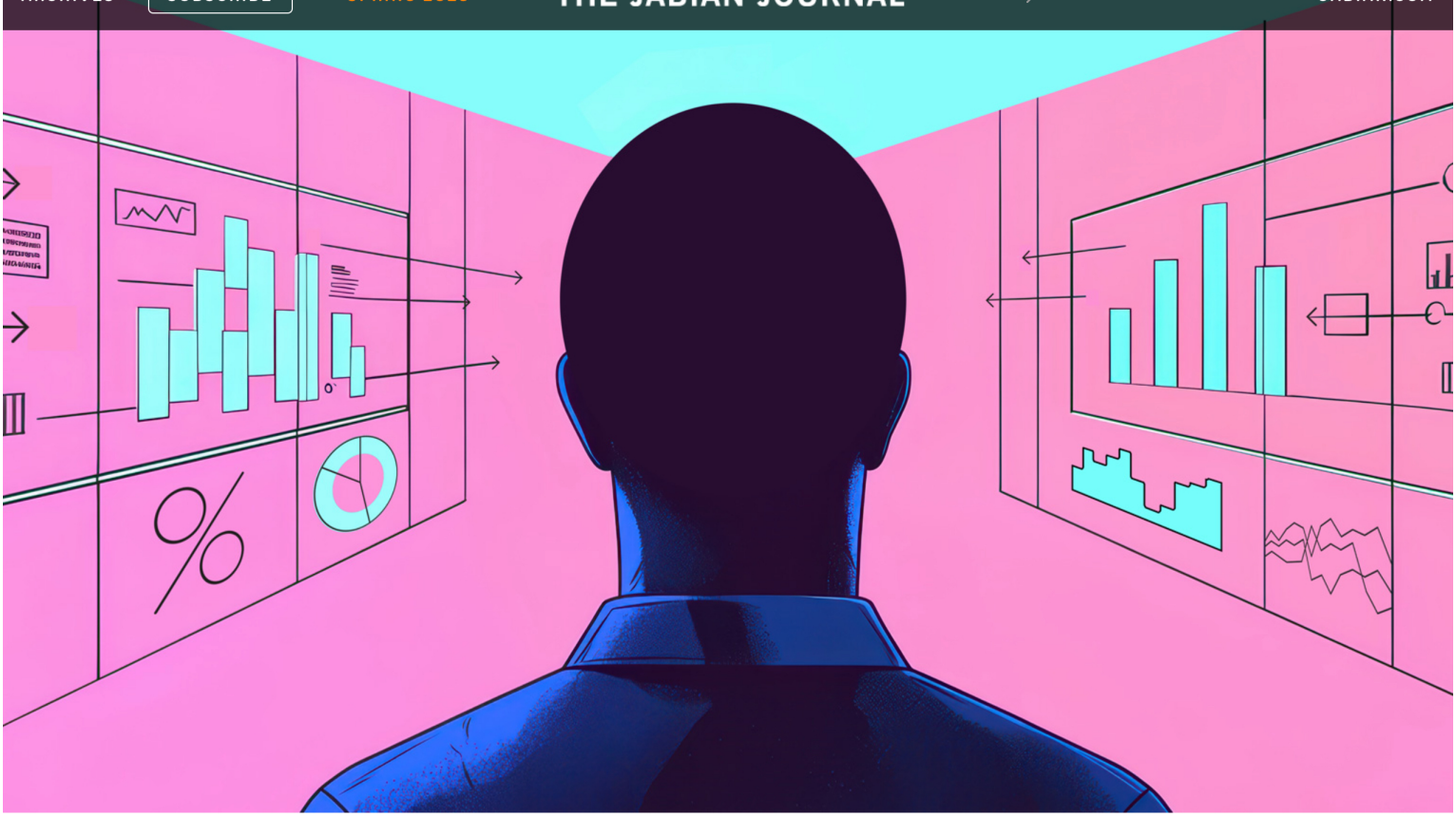


The True Value of a Dashboard: Beyond the Surface

An effective dashboard goes beyond surface visuals; it integrates strategic design, reliable data, and a structured development process to drive informed decision-making.

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Introduction

Dashboards have become essential tools in today's data-driven business landscape, serving as the backbone of organizational decision-making. Additionally, their value extends beyond the surface visuals and summaries users interact with daily. An effective dashboard results from several interconnected components: front-facing visuals, robust background data, and a strategic process for development and use. When harmonized, dashboards inform and drive transformative decision-making, organizational alignment, and continuous improvement. This article explores the critical components of a valuable dashboard and how their interplay creates tools that deliver impactful outcomes.

Front-Facing Visuals: Designing for User Experience

The user-facing aspect of a dashboard often garners the most attention—and for good reason. It's where users interact with the data, uncover insights, and inform decisions to deliver business value

where users interact with the data, uncover insights, and inform decisions to deliver business value. However, compelling visuals must go beyond mere aesthetics; they are strategic tools that guide and empower decision-making, ensuring alignment with organizational goals.

Visuals must provide clear, actionable insights at a glance, allowing users to make informed decisions efficiently without diving into raw data for additional context. For example, in a dashboard designed to identify resource constraints, visuals should directly answer critical questions—such as where bottlenecks occur and why—through intuitive and concise representations. Dashboards transform data into immediate, actionable insights by anticipating the questions users might ask themselves or their teams.

Interactive elements, such as drill-downs, layered charts, and dynamic summaries, enhance usability by making complex data accessible and actionable. While not required, these features allow users to more easily identify trends and anomalies across organizational functions, driving timely and informed decisions.

Key performance indicators (KPIs) form the cornerstone of effective dashboards. Dashboards provide a comprehensive view of organizational progress by displaying KPIs aligned with strategic priorities. Prior to this, organizations must identify and develop the indicators that best align with their strategic priorities. For instance, a dashboard focused on sustainability initiatives might monitor carbon emissions at macro and micro levels, empowering teams to adjust their carbon reduction strategies, mitigate regulatory risks, and provide transparent progress updates based on data-driven insights. As you can see, there is nuance to ensuring that KPIs validate hypotheses or complement the data shown. It is important to consider company and strategic biases when developing or identifying a dashboard's metrics. Choosing the right metrics is crucial to the dashboard's success and adoption across the organization.

Beyond metric identification, dashboards play a critical role in reinforcing organizational strategies. They visually communicate the impact of change initiatives, align stakeholders, and foster transparency. To fully leverage their potential, dashboards should be paired with comprehensive training that equips users to interpret and utilize visuals effectively. Live sessions, self-study resources, and iterative feedback loops ensure that dashboards remain relevant and impactful over time. For example, when trying to align disparate business units, it is critical to train your workforce on the new expectations and ways of working going forward, thereby reinforcing organizational change. A dashboard can be a crucial tool in this process to ensure consistency, acting as a central source of truth for all business units to anchor and adhere to.

When paired with reliable data and a thoughtful development process, front-facing visuals elevate a dashboard from a static display to a dynamic decision-making tool, empowering organizations to navigate complexity with clarity and precision.

Background Data: The Foundation of Reliability

While visuals capture attention, background data makes a dashboard reliable, accurate, and actionable. A dashboard's foundation lies in strong data practices, encompassing data structure, access control, hygiene, and maturity.

At Jabian, our data capability model is a key tool used to assess executive reporting dashboard readiness. This model displays key aspects of any company's data and information strategy and is often used to understand and determine key areas of focus for data visualization within an organization.

Clean, well-maintained data is essential for dashboard reliability. Organizations should establish robust data management processes, including regular audits, validation checks, and adherence to methodologies such as the ACCT framework (Accuracy, Completeness, Consistency, and Timeliness).

These practices ensure that data is accurate, standardized, and up to date, enhancing the dashboard's utility.

Before the creation of such dashboards, organizations should first ask a list of key consideration questions to determine their dashboard readiness:

1. How well are you able to make decisions based on the data provided to you?
2. Do you have the best information possible to make strategic business decisions?
3. Do you have the best information possible to make operational business decisions?
4. Are your metrics and KPIs aligned with your overall business strategy?
5. How clearly defined are your reporting needs?
6. To what degree do your business users have access to dashboards?
7. To what extent are processes documented for gathering business requirements for designing reports and analytical capabilities?
8. Are there defined and accepted KPIs in place to measure data performance and value against business needs?
9. How is your and your team's time divided between preparing data for analysis and analyzing data for insights?
10. How well defined are the roles and responsibilities within your analytics capability versus self-service reporting in the business?

How your organization answers these questions will determine your data maturity. Data maturity also plays a pivotal role in dashboard development. Understanding data maturity is critical for tailoring dashboards to an organization's capabilities. Jabian's data maturity model consists of five levels: **Undefined**, **Managed**, **Defined**, **Quantitatively Managed**, and **Optimized**.

1. Undefined

Data is manually collected and stored in disparate systems.

Minimal to no organizational consistency or standardization exists.

Insights are often reactive, incomplete, outdated, and solely intuitive.

2. Managed

Teams or departments manage data independently, with limited cross-organizational collaboration.

Some standardization exists, but practices are siloed and inconsistent across departments.

Dashboards are primarily localized, serving individual teams or departments.

3. Defined

Data is defined and accepted in pockets across the organization.

Organizationwide dashboards offer unified views of KPIs, fostering collaboration across teams in some cases.

Insights are consistent and reliable, supporting strategic decision-making at most levels.

4. Quantitatively Managed

Predictive analytics and real-time data integration enable proactive decision-making.

Automated data governance and quality control ensure robust, accurate insights.

Dashboards incorporate advanced features, such as trend forecasting and anomaly detection.

5. Optimized

Data is fully embedded into organizational strategy, driving innovation and agility.

Advanced tools, including AI and machine learning, enable adaptive and continuously evolving dashboards.

Insights are seamlessly aligned with strategic goals, empowering data-driven transformations.

As data practices evolve, so too does the sophistication of dashboards. Below is how each maturity level may answer the above questions.

Question	Level 1 Undefined	Level 2 Managed	Level 3 Defined	Level 4 Quantitatively Managed	Level 5 Optimized
How well are you able to make data-driven decisions based on the reports/dashboards presented to you?	Not at all, purely intuitive decisions	Not well, a lot of discussion about the data but still mostly intuitive decisions	Somewhat well, consider the data in the discussion to make decisions	Well, have most of the data required to make an informed decision but supplement with discussion	Easily, have all required data in a digestible format to make decisions
Do you have the best information possible to make strategic business decisions?	Not at all, purely intuitive decisions	Not well, a lot of discussion about the data but still mostly intuitive decisions	Somewhat well, consider the data in the discussion to make decisions	Well, have most of the data required to make an informed decision but supplement with discussion	Easily, have all required data in a digestible format to make decisions
Do you have the best information possible to make operational business decisions?	Not at all, purely intuitive decisions	Not well, a lot of discussion about the data but still mostly intuitive decisions	Somewhat well, consider the data in the discussion to make decisions	Well, have most of the data required to make an informed decision but supplement with discussion	Easily, have all required data in a digestible format to make decisions
Are your metrics and KPIs aligned to your over all business strategy?	Not at all	Very little	Sometimes	Often	Always
How clearly defined are your regular reports/ reporting needs?	Not clear, always different numbers depending on who creates the report and requires much discussion to get alignment	Not clear, often different numbers depending on who creates the report and requires some discussion to get alignment	Somewhat clear, sometimes different numbers depending on who creates the report but requires minimal discussion to get alignment	Mostly clear, fairly consistent numbers regardless of who creates the report and requires minimal discussion to get alignment	Clear, consistent numbers every time regardless of who creates the report, and alignment exists across the business
To what degree do your business users have access to dashboards and/or standard reporting to meet their business requirements?	Not at all	Very little	Sometimes	Mostly	Completely
To what extent are processes documented for gathering business requirements for designing reports and analytical capabilities?	Nothing dcoumented, communicated, or implemented	Very little documented and mostly not communicated or implemented	Somewhat documented, communicated, and implemented	Fully documented and mostly communicated and implemented	Fully documented, communicated, and implemented
Are there defined and accepted KPIs in place to measure data performance and value against business needs?	Not at all	Some in place; not communicated or adopted	Defined and accepted in pockets across organization	Defined and accepted in most areas across organization	Defined and accepted across organization
How is your and your team's time divided between preparing data for analysis and analyzing data for insights?	No analytics/analysis, all data consolidation and preparation	Very little analytics/analysis, mostly data consolidation and preparation	Some analytics/analysis, some consolidation and preparation	Regular analytics/analysis provided, mostly automated data consolidation and preparation	All analytics/analysis and fully automated data consolidation and preparation
How well defined are the roles and responsibilities within your analytics capacity vs. self-service reporting in the business?	Nothing dcoumented, communicated, or implemented	Very little analytics/analysis, mostly data consolidation and preparation	Somewhat documented, communicated, and implemented	Fully documented and mostly communicated and implemented	Fully documented, communicated, and implemented

Thought Exercise

Let's take a midlevel, quickly growing company with local maturity data. Each department in this company has its own KPIs and reporting templates for monthly decision-making meetings. With this structure, each department has its own dashboards, and information sharing is minimal. Because every dashboard looks different, there is no cross-functionality of insights; this can be seen in their decision-making. Due to each department having different success thresholds, there was inconsistency with year-end reporting.

For example, team A interpreted a "spend vs. forecast" variance of +/- 10% as a successful year, while team B reported the same variance as a poor year. This inconsistent interpretation between teams confused the CEO receiving the reports, so they initiated a new strategic goal of advancing their data maturity to improve data sharing and reporting.

With new data management software, this company was able to centralize its data. Teams could now collaborate to define KPIs, success measures, and a consistent dashboard layout. Although it required dedicated resources and a well-defined process, reports were completed more efficiently and effectively by the end of the following year.

Now, there are companywide dashboards all departments use to tell their success stories and

highlight the interconnectivity of the company's joint strategic initiatives. This gives the CEO confidence that departments are on the same page and driving toward their ultimate goals as a team. This illustration displays how different data maturities can affect one's dashboards and how, as one's data maturity evolves, so will dashboards and decision-making capabilities.

Organizations with centralized, governed data and advanced analytics capabilities at higher maturity levels can create dashboards with predictive and real-time insights. Conversely, organizations at lower maturity levels must focus on improving their foundational data practices before realizing the full potential of dashboards.

The Process of Building a Dashboard: Strategy Meets Execution

Building a great dashboard requires a deliberate and strategic approach. The process involves four phases, each critical to the final product's success.

Phase 1: Inventory and Analysis

Organizations must first assess their data maturity and inventory existing data sources. This phase establishes the foundation for aligning the dashboard with organizational goals.

Why is this important?

1. As covered in the previous section, an organization's data maturity directly determines its dashboarding and decision-making capabilities. Understanding this maturity helps set realistic expectations for what the dashboard can achieve immediately versus what will require future growth.
2. Inventorying data sources ensures that the dashboard draws from reliable, relevant, and complete datasets, avoiding potential gaps or inconsistencies that could undermine decision-making.

Phase 2: Wireframing and KPI Management

Wireframing involves designing the dashboard layout with organizational objectives in mind. Engaging stakeholders early in this process helps ensure that the final product meets user needs while reducing the risk of costly redesign.

Why is this important?

1. Wireframing allows teams to translate strategic objectives into visual and functional elements, ensuring that the dashboard is a practical tool for decision-making. Think of it as prototyping a concept before developing it.
2. Engaging stakeholders during this phase fosters alignment across teams and ensures that the dashboard reflects the needs of all key users. This collaborative process reduces miscommunication, prevents significant rework in the development process, and ensures the intended return on investment.

Phase 3: Visual Design and Development

During this phase, developers create intuitive, user-friendly dashboards that enable users to explore data and extract actionable insights. A well-designed dashboard balances aesthetics with functionality, ensuring that it aligns with organizational goals.

Why is this important?

1. This phase transforms theoretical designs into tangible tools. Striking the right balance

between aesthetics and functionality ensures that the dashboard is visually appealing and delivers insights effectively.

2. Intuitive visual design enhances user engagement and adoption, preventing the dashboard from becoming an underutilized asset. Thoughtful development also ensures scalability for future data integrations or feature enhancements.

3. Aesthetically pleasing visuals stem from well-executed design fundamentals that make dashboards easier for organizations to adopt and use. These principles include but are not limited to visuals being read left to right and top to bottom, color theory, and size and proportional focus.

Phase 4: Training, Change Management, and Feedback

Training and change management ensure that users understand how to leverage the dashboard effectively. At the same time, collecting user feedback allows developers to refine and improve the dashboard post-launch. When users feel they have ownership in a tool's development, they are more likely to see its value and promote the benefits to others driving adoption across the organization.

Why is this important?

1. Driving dashboard awareness is critical to realize the return on investment.

2. Even the most sophisticated dashboard may fail to deliver value without proper training, as users struggle to understand or trust its insights. Training builds user confidence and competence.

3. Feedback loops ensure that the dashboard evolves alongside organizational needs, remaining a relevant and impactful tool. This iterative approach allows teams to address issues quickly and continuously improve user experience and functionality.

The phases above are an iterative process. Dashboarding is not always as straightforward as it may seem. As mentioned in the data section, solely based on the organization's maturity level, these phases can look different and be revisited countless times to achieve the expected result. Each creation phase must have a clear deadline to avoid delays in bringing the dashboard to life. Completing all phases and then iteratively improving over time ensures that the dashboard fulfills its purpose: fostering meaningful and timely decision-making. Continuous improvements should maximize return on investment without hindering the dashboard's development or immediate usability.

The Path to Dashboard-Driven Success

Do you or your organization use dashboards for reporting or decision-making? Have you considered your data maturity level? Does the data presented in your dashboards support your company's strategic goals? Does the body of metrics, design, and functionality of the dashboard meet the end user's needs? Before finalizing a dashboard, an organization should be able to answer all these questions.

To gain the ability to deliver meaningful, actionable insights through a dashboard requires a seamless integration of strong visuals, reliable data, and a thoughtful development process. By approaching dashboards holistically, organizations can create tools that inform and transform decision-making processes, driving measurable and sustainable outcomes. Only at this point will your organization realize the true value of a dashboard.

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