



Dashboard Development: Dos and Don'ts

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A Fortune 50 CEO Said...

“Major failures in business come not so much from unmet goals, as from lack of response to unforeseen changes”

Having the right set of “sensors” in place can signal the trends that foretell change

Let's Set the Stage for BI and Analytics

- “Fact-based” decision making is a *critical success factor*
 - It has never been more important to be able to make decisions quickly
 - The sources and amount of data available has never been greater and will continue to expand and grow
- Decisions are being made, even if they are *not* based on all the available information
 - Your organization isn't going to wait for IT to deliver the answers

What Is a Performance Dashboard?

Dashboards are a subset of reporting that includes the ability to publish web-based reports with intuitive, interactive displays using multiple forms of graphics

Dashboards are a visual, dynamic representation of measureable and reportable data

Dashboard data can be viewed at high or summarized levels with the ability to “drill down” to increasing levels of detail

Dashboards Are (or Can Be) a Valuable Management Tool

- Provide a view of actual and trending performance of business critical success factors
- Can be the antennae that signal when the success factors are not hitting targets
- Offer a comprehensive and routine means of identifying performance against targets
- A *best practice* medium for consistently and effectively communicating performance across all areas of the business

Remember What the CEO Said about Responding to Change



The Users and Their Expectations Have Evolved

- If I can have it in my “hand,” why can’t I have it at my desktop at home or at work?
- I don’t know what I don’t know, but when I find out, I want to be able to get the right information
- I want the information when I need it and in a form that I can use it, not when IT can get it to me in the form they think I need it

Let's Discuss the General “Dos” for BI

You need to approach the BI program and the dashboard with a plan, a strategy and a framework

The Enterprise Strategy

- Helps you to think through the entire process
- Helps you manage the deployment and resources
- Helps you secure commitment and build credibility
- Helps you align with corporate standards and architecture

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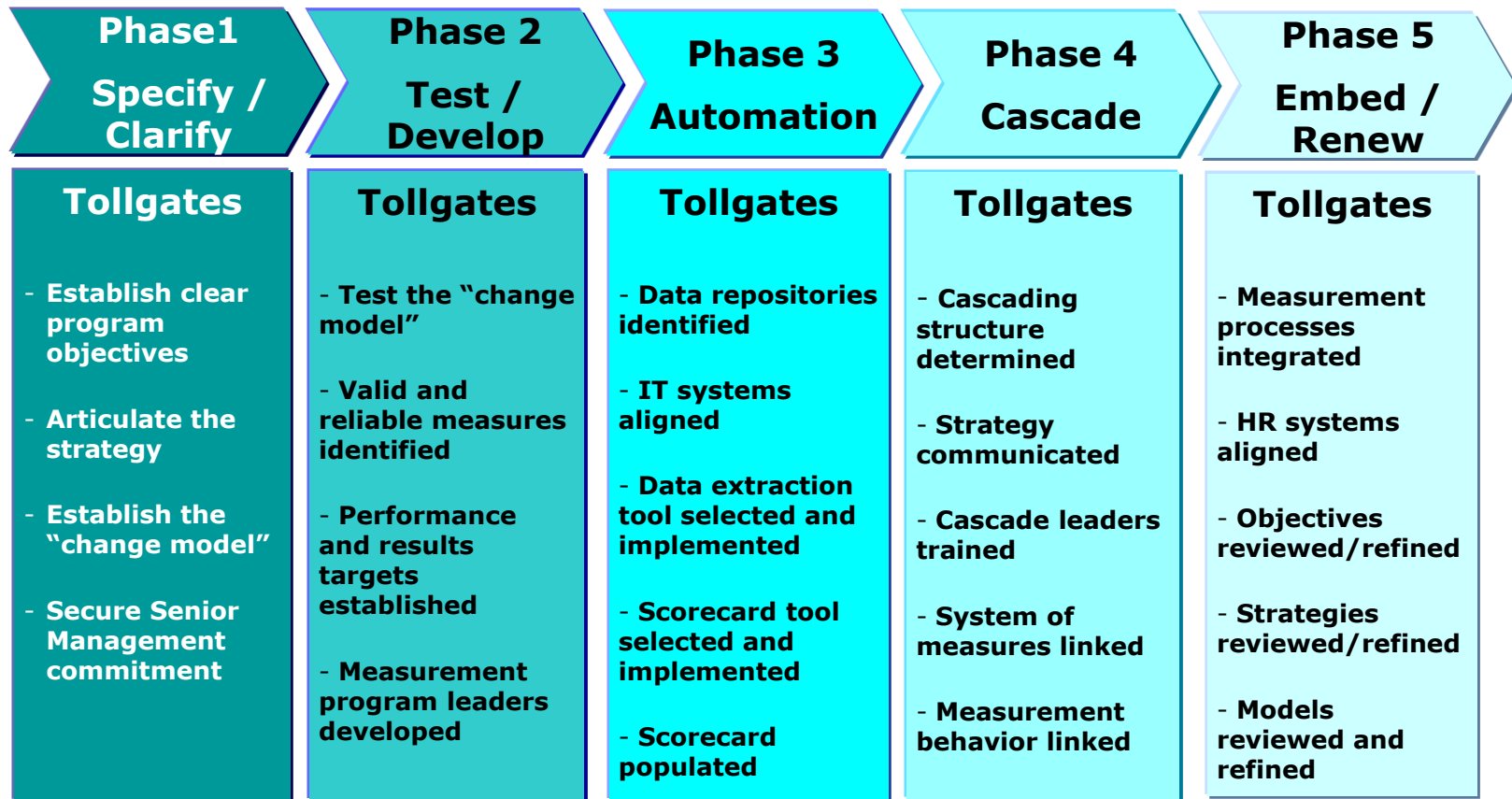
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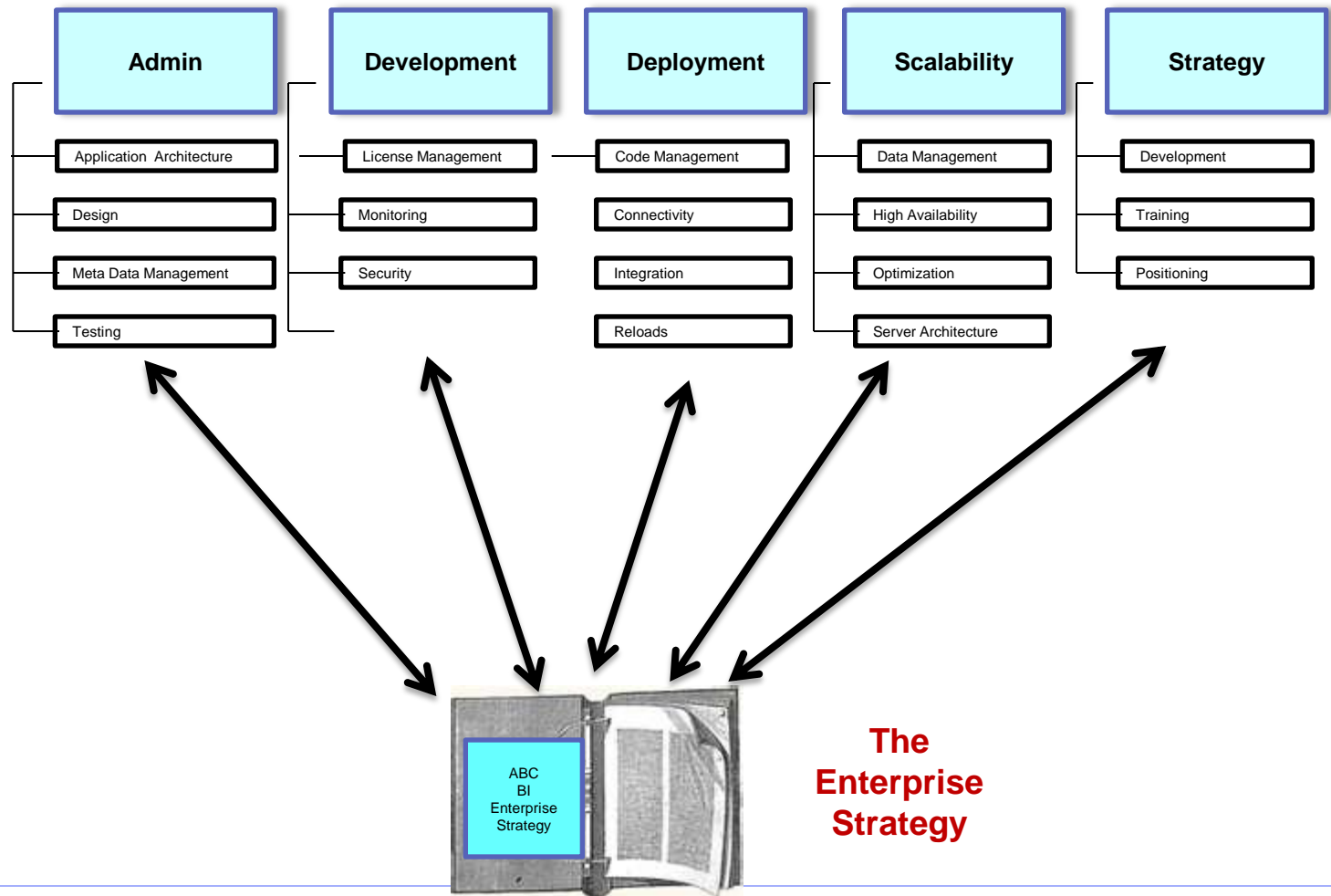
or

Start from an Enterprise Framework that allows you to incrementally build your strategy, taking advantage of others’ experience, samples, best practices and scenarios to draw from

The Plan (If Not This One, Another One)



The Framework – Linked to the Strategy



Learn from the Experts



“Only a fool learns from his own mistakes, the wise man learns from the mistakes of others”

What do you see?

- Focus is on limited number of real key indicators
- Standard approach — the four key indicators always laid out in a “T” formation
- Simple graphics without unnecessary decoration

Your Dashboard Has a Problem If the First Response Is “Those Numbers Can’t Be Right!”

- The dashboard’s KPIs must be of value to the consumer
- Underlying measures must be accurate, easily validated, and readily available
- Data sources must be trustworthy
- Data must be current and refreshable

The “Dos”

- Develop KPIs and measures that hold value and relevance for the users
- Only use data that is known to be accurate and timely
- The dashboard must refresh *at least* weekly. Dashboards that refresh monthly are not dashboards
- If the dials don't move, the user will stop watching

The “Dos”

- Use familiar chart formats and keep them simple
- Include tables that incorporate the data being displayed. Users understand rows and columns
- Make the dashboard “real” for the user by including familiar graphics — geographical maps
- When dials don’t move, users don’t watch

The “Dos”

- Try to allow the user to add and subtract metrics. (User “self service” is part of our next webinar, December 7)
- User needs change, and perfect alignment is almost impossible. Allow the final content to be in the hands of the user
- There is a difference between a dashboard and a scorecard. Make certain everyone has the same understanding

The “Don’ts”

- Don’t overload on the dials as they become information overload. Don’t weight your dashboard down, and don’t wear out your users
- Don’t use colors alone to convey information
- Try to avoid pie charts (if you must, keep it to no more than six segments)

The “Don’ts”

- 3D charts and graphs don’t add value. They can prevent viewing trends, and can obscure other data
- Don’t use animation just for the sake of using animation.
- And now the big three...

Lessons Learned

- Don't believe the vendor hype
 - The vendor is selling "the solution" when in fact it is not
 - The buyer wants to believe they are getting "the solution" when they are not
- It is going to take longer and cost more than you think or perhaps planned for
 - Don't over-promise
 - Start small
- Make certain that the technology behind the product meets the requirements of the organization
 - The initial dashboard will probably fall short of user expectation
 - Work with the users to establish their expectations

Recommendations

- Establish a plan, strategy and framework
- Focus on what dashboards are for: the targeted delivery of a small group of KPIs relevant to a user's role
- Dashboards need to be simple in form to be effective. Avoid the "gimmicky" features (like 3D effects) as they add no value to the delivery of information
- Establish an experienced team, which could also include a UI developer, or human-computer interaction or layout specialist

**To receive additional materials and details on
Dashboard Development: Dos and Don'ts,
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