Case Study: Enhancing Collaboration Through a Metrics Dashboard for a B2B SaaS Platform

1. Background

Company Overview:
A B2B SaaS platform providing project management solutions to mid-size enterprises. The product enables teams to collaborate, track tasks, and manage timelines.

Problem Statement:
The platform lacked a centralized metrics dashboard, making it difficult for users to monitor team performance and project progress. Users reported:

- Limited visibility into key performance indicators (KPIs).
- Difficulty identifying bottlenecks in workflows.
- Inconsistent reporting across teams.

Objective:
To design and implement a **Metrics Dashboard** that would:

1. Centralize key data points for project monitoring.
2. Provide actionable insights to managers and team members.
3. Enhance user experience through data visualization.

2. Research

Methods Used:

- Conducted **user interviews** with 20 project managers and team leads.
- Analyzed usage data from existing reporting features.
- Benchmarked competitors like **Jira** and **Asana** for dashboard capabilities.

Key Insights:

1. Project managers spent 30% of their time manually compiling reports.
2. Teams required real-time updates on task progress.
3. Users prioritized simplicity in design over excessive customization.

3. Planning

Feature Prioritization:
Using the **MoSCoW method**, the following features were prioritized:

- **Must Have:** Real-time task tracking, performance KPIs, and visual charts.
- **Should Have:** Customizable widgets for dashboards.
- **Could Have:** Integration with third-party analytics tools.
- **Won't Have (for now):** Predictive analytics.

Stakeholders Involved:

- **Product Manager (You):** Owned the product vision and roadmap.
- **Engineering Team:** Handled backend and frontend development.
- **UX Designer:** Designed wireframes and mockups.
- **Customer Success Team:** Validated user feedback.

Timeline:
The project was divided into **3 sprints (6 weeks total):**

- **Sprint 1:** Requirement gathering and wireframing.
- **Sprint 2:** Backend development and frontend integration.
- **Sprint 3:** QA testing and user feedback incorporation.

4. Execution

Wireframes and Prototypes:
Created low-fidelity wireframes to map the user flow, followed by high-fidelity prototypes in **Figma**.

Development Highlights:

- Implemented **real-time data syncing** with the backend using WebSocket technology.
- Designed **interactive charts** with D3.js for visualizing task progress and team performance.
- Added **filters** for project-specific views and role-based access control.

Challenges Faced:

1. Data normalization across different teams using custom workflows.
   Solution: Standardized API responses with a shared data schema.
2. Managing performance with real-time data updates.
   Solution: Used caching mechanisms to reduce server load.

5. Results

Launch and Feedback:

- The dashboard was rolled out to 50 beta users over 2 weeks.
- Collected user feedback through surveys and interviews.

Key Metrics Achieved:

1. **Time Saved:** Reduced report generation time by 40%.
2. **User Adoption:** 80% of beta users actively used the dashboard within the first week.
3. **Customer Satisfaction:** Net Promoter Score (NPS) improved from 45 to 70.

User Testimonials:

- *"The new dashboard has made project tracking so much easier for our team."* – Project Manager, Beta User
- *"I love how intuitive the charts are. It's simple yet powerful."* – Team Lead, Beta User

6. Lessons Learned

1. **User-Centric Design is Key:** Early user feedback on wireframes significantly improved the final design.
2. **Iterative Development:** Breaking the project into sprints allowed for flexibility and quick adjustments.
3. **Communication with Stakeholders:** Regular updates kept stakeholders aligned and ensured smooth execution.

7. Next Steps

- **Short Term:** Add more customization options for the dashboard.
- **Long Term:** Explore predictive analytics for project performance.
- **Future Integration:** Connect with third-party tools like **Google Analytics** and **Power BI**.