The art – and science – of effective Power BI dashboard design

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Too often,
dashboards fail

Power BI dashboards can be one of the potent tools in business – providing convenient and relevant insight for effective strategic planning and decision-making. So, it's surprising how many organisations fail to develop their dashboards in the right way.

Indeed, dashboards are often criticised for a number of different reasons, some of which you've probably experienced. They may be slow to function and update; contain incorrect or excessive amounts of data; appear too complex or detailed; be poorly designed or cluttered in appearance...and so on.

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Why do they end up this way?

One common reason is that, when an urgent requirement or demand comes along, it's easy to jump straight to building a dashboard only with that objective in mind, instead of stopping to consider its wider purpose or the considerations for its users and long-term future.

As such, the end result is somewhat confusing and convoluted. Initially, it fulfils its immediate need but then as more people demand more things going forward, it grows in a reactive and disorganised way, trying to be all things to all people with no real focus on the value it needs to add. Ultimately, it becomes unwieldy and unmanageable.

How can you prevent this from happening?

Four steps to a successful dashboard

Successful and effective dashboards always consider four key best practices.

Each stage informs the next, and the process is cyclical. Let's take a closer look at each one in turn.

1 **Plan**

2 **Design**

3 **Test**

4 **Repeat**

Before even opening PowerBI, you should take proper time to understand and establish:

- What the purpose of your dashboard will be

- The relationship between purpose and audience

- Its audience, their priorities, behaviour and other characteristics

- The status of your data and what that means for your dashboard's potential

The purpose

First, consider what your dashboard actually needs to deliver. Why are you building it? What should it include? What business goal is it looking to achieve? Keep your answers clear and concise.

For example, it could measure the performance of your sales department employees, to increase sales in a specific country or region. This objective can then be underpinned by related criteria, such as measuring your sales conversion rate in the particular country over time or recording who your highest performing sales manager is every month.

With multiple stakeholders to satisfy and different demands to address, it's worth organising a workshop or brainstorming session so that all stakeholders can feel included and able to have their say. Ask open questions and ensure you capture everyone's priorities in one place, before agreeing how to proceed. And remember to ask 'why?' when someone shares a specific dashboard request or objective.

Once completed, confirm and document the criteria, along with the metrics and (or) KPI's you will use to monitor progress.

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The audience

Who is going to use your dashboard? Which department do they work in, and what information and insights will be most important for them? What is their incentive to interact with dashboard data, how will they consume it, and what will its success look like for them?

Your audience members will typically fall into one of four core categories, in terms of their dashboard demands:

Analytical: they will leverage data to support employees across the business. So, it needs to be fast and easy to understand and report on.

Strategic: they will track KPIs over time to gain strategic insights and observe trends. In this way, critical success factors can be predicted and evaluated for leadership teams.

Operational: they will provide an overview of business performance on the ground, to identify successes as well as issues requiring immediate action and areas for improvement.

Tactical: they will value insights relating to specific data points during a focused time period, such as month to month changes, and drill right down into the data for deeper investigation.

By mapping your audience description and details to your defined purpose, business questions and measurement metrics, you can create an accurate brief for what your dashboard will deliver and how it will function. Be sure to keep this scope precise and concise, then nominate an owner to oversee its development.

The data landscape

Once you have established the above and determined your dashboard's desired business value, it's critical to follow up on your vision by gaining sustained investment from those responsible. Engage with the data owner at the earliest opportunity, to fully understand the quality and or limitations of the data they have available, so you can accurately manage expectations on what can be achieved and delivered going forward.

Now, you're ready to build your **dashboard.**

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2 Design

Consider your dashboard as a **story** – with a beginning, middle and end – which must provide you with accurate, actionable insights which help users to meet their specific business requirements and KPIs.

It should do this in a **user-friendly** way, by sharing the right, relevant information in a fast, easy and well-organised way. Your dashboard design can encourage this in lots of ways.

Make sure information is laid out in a style that supports people's **natural reading flow**, using text positioned as a story that goes left to right, then top to bottom.

Structure each section consistently, to include an introduction explaining the context and purpose, an explanation of the questions or topics being addressed and then the information and insights to answer them.

Use colours and shape to highlight the most important elements and drill-down where necessary to offer further detail.

In this way, you can bring your data to life and **present facts** in a way that your dashboard's users can relate to and which paints a vivid, tangible picture of what the future is looking like for them.

For example, your CEO or management team could quickly understand how the company is performing against strategic **critical success factors** and assess where they need to shift their focus for the next month or quarter.

However impressive your dashboard's capabilities may be, resist the temptation to show everything in one place. Remember your audience and their priorities – and only present the facts that relate to those. Every item should **serve a purpose.** If it's not directly adding value, delete it.
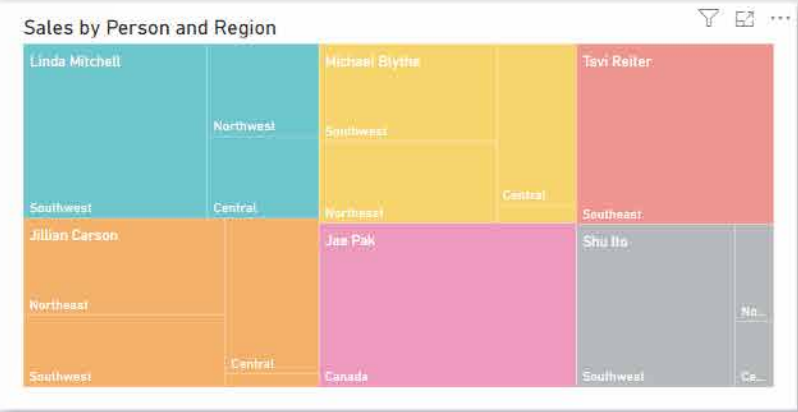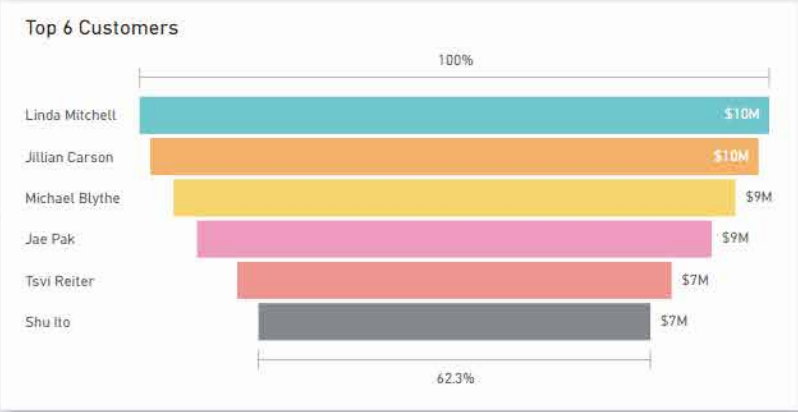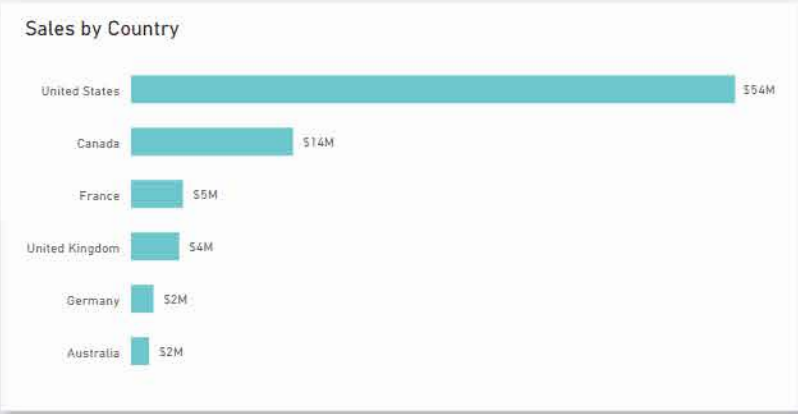
Example of a Sales / Profit dashboard that follows visual best practices

2 **Test**

The golden rule for dashboard best practice is that a user should be able to find out everything they need to know, in under 20 seconds.

The only way to check your own dashboard's effectiveness, is by testing it with real users, live, to gain feedback first-hand and incorporate it into your design process prior to launch.

It sounds obvious, but it's often neglected. There is no one better placed to guide you on an effective dashboard, than those who will be using it.

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3 **Repeat**

As with many technological tools, the development process is iterative and must consider a culture of continuous improvement. With economic and commercial needs evolving rapidly and constantly, it's vital to keep reviewing and enhancing your dashboard to ensure it continues to deliver on its original objectives.

Hopefully these good habits and guidance will help make a difference to your own dashboards. Try them out, get constructive feedback from users, and always keep testing and continuously improving. That way, you will be sure to achieve greater ROI and get closer to achieving your business objectives.
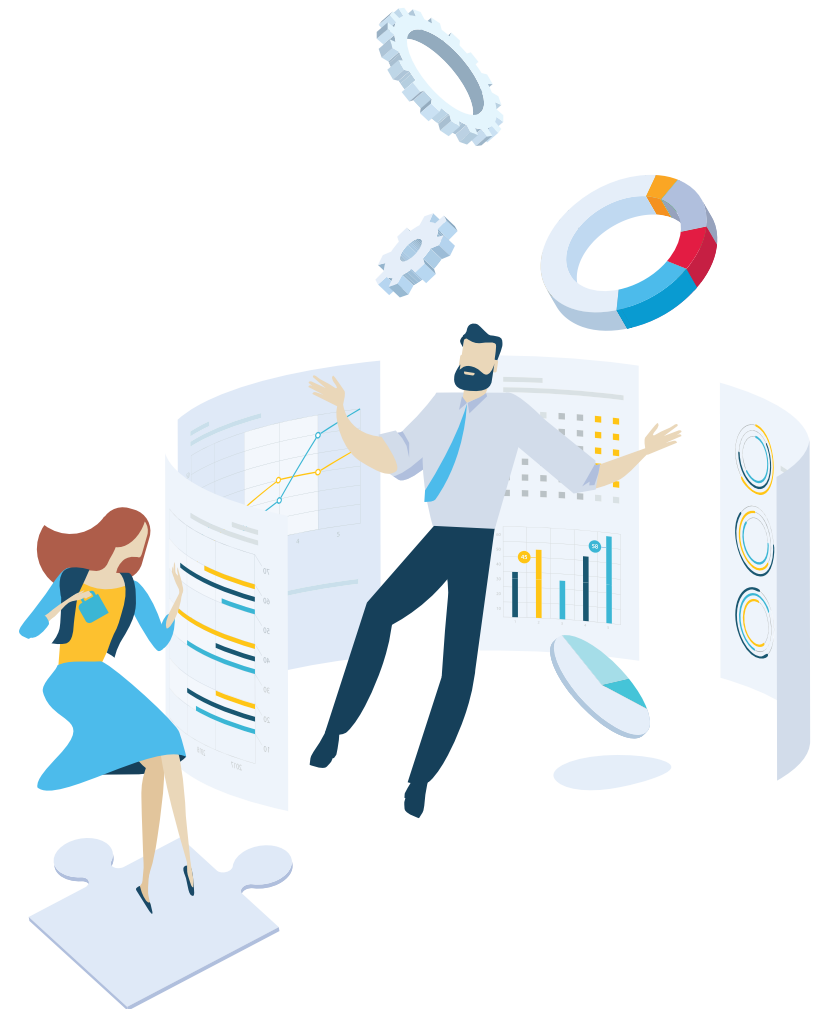
The Keyrus Approach

We understand the importance of supporting your day-to-day operations, and our dashboards are specifically tailored to meet your unique needs.

Whether you're a manager or executive, our comprehensive analytics solutions provide you with the tools to transform raw data into actionable intelligence, enabling you to stay ahead in a rapidly evolving business landscape.

Thanks!

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