

Dashboard Creation Best Practices

Developing compelling dashboards is more involved than simply reporting on the information you are collecting. These bits of data need to work collaboratively to paint an overall picture of your business's performance and provide insights based on established KPI's in a way that is easy for your audience to interpret. When creating dashboards there are a few key things to keep in mind.

KNOW YOUR AUDIENCE

To determine what to report, and how to present it, you must first know your audience. What position and role do they have within the organization? This will allow you to understand what the intended purpose of the dashboard is and how it will be viewed. For example, your outside sales team may be more likely to need mobile reporting as compared to their marketing colleague's.

By meeting with each stakeholder you can understand the information they need to best perform their job, which will in turn drive the goals and KPI's that are created as part of the underlying structure.

DETERMINE YOUR GOALS

Define your goals by determining the conclusions your audience is looking to draw and what decisions they are looking to make based on the information that will be presented. Is the goal of the dashboard to visualize individual rep revenue potential? Or perhaps measuring pre funnel activity such as web clicks and downloads to measure the rate of MQL lead conversion.

By setting a clear expectation to the purpose of the dashboard the underlying measures can be structured and collected to present in a visually appealing way.



CHOOSE RELEVANT KPI'S

Now that you know your audience, and their goals, you can create the relevant KPI's for your dashboards to provide the metrics that will display your intended performance measurements. Here is where you can leverage leading and lagging indicators to paint an overall picture. For instance, if you are tracking to a new business sales goal, you may want to include average deal size, number of quotes over a set period of time and upcoming deal closure timing to understand if you are headed in the right direction.



Developing effective dashboards is an important part of your reporting strategy. By taking these three guidelines into account you will be able to create collaborative dashboards that will provide a high level of value to your business in managing and monitoring overall performance against objectives.



Developing the optimal data driven strategy for you business can have a large impact on how your teams are managed and perform. Lets talk about how [Kallan Sales Development](#) can help you build the right plan.

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