Checklist for effective dashboard design

You can use this short checklist to verify if your dashboard holds up to common design principles:

	Item	Description
☐	Dashboard is a single screen with no scrolling	• Confine your display to a single screen - no navigating to separate screens and no scrolling • Use multiple tabs if necessary • Enabling users to navigate to related reports and dashboards to obtain more details if necessary
☐	Provide context for the data	• Provide context for each number (e.g. compared to what? Is this good or bad? How good or bad? Are we on track? Are we doing better than we have in the past, or worse than we've forecasted?) • If applicable, display the target value, the difference versus target, any projections, any forecasts, etc • Each chart should have a title • Provide the date when the data was last updated
☐	Display high-level information only	• Use $3.8M rather than $3,848,305.93 • Watch your decimal places • Abbreviate dates
☐	Choose relevant measures	• Think carefully about the message that most directly supports the viewer's needs, and then select the measure that most directly supports that message • Don't expect the user to perform their own calculations (totals, variances, percent change, etc)
☐	Choose appropriate visualizations	• Do not use a graph when a simple table of numbers would do • Choose the correct data visualization for the data (e.g. use a line chart for time-based data, use a bar chart for categories) • Sort your bars and pie slices • Use consistent color palettes across your charts
☐	Arrange data hierarchically	• Place information according to its importance and desired viewing sequence • Segregate data into meaningful groups • The most important data should be prominent • Data that requires immediate attention must stand out

		• Data that should be compared should be close together
☐	Use text correctly	• Use one font face • Establish a hierarchy of no more than 3 headings (font size) and 1 body text size
☐	Simplify	• Eliminate redundant axis titles on charts if the title already displays that information • Remove unnecessary borders and gridlines
☐	Filters	• Place global filters that apply to everything at the top of the dashboard or report • Place local filters that apply to a specific widget near (above) that widget
☐	Branding	• Design a corporate color palette that uses the colors in your Web site or printed marketing materials • Use your corporate palette on the bars on a chart, lines on a line chart, and headings on a table • Use color consistently throughout the dashboard • Use your corporate logo in the header of the dashboard or report