BUSINESS INTELLIGENCE DASHBOARD BEST PRACTICES

Your dashboard should answer business questions

Make this your number one priority.

From the first to the last step in the dashboard design creation, you must be thinking about how helpful is the dashboard in answering business questions.

Choose the type of dashboard

Three most common types of dashboard design:

- Operational dashboards
- Strategic dashboards
- Analytical dashboard

Commonly, different user groups have different needs of dashboard type.

Choose the right metrics to display

To determine metrics, consider things such as:

- What are the core business goals?
- Can you design metrics that contribute to those goals?
- What do the users need to learn from the data?

Create it visual

- Choose the best types of graphs and charts to display the information more clearly.
- Think about the use of colors, lines, shapes, shading, and etc.
- Avoid things like overly cute widgets and complicated graph types.

Build it interactive

Interactive dashboard features to consider are:

- Click-to-filter to dissect data
- Time interval widget
- A chart zoom feature
- Show or hide charts - a feature to combine numerous datasets in a few clicks.

Include data context

Your design must be so clear that everyone from the C-level manager to a junior salesperson to understand the meaning of context. Data context allows the design to serve multiple business people.

Easy web-based access

Web-based dashboards reach a wider audience, give users the ability to share data, insights and to collaborate seamlessly. You achieve a real-time and productive collaboration around the data.

Don't forget alerts

The users should be able to set-up alert notifications that will automatically be sent via email as soon as a particular event occurs. Then the users can react immediately to the event and stay on track for their goals.

Make the complex simple

Tips to help you avoid cluttering:

- Use white space
- Don't use complicated visualizations
- Say no to too many colors
- Don't use decorations
- Group the relevant elements

Experiment

Sometimes, experiments are the best way to figure out what is best. You can experiment with graphs, colors, icons, and etc. Go to colleagues outside of your organization or department to get their feedback.