

# Activity Overview

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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

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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:

1. 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?
2. What is the average length of time between visits per patient?
3. 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?
4. 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

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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