

Dashboard Requirements Gathering Worksheet

Questions to Ask Users

1. How do you hope data will help you?
2. What questions are you trying to answer with the data? In other words, what problem are you trying to solve?
3. What are the three most important metrics that you care about?
4. How are these metrics defined or calculated?
5. Will you need to limit the data you see (for example, will you need to only look at results from a specific region or a specific time frame)? How so?
6. Are all the data sources you need to answer your questions currently available?
7. Are there any reports you use today that could be provided as examples of what would be useful? If so, please provide them.
8. If you had all this information in front of you, would you have enough information to take action? What action would you take? Would you need to know anything else?

Business Requirements Summary

Use this section to summarize your findings from user interviews.
Hover over the text fields for additional context.

Who?

Who is the target audience for this dashboard?

Primary Business Owner:

Primary Technical Owner:

What is the pain point this dashboard aims to address?

What requirements have been expressed for this content?

What actions are the users trying to take based on this data?

What?

Use this space to take additional notes on business requirements, if desired.

Technical Requirements Summary

What?

Do you have examples of existing reports that should be replicated?

Do you have product specifications, or requirements for what metrics you need?

Will having this data in Looker replace an existing system?

Is the data needed for this dashboard readily available?

Which data sources correlate to this dashboard?

Where does this data live?

What is the delivery method for this data?

Where?

Who?

Who should have access to this data?

Who should **not** have access to this data?

Use this space to take additional notes on technical requirements, if desired.