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The ‘Spicy Design’ Dashboard Checklist

Want to turn a run-of-the-mill report into a “spicy” dashboard — adding that extra touch that ensures your stakeholders can confidently trust and use your dashboard to make the right insights-driven decisions. The checklist includes items related to visual design, usability, insights, and trust — a manual step that requires the human eye to master.

Vital Signs:

The dashboard is owned by an active employee.
 The dashboard has a description.
 If it has custom permissions, then the dashboard has been shared using an LDAP group.

Dashboard is not powered by any deprecated datasets (as defined in a separate Data Lifecycle Framework).
 The dashboard is on a reload schedule, and its last two consecutive data reloads did not fail.

Spicy Checklist:

Visual Design

Structure the layout to follow a logical pattern of western reading (top to bottom, left to right), placing the most crucial information above-the-fold.

Choose colors suitable for data visualization, such as Tableau/ Looker Studio defaults, ColorBrewer, or Spotify’s own Data Viz Color Palette.

Use diverging or sequential color palettes appropriately.

Select colors that pass a color blind simulator test, with a color blind audience in mind.

Ensure color usage is consistent across the dashboard.

Include Color Legends when color is used; place the legend near the color usage.

Emphasize BANs (Big Ass Numbers), if used — big and bold to get attention.

Use consistent and appropriate formatting styles for titles, headers, labels, etc.

Remove or de-emphasize unnecessary grid lines, axis lines, axis titles, or labels.

Use appropriate chart types.

Trust

Ensure displayed metric values match other trusted sources.

Peer Review the SQL (data) that powers the dashboard.

Include the date when the data was last updated.

Give the dashboard a clear, recognizable title.

Give all tabs of a dashboard clear, readable titles, hiding unused tabs.

Include information about the displayed metrics in the description.

Publish workbooks in the appropriate folder.

Usability

Include instructions for user when actions or interactivity are present.

Include an Apply button on multi-value dropdown selections.

Set filters to only show relevant values when multiple filters are in use.

Arrange filters in proper hierarchy (left to right, top to bottom) and group together with intent.

Remove unnecessary fields from tooltips, showing only relevant information.

Use user-friendly wording for field and metric names in labels and tooltips.

Check that the dashboard loads in less than 30 seconds.

Check that dashboard interactions take less than 10 seconds

Insights

Meet with stakeholders prior to development and gather feedback during and after development.

Design with a clear audience and purpose in mind, using title, descriptions, and other text to convey importance and avoid potentially redundant work.

Provide at-a-glance capability with a simple, clean layout, allowing user to monitor the metrics they care about in less than 30 seconds.

Include metric definitions.

Empower self-service analysis using flexible “slice/dice” interactions that allow user to easily compare multiple dimensions.