

One dashboard won't fit all your business needs

Scroll to discover how to design perfect dashboards for every level of your organization - from C-suite to store operators.



The Persona Strategy

Different personas (roles) need different views of your data.
Here's how to structure dashboards across your organization:

1

C-Suite

Strategic direction & high-level KPIs

2

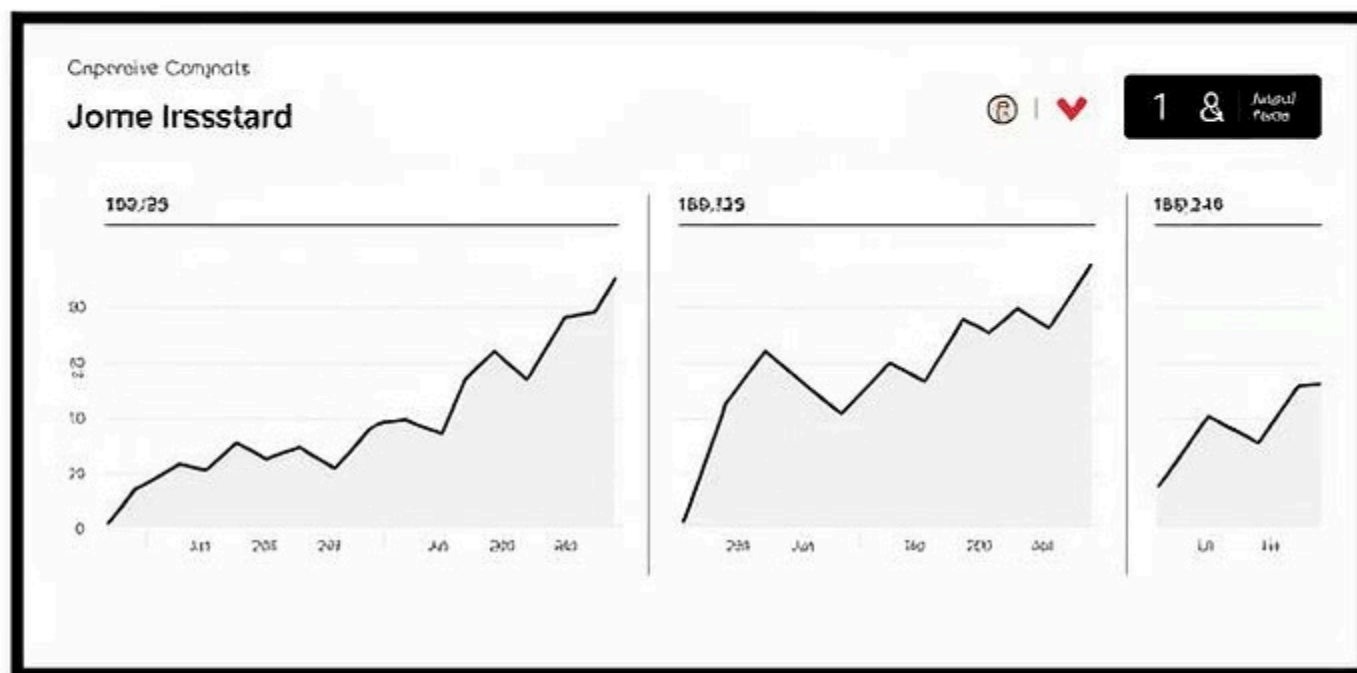
Middle Management

Performance monitoring & diagnostics

3

Store Operations

Daily execution & tactical metrics



C-Suite Dashboard: Strategic Clarity

Focus on North-Star Metrics

Revenue, Gross Margin %, Customer Growth, NPS

Investor-Style Format

12-month trends + forecasts, minimal clutter

What Makes a Great Executive Dashboard?

Scannable in 60 Seconds

Executives need to quickly assess business health without digging

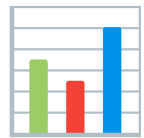
Forward-Looking

Include forecast projections alongside historical data

High Signal, Low Noise

No slicers, filters or tables - just critical insights

Create a dashboard that answers: "How is the business performing toward our strategic goals?"



Middle Management Dashboard: Diagnostic Power

Middle managers need to monitor performance AND identify improvement opportunities.

Same KPIs as Executives

But with drill-down by site, region, or product line

Comparative Analysis

Top vs Bottom 5 sites, channel/product breakdowns

The Middle Manager Dashboard Journey



Scan

Quick overview of all KPIs and performance areas



Diagnose

Identify problem areas or opportunities



Drill

Deep-dive into specific metrics or locations

Include interactive elements like filters and slicers to enable this workflow.



Operator Dashboard: Action-Oriented

Store-level dashboards drive daily execution that rolls up to company success.

Tactical Metrics

Basket size, labor hours, shrink, daily sales vs targets

Exception Reporting

Highlight items requiring immediate attention

Store Operator Dashboard Best Practices

Dense but Clear

Operators need comprehensive data but can't be overwhelmed

"My World" Focus

Only show metrics the operator can directly influence

Real-Time Updates

Refresh frequently to enable immediate course correction

Clear Targets

Every metric should have an obvious goal or benchmark



Connecting Your Dashboard Ecosystem



Store Metrics

Drive daily decisions that impact...



Regional Performance

Which rolls up to influence...



Executive KPIs

Creating a cohesive data story

Build Better Dashboards at Every Level

Tailor your data visualizations to each audience's needs. Create a dashboard hierarchy that connects strategic goals to daily execution.

Remember: The best dashboards don't just display data—they drive the right actions at the right level.