

Data Dashboarding Playbook

Your guide to develop, deploy,
and maintain custom data
dashboards for every team



Welcome to the Data Dashboarding Playbook

Easycoder has compiled this playbook to explain how to set up data dashboards that are effective, efficient, and improve decision-making.

Who should read this playbook?

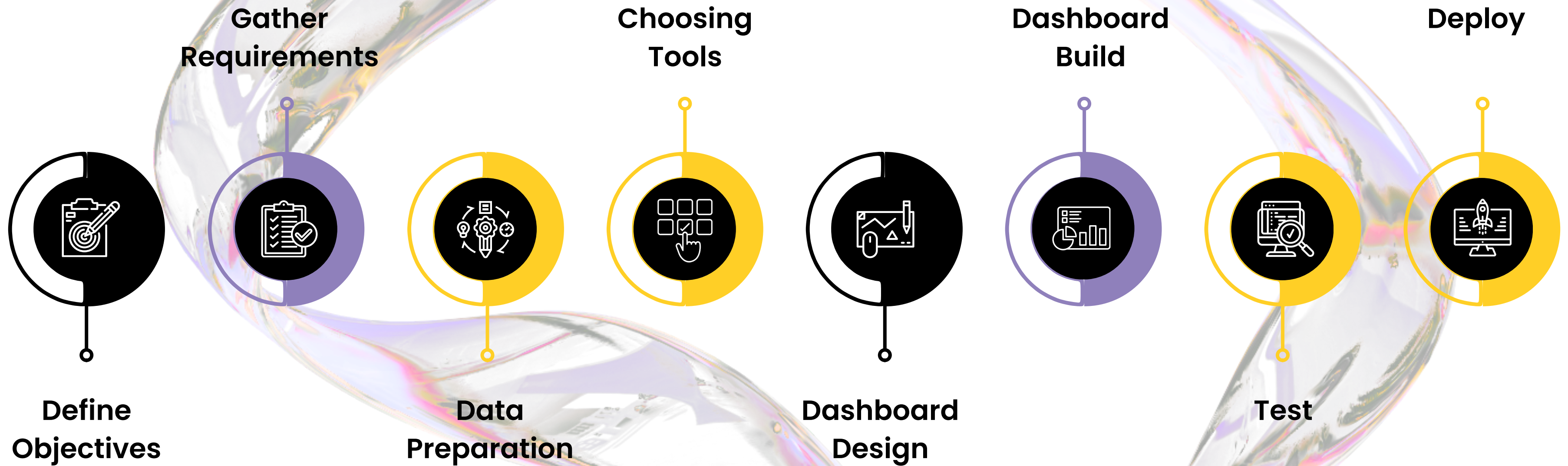
- Business Stakeholders
- Project Managers
- Data Analysts
- IT Professionals

What will you find in this playbook?

- Understanding the basics of data dashboarding
- Step-by-step instructions on setting up your first dashboard
- Tips for maintaining and optimising your dashboards
- Best practices for dashboard design and data visualization



Data Dashboarding Process



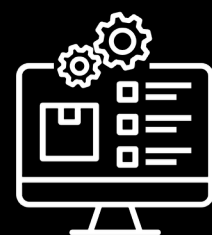


Define Objectives and Users

Define your goals for the dashboard and its users. Understanding the objectives will guide the design and functionality of your dashboard. Consider what decisions the dashboard should help make.

Examples

If the dashboard is for a retail manager, the goal might be to track daily sales and inventory. This would help manage stock and promotions.



Actions to take

- ☒ List your main objectives for the dashboard
- ☒ Identify the primary users and consider their needs and tech savviness
- ☒ Determine the critical decisions users will make based on the dashboard





Gather Requirements

Talk to the potential users of the dashboard and collect all their requirements. Know their preferences, what data they need, and how they'll use the dashboard. This step ensures the dashboard is useful to its audience.

Examples

Users may need to see monthly trends in sales data. They want to compare against targets and KPIs that affect their work.



Actions to take

- ✓ Conduct interviews or send out surveys to future users
- ✓ Compile a list of required features and data points
- ✓ Prioritise the features based on user needs and dashboard objectives





Data Collection and Preparation

Gather data for the dashboard from various sources. These could include internal databases, spreadsheets, or online data services. Ensure the data is accurate and clean. It must be error-free, with no duplicates or irrelevant info.



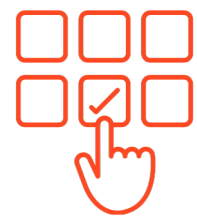
Examples

You may need to collect sales data and inventory levels from an internal database. Ensure the data is current and consistently formatted. You are preparing your company's sales data to create a dashboard that tracks monthly revenue, top-selling products, and regional performance. You will want to clean the data to get accurate dashboards. This will include things like identifying duplicates, standardizing formats, handle missing Data, convert fields to the correct data types, filter outliers and errors, merge data from various sources, and add calculated fields.

Actions to take

- ☒ Identify and access data sources
- ☒ Clean the data to ensure accuracy
- ☒ Organise the data logically for easier use in the dashboard





Choose the Right Tools

Select the dashboard tool that fits your needs and budget. Consider tools that are easy to use. They must handle the data you need to display. The tool should also integrate easily with your existing data systems.

Examples

For a non-tech-savvy user, tools like Power BI or Tableau work best. They have easy drag-and-drop interfaces for making dashboards.



Actions to take

- ☒ Research and compare different dashboard tools
- ☒ Consider factors like cost, ease of use, and compatibility with existing systems
- ☒ Select a tool that meets the requirements gathered in the previous steps



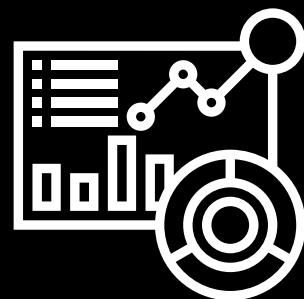


Design the Dashboard Layout

Plan the dashboard layout. Make it intuitive and easy to read. Organise information logically, grouping related data together. Keep the design simple to avoid overwhelming the users.

Examples

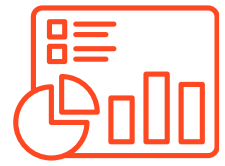
Place key metrics, like daily sales, at the top. Then, add trend graphs and detailed tables below. This ensures a logical flow that matches users' thinking.



Actions to take

- ☒ Sketch a rough layout considering which data points are most important
- ☒ Get feedback on the layout from potential users
- ☒ Revise the layout based on feedback to ensure usability



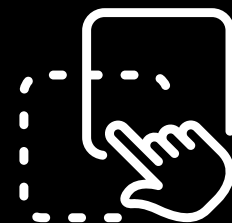


Build and Develop the Dashboard

Start putting together the dashboard using the selected tool. Import the prepared data and use the tool's features to create charts, graphs, and tables as per your layout plan. Customize the design to make it visually appealing.

Examples

In Power BI, you might drag and drop sales data into a line chart to show trends over time. Then, use conditional formatting to highlight significant variances.



Actions to take

- ☒ Import the data into the dashboard tool
- ☒ Create visual representations of the data according to the layout
- ☒ Customise the aesthetic elements (colors, fonts) to make the dashboard engaging



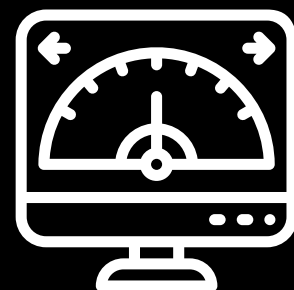


Test and Validate

Check the dashboard thoroughly to ensure it works as expected. Test it with real users to get feedback on its functionality and ease of use. Make sure the data displayed is accurate and updates correctly.

Examples

Test all dashboard features. Ensure there are no bugs or misleading data. Adjust as needed based on user feedback.



Actions to take

- ☒ Perform technical tests to check for bugs
- ☒ Conduct user testing sessions to gather feedback
- ☒ Refine the dashboard based on the testing outcomes



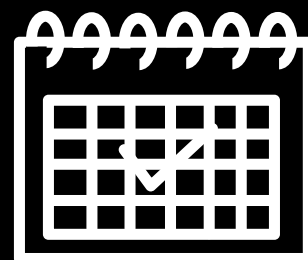


Deploy and Maintain

After testing, deploy the approved dashboard to all users. Provide training if necessary. Update the data on the dashboard regularly. Improve it based on user feedback and changing needs.

Examples

Schedule monthly check-ins with users to discuss issues and updates. This will keep the dashboard useful and relevant.



Actions to take

- ☒ Set up access for all users
- ☒ Provide training and documentation on how to use the dashboard
- ☒ Regularly update the data and refine the dashboard as needed



You have reached the end of the playbook

Thank you for taking the time to walk through our playbook for setting up data dashboards.

Easycoder is your partner in developing data dashboards your team can use. They turn your complex data into actionable insights.

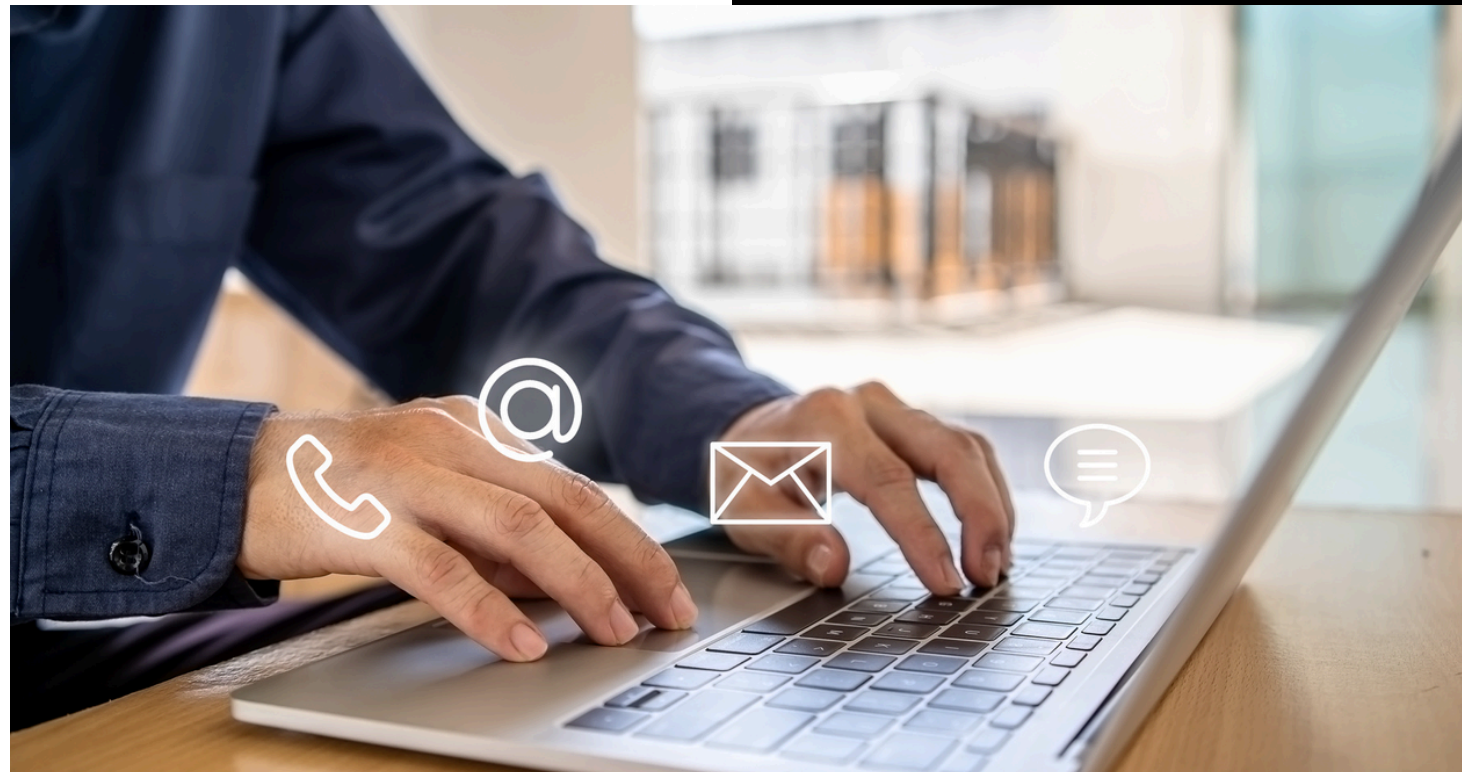
Every data point you collect is a step toward better decisions and improved business processes. Let's build powerful dashboards that not only meet but exceed your expectations.

For continued support or any queries, do not hesitate to contact us. Let's embark on this transformative journey together and start using the true power of your data.



Get in Touch

To get started on your custom GenAI solution, Easycoder is here to partner with your organisation and lend expert services to bring your solution to the market.



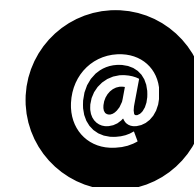
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