

# Dashboard Planning

Ben Sullins  
bensullins.com  
@bensullins



**pluralsight**   
hardcore dev and IT training

# Course Outline



**Visual Perception**



**Planning**



**Building in Excel**



**Common Charts**



**Design**



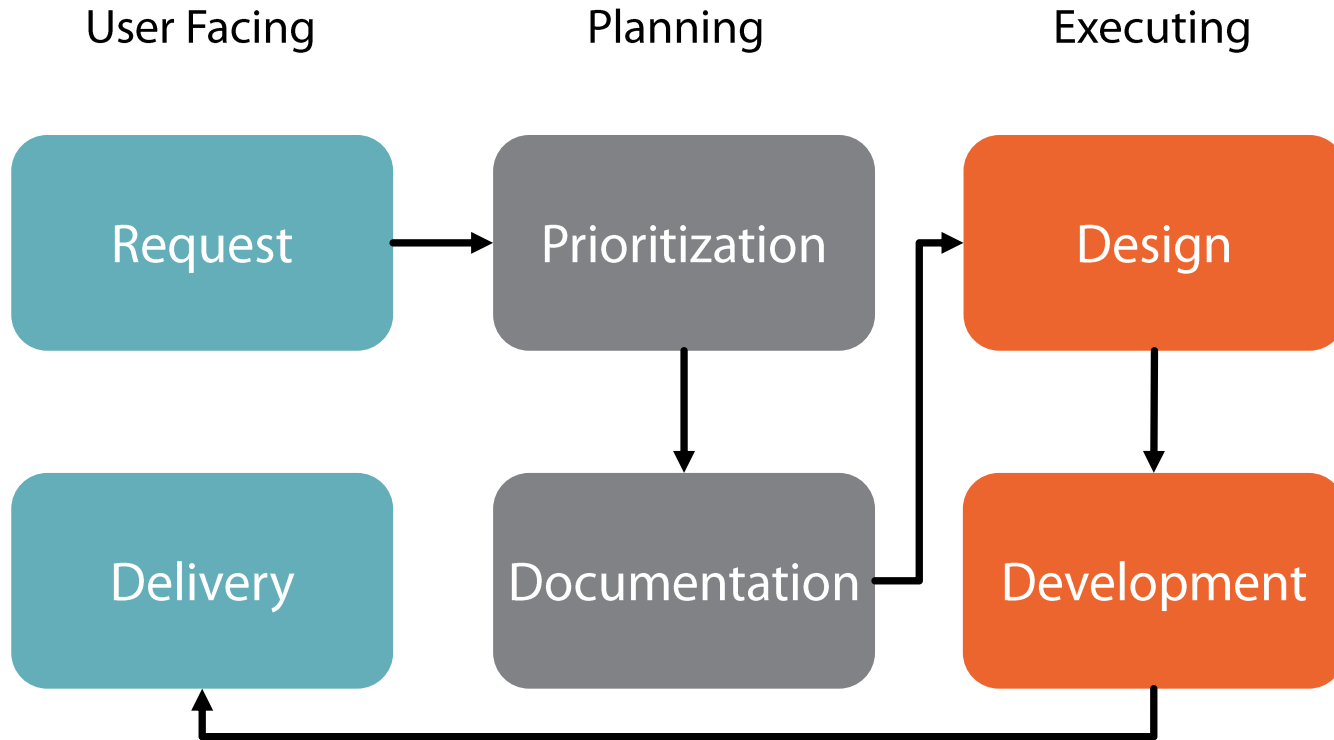
**Building in Tableau**

# Overview

- **Dashboard Development Process**
- **Request Process**
- **Prioritization**
- **Documentation**

# Dashboard Development Process

# Dashboard Development Process



# Request Process

# Request Form

**Objective** – What is the outcome you're looking for?

**Audience** – Who is going to use this dashboard?

**Impact** – What impact will this have? Set guidelines

**Data** – What data can help you achieve your objective?

**Interactions** – What interactivity would you like? Filters, etc.

**Format** – What format will the dashboard be viewed in? (eg. Mobile)

**Example Form** - <http://bit.ly/1kcHvoJ>

# Prioritization



# Scoring Guidelines

## Impact Score

**10** - makes a small part of my individual job a bit easier, results will likely not leave my desk

**20** - makes a significant part of my individual job easier, results will occasionally leave my desk

**30** - necessity for my role, results will be circulated regularly within my group

**40** - necessity for my department's success

**50** - necessity for my organizations success

## Cost Score

**1** - Access to something existing

**10** - New dashboard, existing data, no new calculations

**20** - New dashboard, existing data, needs custom calculations or aggregations

**30** - New dashboard, data not readily available, may require additional data structures

**40** - New dashboards, new data structures, probably includes additional hardware/software costs

**50** - Brand new cluster needed for service with dashboards and aggregations

# Add Scores to Requests

## Dashboard Request Form (Responses) ☆

File Edit View Insert Format Data Tools Form Help All changes saved in Drive

1 other viewer

fx | 10

	A	B	C	D	E	F	G	H	I	J
	Timestamp	Primary Objective	Who is the audience?	What impact will this dashboard have?	What data do you need to see on this dashboard?	Are there any interactive features you'd like?	How will this dashboard be viewed most often?	Cost Score	Impact Score	ROI
1										
2	1/4/2014 7:42:20	Increase customer satisfaction by reducing wait times and abandoned calls in our call center.	Call Center Staff, approximately 1,000 people	40 - necessity for my department's success	Current calls on hold, average wait times, average call duration, call disposition heat map, abandonment rates	Sort and filter by team and date	Desktop, Laptop, Tablet, Mobile	20	40	2.00
3	1/4/2014 7:43:46	Identify our most effective twitter posts to increase effectiveness	Me alone	20 - makes a significant part of my individual job easier, results will occasionally leave my desk	Twitter clicks, retweets, and favorites	Sort and filter by date and campaign	Laptop	30	20	0.67
4	1/4/2014 7:45:56	Improve operational efficiency of our shipping facility	All shipping managers and above	50 - necessity for my organizations success	Key metrics from our sensors on the shipping line, HR system about employees, Accident rates, Orders from our ERP system, and data about customer satisfaction	Filters on every possible dimension from data sources listed above	Desktop, Laptop, Tablet, Mobile	40	50	1.25
5	1/4/2014 7:46:59	Identify users of Windows 8 that use our product	Release Management and QA	30 - necessity for my role, results will be circulated regularly within my group	Number of users over time by OS and product version	OS and Date Filter	Desktop, Laptop	10	30	3.00

# Visualize Results

BI Opportunity Portfolio (select to see details)



Details

Title	Cost Score	Impact Score	ROI
Windows 8 Dashboard	10.00	30.00	3.00
Call Center Dashboard	20.00	40.00	2.00
Shipping Data Mart	40.00	50.00	1.25
Twitter Dashboard	30.00	20.00	0.67

# Documentation

# Minimal Documentation

- User Request (submitted by user)
- Dashboard Requirements (ex. <http://bit.ly/19HrPW4>)
  - Key Stakeholders
  - Objectives
  - Audience
  - Data Sources
  - Interfaces (eg. Displays)
  - Measures
  - Dimensions
  - Calculations

# Summary

- Dashboard Development Process
- Request Process
- Prioritization
- Documentation