

Key Questions to Ask for Smart Dashboards

[VISUALIZATION] Questions to Ask During VISUALIZATION

- Do we have all our key sales, marketing, and customer data in one place?
- Which data sources are still siloed (e.g., spreadsheets, separate tools)?
- Can you build a dashboard that updates automatically with real-time data?
- What's the most effective way to visualize our customer journey?

[ANALYSIS] Questions to Ask During ANALYSIS

- What are the top three patterns in our current sales data?
- Where in the funnel are we losing the most leads/customers?
- Which product, service, or campaign is underperforming - and why?
- Are there seasonal or time-based trends in our conversions or revenue?
- What's the average order value and how is it trending?
- Which customer segments generate the most repeat purchases?

[ACTION] Questions to Ask to Drive ACTION

- What's one high-impact change we can test this week based on the data?
- Which price points, bundles, or offers seem to be working best?
- Can we segment cold leads and recommend a re-engagement strategy?
- Which channels are most cost-effective - and where should we cut back?
- What metrics should we monitor daily vs. weekly to catch issues early?