Essential Design Principles for Tableau

Know Your Audience(s)

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Think about your audience:

Needs

Skills

Knowledge

Goals

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What are the interests, needs and goals of your audience?

How will your visualization meet those needs?

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Audience needs can range from curiosity to urgent real-time alerts

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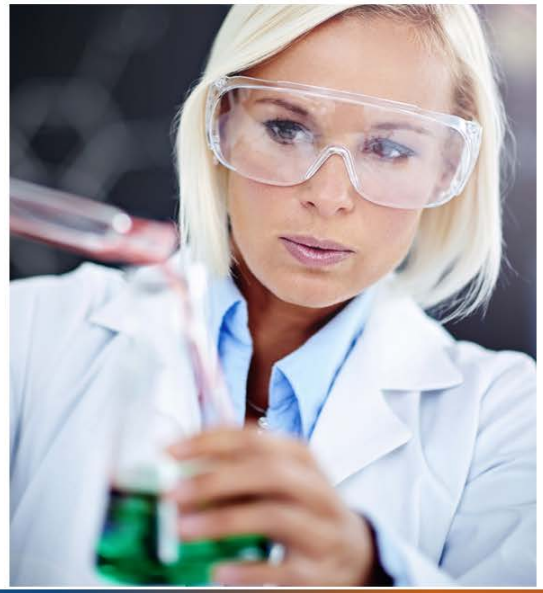
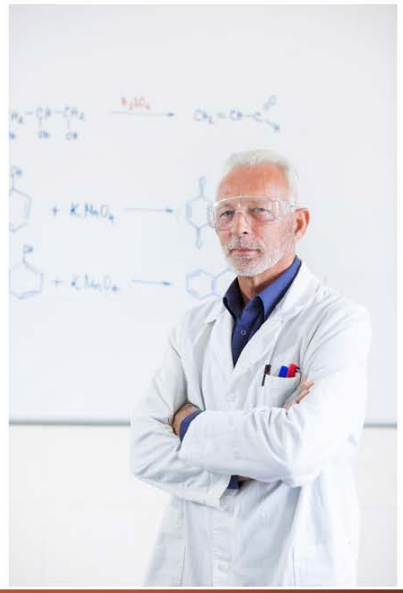
What level of familiarity should your audience have with this subject?
What level do they actually have?

Novice

User



Expert



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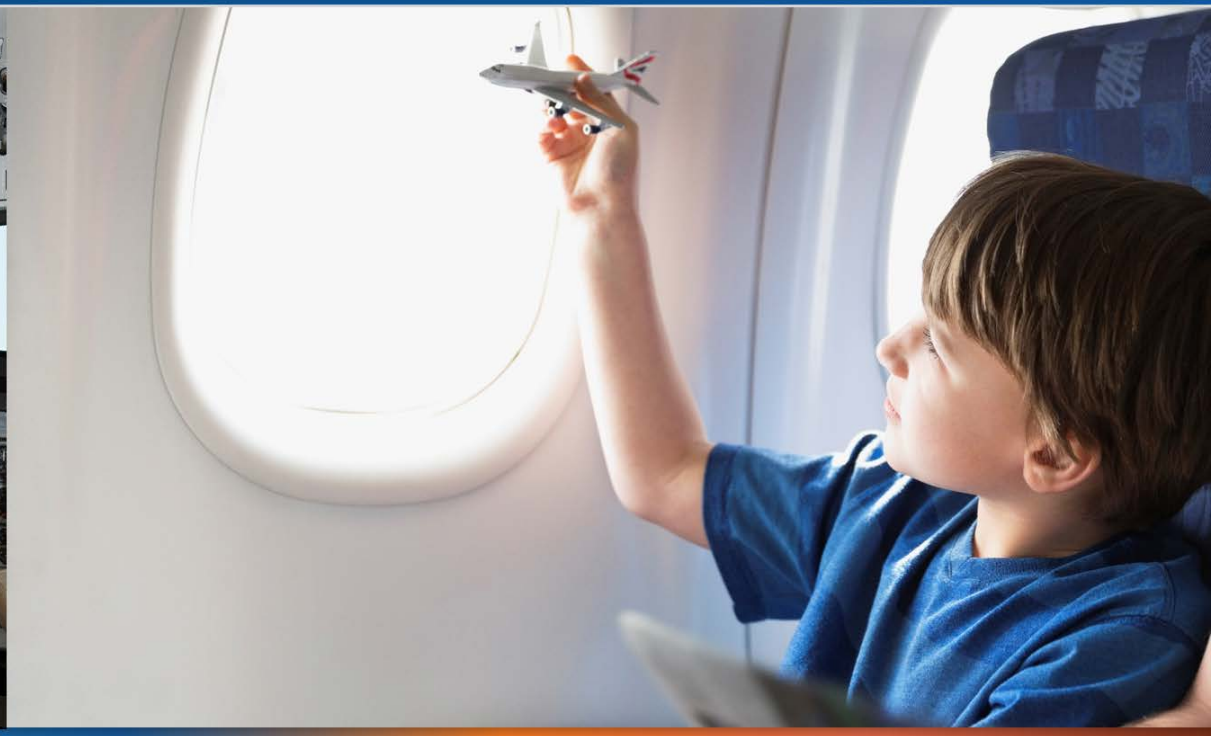
What level of detail and information density fits your target audience?



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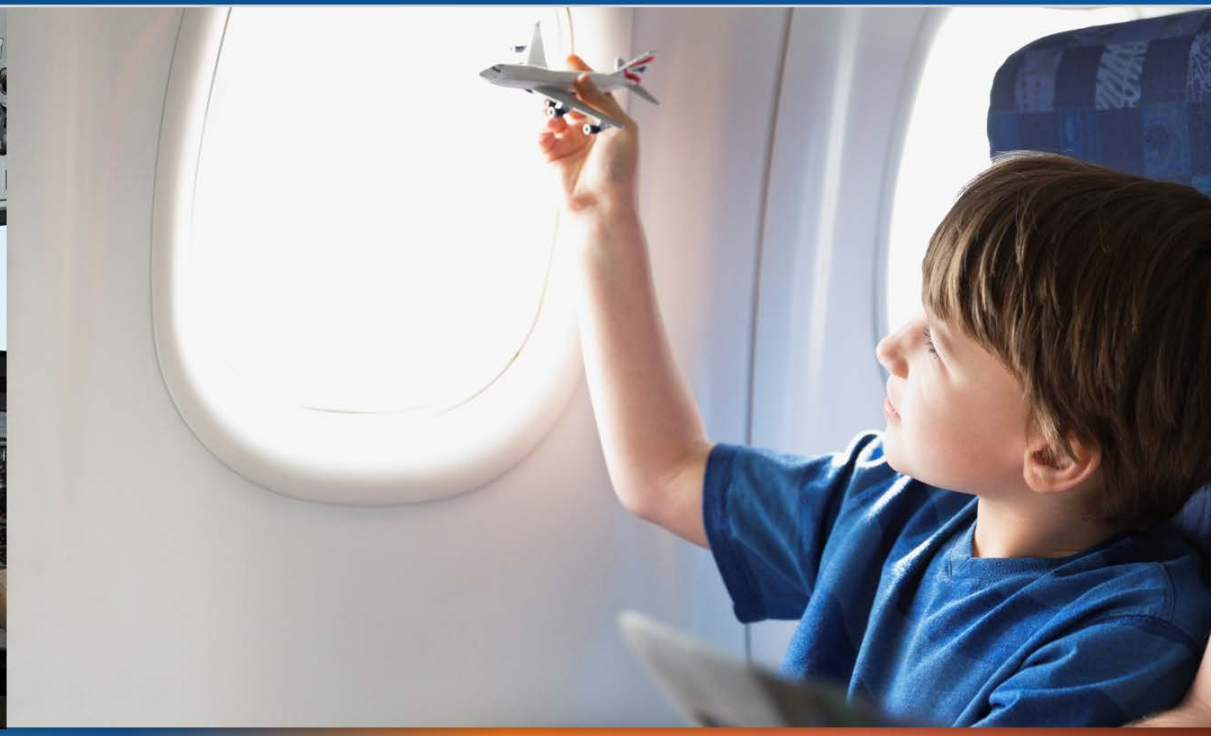
Too much or too little detail are both counterproductive – depending on who's looking



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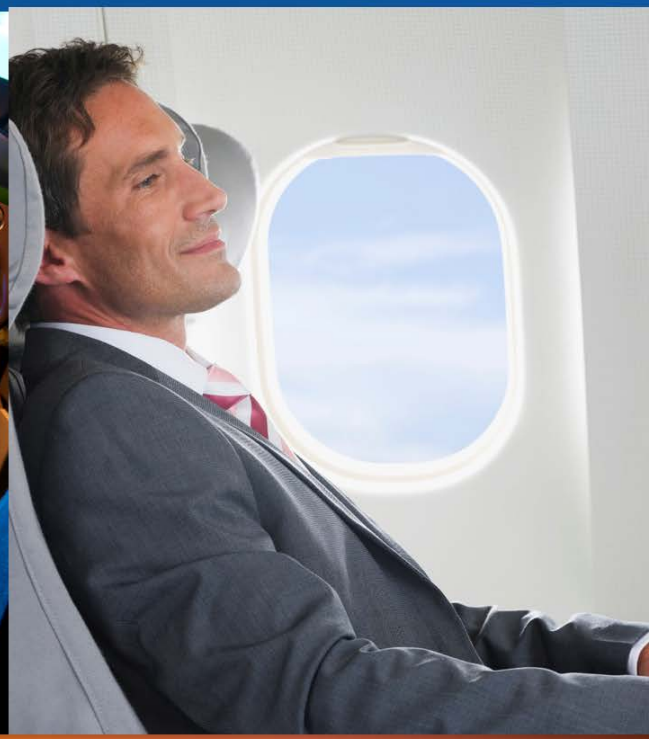
How much control do users have?

More user control may require more effort and knowledge from the user



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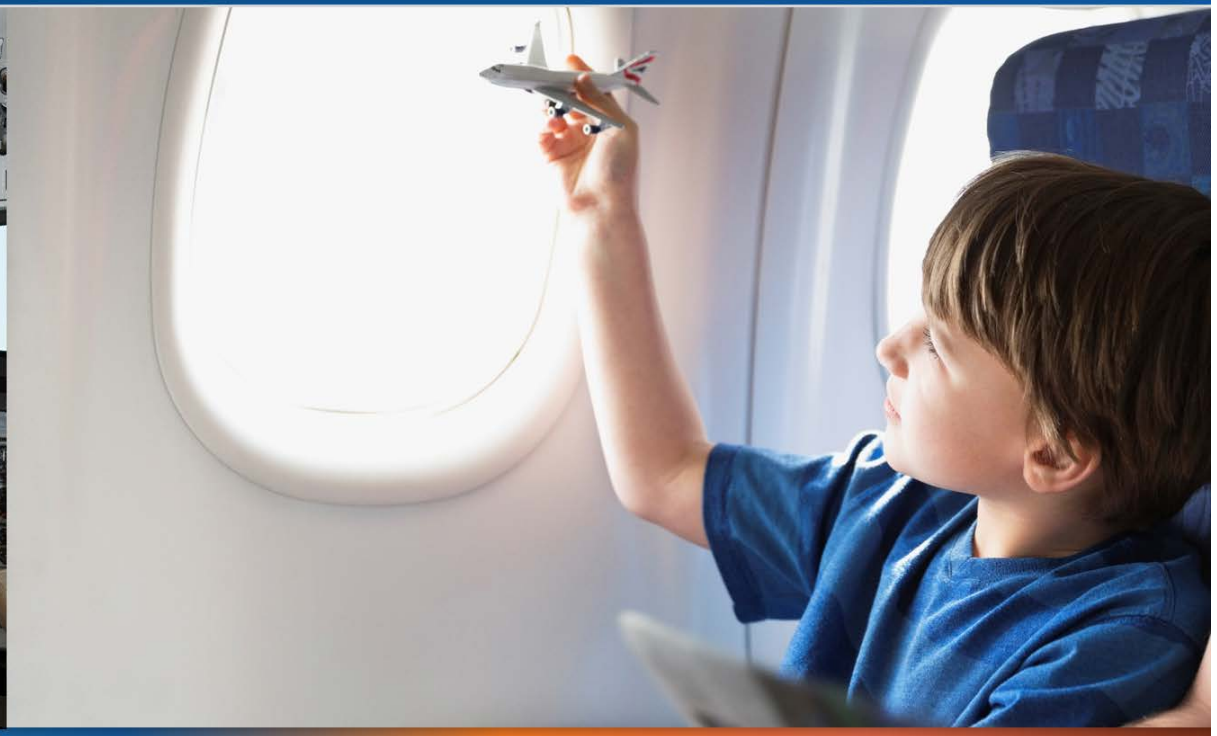
Simplicity is relative



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Retail analysts may need tools to discern patterns and trends in the data

Goal is to facilitate user's ability to explore the data

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Sales presentations will have different goals: conveying specific information simply

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Detail is relative

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Time scale needs can vary amongst audience members

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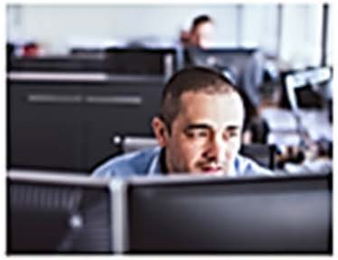
Personas are collections of user types that capture characteristics, goals and needs of different types of users

Persona 1: Zach



"I need a better way to apply these so-called advanced analysis methods to my company's data sources."

Zach wants to keep a foot in operational security work, but doesn't want the pressure of day-to-day ops. Zack lacks the development skills to create top notch tools, but tries to apply the software he finds to solve his problems. In a few years Zach wants to move into the world of management where he can lead junior analysts.

Role
Sr. Security Analyst/"Hunter"

Organization
Fortune 100 company technology company, based in Denver, CO.

Experience
Zack used to work as a consultant in a large security company.

Education
Bachelors Degree Information Technology
Certifications from SANS

Goals
- Detect advanced intrusion attempts as quickly as possible
- Protect organization network from internet attacks & threats
- Show the bosses his value

Challenges
- Lack of advanced analytical tools
- Struggling with creating usable, re-usable scripts that can apply those advanced analytics
- Large amount of data to dig and carve through to make decisions

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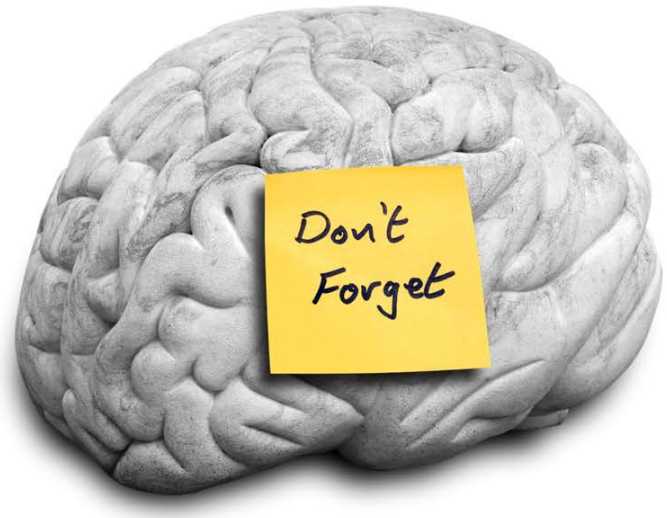

Ask questions

Adjust your design

Use personas

Understand and anticipate your audience's needs

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