**Tableau Best Practices**

**General Guidelines:**

* Select basic colors: White, Black.
* Choose custom colors: Any two.
* Plan your dashboard: Sketch it on paper first.
* Use draw.io for designing dashboard layouts.
* Remove unnecessary elements to keep visuals clean.

**Data Preparation:**

* Build and configure the data source properly.
* Collect and validate data before use.
* Check column names and properties to ensure correctness.
* Create hierarchies for better drill-down analysis.

**Data Analysis & Chart Selection:**

* Analyze the problem statement before designing visuals.
* Choose the correct charts for the data type.
* Use barbell charts for comparing two dimensions.
* Use scatter plots to show relationships between two measures.
* Use heat maps for analyzing between two dimensions.
* When using a line chart, also include an area chart for better representation.
* Create an index pill for ranking purposes.
* Utilize CASE statements where applicable.
* Map data efficiently when working with geographical data.

**Formatting & Design:**

* Create a format template for sheets and apply it to all sheets.
* Add custom colors for branding consistency.
* Adjust and customize tooltips.
* Attach charts inside tooltips for deeper insights.
* Use navigation buttons for better user interaction.
* When creating tables, use AVG(AVG(-1.0)) for proper calculations.
* Duplicate charts for maintaining the same format across multiple views.

**Dashboard Optimization:**

* Save the file in Tableau Packaged Workbook (.twbx) format.
* Create necessary calculated fields to enhance insights.
* Ensure the dashboard is interactive and user-friendly.

Following these best practices will help in creating a structured, insightful, and efficient Tableau dashboard. 🚀