NOT *JUST* ANOTHER DASHBOARD

Design dashboards that get adopted and deliver results

Sarah Bartlett

COMMON DASHBOARD COMPLAINTS

USER

- Difficult to find or navigate
- Non-performant or slow
- Too much or too little information
- Lack business value

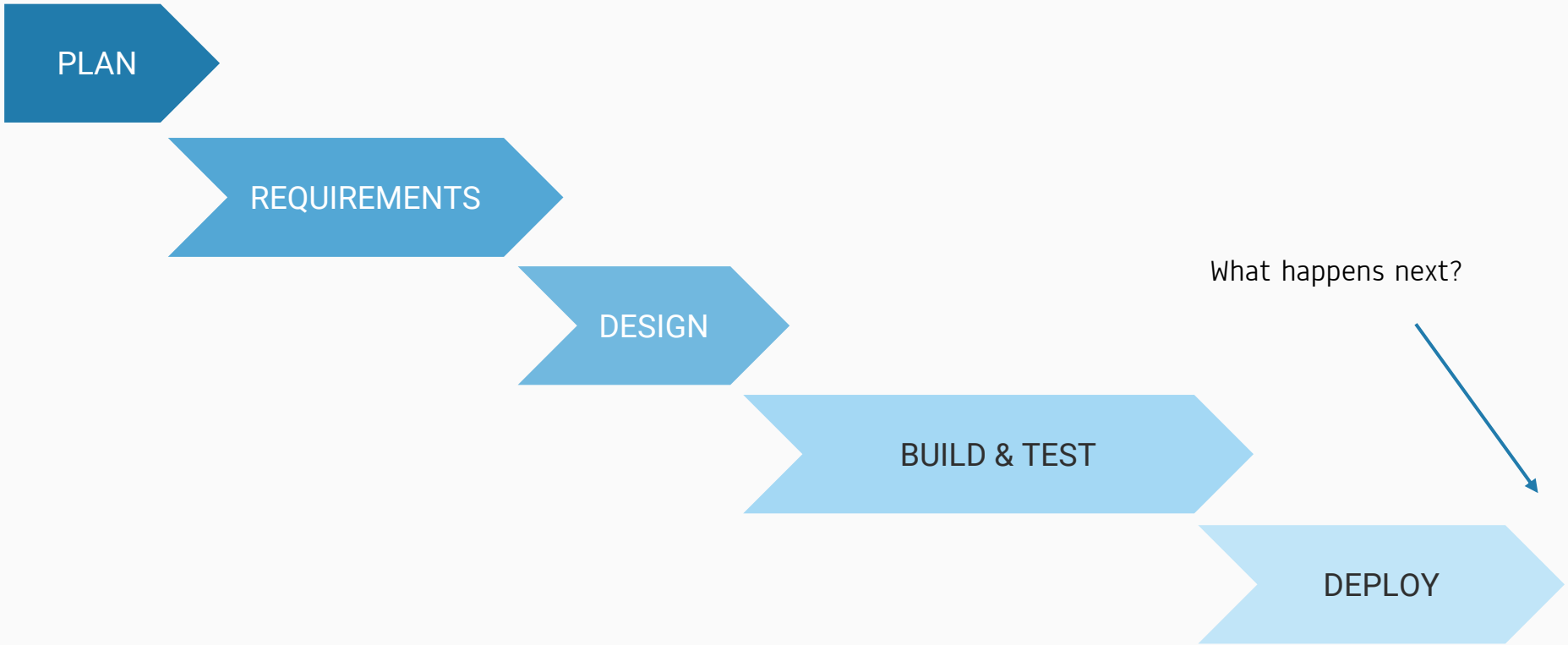
DEVELOPER

- Vague user requirements
- Users have different needs
- Unrealistic expectations
- Data is difficult to source

DOESN'T OFFER VALUABLE INSIGHTS

DOESN'T GET USED

TYPICAL DASHBOARDING PROCESS



AGILE DESIGN THINKING PROCESS

VISION

EMPHASISE

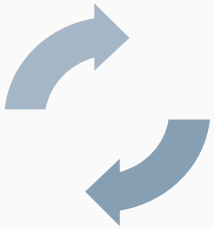
DEFINE

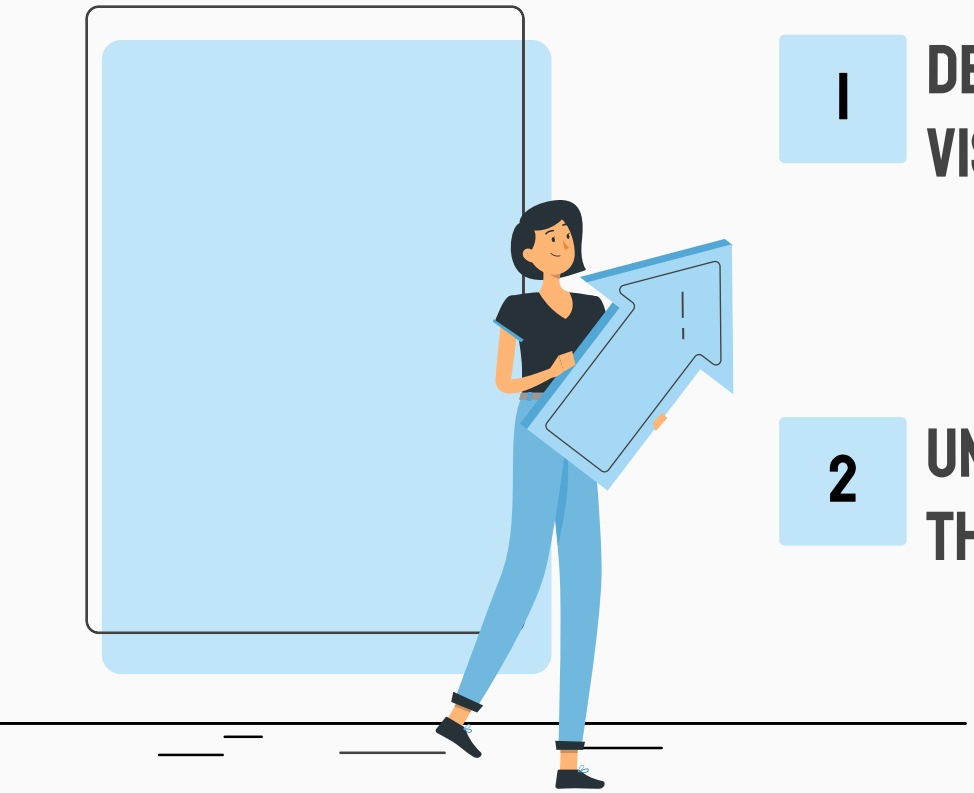
IDEATE & PROTOTYPE

TEST

IMPLEMENT

- GOALS
- USER FEEDBACK
- MEASUREMENT
- OWNERSHIP



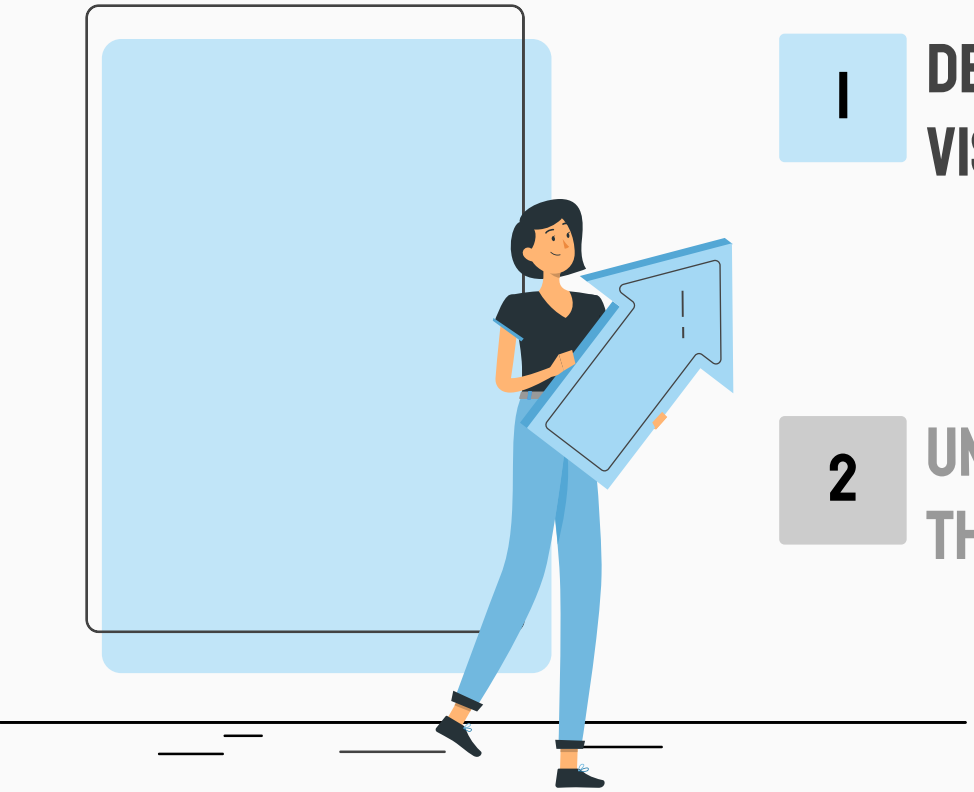


1 DEFINE THE VISION

2 UNDERSTAND THE USER

3 DESIGN & DEVELOPMENT

4 ENABLEMENT & ADOPTION



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“BE STUBBORN ON VISION BUT FLEXIBLE ON DETAILS”

- *Jeff Bezos*

START WITH A STRATEGIC VISION

GOALS

Define the **WHY**?

Business value & impact?

DESIRED OUTCOMES

How will outcomes be measured?

Aligned to business goals

Actions needed to achieve outcomes?

PEOPLE

Who is responsible for what?

Who is our audience?

What are their goals & challenges?

TIMELINE

Set delivery expectations

What will be delivered & when?

IMPACT

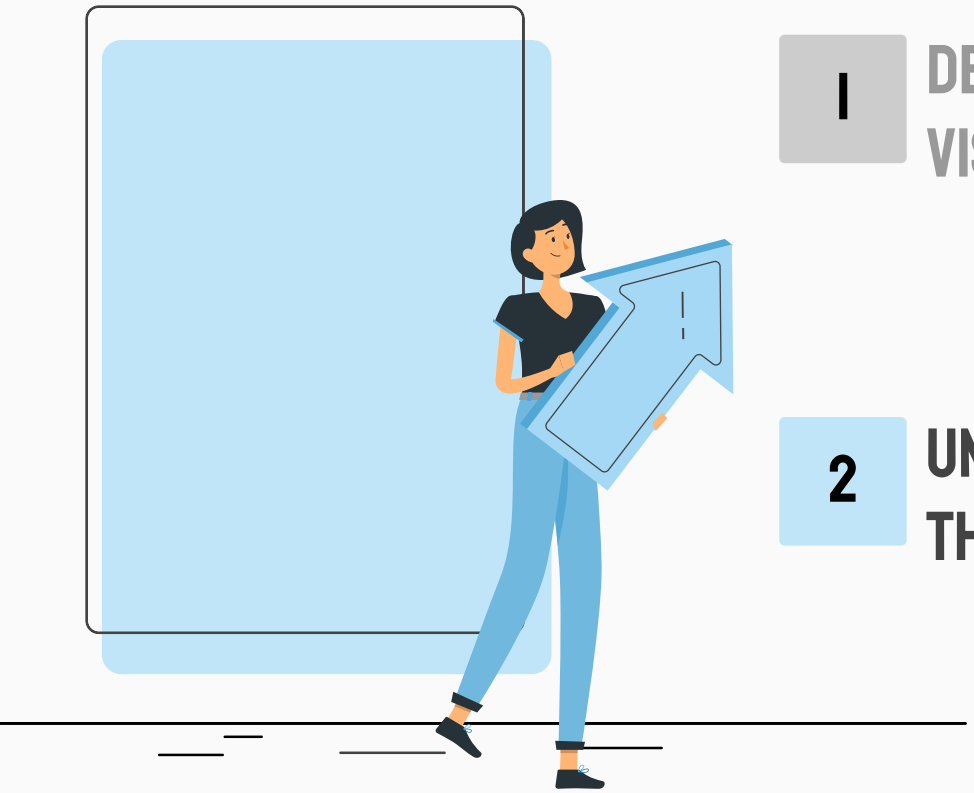
Who & what will be impacted?

How can we minimize risk?

DATA

What data sources?

Is the data missing or dirty?



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PRINCIPLES OF UX

- USEFUL
- USEABLE
- FINDABLE
- CREDIBLE
- ACCESSIBLE
- VALUABLE

ADOPTION

Credit: Peter Morville

USER PERSONAS

- ‘Walk in the users shoes’
- Start with job functions or roles - common goals & challenges
- Consider sub-personas - i.e. regional differences
- Unique dashboard experience per persona (ideally)
- Refine through user research

“NAME”

JOB TITLE

Quotes

“I need a dashboard that’s easy to understand with forward-thinking insights that help me determine where to focus”

Background

Job title

Role description

Years of experience

Preferences

Data consumption

Frequency

Methods (i.e. phone)

Goals

Motivations

Targets

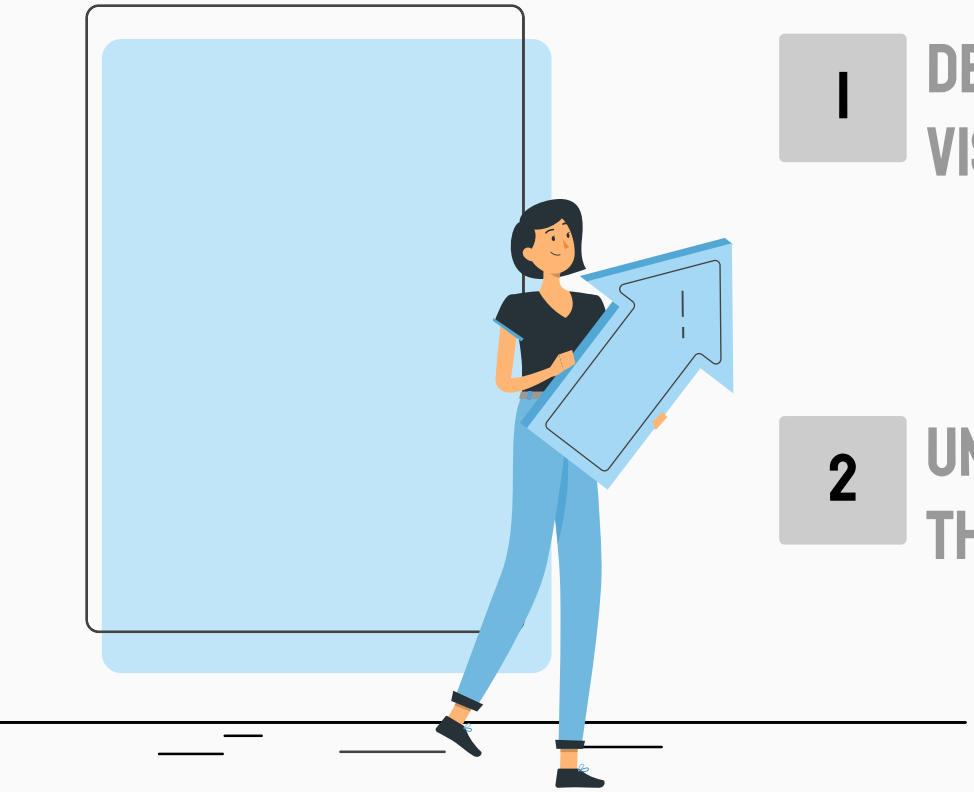
Pain Points

Barriers or issues

Frustrations with current state

STAKEHOLDER & USER INTERVIEWS

- Structured set of predefined questions
- Identify Business Value Questions - aligned to business goals
- Stakeholders: Define the “So what?” - potential dashboard impact
- Users:
  - Ways of working
  - Current challenges
  - Goals & Metrics



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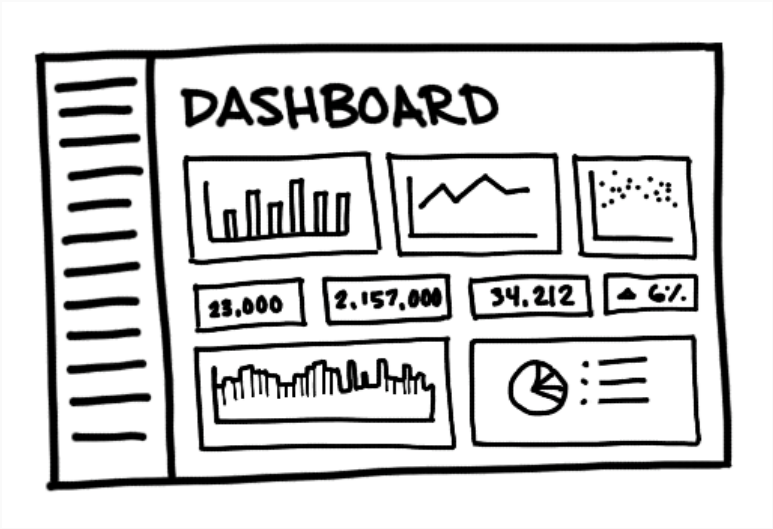
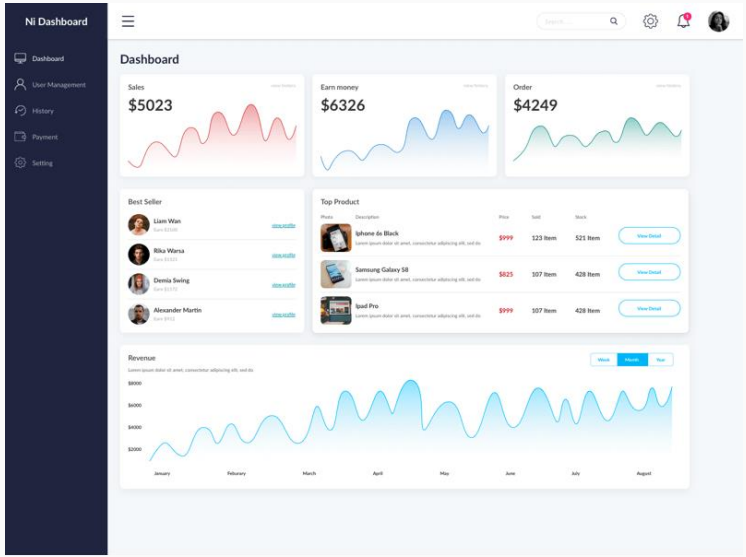
WIREFRAMING





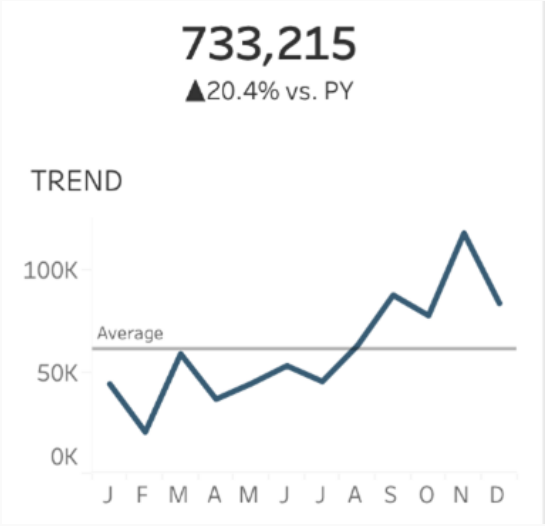
LOW-FI

HIGH-FI

DASHBOARD DESIGN

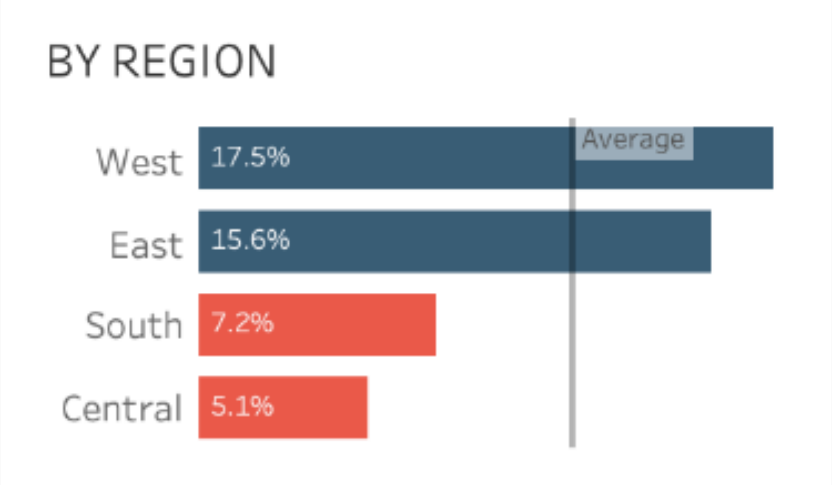
Provide Context

SALES
733,215



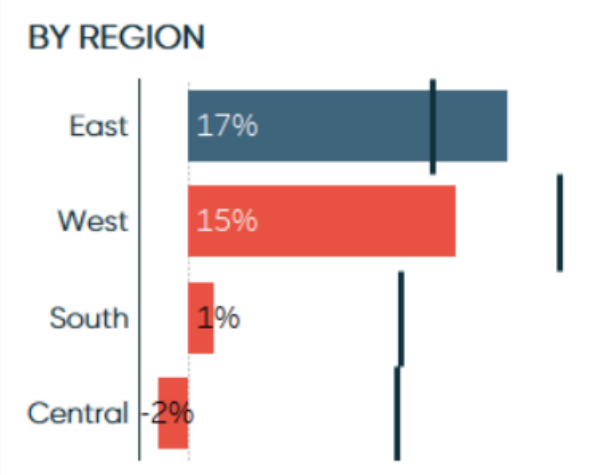
DASHBOARD DESIGN

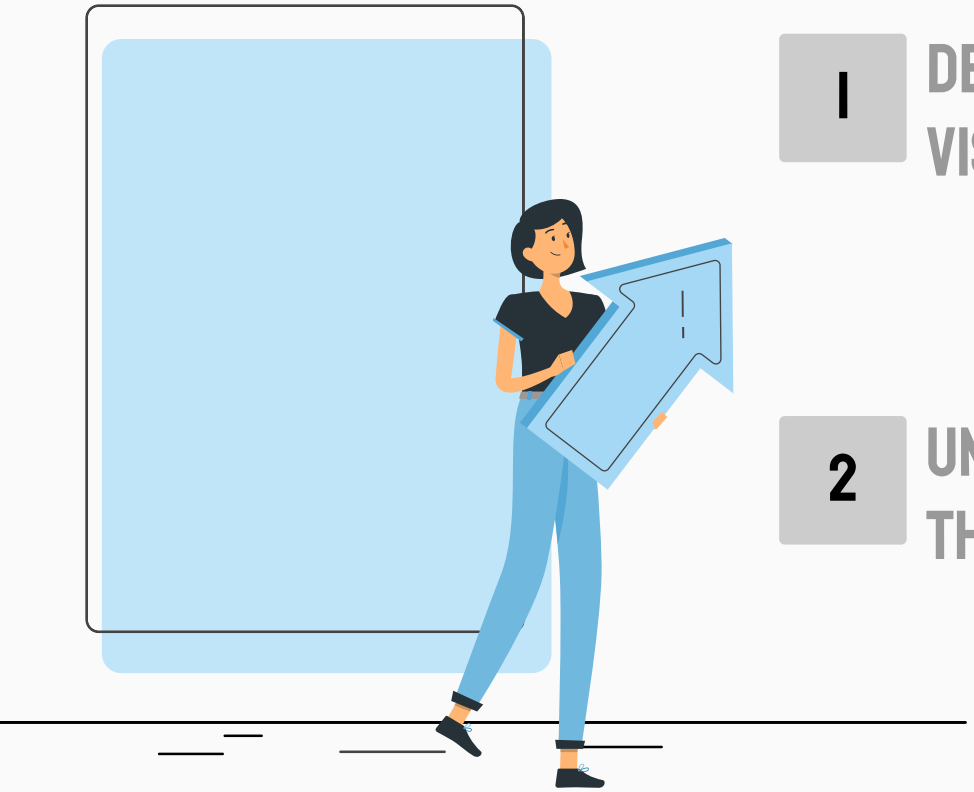
Highlight what needs attention



SCENARIO MAPPING

Align actions to business value questions

QUESTION	INSIGHT	ACTION
“Are we on track to hit our quarterly revenue goals?”		Managers in underperforming regions to review discounts and marketing strategy



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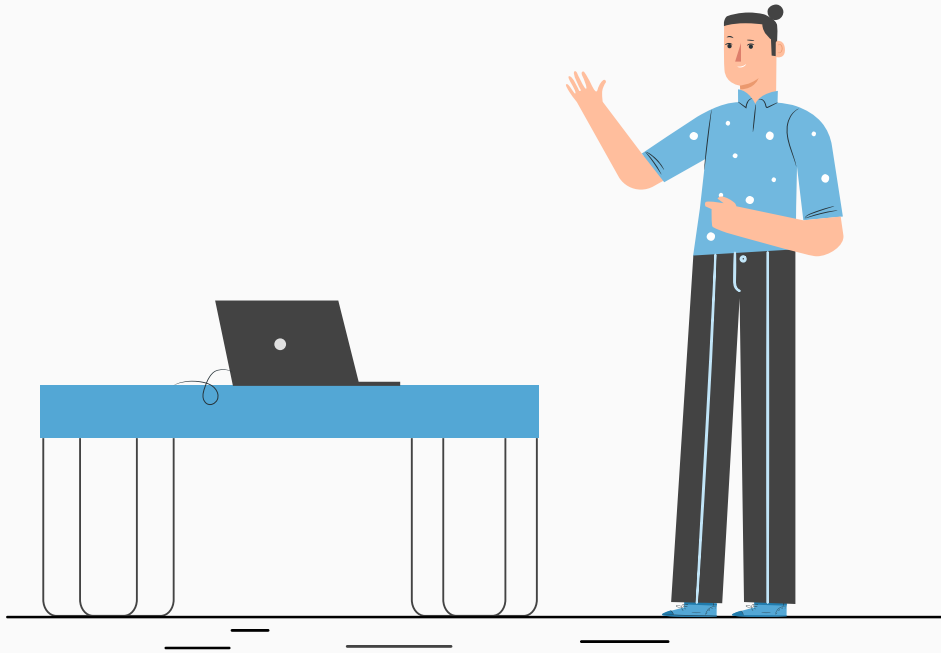
CHANGE MANAGEMENT CONSIDERATIONS

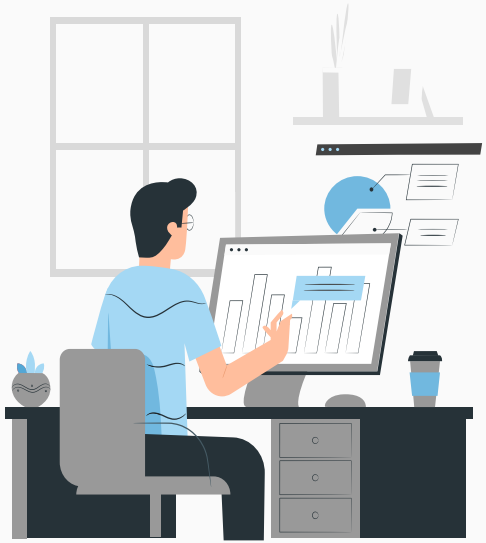
- Change is key to adoption
- How will the organisation adapt to the change?
- What barriers exist & how can we overcome them?
- Who will advocate for change?
- ADKAR model; Awareness, Desire, Knowledge, Ability, Reinforcement

CHANGE MANAGEMENT APPROACHES

- Create a sense of urgency - why we need to act NOW
- Gather a group of champions
- Identify and remove blockers
- Communicate short-term wins
- Maintain momentum



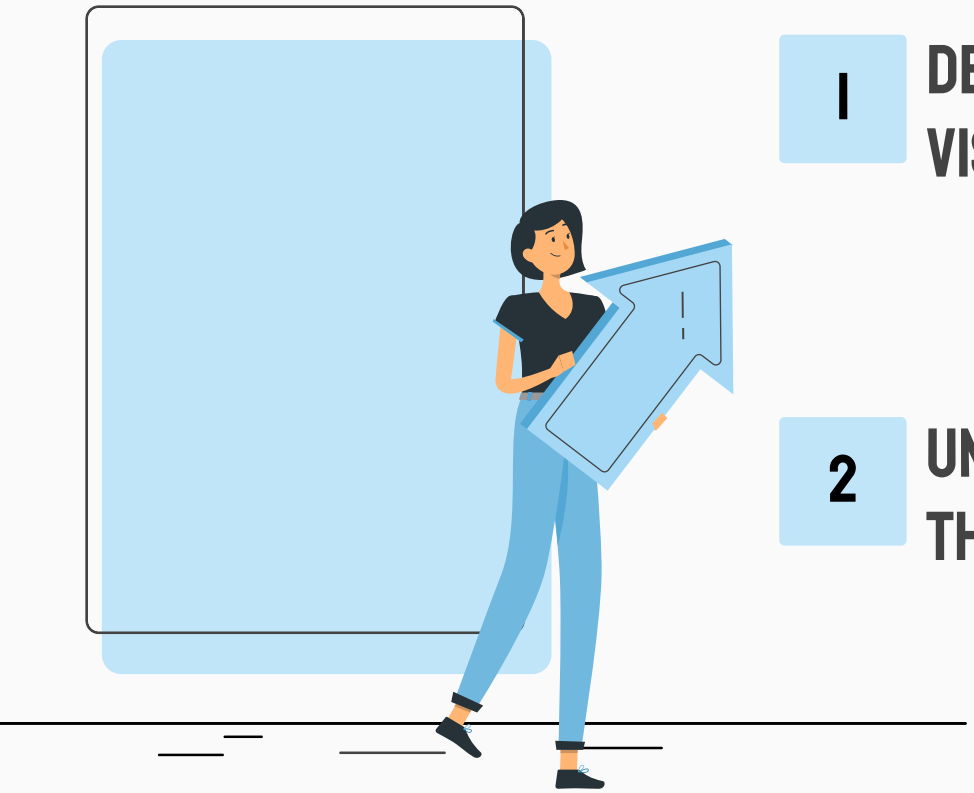
LAUNCH PLAN



- Treat the dashboard like a product
- Leverage mental triggers:
  - Social proof
  - Scarcity (pilot)
  - Anticipation
- Pre-launch - what is happening & why?
- Launch event
- Post-launch - customer experience

MEASURING ADOPTION

- How do the insights impact the business?
- How many people are adopting the dashboard?
  - *How often?*
  - *How long?*
- Measure frequently and adjust as necessary



1 **DEFINE THE VISION**

2 **UNDERSTAND THE USER**

3 **DESIGN & DEVELOPMENT**

4 **ENABLEMENT & ADOPTION**

WHERE TO START?

- Start small
- Seek feedback on current dashboards & processes
- Look for quick wins
- Design repeatable processes

CREDITS: This presentation template was created by Slidesgo, including icons by Flaticon, and infographics & images by Freepik and illustrations by Storyset

THANKS

Questions?

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