

Dashboard Purpose

- Why do you need the information and what action will be taken with it?
- What are your business questions?
- Who is the dashboard meant for?
- What are the KPIs? Are they actionable?

Dashboard Design

- Is the dashboard meant to be exploratory or explanatory?
- How many tabs do you envision?
- Is there a color palette or font that should be used?

Data Discovery

- Is there currently a data source? If not, what does the ideal data source look like?
- Will data engineering be required?
- Are we dealing with a single source or multiple?
- How large is the data set?

Existing Reporting

- Can you give us examples of what you like and dislike about dashboards you have used or that this is meant to replace/augment?

Publishing/Sharing

- Where will this dashboard be published?
- What are the target dates?
- What should it be named?
- What default filters should be applied?

Miscellaneous

- Any other pertinent information?
- General notes