

WHY MOST DASHBOARDS FAIL ❌

Most organizations don't have a dashboard problem.
They have a decision problem.

TOO MUCH DATA
NO ANSWERS

LEADERSHIP
NEEDS ANSWERS

- ❌ Too many metrics with no focus
- ❌ Nobody trusts the data
- ❌ No ownership or accountability
- ❌ Built for reporting, not decisions
- ❌ No actions tied to the metrics
- ❌ Different teams, different answers
- ❌ Leaders still ask for spreadsheets

BEFORE BUILDING ANY DASHBOARD, ASK:

- ❓ What decisions must this dashboard help people make?
- ❓ Who will use it?
- ❓ What actions should happen when metrics change?
- ❓ Where does the data come from?
- ❓ Who owns each metric?

DASHBOARD FAILURE CHECKLIST™

Most dashboards fail because:

- ☐ Too many metrics
- ☐ Nobody trusts the data
- ☐ No ownership or accountability
- ☐ Definitions change across teams
- ☐ Data is outdated or incomplete
- ☐ Built for reporting instead of decisions
- ☐ No actions tied to metrics
- ☐ Nobody actually uses it

Check any that currently exist in your organization.

THE DASHBOARD PLANNING CANVAS™

Complete this section before designing anything.

1 STEP 1 — WHO IS THIS DASHBOARD FOR?

☐ Executive Leadership

☐ Board of Directors

☐ Department Managers

☐ Program Staff

☐ Operations Team

☐ Finance Team

☐ Funders

☐ Customers

☐ Community Stakeholders

Primary Audience: _____

2 STEP 2 — WHAT DECISIONS MUST IT SUPPORT?

Write the top 5 questions people ask repeatedly.

1

2

3

4

5

3 STEP 3 — CONVERT QUESTIONS INTO KPIS

LEADERSHIP QUESTION	KPI NEEDED
Example: Are programs working?	Outcome Success Rate

THE DATA GUYS™ DASHBOARD FORMULA

QUESTION
What do we need to know?

DECISION
What decision will we make?

KPI
What metric tells us?

VISUAL
How will we visualize it?

ACTION
What action will we take?

----- EXAMPLE -----

Question:
Are we meeting our goals?

Decision:
Expand, improve, or redesign program

KPI:
Outcome Achievement Rate

Visual:
Trend Line + Target Gauge

Action:
Allocate resources to underperforming areas

QUICK SELF-ASSESSMENT

Rate Your Dashboard Readiness (1 = Not Ready, 5 = Strong)

QUESTION	SCORE
We know who uses our dashboards	1 2 3 4 5
We agree on KPI definitions	1 2 3 4 5
Data comes from trusted sources	1 2 3 4 5
Metrics drive decisions	1 2 3 4 5
Dashboards are reviewed regularly	1 2 3 4 5

TOTAL SCORE: _____ / 25

0 - 10
POORLY
DEFINED
NEEDS

11 - 18
DEVELOPING

19 - 25
DASHBOARD READY

WHAT YOU'LL BUILD IN THIS GUIDE

PAGE 2
Executive vs Operational Dashboards

PAGE 3
Choosing The Right KPIs

PAGE 4
Mapping Questions To Metrics

PAGE 5
Dashboard Layout Blueprint™

PAGE 6
Visualization Selection Guide

PAGE 7
Dashboard Wireframe Worksheet

PAGE 8
Your Dashboard Build Plan™

QUICK WIN

If you only do one thing today:
Write down the five questions leadership asks most often.

Those questions should become the foundation of your dashboard.

MY TOP 5 LEADERSHIP QUESTIONS

1

2

3

4

5

REMEMBER ★

Great dashboards are not about fancy charts. They are about the right questions, the right metrics, and the right actions.

NEXT PAGE ➡

Page 2: Executive vs Operational Dashboards — What Belongs Where?

DASHBOARD PLANNING TEMPLATE™

EXECUTIVE vs. OPERATIONAL DASHBOARDS

— What Belongs Where? —



Different audiences. Different needs. Different level of detail. Design each dashboard with a clear purpose.

EXECUTIVE DASHBOARD

High-Level • Strategic • Decision-Focused

Gives leaders a clear view of what matters most so they can make decisions, allocate resources, and manage performance.

FOCUS

- Big Picture
- Key Outcomes
- Trends & Patterns
- Exceptions
- Strategic Decisions

REVENUE
\$2.4M
↑ 12%

NET INCOME
\$580K
↑ 8%

CUSTOMERS
12,350
↑ 15%

NPS
68
↑ 6

Revenue Trend (YTD)

Goal Achievement

Top Programs by Outcome

Youth Support	92%
Job Training	78%
Family Services	73%

At Risk / Watch List

- ⚠ Program C
- ⚠ Site 4
- ⚠ Budget Overrun

BEST FOR:

Executive Team

Board Meetings

Strategic Planning

Funding Updates

DESIGN PRINCIPLES

- ✓ Keep it simple and focused (5–10 KPIs)
- ✓ Show trends, not just numbers
- ✓ Highlight exceptions
- ✓ Use visuals that drive quick understanding
- ✓ Everything should answer a leadership question

KEY DIFFERENCES

PURPOSE

Make strategic decisions

Manage day-to-day operations

AUDIENCE

Executives, Board, Funders

Managers, Staff, Operations Teams

TIME HORIZON

Long-term (Quarterly/Annual)

Short-term (Daily/Weekly)

LEVEL OF DETAIL

Summarized (High-Level)

Detailed (Granular)

KPIs

Few, Critical (5–10)

More, Operational (10–25+)

ACTIONS

Strategic Actions (Big Bets)

Tactical Actions (Day-to-Day)

FREQUENCY

Reviewed Weekly/Monthly

Reviewed Daily/Weekly

OPERATIONAL DASHBOARD

Detailed • Tactical • Action-Oriented

Helps managers and teams monitor progress, identify issues, and take action to keep operations running smoothly.

FOCUS

- Day-to-Day Performance
- Process Efficiency
- Tasks & Activities
- Timeliness
- Issue Resolution

OPEN TASKS
128
↑ 15%

ON-TIME %
92%
↓ 3%

AVG. RESPONSE
2.6 hrs
↓ 0.4

SLA MET
96%
↑ 2%

Tasks by Status

Tasks Over Time

Team Performance

Team A	98%
Team B	92%
Team C	87%

Recent Alerts

- ⚠ SLA Breach – Ticket #4321
- ⚠ High Backlog – Team B
- ⚠ Data Sync Issue

BEST FOR:

Operations Managers

Team Leads

Daily Standups

Process Improvement

DESIGN PRINCIPLES

- ✓ Show the details needed to take action
- ✓ Include real-time or near real-time data
- ✓ Surface issues early
- ✓ Make updates easy and frequent
- ✓ Drill-down available when needed

MAP YOUR DASHBOARDS

List the dashboards your organization needs and who they are for.

DASHBOARD NAME	PURPOSE (What decisions does it support?)	AUDIENCE	TYPE (Executive / Operational)	PRIMARY OWNER
Example: Executive Overview	Resource allocation and strategic direction	Executive Team, Board	Executive	CEO

CHOOSE THE RIGHT DETAIL LEVEL

Match the level of detail to the decision needed.

EXECUTIVE LEVEL
Why is it happening?
What should we do?

MANAGER LEVEL
What is happening?
Where should we focus?

OPERATIONAL LEVEL
What tasks need attention?
How can we improve?

5–10 KPIs
High-Level
Summarized

10–20 KPIs
Mid-Level
Detailed

20+ KPIs
Detailed
Actionable

ALIGN WITH YOUR ORGANIZATION'S RHYTHM

How often will each dashboard be reviewed?

DASHBOARD NAME	REVIEW FREQUENCY	REVIEW FORMAT (Meeting / Email / Portal)	LAST UPDATED BY

CHECK YOUR ALIGNMENT

Use this checklist to ensure the right dashboards are built for the right people.

- ☐ Each dashboard has a clear purpose tied to decisions.
- ☐ KPIs match the needs of the audience.
- ☐ Executive dashboards are not overloaded with detail.
- ☐ Operational dashboards include the detail teams need.
- ☐ Ownership is assigned for each dashboard.
- ☐ Review frequency is defined.

REMEMBER: The best dashboards don't show everything. They show the right things to the right people.

NEXT PAGE

Page 3: Choosing The Right KPIs – What Really Matters

RIGHT PEOPLE. RIGHT DATA. RIGHT INSIGHTS. RIGHT ACTIONS. BETTER OUTCOMES. ★

DASHBOARD PLANNING TEMPLATE™

CHOOSING THE RIGHT KPIs

—> What Really Matters <—



The right KPIs turn data into decisions. The wrong KPIs create noise.

GOOD KPI CRITERIA

A good KPI should be:

☒

Relevant – Linked to your mission and goals

☒

Actionable – You can do something about it

☒

Measurable – Has a clear definition and source

☒

Timely – Available when decisions are made

☒

Understandable – Easy to explain in one line

☒

Comparable – Trackable over time or against a target

☒

Owned – Someone is responsible for the result

TIP:
If a KPI doesn't drive a decision, don't use it.

THE SMART KPI FORMULA

S

SPECIFIC
Clearly defines what is being measured

M

MEASURABLE
Has a number, percentage, or rate

A

ATTAINABLE
Influenced by your team or organization

R

RELEVANT
Aligned to goals and key decisions

T

TIME-BOUND
Measured over a specific period

EXAMPLE:

Increase program completion rate to 85% by Dec 31, 2025.

COMMON KPI CATEGORIES

OUTCOMES
Measures impact and results
Examples: Success rate, outcomes, satisfaction, improvements

PERFORMANCE
Measures how well you are performing
Examples: Productivity, efficiency, timeliness, quality

FINANCIAL
Measures financial health and stewardship
Examples: Revenue, expense, margin, cost per outcome

CUSTOMER / STAKEHOLDER
Measures stakeholder experience
Examples: Satisfaction, retention, engagement, referrals

PROCESS
Measures how well work gets done
Examples: Cycle time, error rate, backlog, on-time completion

KPI SELECTION WORKSHEET

Use this worksheet to identify and prioritize the KPIs that matter most.

POTENTIAL KPI (What could we measure?)	CATEGORY (Choose One)	WHY IT MATTERS (What decision does this help us make?)	SOURCE (Where does the data come from?)	FREQUENCY (How often is it available?)	OWNER (Who owns this KPI?)	KEEP? (Y/N)
Example: Program Completion Rate	☒ ☐ ☐ ☐ ☐	Helps us know if participants are completing and benefiting.	Program Database	Monthly	Program Director	Y
1.	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐					
2.	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐					
3.	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐					
4.	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐					
5.	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐					
6.	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐					
7.	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐					

PRIORITIZE YOUR KPIs

Plot your KPIs to focus on what matters most.

Rate each KPI:
Impact (How much impact does it have on success?)
Effort (How hard is it to get or maintain?)
Use scale 1-5

SCORE EXAMPLE

Impact: 4
Effort: 2
Plot here →

IMPACT

HIGH

LOW

LOW

HIGH

EFFORT

QUICK WINS

High Impact
Low Effort
Do These First

MAJOR PROJECTS

High Impact
High Effort
Plan & Invest

FILL-INS

Low Impact
Low Effort
Do When Time Allows

LOW PRIORITY

Low Impact
High Effort
Consider Dropping

KPI DEFINITION TEMPLATE

Define each KPI clearly to ensure consistency.

KPI Name:

Definition:

Why It Matters:

Calculation:

Data Source:

Frequency:

Target / Goal:

Good Direction:

Notes / Context:

☐ Higher is better

☐ Lower is better

☒ Target is range

EXAMPLES: GOOD vs. POOR KPIs

GOOD KPIs

☒ Program Completion Rate

☒ Cost Per Outcome

☒ Participant Satisfaction Score

☒ Revenue Growth %

☒ Average Response Time

POOR KPIs (Avoid These)

☒ Total Number of Meetings

☒ Number of Staff

☒ Money Spent on Programs

☒ Number of Reports Generated

☒ Things We Can't Control

THE 5 KPI RULE

A dashboard should focus on 5-10 KPIs for executives and 10-25 for operational teams.

Focus creates clarity.
Clarity drives action.

QUICK CHECK

Before moving on, make sure:

☐ Each KPI meets the Good KPI Criteria.

☐ Every KPI answers an important question.

☐ You know the data source for each KPI.

☐ Each KPI has an owner.

☐ You can explain each KPI in one sentence.

REMEMBER:

The best dashboards don't track everything. They focus on what drives the right decisions.

NEXT PAGE

Page 4: Mapping Questions To Metrics – Connect Decisions to Data

WHY THIS MATTERS

Leaders ask questions.
You provide answers.
This page helps you connect the two.

Focus on what matters

Remove unnecessary noise

Drive better decisions

TIP: If you can't link a metric to a decision, don't put it on the dashboard.

THE QUESTION → METRIC → INSIGHT → ACTION FLOW

1. QUESTION

What do we need to know?

→

2. METRIC

What will we measure?

→

3. INSIGHT

What does the data tell us?

→

4. ACTION

What will we do about it?

→

5. IMPACT

What result will we achieve?

EXAMPLE:

Are programs working?

→

Program Completion Rate

→

Completion rate below goal

→

Investigate barriers and adjust support

→

More participants complete successfully

GOOD MAPPING CHECKLIST

Question is clear and decision-focused

Metric directly answers the question

Data is available and trusted

Metric has an owner

Insight leads to action

Action drives impact

QUESTION TO METRIC MAPPING WORKSHEET

Use this table to map your top questions to the right metrics and insights.

Use the questions you listed on Page 1 (Step 2).

#	LEADERSHIP QUESTION What do we need to know?	THE DECISION What decision will this inform?	KPI / METRIC What will we measure to answer the question?	HOW WE MEASURE Calculation or Definition	DATA SOURCE Where does the data come from?	FREQUENCY How often is it updated?	OWNER Who owns this metric?
EXAMPLE	Are participants completing our programs?	Adjust support and resources	Program Completion Rate	# Completed / # Enrolled x 100	Program Database	Monthly	Program Director
1.							
2.							
3.							
4.							
5.							
6.							
8.							

COMMON QUESTION STARTERS

• Are we achieving our goals?

• How are we performing over time?

• Where are we seeing the biggest impact?

• What resources do we need?

• What risks or issues should we address?

• How efficiently are we operating?

METRIC TYPES

COUNT

A total number (e.g., # of participants)

RATE / PERCENTAGE

A portion or percentage (e.g., completion rate)

RATIO

A relationship between two values (e.g., cost per outcome)

AVERAGE

An average value (e.g., avg response time)

TREND

Shows change over time (e.g., monthly revenue)

INDEX / SCORE

Combined measure (e.g., satisfaction score)

DATA QUALITY CHECK

Rate the data quality for your key metrics.

1 = Poor 5 = Excellent

Accuracy

Timeliness

Completeness

Consistency

Accessibility

①

②

③

④

⑤

①

②

③

④

⑤

①

②

③

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⑤

①

②

③

④

⑤

①

②

③

④

⑤

OVERALL DATA QUALITY SCORE:

___ / 25

INSIGHT & ACTION PLANNING

For each metric, define the insight that matters and the action you will take.

#	KPI / METRIC	WHAT INSIGHT ARE WE LOOKING FOR? What will the data tell us?	WHAT ACTION WILL WE TAKE? What will we do based on the insight?	WHO WILL TAKE THE ACTION?
1.				
2.				
3.				
4.				
5.				
6.				
8.				

THRESHOLD GUIDE (EXAMPLES)

Set thresholds to quickly identify performance levels.

Good (On Track)	≥ Goal or Target
Watch (Monitor)	85% – 99% of Goal
Needs Attention (At Risk)	70% – 84% of Goal
Critical (Act Now)	< 70% of Goal

Customize thresholds for your organization.

PRO TIP

Limit executive dashboards to 5–10 key metrics.
Quality over quantity.

If it's not on the dashboard, leaders won't focus on it.

REAL-WORLD EXAMPLE

QUESTION	KPI / METRIC	INSIGHT	ACTION
Are we meeting our goals?	Goal Achievement %	Below target	Reallocate resources
Are participants improving?	Outcome Improvement %	Improvement slowing	Adjust program strategy
Are we using resources well?	Cost Per Outcome	Higher than target	Improve efficiency
Are clients satisfied?	Satisfaction Score	Score declining	Address key issues

QUICK CHECK

Before moving to Page 5, confirm:

☐

 Every question has a metric.

☐

 Every metric has a data source.

☐

 Every metric has an owner.

☐

 Every metric will drive action.

If you can't check all four, go back and refine.

THE 6 LAYOUT PRINCIPLES

1



Lead With What Matters Most
Important KPIs go in the top-left where eyes start.

2



Follow a Logical Flow
Guide users left-to-right, top-to-bottom.

3



Show Big Numbers Upfront
Use KPI cards for instant context.

4



Group Related Information
Use sections to create visual organization.

5



Minimize Clutter
Remove what doesn't drive a decision.

6



Make It Actionable
Surface insights, alerts, and next steps.

THE EXECUTIVE DASHBOARD LAYOUT BLUEPRINT

1

Headline KPI 1

\$2.4M

↑ 12%

vs Last Month

Headline KPI 2

85%

↑ 8%

vs Last Month

Headline KPI 3

68

↓ 5%

vs Last Month

2

Trend / Performance Over Time



3

Breakdown / Composition



Category A

40%

Category B

30%

Category C

20%

Category D

10%

4

Key Drivers / Top Contributors

Driver 1

Driver 2

Driver 3

Driver 4

\$950K

\$600K

\$400K

\$250K

5

Alerts / Exceptions

Budget Variance > 10%

Client Satisfaction Down

Deadline at Risk (3)

6

Insights / Takeaways

Revenue up 12% driven by new clients

Program completion rate above target

Watch budget in Q4

7

What's Next / Actions

Investigate Budget Variance

Review At-Risk Projects

Approve Resource Plan

1 KPI Snapshot (At-a-Glance)

2 Trend Analysis

3 Breakdown

4 Drivers

5 Alerts

6 Insights

7 Actions

LAYOUT DOs & DON'Ts

DO

✔ Show the big picture first

✔ Use KPI cards for instant understanding

✔ Keep related items together

✔ Use whitespace to reduce clutter

✔ Highlight exceptions

✔ Make actions obvious

DON'T

✗ Put everything on one screen

✗ Use too many charts

✗ Hide insights at the bottom

✗ Mix too many colors

✗ Show data without context

✗ Make users think too hard

SCREEN REAL ESTATE GUIDE

Design for the most common screen resolutions.

SCREEN SIZE	RECOMMENDED COLUMNS
1366 x 768	8
1920 x 1080	12
2560 x 1440	12-16
3840 x 2160 (4K)	16-24

YOUR LAYOUT PLANNING WORKSHEET

Use this worksheet to plan the structure of your dashboard before you build it.

1

Your Dashboard Type (Check one)



☐ Executive (High-Level)



☐ Operational (Detailed)



☐ Strategic (Long-Term Focus)

2

Primary Goal of This Dashboard

3

Key Sections You Will Include

List the main sections you need on your dashboard.

	Purpose
1.	
2.	
3.	
4.	
5.	
6.	
7.	

4

Layout Sketch

Sketch your dashboard layout below.



SECTION PLANNING TABLE

Define what each section will show.

SECTION #	SECTION NAME	PURPOSE (What will this section show?)	KEY METRICS (Which KPIs will appear here?)	VISUAL TYPE (Chart / Table / KPI Cards / etc.)	DATA SOURCE	REFRESH FREQUENCY	OWNER
1.							
2.							
3.							
4.							
5.							
6.							
7.							

COMMON SECTION EXAMPLES

1

KPI Snapshot

Key metrics at a glance

2

Trends Over Time

Performance over time

3

Breakdown / Composition

How the whole is broken down

4

Top Drivers

What's driving performance

5

Alerts / Exceptions

What needs attention now

6

Insights / Takeaways

What the data is telling us

7

Actions / Next Steps

What users should do next

VISUAL HIERARCHY GUIDE

Use size, color, and position to guide attention.

HIGH

Top Left

Big Numbers

Key Alerts

MEDIUM

Charts, Trends

Breakdowns

LOW

Details, Supporting Info

Can scroll or drill down

Most Important

↑

↓

CHECK YOUR STORY

Can a user understand the story in 10 seconds?

☐ Is the most important information easy to see?

☐ Do the visuals follow a logical flow?

☐ Are exceptions and risks highlighted?

☐ Does the dashboard answer a key question?

☐ Is the next action clear?

If you answered "No" to any of these, refine your layout.



PRO TIP

 Build for decisions, not for reports. Every section should help users decide what to do next.

NEXT PAGE

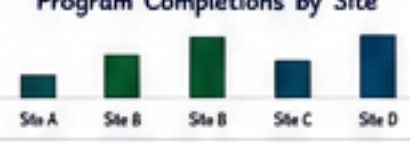
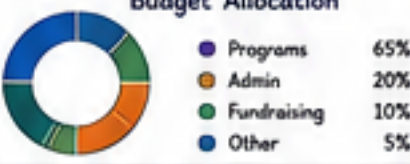
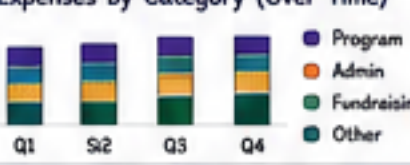
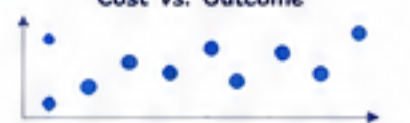
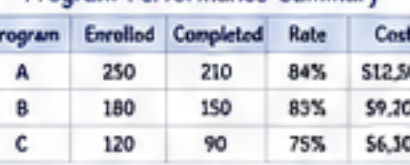
 Page 6: Visualization Selection Guide – How to Choose the Right Chart

REMEMBER:

 A clear layout turns complex data into clear decisions.

BUILD FOR IMPACT. DESIGN FOR ACTION.



COMMON VISUALS: WHEN TO USE THEM						
VISUAL TYPE	BEST USED TO SHOW...	BEST FOR DATA...	EXAMPLE	WHY IT WORKS	USE IT WHEN...	AVOID IT WHEN...
 LINE CHART	Trends over time	Continuous over time (daily, weekly, monthly, yearly)		Shows change and direction clearly	You have many data points over time	Too many lines (more than 4-5) makes it hard to read
 BAR CHART (Vertical)	Compare categories or items	Discrete categories or items		Easy to compare values across categories	You need to compare across categories	Too many categories (more than 10-12) becomes cluttered
 BAR CHART (Horizontal)	Rank items from highest to lowest	Discrete categories with long labels		Easier to read long labels and compare rankings	You have long labels or many categories	When showing trends over time
 PIE / DONUT CHART	Part-to-whole (percentages)	Parts of a whole (should equal 100%)		Quickly shows proportion of the whole	You have up to 5-6 categories	Too many slices (hard to compare) or small differences
 STACKED BAR CHART	Composition over time or across categories	Parts of a whole across time or categories		Shows both totals and composition	You need to see both total and breakdown	Too many segments makes it hard to read
 GAUGE / KPI SCORECARD	Performance against a target	Single value compared to a goal		Instantly shows how you're doing at a glance	You have a clear target or threshold	When context or trend is important
 SCATTER / BUBBLE PLOT	Relationship between variables	Two or more numeric variables		Reveals patterns and correlations	You want to find relationships or outliers	Too complex for executive overviews
 TABLE / KPI TABLE	Detailed data with multiple fields	Many values or detailed numbers		Shows exact numbers and detail	You need to show detail or export data	Too much detail on executive dashboards

CHOOSE BASED ON YOUR MESSAGE

What do you want your audience to understand?

 **TREND**
What changed over time?

Line Chart
Area Chart

 **COMPARISON**
Which is higher or lower?

Bar Chart (Vertical)
Bar Chart (Horizontal)

 **COMPOSITION**
What makes up the whole?

Pie / Donut Chart
Stacked Bar Chart

 **DISTRIBUTION**
How are values spread out?

Histogram
Box Plot

 **RELATIONSHIP**
How are variables related?

Scatter / Bubble Plot

 **PERFORMANCE**
Are we meeting our goals?

Gauge / KPI Scorecard

 **DETAIL**
Show the exact values

Table / KPI Table

VISUAL SELECTION DECISION TREE

Start here to pick the right visual.

What do you want to show?

Change over time

Is it continuous over time?

Yes

Line Chart

No

Bar Chart

Compare items

Many items or long labels?

Yes

Bar Chart (Horizontal)

No

Bar Chart (Vertical)

Part of a whole

Few parts (up to 5-6)?

Yes

Pie / Donut Chart

No

Stacked Bar Chart

Relationship between variables

Two or more numeric variables?

Yes

Scatter / Bubble Plot

No

Reconsider your goal

Exact numbers

Need detail or many fields?

Yes

Table / KPI Table

No

Use another visual

When in doubt: Keep it simple. One message per visual.

VISUAL SELECTION CHECKLIST

Use before you build any chart.

☐ 1. What is the key message I want to communicate?

☐ 2. Who is my audience?

☐ 3. What action should they take?

☐ 4. Does this visual best support my message?

☐ Yes ☐ No

☐ 5. Is the data the right format for this visual?

☐ Yes ☐ No

☐ 6. Will the visual be easy to understand in 10 seconds?

☐ Yes ☐ No

EXAMPLES: SAME DATA, DIFFERENT VISUALS

Choose the visual that tells the story best.

Monthly Revenue

Goal: Show trend

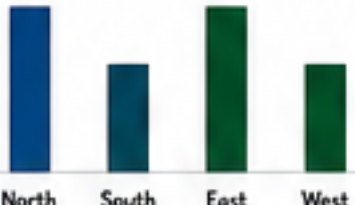


Use: Line Chart

Best for seeing change over time.

Revenue by Region

Goal: Compare regions



Use: Bar Chart

Best for comparing categories.

Budget Allocation

Goal: Show composition

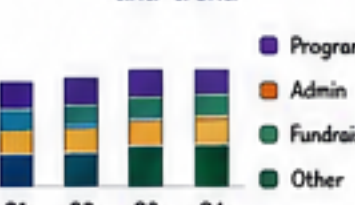


Use: Donut Chart

Best for part-to-whole.

Expenses Over Time

Goal: Show composition and trend



Use: Stacked Bar Chart

Best for totals and breakdowns.

Client Satisfaction

Goal: Show performance against goal



Use: Gauge

Best for quick performance check.

Program Performance Detail

Goal: Show detailed values

Program	Enrolled	Completed	Rate
A	250	210	84%
B	180	150	83%
C	120	90	75%

Use: Table

Best for exact numbers and detail.

DASHBOARD PLANNING TEMPLATE™
DASHBOARD WIREFRAME WORKSHEET™



Plan your dashboard before you build it.

- ✔ Map the layout
- ✔ Define each visual
- ✔ Design with purpose

1. DASHBOARD LAYOUT SKETCH

Sketch your dashboard layout below. Use the numbers from your key sections on Page 5.

1

2

3

4

5

6

7

8

9

2. DASHBOARD INFORMATION

Dashboard Name:

Purpose / Primary Goal:

Primary Audience:

Dashboard Type:

Executive (High-Level)

Operational (Detailed)

Strategic (Long-Term)

3. DEVICE CONSIDERATIONS

Where will this dashboard be viewed?

Desktop

Laptop

Tablet

Mobile

Design Priority:

Desktop First

Mobile First

Both Equally

4. DATA REFRESH PLAN

How often will the data update?

Real-Time

Monthly

Daily

Quarterly

Weekly

Other:

Last Updated By:

Data Owner:

Data Source(s):

5. VISUAL / METRIC DEFINITION TABLE

Define what each section will show and how it will behave.

SECTION #	WHAT WILL THIS SECTION SHOW? (Metric / Insight / Grouping)	VISUAL TYPE (Chart / Table / KPI / Gauge / etc.)	DATA SOURCE	KEY METRIC(S) (What's being measured?)	INTERACTION / DRILL-DOWN (Yes / No - Details)	NOTES
1.						
2.						
3.						
4.						
6.						
6.						
7.						
9						

6. FILTERS & CONTROLS

What filters or controls will users have?

Date Range

From: To:

Department / Program

List:

Location / Region

List:

Other Filters:

Default View:

7. USER INTERACTION PLAN

How will users explore the data?

Click a KPI to see more detail

Click a chart segment to filter

Hover for additional information

Drill-down to another page/dashboard

Export data / reports

Other:

What action should users take based on what they see?

8. RESPONSIVENESS CHECK

How should the layout adapt to different screen sizes?

Desktop
(Full Layout)

Tablet
(Simplified Layout)

Mobile
(Stacked Layout)

What can be hidden, moved, or collapsed on smaller screens?

9. KEY TAKEAWAYS

The top 3 things users should understand in 10 seconds or less.

1

2

3

PRO TIP

Build for clarity, not complexity.
Every element on the page should answer a question or drive action.

QUICK CHECK

Does this layout support the goal?

Is each section necessary?

Will users understand it quickly?

Can they take action from it?

Is the data trustworthy and up to date?

NEXT STEP

Page 8: Your Dashboard Build Plan™
Turn your wireframe into a plan.



DASHBOARD PLANNING TEMPLATE™
YOUR DASHBOARD BUILD PLAN™



From plan to impact. Turn your blueprint into a dashboard that drives results.

Plan It Build It Use It Improve It

1. EXECUTIVE SUMMARY

Capture the big picture.

Dashboard Name:

Purpose / Primary Goal:

Success Looks Like:

Key Decisions This Dashboard Will Support:

1.

2.

3.

4.

5.

2. WHAT WILL THIS DASHBOARD DELIVER?

The value this dashboard will create.



BUSINESS IMPACT

What difference will it make?



WHO BENEFITS?

Who will use and benefit from it?



KEY OUTCOMES

What results are we driving?



SUCCESS METRICS

How will we measure success?

TOP 3 OUTCOMES WE EXPECT:

1.

2.

3.

3. STAKEHOLDERS & OWNERSHIP

Clear ownership drives action.

EXECUTIVE SPONSOR

Name:

Role:

DASHBOARD OWNER

Name:

Role:

PRIMARY USERS

KEY CONTRIBUTORS

4. IMPLEMENTATION ROADMAP

A simple plan to go from design to dashboard.

PHASE	KEY ACTIONS	OWNER	START DATE	TARGET DATE	STATUS
 1 PLAN	- Confirm requirements - Validate metrics & data - Finalize layout & visuals				☐ Not Started ☐ In Progress ☐ Complete
 2 BUILD	- Prepare data sources - Build calculations & KPIs - Build dashboard & visuals				☐ Not Started ☐ In Progress ☐ Complete
 3 TEST	- Validate data accuracy - User testing & feedback - Refine based on feedback				☐ Not Started ☐ In Progress ☐ Complete
 4 LAUNCH	- Deploy dashboard - Train users - Communicate availability				☐ Not Started ☐ In Progress ☐ Complete
 5 ADOPT & IMPROVE	- Monitor usage - Gather feedback - Iterate & improve				☐ Not Started ☐ In Progress ☐ Complete

STATUS KEY: ☐ Not Started ☐ In Progress ☐ Complete

5. DATA READINESS CHECK

Confirm your data is ready to go.

CHECKPOINT		YES	NO	N/A
	Data sources are identified and accessible	☐	☐	☐
	Data is accurate and trustworthy	☐	☐	☐
	Definitions for all KPIs are documented	☐	☐	☐
	Data refresh frequency is defined	☐	☐	☐
	Access & permissions are established	☐	☐	☐
	Data quality checks are in place	☐	☐	☐
	Data owner assigned for each source	☐	☐	☐

DATA READINESS SCORE

/ 7

0-3 = Not Ready 4-5 = Getting There 6-7 = Ready to Build

6. DASHBOARD MAINTENANCE PLAN

Keep it accurate, relevant, and useful.

Review Frequency: ☐ Daily ☐ Weekly ☐ Monthly ☐ Quarterly ☐ Annually

Data Refresh Frequency:

Who Reviews the Dashboard?

How Will Feedback Be Collected?

How Will We Know If It's Working?

What Triggers an Update or Change?

7. RISK & ASSUMPTIONS

Identify what could get in the way.



KEY RISKS

1.

2.

3.

4.



KEY ASSUMPTIONS

1.

2.

3.

4.

MITIGATION PLAN

8. LAUNCH & COMMUNICATION PLAN

Drive awareness and adoption.



How Will We Launch?

☐ Team Announcement

☐ Email Communication

☐ Training Session

☐ Documentation / Guide

☐ Other:

Key Messages to Communicate

1.

2.

3.

Resources Users Will Have

☐ User Guide / Documentation

☐ FAQ / Help Sheet

☐ Training / Walkthrough

☐ Support Contact:

9. FINAL CHECK BEFORE BUILD

Confirm you're ready to move forward.

☐ Business goals and decisions are clear

☐ Users and owners are identified

☐ KPIs and metrics are defined

☐ Data sources are validated

☐ Layout and visuals are planned

☐ Refresh and review cadence set

☐ Launch plan is ready

READY TO BUILD? ☐