
INTRODUCTION

Digital dashboards are an excellent tool for quickly communicating the status of key performance indicators (KPI). The visual presentation of a digital dashboard allows executives and managers to quickly identify problem areas and take immediate action. Like all tools digital dashboards must be designed with the end user in mind and with a specific purpose.

Digital dashboards are often included as part of a corporate performance management, Six Sigma, or balanced scorecard initiative. Discipline must be exercised in setting user expectations when a dashboard is used in these situations. The digital dashboard is only a presentation tool for KPI's defined during the corporate performance management, six, sigma, or balanced scorecard effort. Users need to understand this differentiation.

Through our client work the Rainmaker Group has participated in numerous digital dashboard and information analysis projects. We have compiled the following dashboard recommendations and best practices based on our experience and research.

KPI = Key Performance Indicator (e.g. sales by product, inventory turns, units produced)

- KPI's should be indicators only, analysis is accomplished via drill-down.
- KPI's should provide: status, trend, variance to plan/forecast/budget/pacing. This context is critical in helping users understand the impact and severity of the indicator.
- KPI's must be actionable. For a detailed explanation see our whitepaper on designing effective KPI's.
- The dashboard should be tabular providing a tab for each major functional area (e.g. marketing, finance, sales, product, etc.) and should include a "my KPI's" tab.
- User's eyes will naturally track from top left to right and then across the bottom from left to right. Digital dashboard screens should be laid out with the most important KPI's in the upper left quadrant of the screen and then track as indicated in figure 1.

Figure 1

1	2
3	4

- Users should be presented with a library of KPI's which can be added to their dashboard by functional area. This simple customization provides end users with the ability to setup their desktop to meet their needs.
- Content is king. Do not roll out a new functional area (e.g. marketing, finance, etc.) until there are at least 3 to 5 KPI's available for users to select.
- Three to seven KPI's per tab seems to be most effective.
- Overall the median number of KPI's on most user's dashboards is 20 across all functional areas. (e.g. 3 to 7 KPI's per tab, with 3 to 5 tabs).
- KPI's should be indicators only; analysis is accomplished via drill-down.
- All KPI's should be "drillable" to access additional detail and conduct further analysis.
- Be judicious in your use of graphic icons and color coded indicators. Too many graphics or the proverbial spinning logo can quickly confuse or annoy users.

Recommended reading

- Show Me the Numbers by Stephen Few
- Performance Dashboards by Wayne Eckerson

A complete list of dashboard design best practices is available by contacting sales@rainmakerworks.com