you narrow down the general visual details and gives the stakeholder an opportunity to provide early feedback.
- ☒ Gives the stakeholder an opportunity to provide early feedback
- ☒ Correct
Creating a mockup gives the stakeholder an opportunity to provide early feedback before you invest a lot of time making a more detailed digital tool. It also helps you narrow down the general visual details of your dashboard and avoid potential errors in your dashboard.

3. Which data visualization approach entails representing the main takeaways in the largest chart at the top of your mockup and then going into further detail in the following charts?

1 / 1 point

- ☐ Annotating
- ☐ Scanning
- ☒ Funneling
- ☐ Drafting

✓ Correct
A “funneling” visualization approach involves representing the main takeaways in the largest chart at the top of your mockup and then going into further detail in the following charts.

4. In order to be most effective, what characteristics should your mockups have?
Select all that apply.

1 / 1 point

☒ They should have clear, bold details.

✓ Correct
In order to be effective, your mockups should have clear, bold details and be easy to understand. You don't need to spend time defining color schemes, fonts, or other kinds of visual style. Your mockups just need to clearly communicate your intentions.

☒ They should be easy to understand.

✓ Correct

In order to be effective, your mockups should have clear, bold details and be easy to understand. You don't need to spend time defining color schemes, fonts, or other kinds of visual style. Your mockups just need to clearly communicate your intentions.



They should communicate your intentions.



Correct

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They should include color schemes, fonts, and other kinds of visual style.