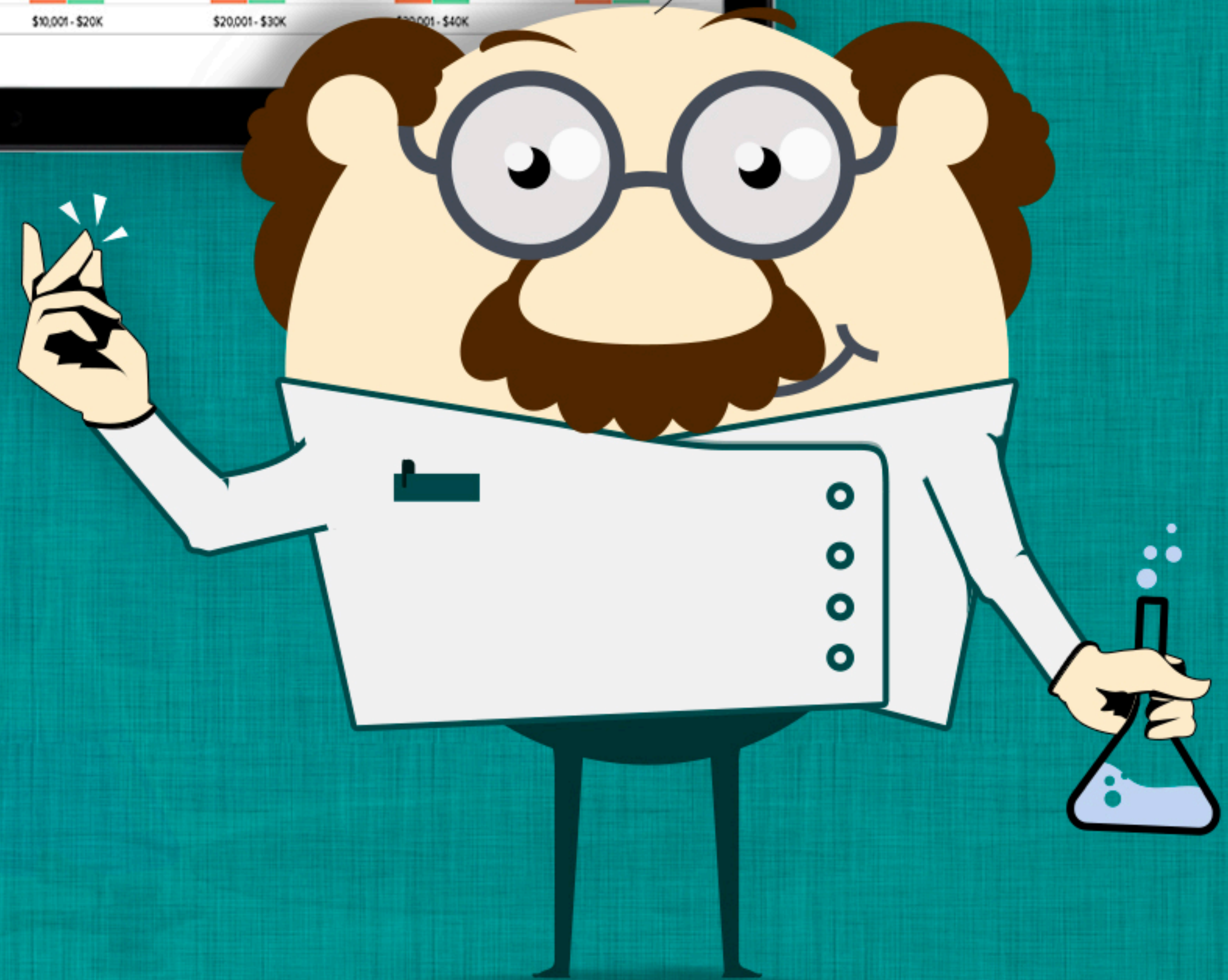
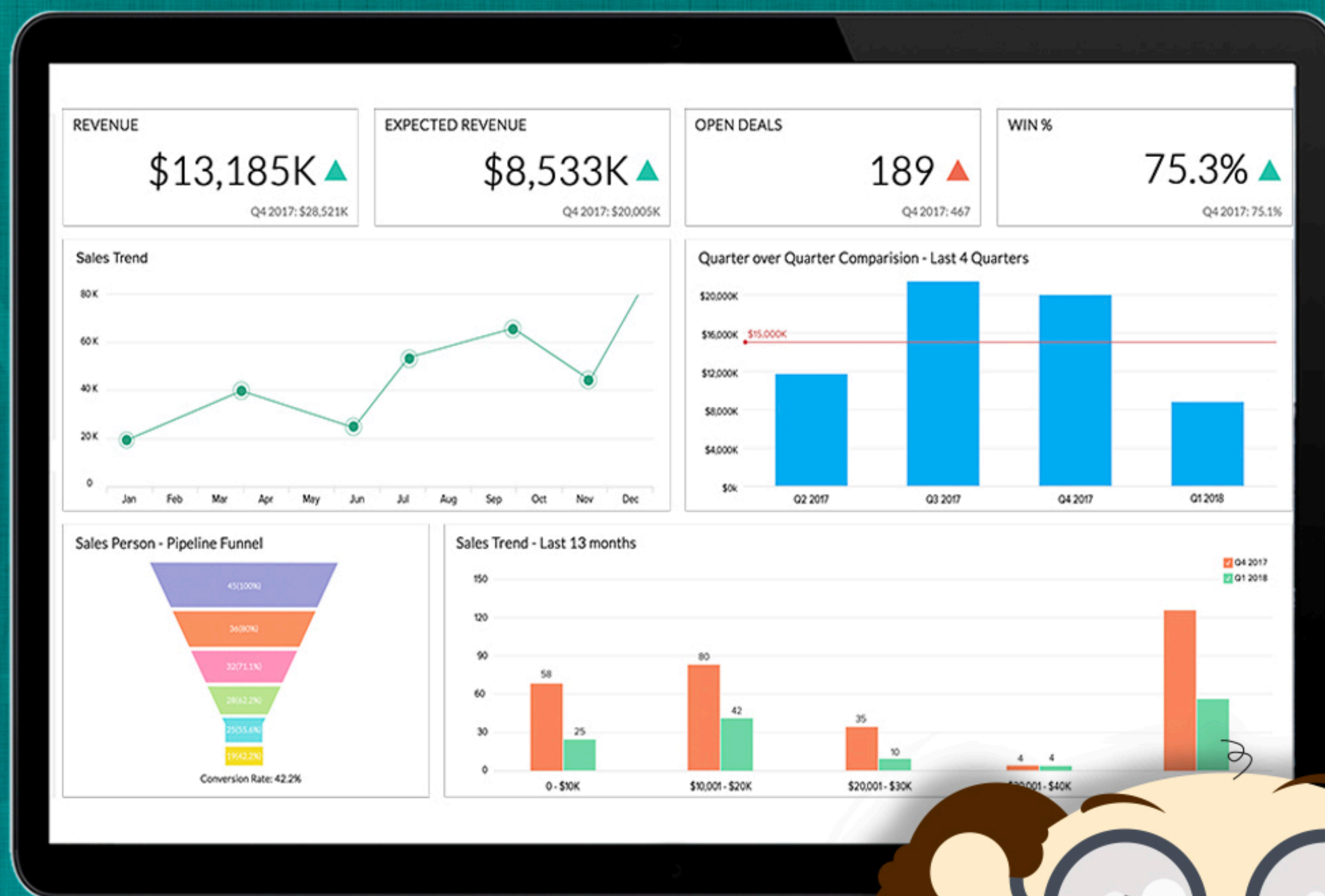


# The secret to creating powerful dashboards





# Introduction

Dashboards track key metrics and trends, giving you the information you need to convert your organization's data into actionable plans for the future. Augmenting dashboards to provide business insights will give you the edge you need to make key decisions. This guide will help you create powerful dashboards that you can tailor to fit your organization's specific needs.

## Preparing for dashboard creation

Designing a dashboard is like narrating a story. A good story is created to appeal to a specific audience and is told with a goal in mind. For example, children's stories are told in ways that engage children and teach a positive message. Similarly, a dashboard must be customized to fit its audience's needs. To begin laying the groundwork for your dashboard, do the following

- Identify your audience
- Define the dashboard's purpose
- Choose the right metrics
- Build an outline for your dashboard

### Identify your audience

Before you start designing the dashboard, ask yourself who the dashboard is really for. Is it for a help desk manager who needs to review their team's SLA compliance? Or is it for a technician who wants to monitor their personal progress? You must understand the thought process of your viewer to design engaging dashboards. For technicians, a dashboard similar to the one shown below would be appropriate.

## Technician 360 View

Overview of technician performance

Backlog requests

7 ▼

Dec 2017: 9

Overdue request count

5 ▲

Dec 2017: 4

Avg time spent (mins)

15 ▼

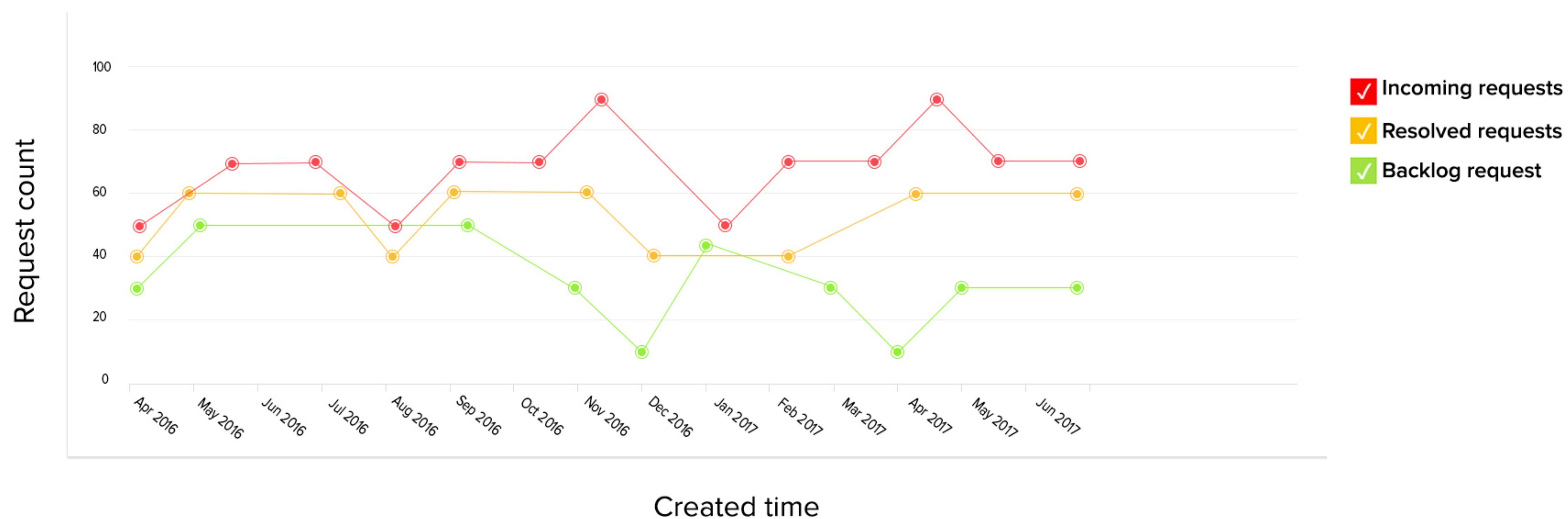
Q4 2017: 17 Mins

Avg resolution time (days)

14 ▲

Q4 2017: 12 Days

### Incoming, resolved, backlog request by month



Take the time to figure out what your target audience needs in a dashboard so you can match their expectations. For example, a help desk manager would expect to monitor their team's performance using metrics like Top 5 technicians by ticket closed or Top 5 technicians by fastest average resolution time, as shown below.

## Technician Leaderboard

Overview of top performers

Technician with the most tickets closed - Steve Wilson

116

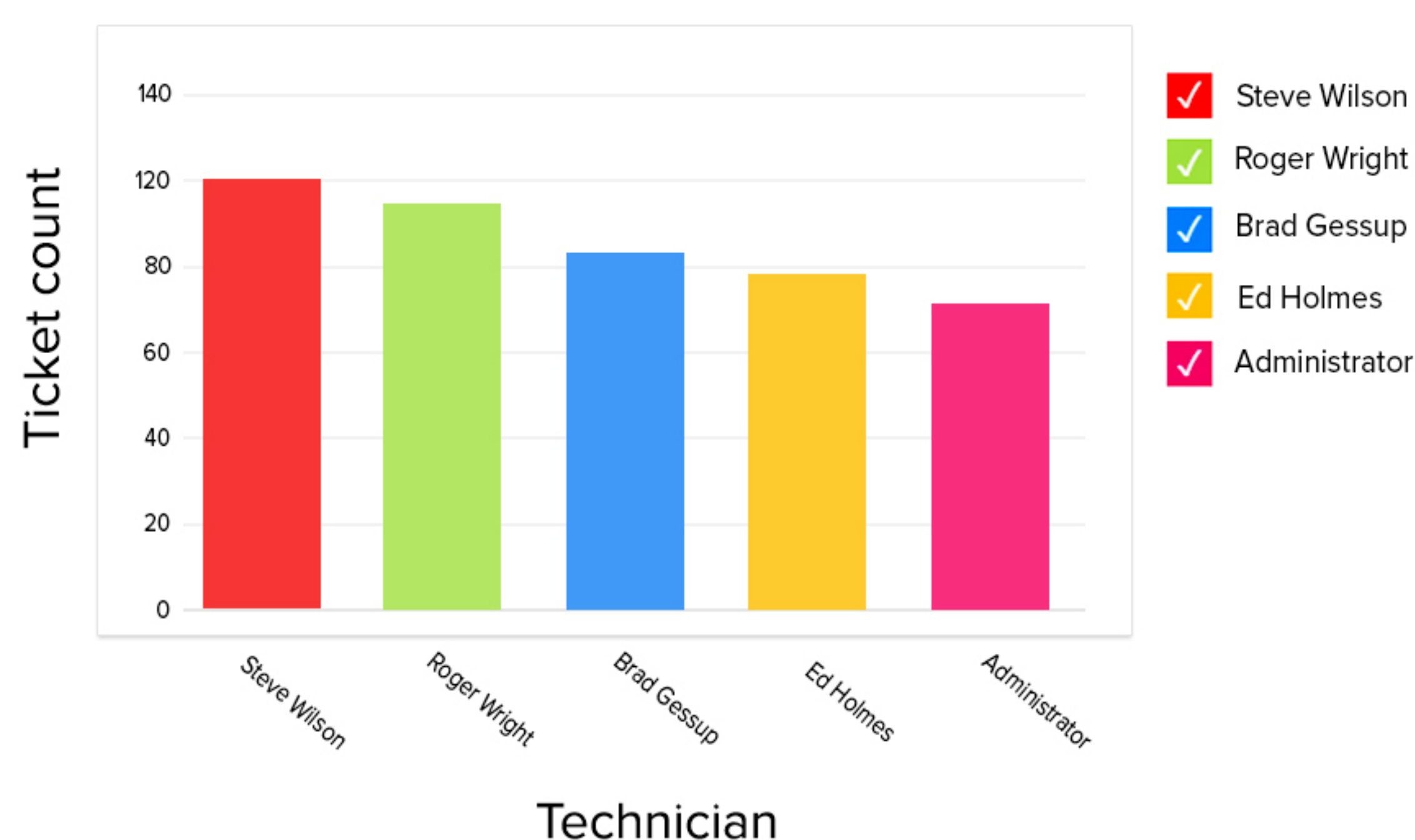
Site with the most tickets closed - Cape Town

242

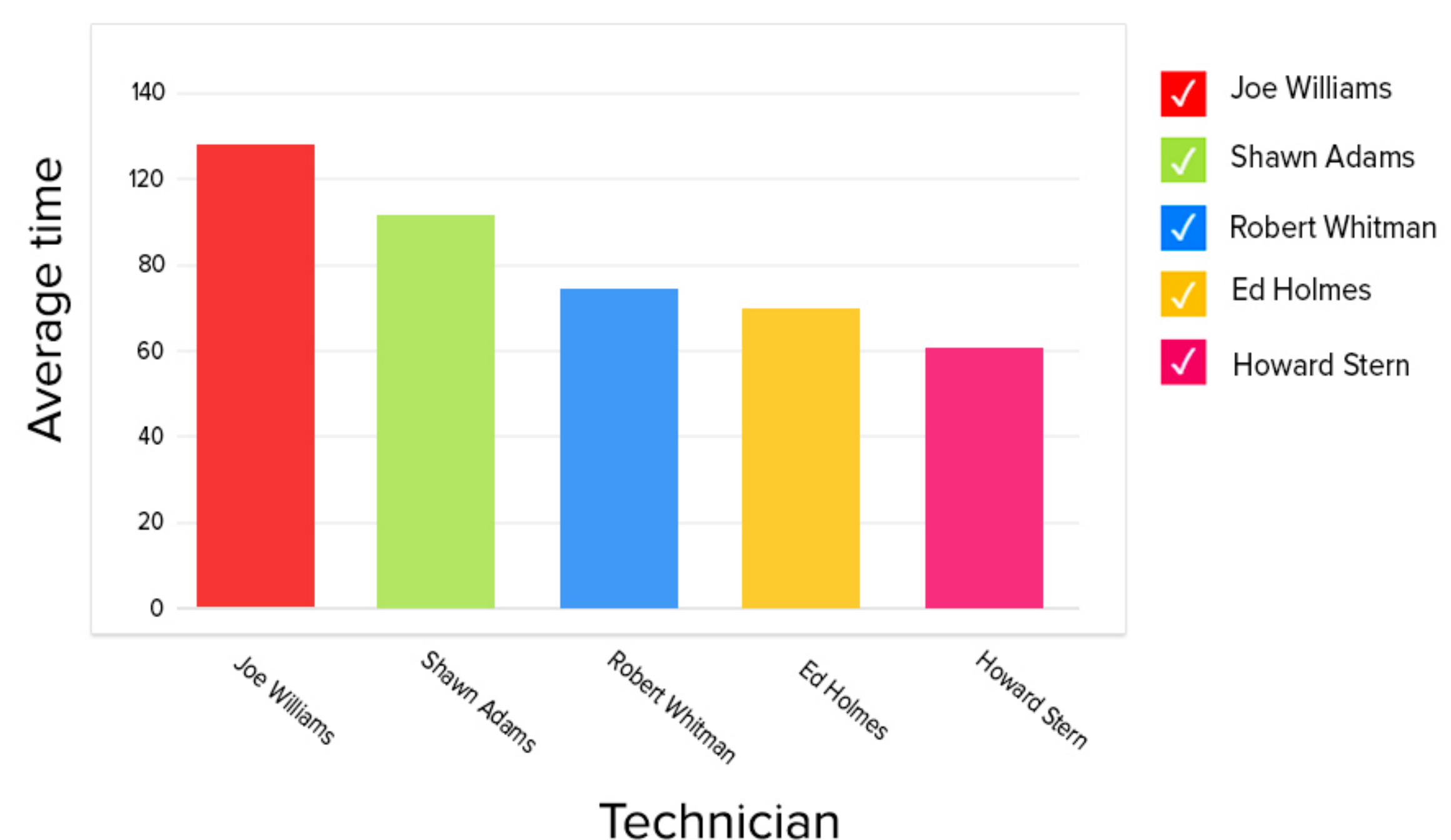
Group with the most tickets closed - Network Team

215

### Top 5 performers by ticket closed



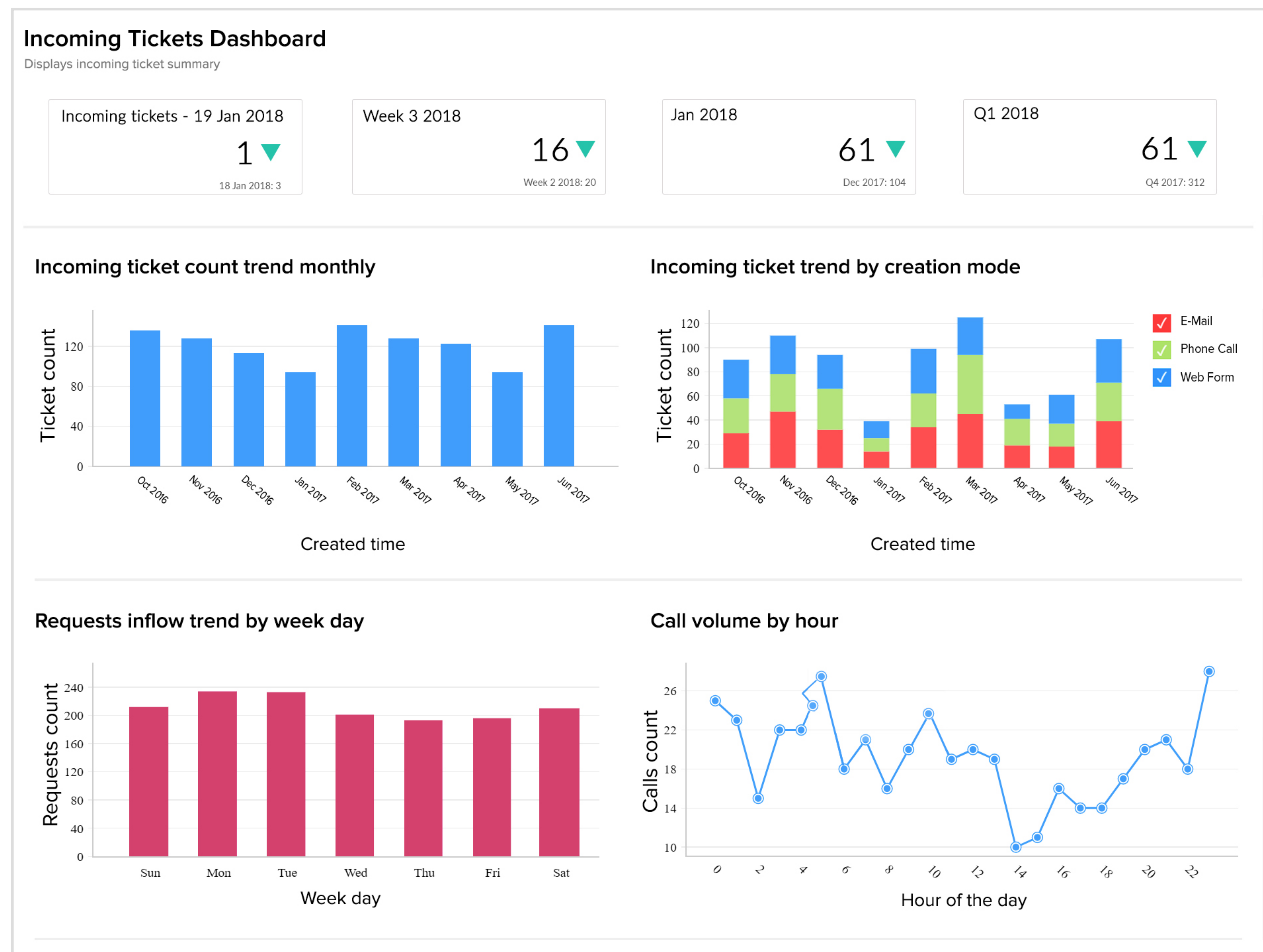
### Top 5 technicians by fastest average resolution time





## Define the dashboard's purpose

Make sure you have decided what you wish to achieve with your dashboard before you start designing it, as those goals will determine what goes into the final dashboard. For example, a dashboard that will be used to monitor a help desk team's incoming ticket trend will look something like the one shown below.



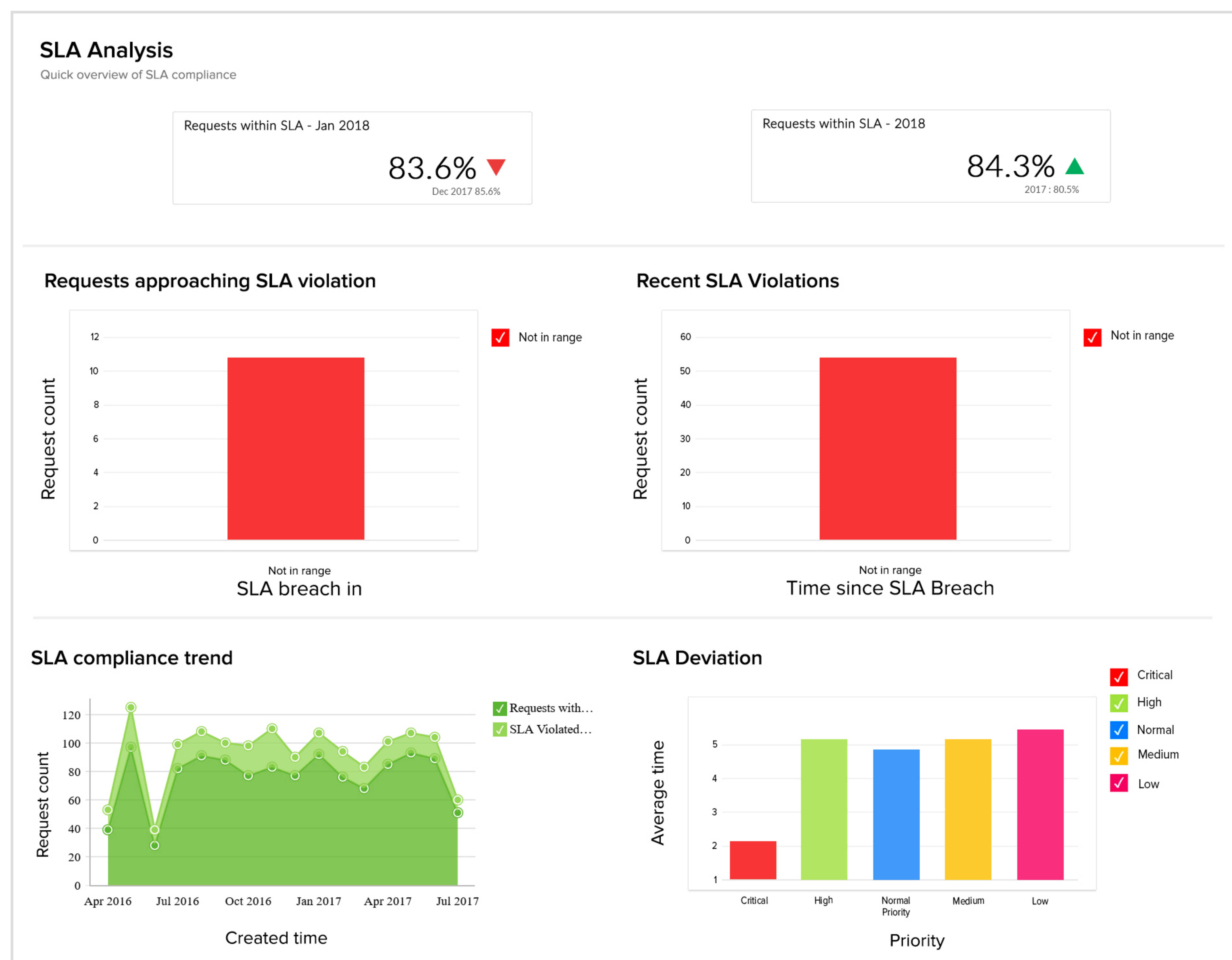
Since this dashboard was designed to monitor the incoming ticket trend, it has a widget that shows the difference in the number of incoming tickets between December 2017 and January 2018.

Avoid getting carried away and stick to designing a dashboard that serves just one clearly-defined purpose. Ambitious dashboards that try to serve multiple purposes end up being difficult to interpret. You can always design more dashboards to serve other purposes.



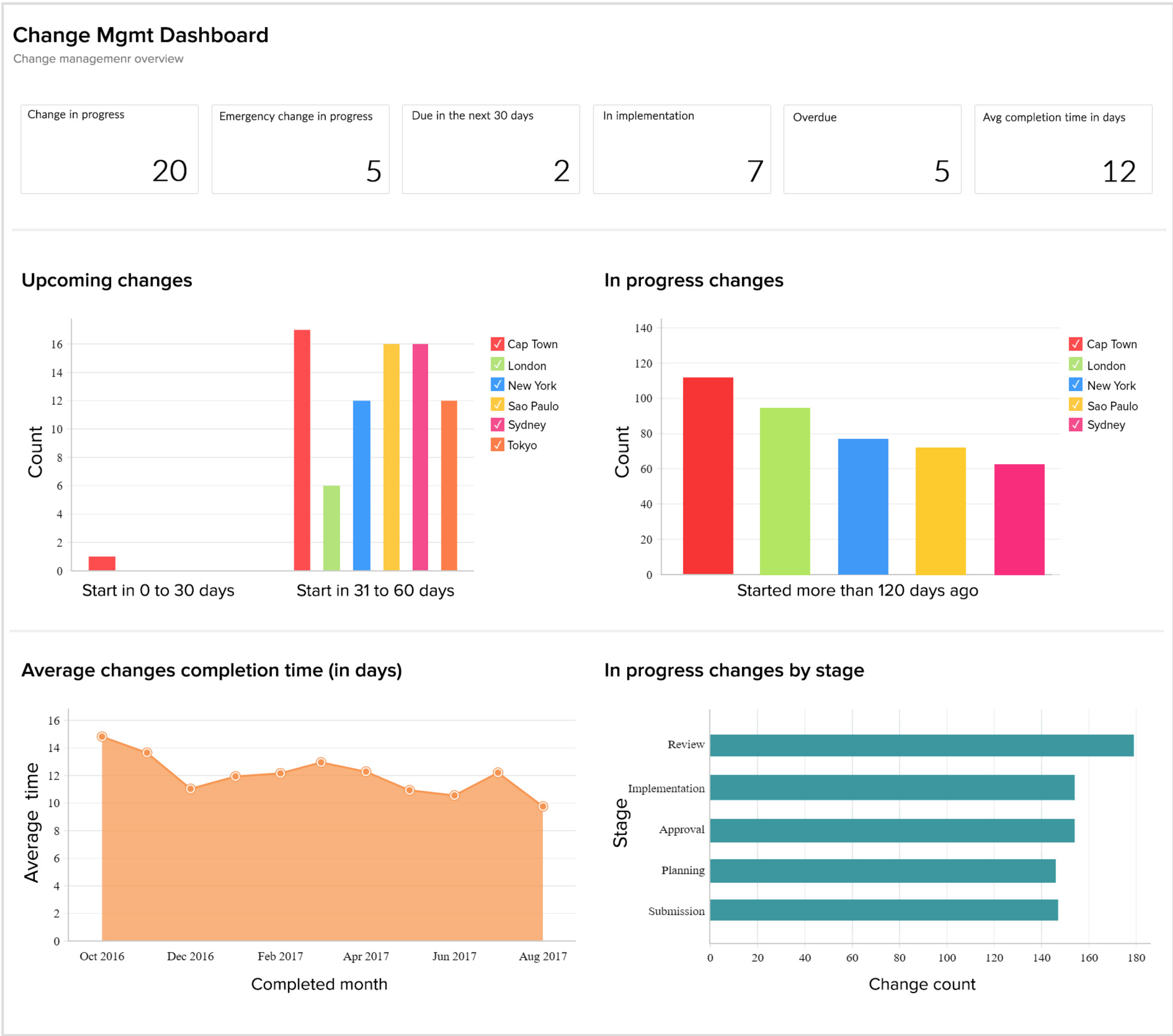
## Choose the right metrics

Now that you have defined your dashboard's purpose and audience, it's time to begin making a list of KPIs that will be relevant to the dashboard's objective. For example, a dashboard aimed at keeping track of a help desk's progress towards better SLA compliance should contain KPIs like percentage of requests resolved within SLAs, recent SLA violations, SLA deviation, etc. Once you have your potential KPI list, start eliminating KPIs that aren't relevant to your audience. You don't have to include every relevant metric in the dashboard. A data-driven dashboard should be clear and not require interpretation from the viewer, so empower your viewers by including only those metrics they will quickly understand. Go through your list a few times and eliminate unnecessary metrics until you are satisfied.



# Build an outline for your dashboard

Now that you've decided who your dashboard is for and what it will do, take time to plan how it will tell your audience its story. What information should be listed at the top? Which metrics make sense a little later on? The dashboard's structure will determine how the story unfolds for the reader, so make sure your dashboard is intuitive and has a clear message that allows readers to move from point A to point B easily. Once you establish a flow for your dashboard, you can start designing it.





Take a look at the change management dashboard above. It begins with an Upcoming Changes chart and then shows the changes that are in progress. In the next tier, it talks about the average amount of time it takes to complete changes, as well as the changes that are due in the next 30 days. In the last tier, it shows the progress of different changes. The widgets sum up the reports to show you the numbers at a glance.

## Pitfalls to avoid during dashboard creation

### 1. Including too much information

Don't overwhelm your viewers with information. Adopt a minimalistic approach to adding information to avoid designing a cluttered dashboard. Feel free to cut down widgets and reports that are not completely aligned with your dashboard's purpose. Remember you can always create more dashboards.

### 2. Failing to update your dashboard regularly

Keep your dashboard populated with the latest metrics and data. It's quite possible that the metrics that were important when you created your dashboard won't be relevant six months down the line. If the data in your dashboard is outdated, your viewers won't be able to use it effectively.

### 3. Not getting feedback from your audience

After you've deployed your dashboard, make sure you get periodic feedback from your audience. Ensure that your audience finds the dashboard engaging. Constantly tweak it based on your viewers' feedback. You must understand that dashboard creation does not end once the dashboard is deployed, but involves constant calibration and updates to keep it focused on its purpose and audience.