

DOMO  
**city tours**  
2018

**EFFECTIVE DASHBOARD DESIGN:  
STRATEGIES & TACTICS**

Brent Dykes | Director, Data Strategy



**ARE YOUR USERS FEELING OVERLOADED?**



# HOW DOES THIS HAPPEN?



# WHAT INFORMS DATA VISUALISATION?



AUDIENCE



BUSINESS OBJECTIVES



METRICS & TARGETS



QUESTIONS

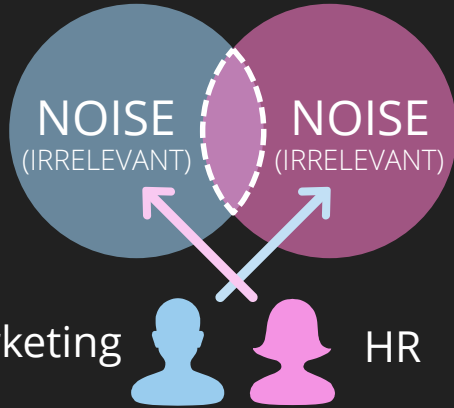
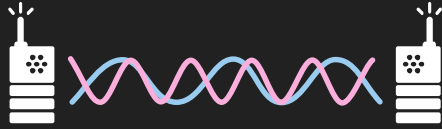


VISUALISATIONS



***HAVING A CLEAR SIGNAL IS IMPORTANT***

# AUDIENCE: HOW TO GET A CLEAR SIGNAL



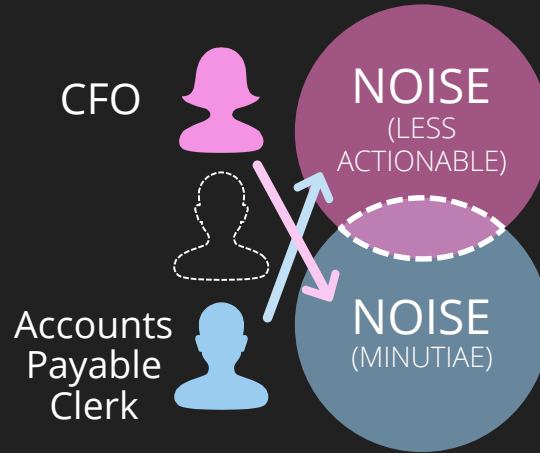
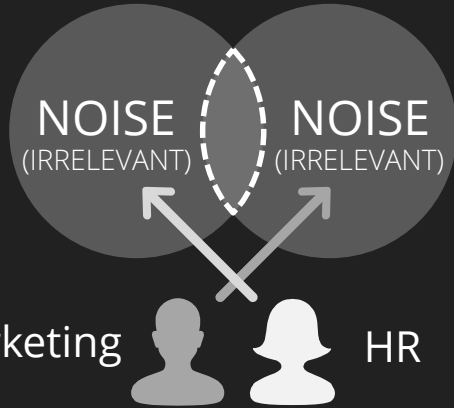
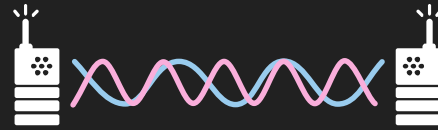
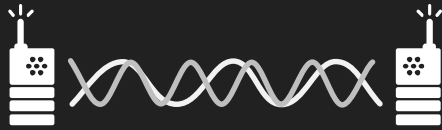
## AUDIENCE

DIVERGENT  
AREAS OF FOCUS



FOR  
THE GOOD  
OF THE  
COMPANY™

# AUDIENCE: HOW TO GET A CLEAR SIGNAL



**AUDIENCE**

DIVERGENT  
AREAS OF FOCUS

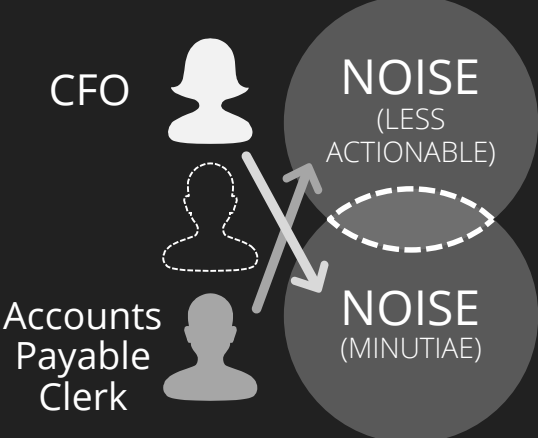
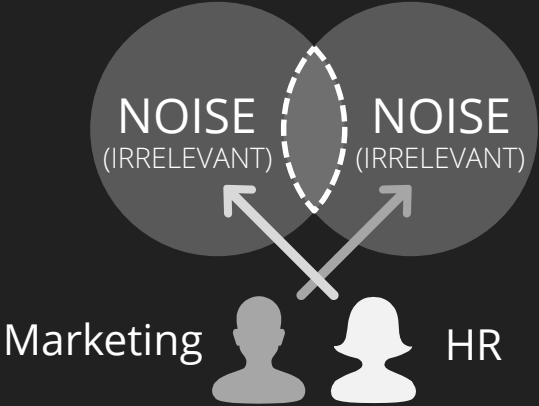
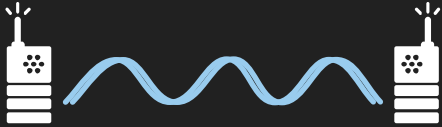
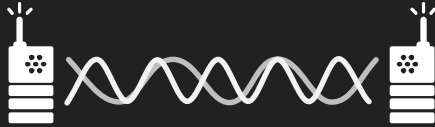
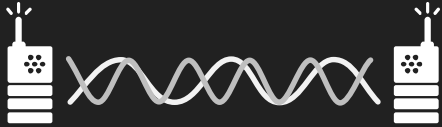
**AUDIENCE**

DIFFERENT  
LEVELS



FOR  
THE GOOD  
OF THE  
COMPANY™

# AUDIENCE: HOW TO GET A CLEAR SIGNAL



## AUDIENCE

DIVERGENT  
AREAS OF FOCUS

## AUDIENCE

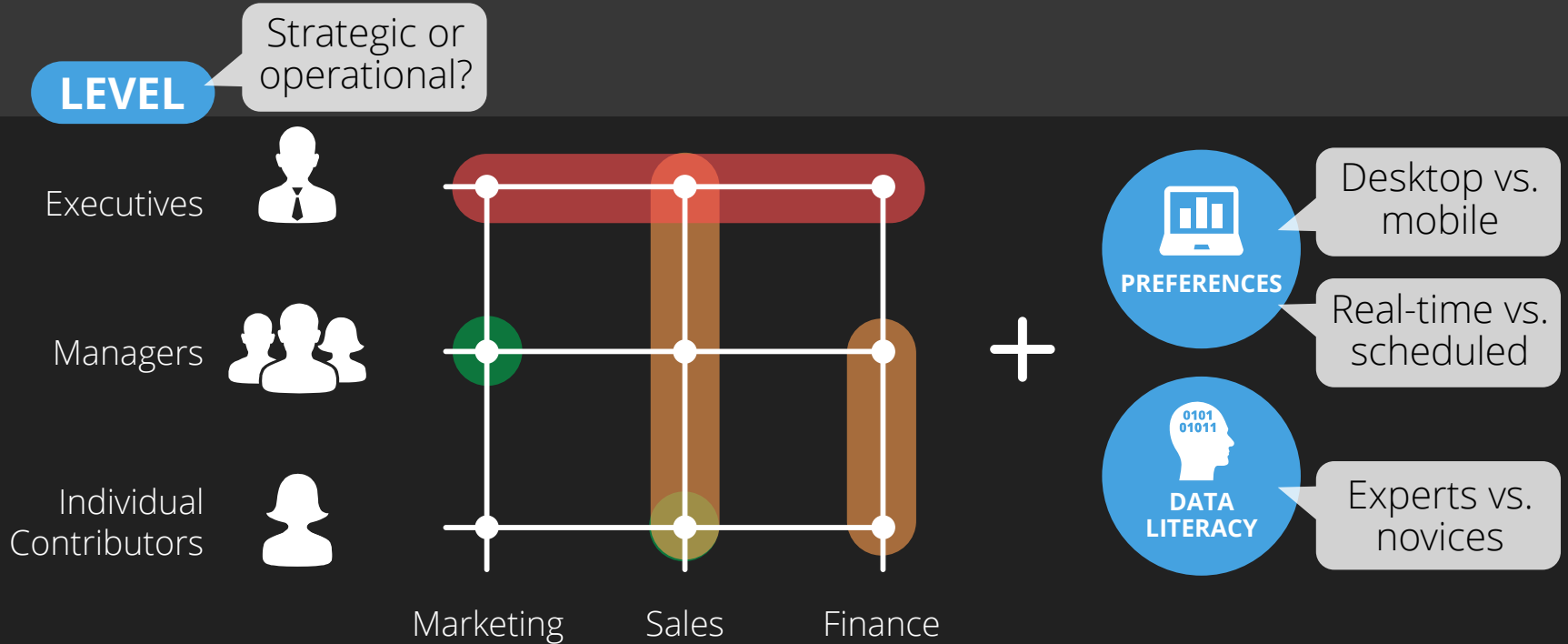
DIFFERENT  
LEVELS

## AUDIENCE

SHARED FOCUS  
+ SIMILAR LEVEL



# DEFINE YOUR AUDIENCE & THEIR SHARED NEEDS



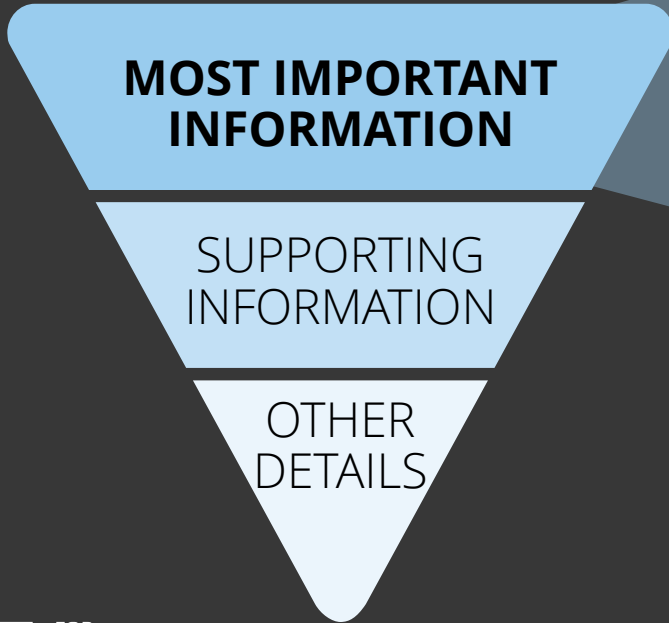
**FOCUS** Key priorities & metrics

# ***WHAT ARE THEIR BURNING QUESTIONS?***



# INVERTED PYRAMID FRAMEWORK

## INVERTED PYRAMID



## THE BOY WHO CAME BACK TO LIFE

The former missing child Will Byers has been found after a week of searching. He is presently in stable condition in Hawkins General Hospital. Byers' mother, Joyce Byers, alleges that Will was the subject of a secret government program run by the Hawkins National Laboratory. The allegation comes amidst a massive investigation into the hidden organization and its elaborate experimentation in perusal of mind control.

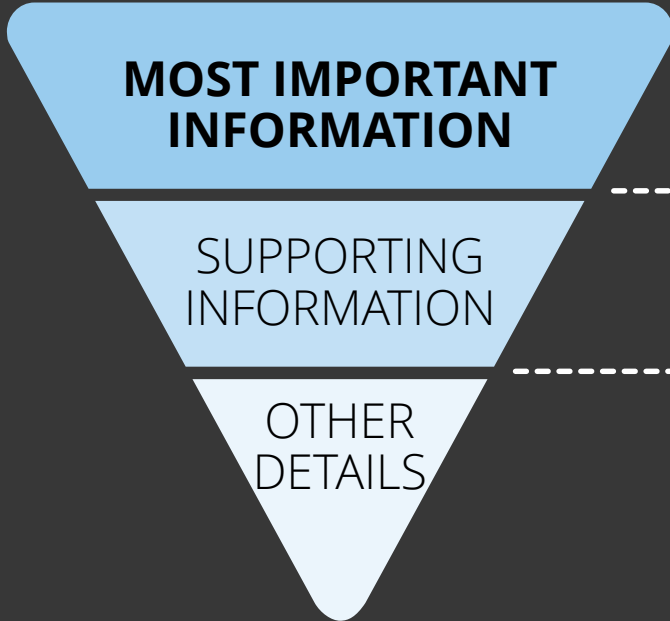
The abuse detailed in the first report includes prolonged physical duress and psychological interrogation. This government sanctioned torture has provoked outrage amongst the American people. In a statement issued yesterday morning, Ives mentioned her "disgust" with the organization saying "our own American people are being treated like the enemy... we should be directing our attention to the real target, the Soviets, not our own daughters and sons." Under legal advice, Brenner has issued no comment on...



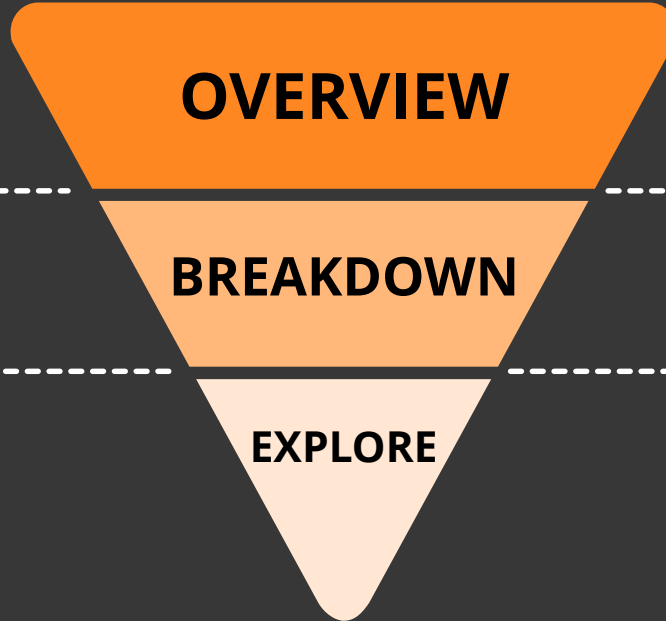
Twelve-year-old Will Byers was reported missing on Nov. 3, and it was falsely reported that his body was recovered at Sattler Quarry.

# INVERTED APPROACH TO DASHBOARD DESIGN

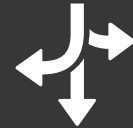
## INVERTED PYRAMID



## DASHBOARD DESIGN



HOW ARE WE DOING?

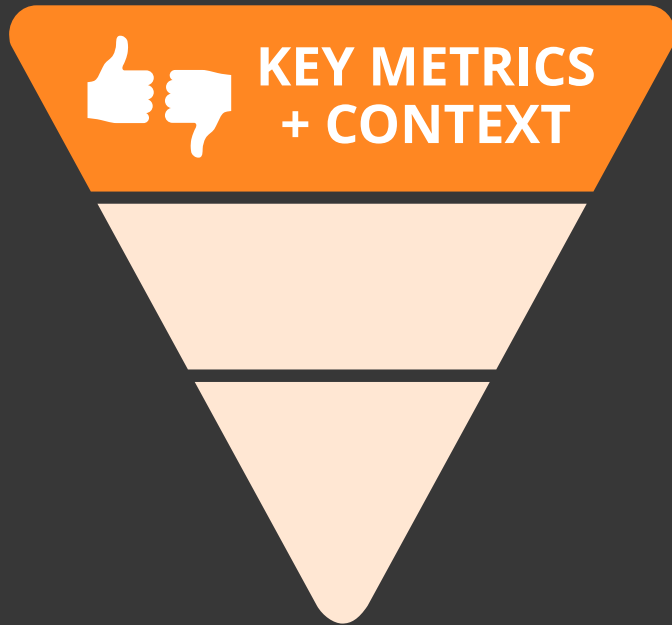


WHAT'S HAPPENING?

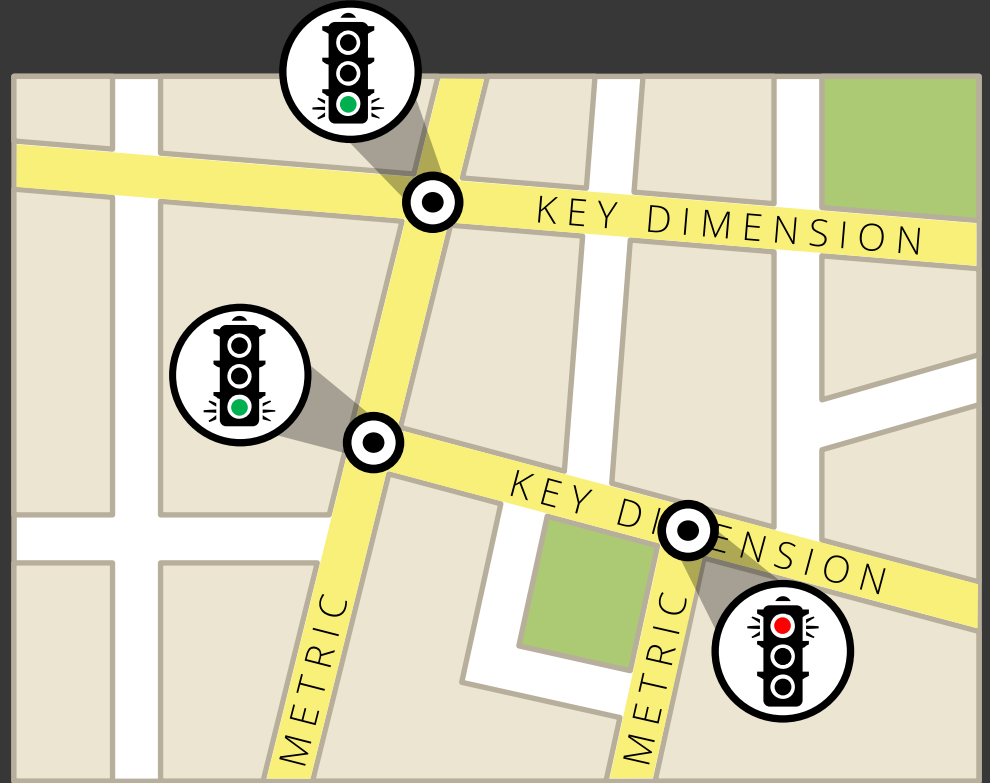
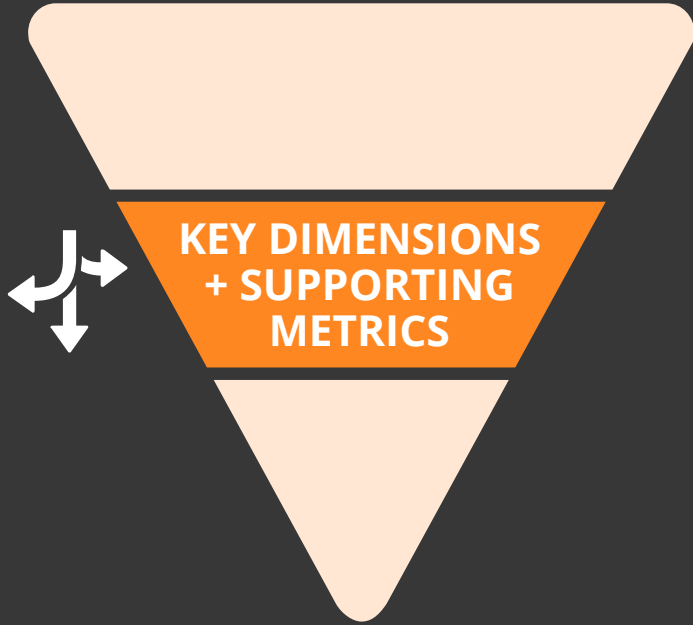


HOW CAN I LEARN MORE?

# OVERVIEW: HOW ARE WE DOING?



# BREAKDOWN: WHAT'S HAPPENING?



# EXPLORE: HOW CAN I LEARN MORE?

OTHER  
RELEVANT  
DIMENSIONS  
+ METRICS



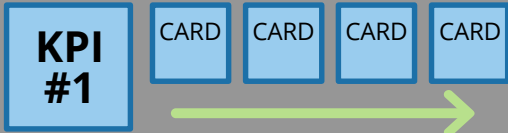
FOR  
THE GOOD  
OF THE  
COMPANY™

# HOW TO DESIGN YOUR DASHBOARD

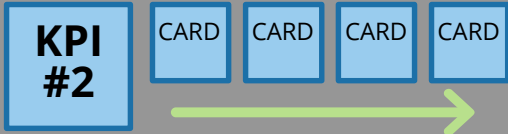


## FOCUS AREA DASHBOARD

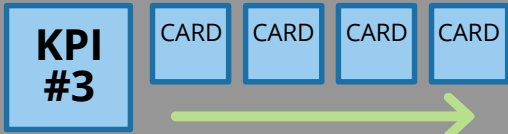
COLLECTION - FOCUS AREA #1



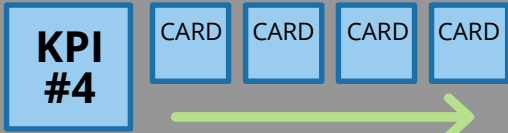
COLLECTION - FOCUS AREA #2



COLLECTION - FOCUS AREA #3



COLLECTION - FOCUS AREA #4



OVERVIEW

BREAKDOWN

## INVERTED PYRAMID DASHBOARD

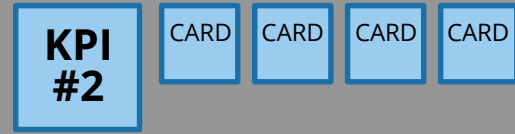
COLLECTION - OVERVIEW



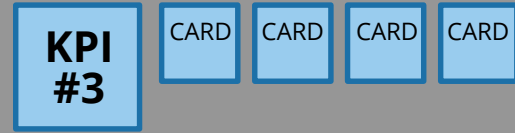
COLLECTION - BREAKDOWN #1



COLLECTION - BREAKDOWN #2



COLLECTION - BREAKDOWN #3

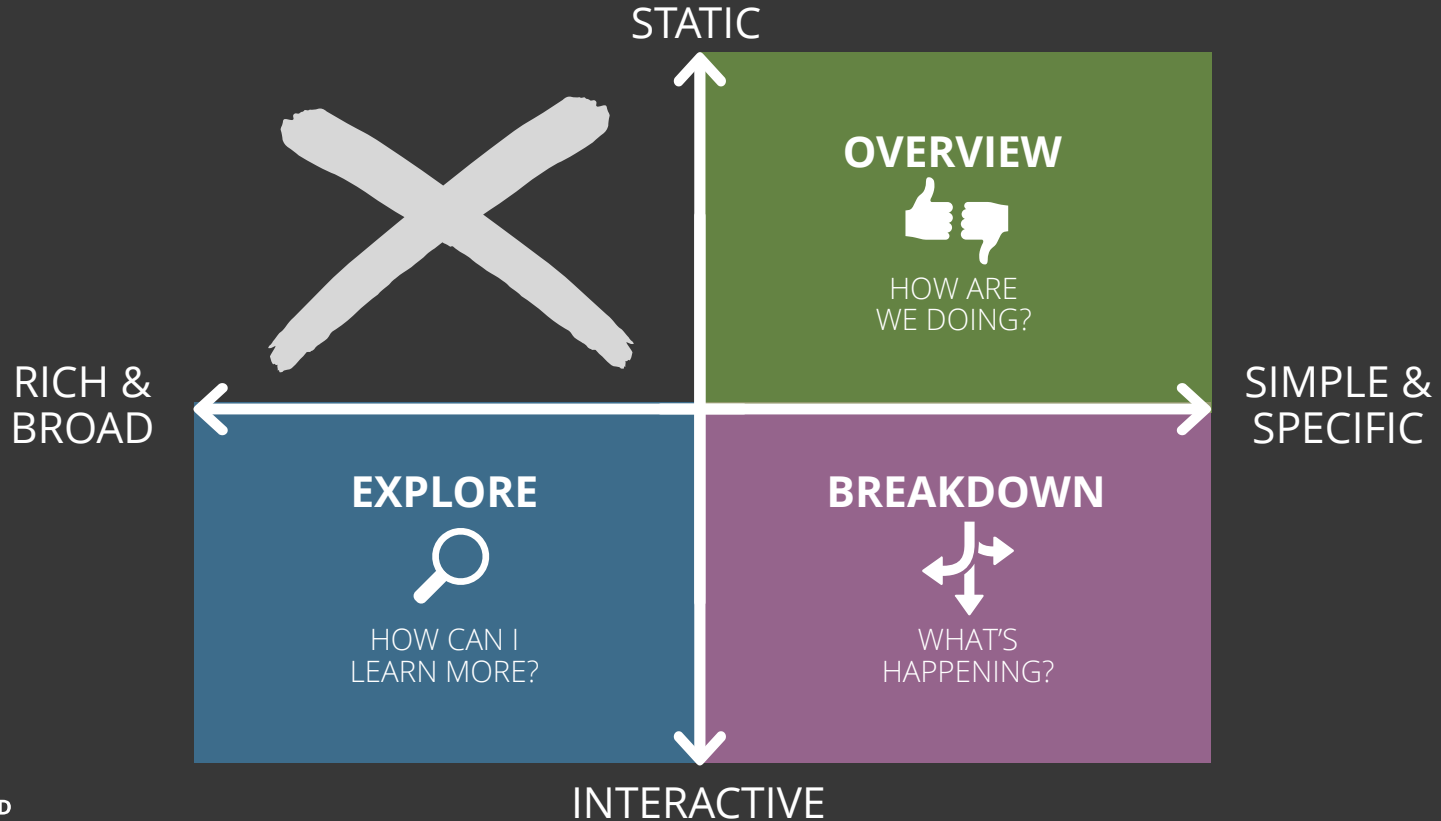




# ***VISUALISING DATA EFFECTIVELY***

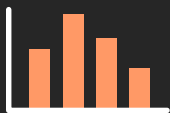


# VISUALISATION STRATEGY BY DASHBOARD SECTION



# THE RIGHT CHART TYPE FOR YOUR DATA

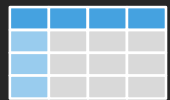
## Comparison



Bar



Lollipop

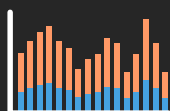


Table

## Trend



Line

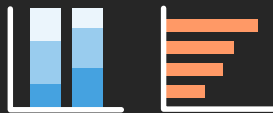


Bar



Stacked Area

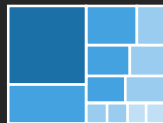
## Composition



Bar

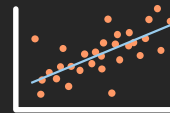


Pie & Donut



Treemap

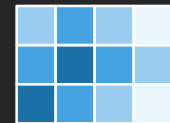
## Relationship



Scatterplot

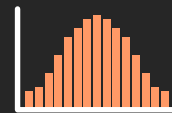


Bubble

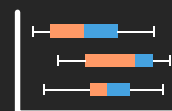


Heatmap

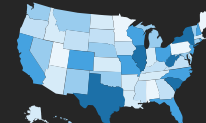
## Distribution



Histogram



Box plot



Choropleth

# NOT ALL CHARTS ARE CREATED EQUAL

	Comparison	Trend	Composition	Relationship	Distribution
OVERVIEW  HOW ARE WE DOING?	 Bar	 Line	 Donut		
BREAKDOWN  WHAT'S HAPPENING?			 Donut	 Scatterplot	 Choropleth
EXPLORE  HOW CAN I LEARN MORE?	 Table	 Stacked Area	 Treemap		

# ***OVERVIEW: WHAT CAN YOU SEE AT A GLANCE?***



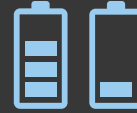
## **RULE #1**

Understood  
in 3 seconds  
or less

## **RULE #2**

No clicking or  
hovering is  
required

# WHAT'S ESSENTIAL FOR THE OVERVIEW CARDS?



**KEY RESULTS**



**CONTEXT**



**POLARITY**



**VARIANCE**



**ANOMALIES**

- Count
- Sum
- Ratio

- Historical performance (P-o-P)
- Statistical benchmarks
- Targets
- Pace (to target)
- Peer / industry benchmarks

- Positive
- Negative
- Neutral

- No change
- Slight change
- Significant change

- Potential alerts
- Actionable reminders

# THREE KEY TYPES OF OVERVIEW CARDS

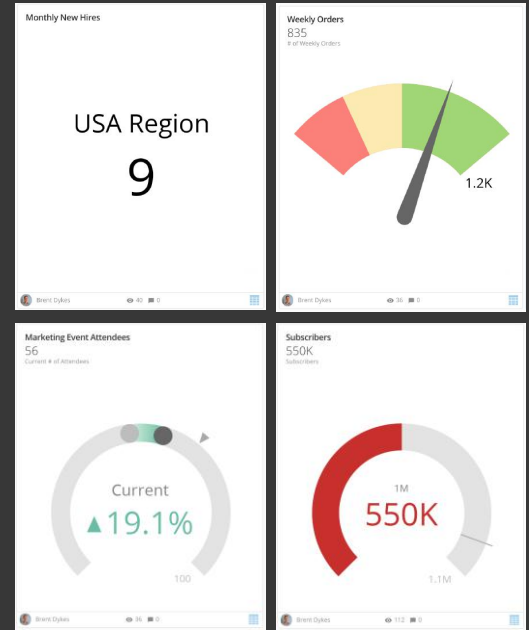
## BAR CHARTS



## LINE CHARTS



## GAUGES



# OVERVIEW: BAR CHARTS



KEY RESULTS



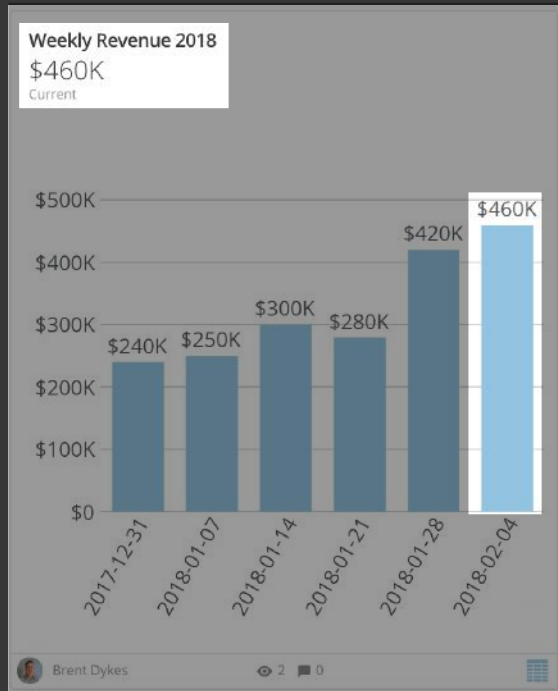
CONTEXT



POLARITY



VARIANCE



## 1. Bar





# OVERVIEW: BAR CHARTS



KEY RESULTS



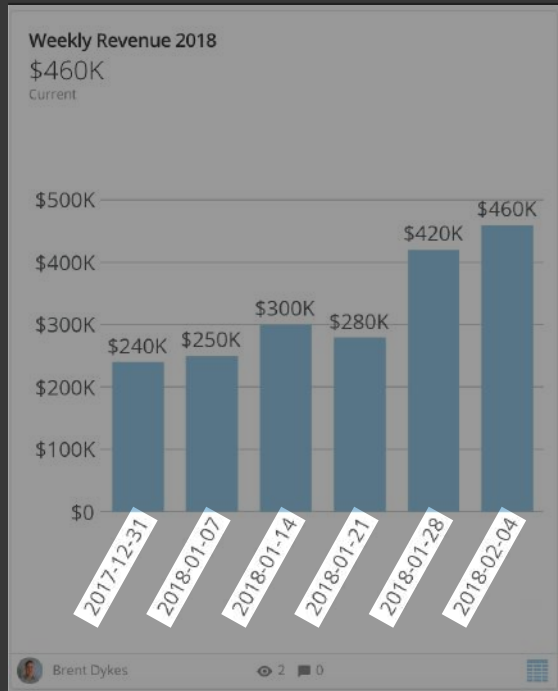
CONTEXT



POLARITY



VARIANCE



## 1. Bar



# OVERVIEW: BAR CHARTS



KEY RESULTS



CONTEXT



POLARITY



VARIANCE

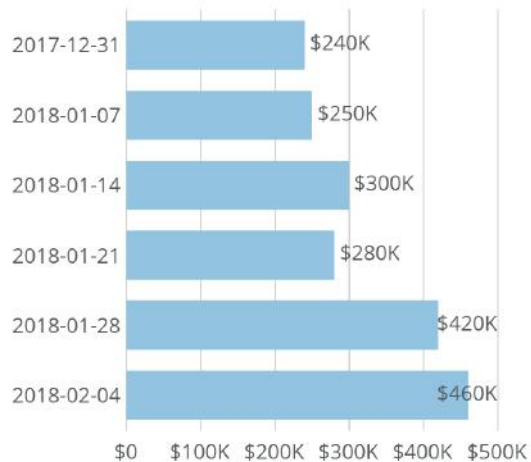
## 1. Bar



Weekly Revenue 2018 - H

\$460K

Current



Brent Dykes

2 0



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# OVERVIEW: BAR CHARTS



KEY RESULTS



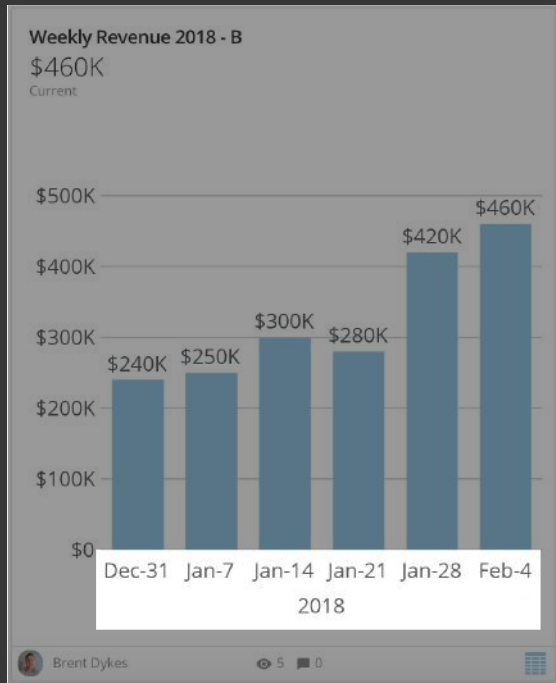
CONTEXT



POLARITY



VARIANCE



## 1. Bar



Bar Settings	>	Title	2018	←
Grid Lines	1 >	Show Label	Default	▼
Data Label Settings	3 >	Date Output Format	MMM-DD	←
Value Scale (Y)	>	Label Interval		
Category Scale (X)	3 >			

# OVERVIEW: BAR CHARTS



KEY RESULTS



CONTEXT



POLARITY



VARIANCE



## 1. Bar



Acceptable Range **\$300K - \$500K**

Value

Lower Standard Deviations

- Fill Color **Light Green**
- Fill Transparency Percent 50
- Border Color **Green**
- Border Style Dashed

Acceptable Range **\$300K - \$500K**

Value

Lower Standard Deviations

- Fill Color **Green**
- Fill Transparency Percent 90
- Border Color **Green**
- Border Style Dashed

# OVERVIEW: BAR CHARTS



KEY RESULTS



CONTEXT



POLARITY



VARIANCE



## 1. Bar



GOOD



BAD

\$300K

# OVERVIEW: BAR CHARTS



KEY RESULTS



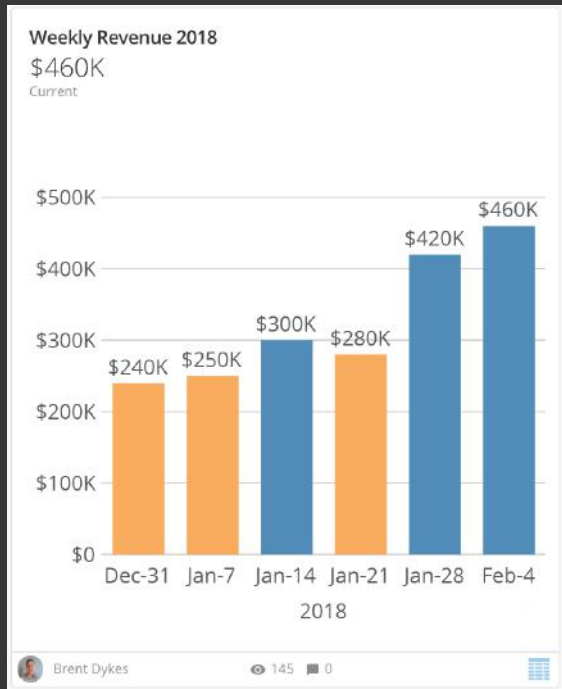
CONTEXT



POLARITY



VARIANCE



## 1. Bar



GOOD



BAD

-\$300K

# OVERVIEW: BAR CHARTS



KEY RESULTS



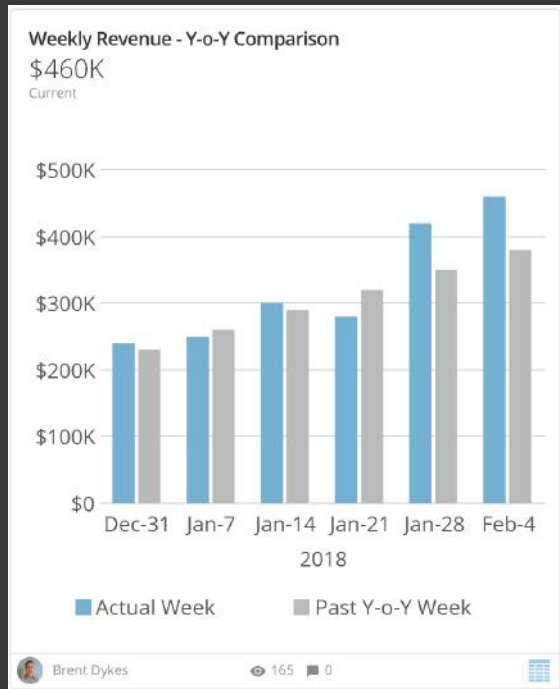
CONTEXT



POLARITY



VARIANCE



## 1. Bar



# OVERVIEW: BAR CHARTS



KEY RESULTS



CONTEXT



POLARITY



VARIANCE

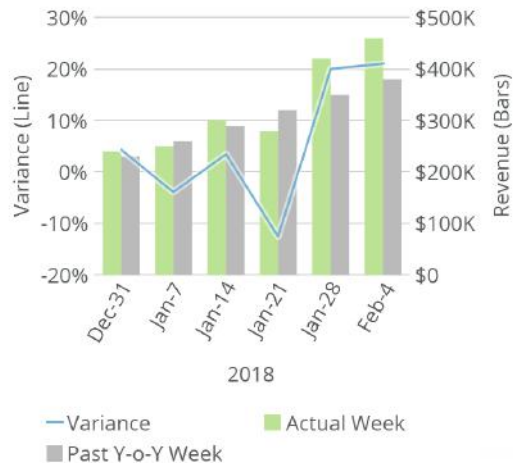
## 1. Bar



Weekly Revenue - Y-o-Y Comparison 2

\$460K

Current



Brent Dykes

143

0



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# OVERVIEW: BAR CHARTS



KEY RESULTS



CONTEXT

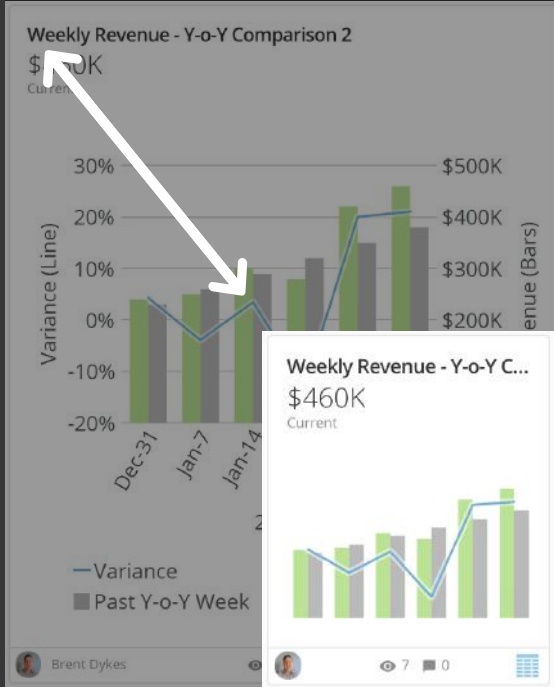


POLARITY



VARIANCE

## 1. Bar



# OVERVIEW: BAR CHARTS



5/5  
UTILITY

3/5  
NOVELTY



KEY RESULTS



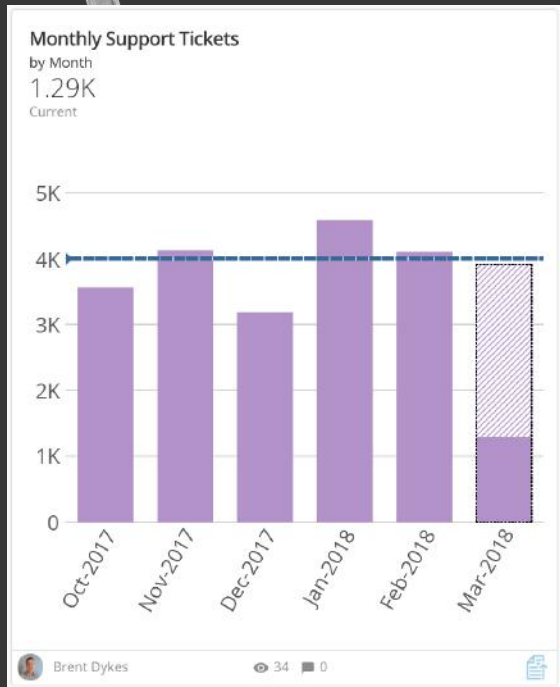
CONTEXT



POLARITY



VARIANCE



## 1. Bar



Scale Marker 6 >

Regression Line >

Last Value Projection 1 >

Colors 1 >

Full Size Settings >

Reset All Chart Properties

- Project Using
- Projection Value
- Previous Values to Average

Average Previous Values

- Default
- No Projection
- Forecast Value
- Specified Value
- Average Previous Values**
- Linear Regression

0 Oct-2017 Jan-2

# OVERVIEW: BAR CHARTS



KEY RESULTS



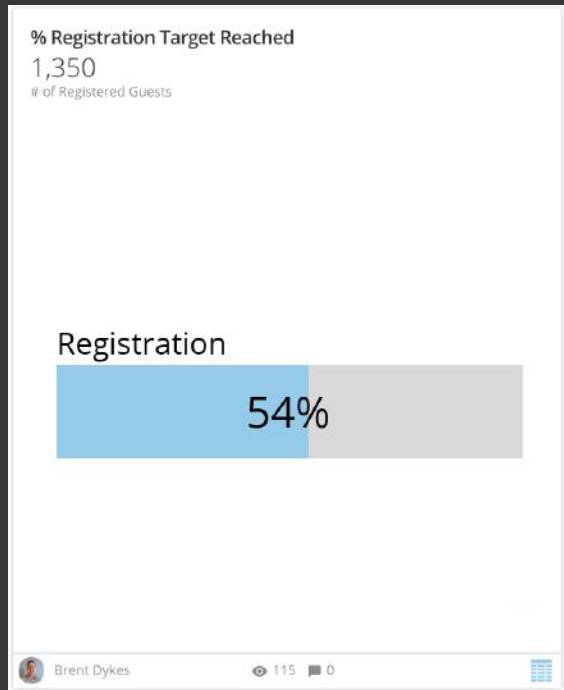
CONTEXT



POLARITY



VARIANCE



1. Bar

2. Progress bar



# OVERVIEW: BAR CHARTS



KEY RESULTS



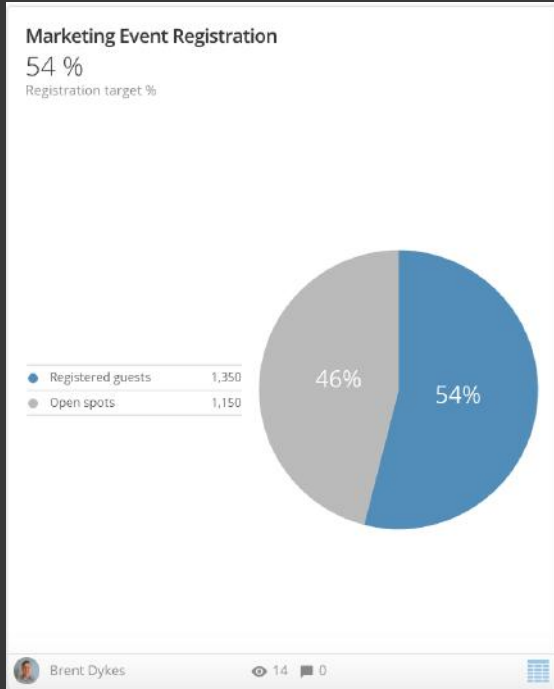
CONTEXT



POLARITY

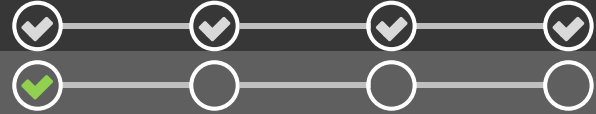


VARIANCE



1. Bar

2. Progress bar



# OVERVIEW: BAR CHARTS



1/5  
UTILITY

3/5  
NOVELTY



KEY RESULTS



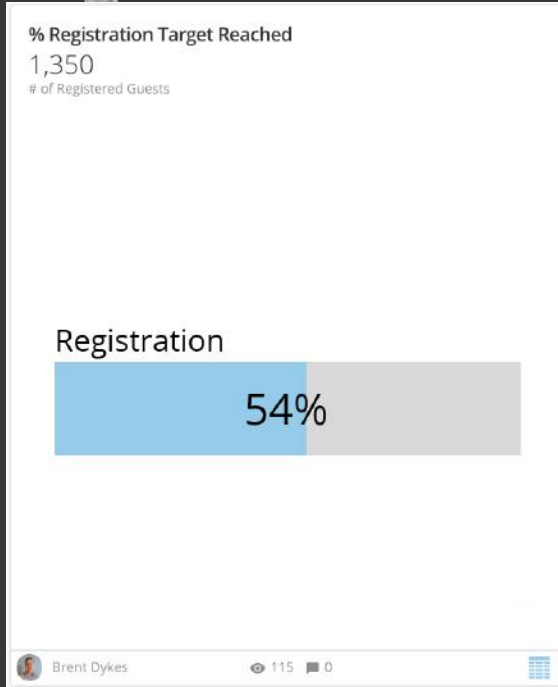
CONTEXT



POLARITY



VARIANCE



1. Bar
2. Progress bar



# OVERVIEW: BAR CHARTS



KEY RESULTS



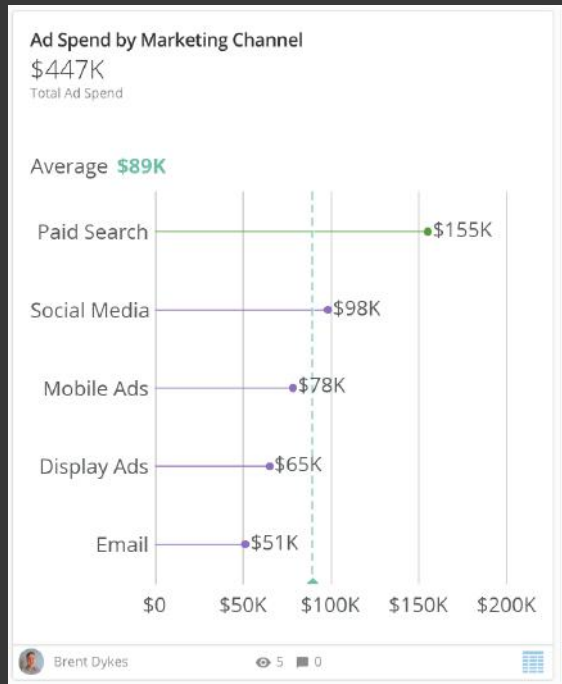
CONTEXT



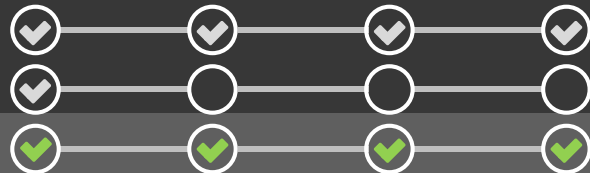
POLARITY



VARIANCE



1. Bar
2. Progress bar
- 3. Lollipop**



# OVERVIEW: BAR CHARTS



KEY RESULTS



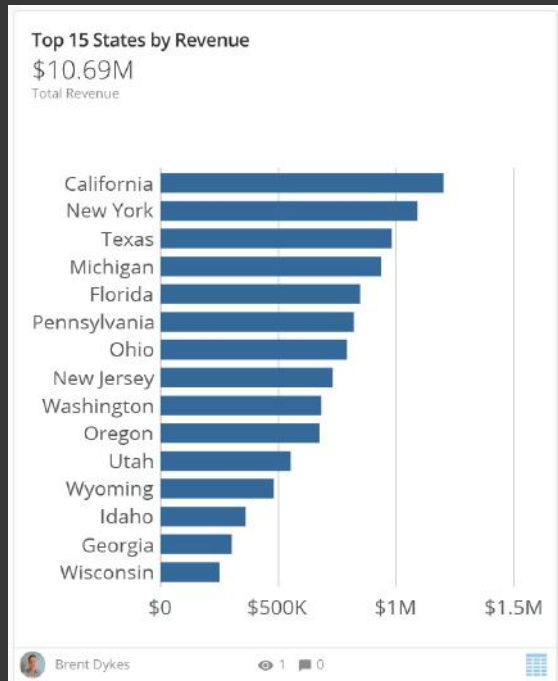
CONTEXT



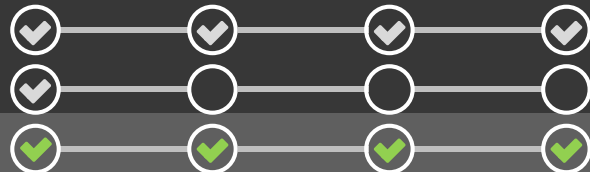
POLARITY



VARIANCE



1. Bar
2. Progress bar
3. Lollipop



# OVERVIEW: BAR CHARTS



2/5

UTILITY

4/5

NOVELTY



KEY RESULTS



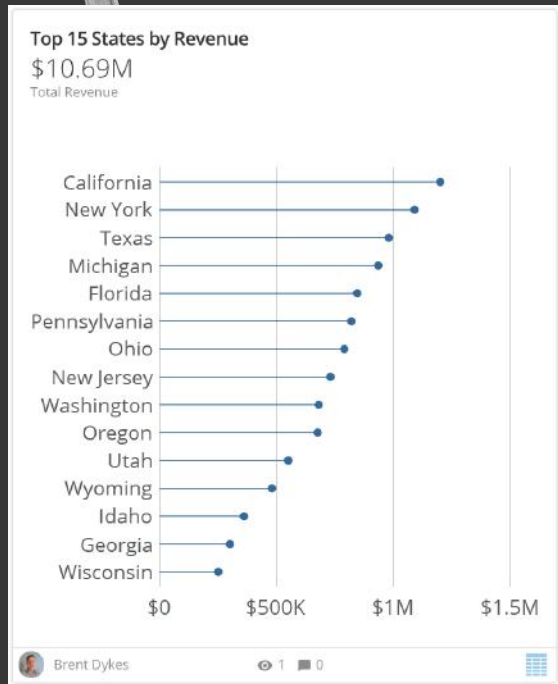
CONTEXT



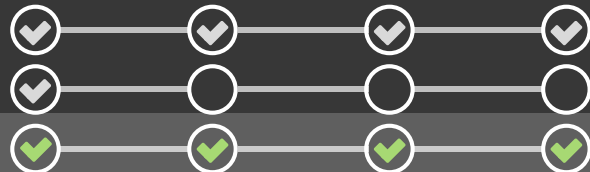
POLARITY



VARIANCE

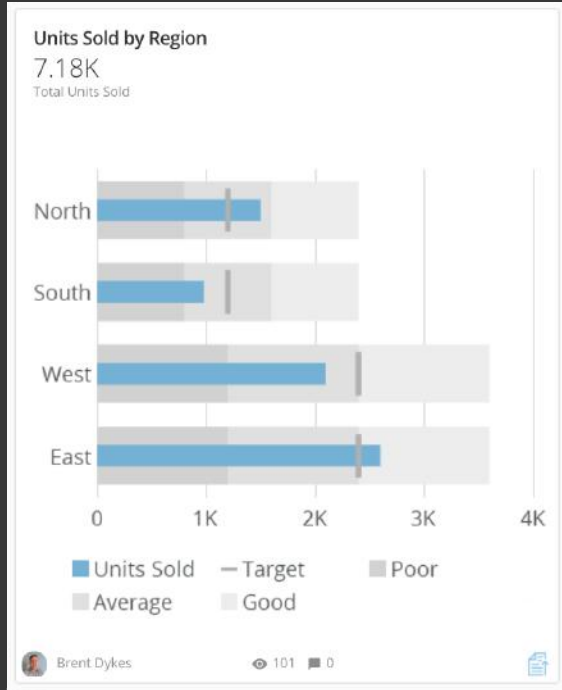


1. Bar
2. Progress bar
3. Lollipop





# OVERVIEW: BAR CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. **Bullet**



KEY RESULTS



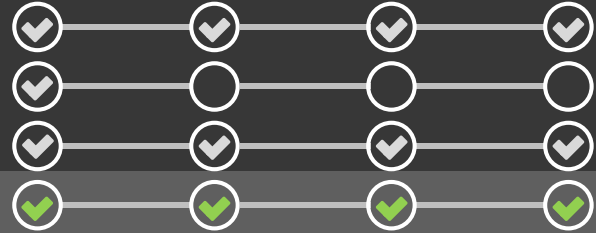
CONTEXT



POLARITY



VARIANCE



# OVERVIEW: BAR CHARTS



KEY RESULTS



CONTEXT



POLARITY



VARIANCE



1. Bar
2. Progress bar
3. Lollipop
- 4. Bullet**

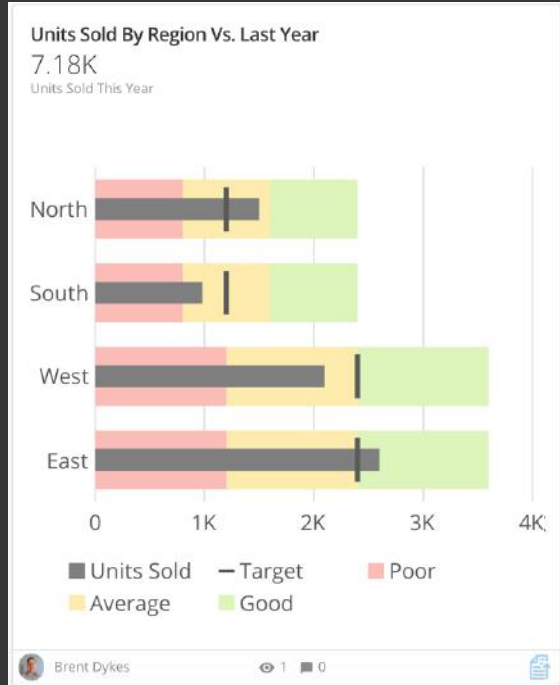


Color Rules

Rules loaded from **this card**

Column	Condition	Fill
Target	is always	■

# OVERVIEW: BAR CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. **Bullet**



KEY RESULTS



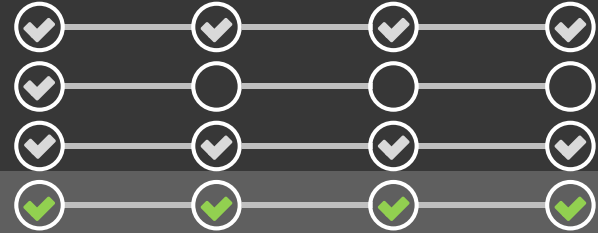
CONTEXT



POLARITY



VARIANCE



# OVERVIEW: BAR CHARTS



5/5  
UTILITY

4/5  
NOVELTY



KEY RESULTS



CONTEXT



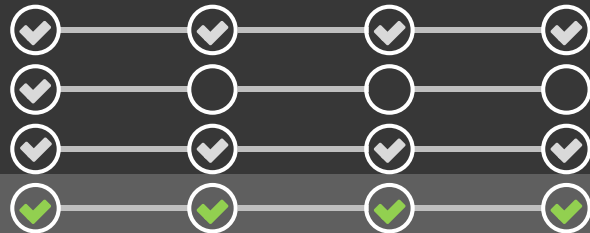
POLARITY



VARIANCE



1. Bar
2. Progress bar
3. Lollipop
4. **Bullet**



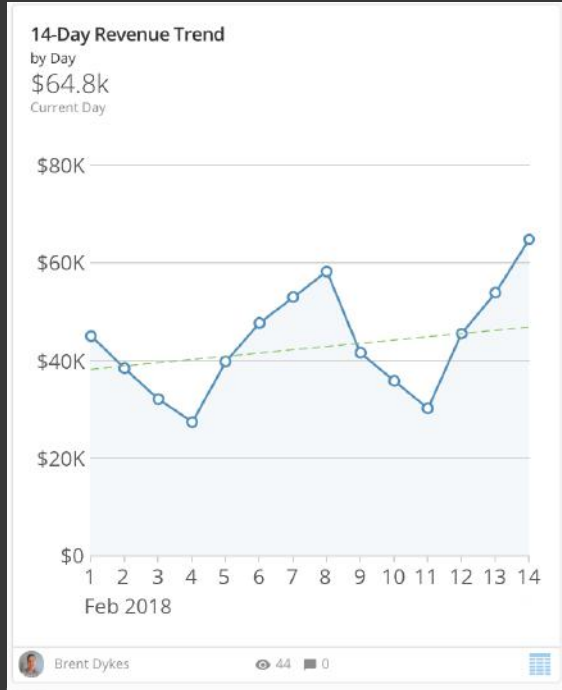
Target

OR



P-O-P

# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
- 5. Line**



KEY RESULTS



CONTEXT



POLARITY



VARIANCE



# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
- 5. Line**



KEY RESULTS



CONTEXT



POLARITY



VARIANCE

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. **Line**



KEY RESULTS



CONTEXT



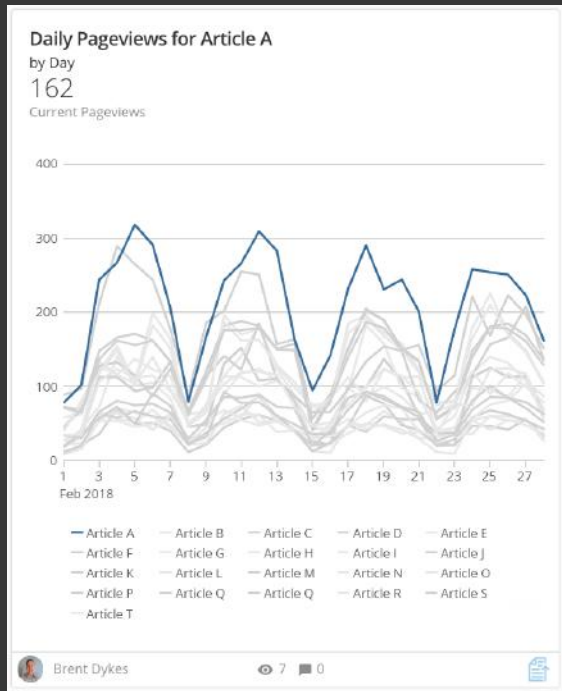
POLARITY



VARIANCE



# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line



KEY RESULTS



CONTEXT



POLARITY

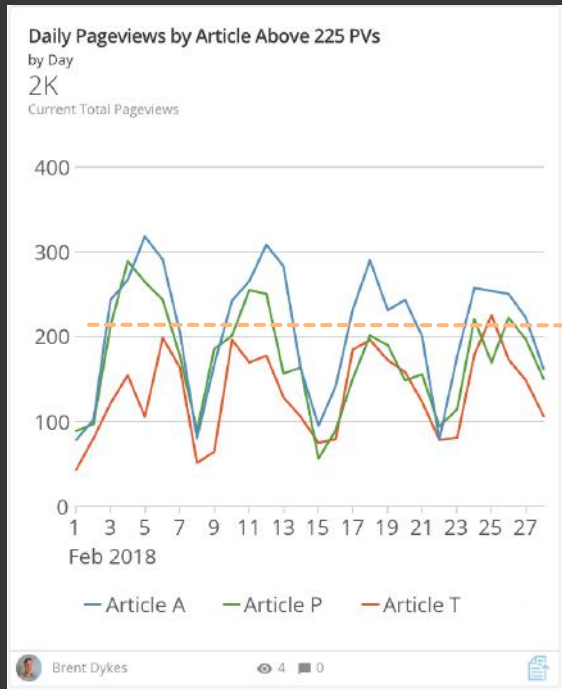


VARIANCE





# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
- 5. Line**

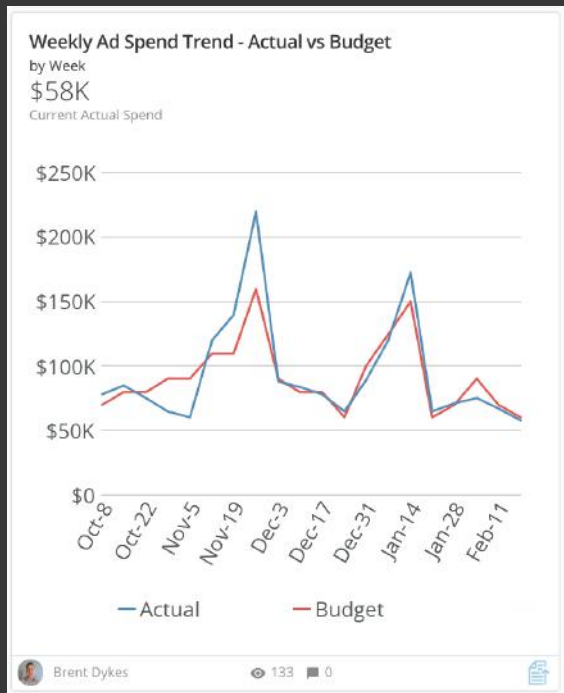
↑ 225 page views

- Hints >
- Number Format >
- Outlier Filtering **1** >
- Scale Marker >
- Regression Line >

- Show When Points Above
- Show When Points Below

KEY RESULTS	CONTEXT	POLARITY	VARIANCE
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line



KEY RESULTS



CONTEXT



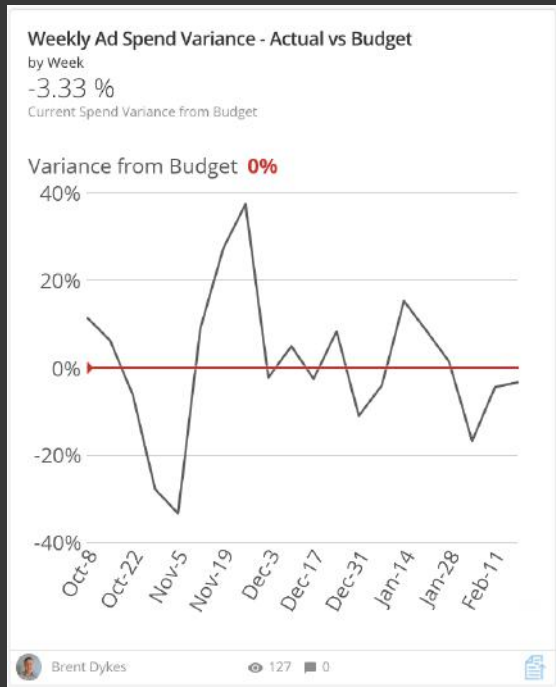
POLARITY



VARIANCE



# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
- 5. Line**



KEY RESULTS



CONTEXT



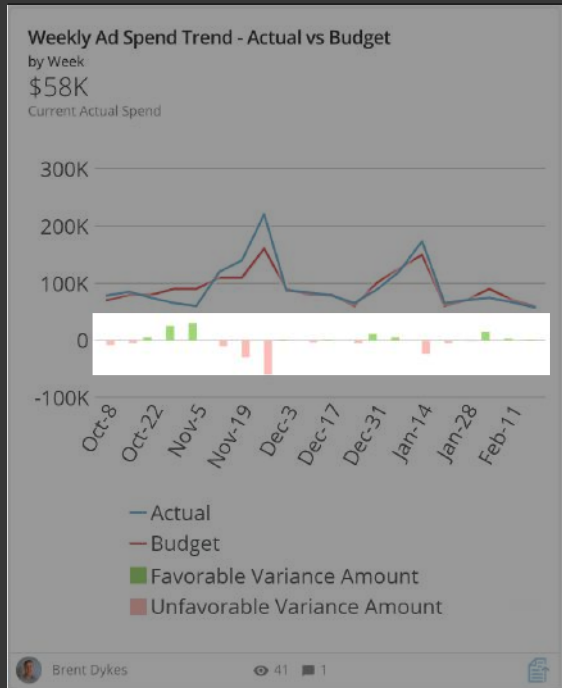
POLARITY



VARIANCE



# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line

	KEY RESULTS	CONTEXT	POLARITY	VARIANCE
1. Bar	✓	✓	✓	✓
2. Progress bar	✓	○	○	○
3. Lollipop	✓	✓	✓	✓
4. Bullet	✓	✓	✓	✓
5. Line	✓	✓	✓	✓



**Favorable Variance Amount**

FORMULA

```
1 case when sum(`Budget`)-sum(`Actual`) >=0 then sum(`Budget`)-sum(`Actual`) end
```

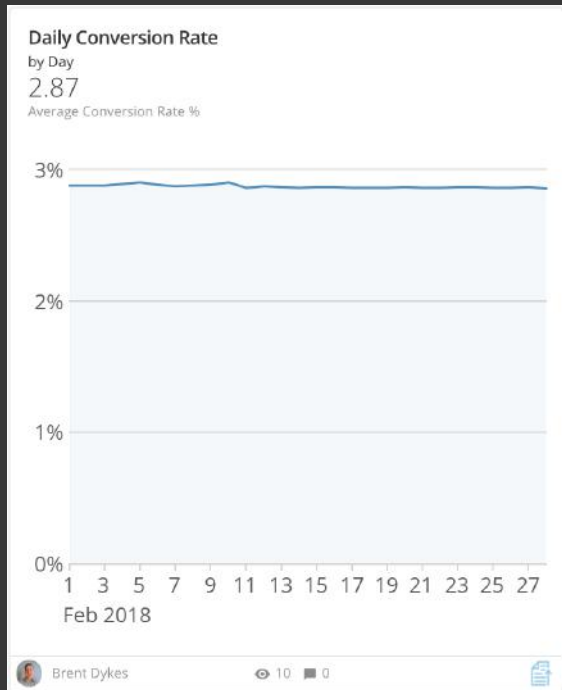
---

**Unfavorable Variance Amount**

FORMULA

```
1 case when sum(`Budget`)-sum(`Actual`) <0 then sum(`Budget`)-sum(`Actual`) end
```

# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
- 5. Line**



KEY RESULTS



CONTEXT



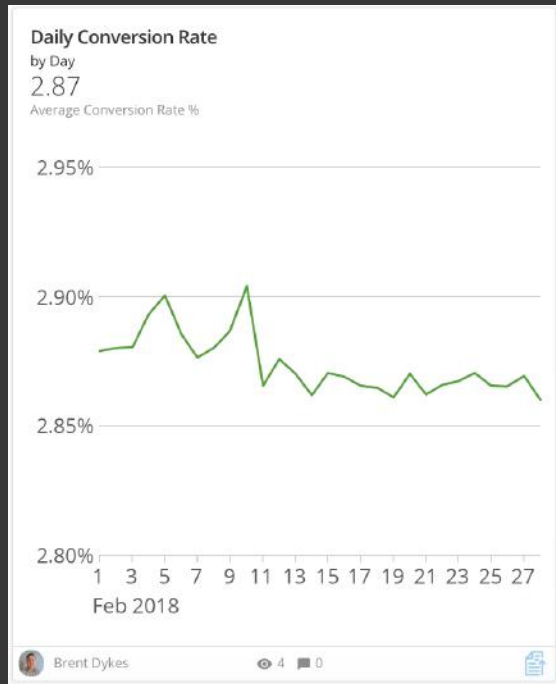
POLARITY



VARIANCE



# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
- 5. Line**



KEY RESULTS



CONTEXT



POLARITY



VARIANCE



# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
- 5. Line**



KEY RESULTS



CONTEXT



POLARITY



VARIANCE

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# OVERVIEW: LINE CHARTS



5/5  
UTILITY

3/5  
NOVELTY



KEY RESULTS



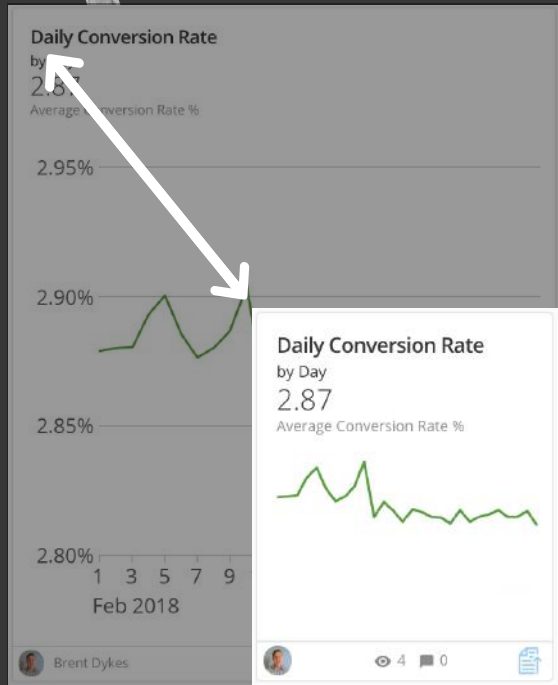
CONTEXT



POLARITY



VARIANCE

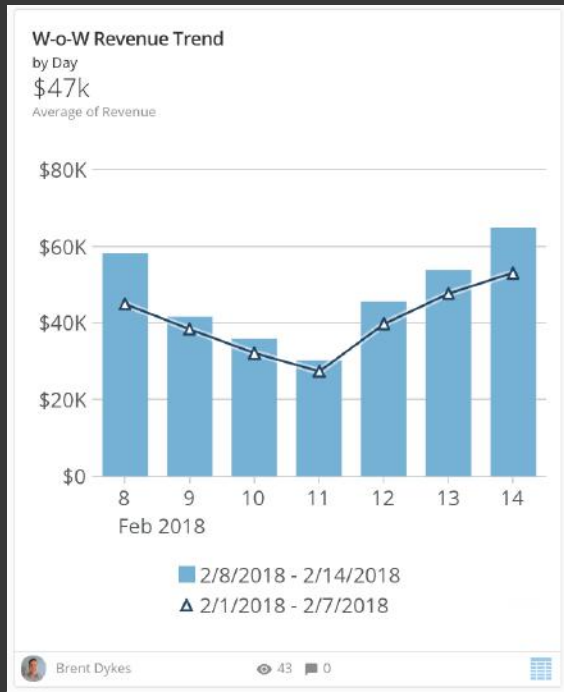


1. Bar
2. Progress bar
3. Lollipop
4. Bullet
- 5. Line**





# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. **Period-over-period**



KEY RESULTS



CONTEXT



POLARITY



VARIANCE

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. **Period-over-period**



KEY RESULTS



CONTEXT



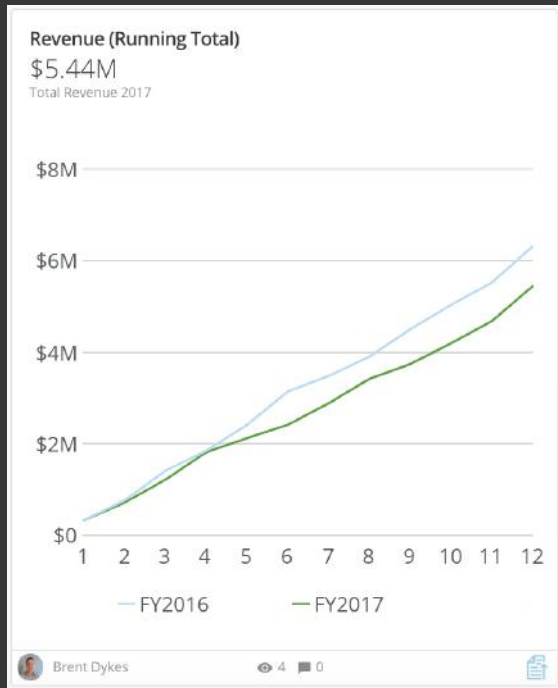
POLARITY



VARIANCE

✓	✓	✓	✓
✓	○	○	○
✓	✓	✓	✓
✓	✓	✓	✓
✓	✓	○	✓
✓	✓	○	✓

# OVERVIEW: LINE CHARTS



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. **Period-over-period**



KEY RESULTS



CONTEXT



POLARITY



VARIANCE

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# OVERVIEW: LINE CHARTS



5/5

UTILITY

3/5

NOVELTY



KEY RESULTS



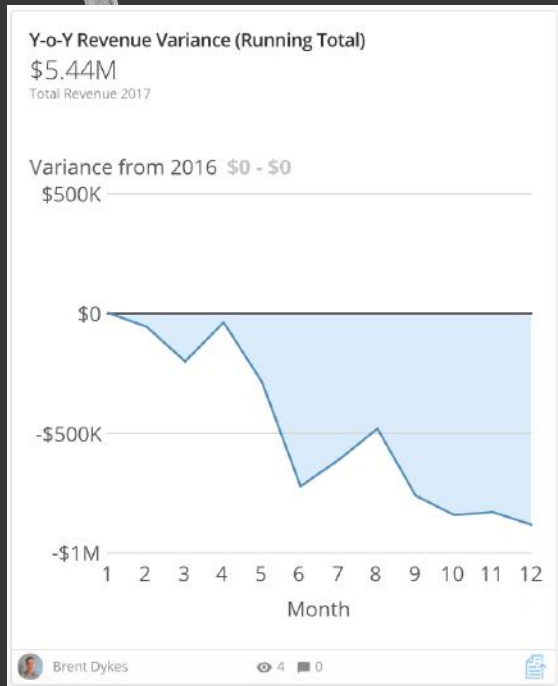
CONTEXT



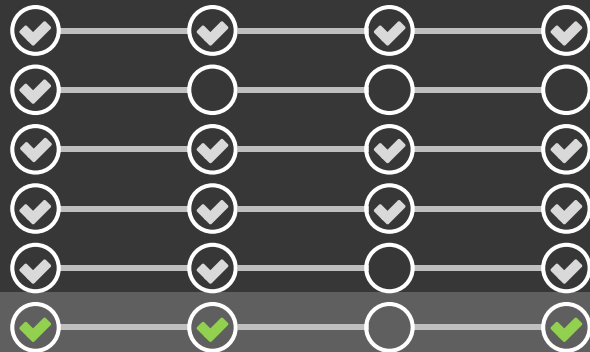
POLARITY



VARIANCE



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. **Period-over-period**



# OVERVIEW: GAUGES



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. Period-over-period
- 7. Single value**



KEY RESULTS



CONTEXT



POLARITY



VARIANCE

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# OVERVIEW: GAUGES



1/5  
UTILITY

1/5  
NOVELTY



KEY RESULTS



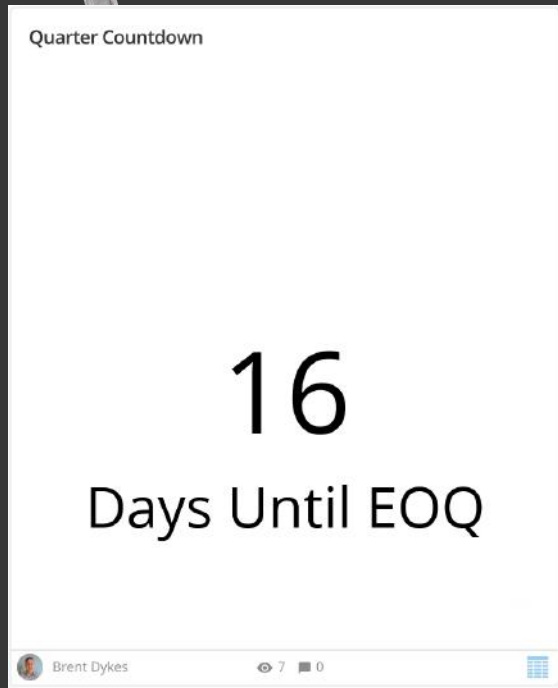
CONTEXT



POLARITY



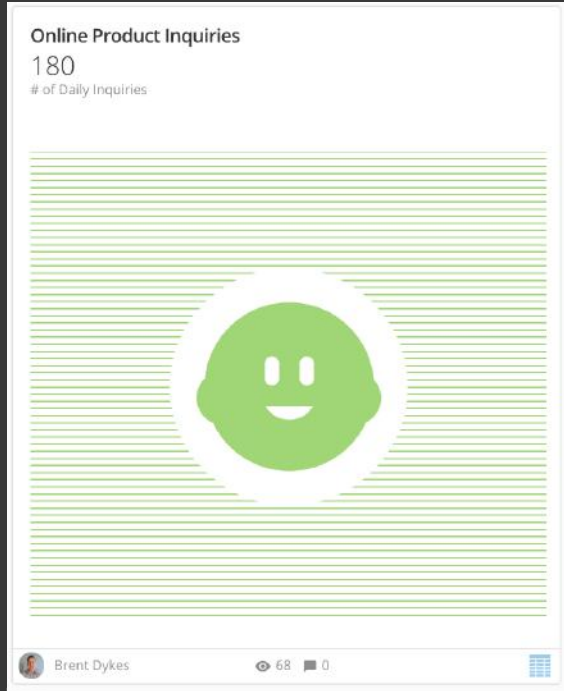
VARIANCE



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. Period-over-period
7. **Single value**

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# OVERVIEW: GAUGES



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. Period-over-period
7. Single value
- 8. Face**



KEY RESULTS



CONTEXT



POLARITY



VARIANCE

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# OVERVIEW: GAUGES



2/5  
UTILITY

5/5  
NOVELTY



KEY RESULTS



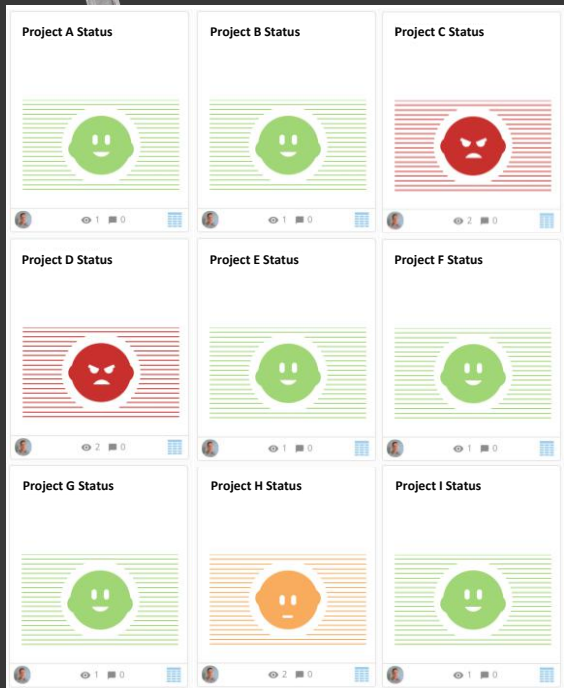
CONTEXT



POLARITY



VARIANCE



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. Period-over-period
7. Single value

**8. Face**





# OVERVIEW: GAUGES



2/5  
UTILITY

2/5  
NOVELTY



KEY RESULTS



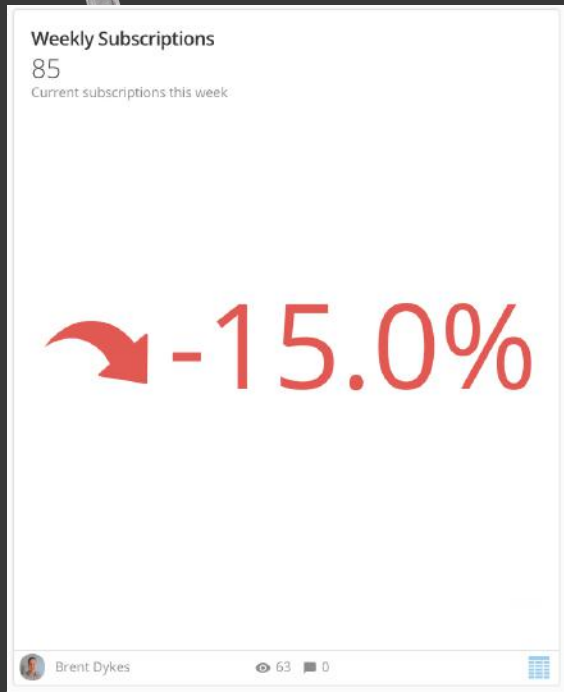
CONTEXT



POLARITY



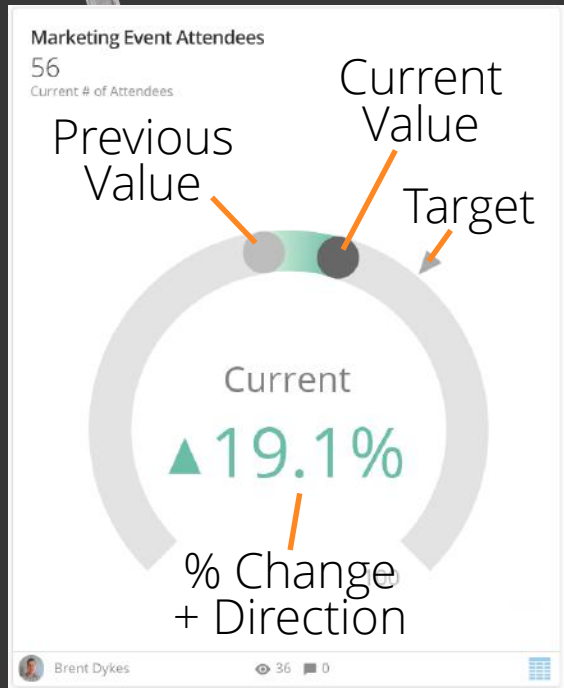
VARIANCE



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. Period-over-period
7. Single value
8. Face
9. **Comparative**

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# OVERVIEW: GAUGES

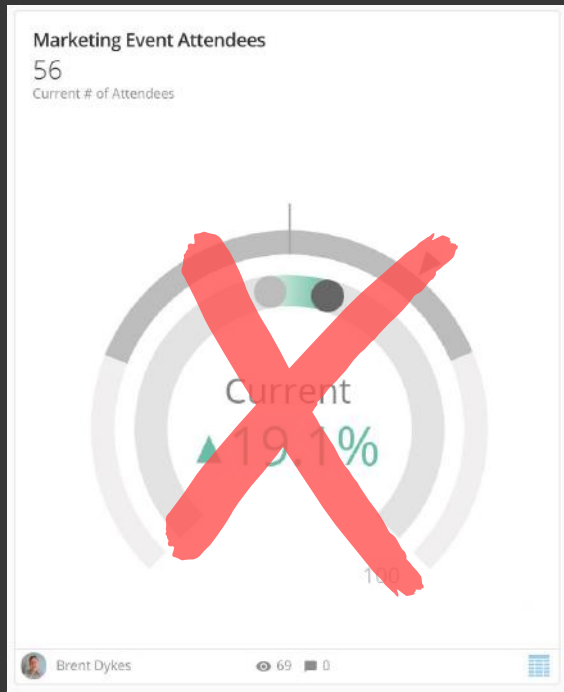


1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. Period-over-period
7. Single value
8. Face
9. Comparative

## 10. Comparative filled

KEY RESULTS	CONTEXT	POLARITY	VARIANCE
2 1 3	Scales	U-shaped	Batteries
✓	✓	✓	✓
✓	○	○	○
✓	✓	✓	✓
✓	✓	✓	✓
✓	✓	○	✓
✓	✓	○	○
✓	○	✓	○
✓	○	✓	✓
✓	✓	✓	✓

# OVERVIEW: GAUGES



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. Period-over-period
7. Single value
8. Face
9. Comparative

## 10. Comparative filled



KEY RESULTS



CONTEXT



POLARITY



VARIANCE

✓	✓	✓	✓
✓	○	○	○
✓	✓	✓	✓
✓	✓	✓	✓
✓	✓	○	✓
✓	✓	○	✓
✓	○	○	○
✓	○	✓	○
✓	○	✓	✓
✓	✓	✓	✓

# OVERVIEW: GAUGES



4/5  
UTILITY

3/5  
NOVELTY



KEY RESULTS



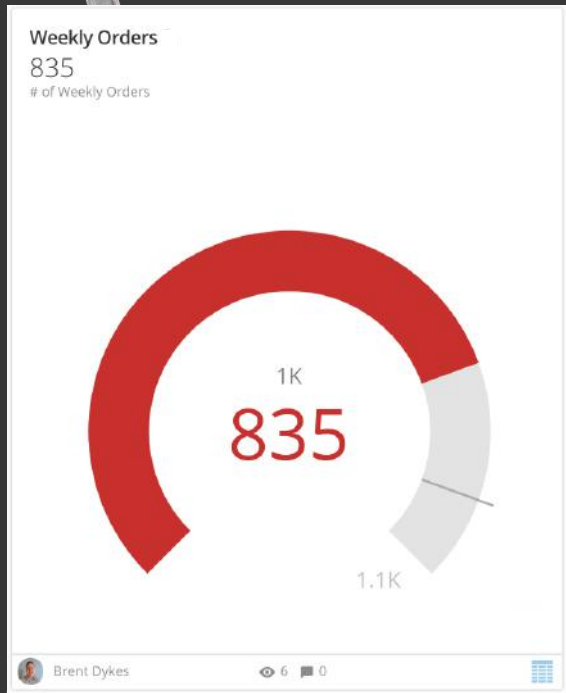
CONTEXT



POLARITY



VARIANCE



1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. Period-over-period
7. Single value
8. Face
9. Comparative
10. Comparative filled

**11. Filled**

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# OVERVIEW: GAUGES



3/5  
UTILITY

4/5  
NOVELTY



KEY RESULTS



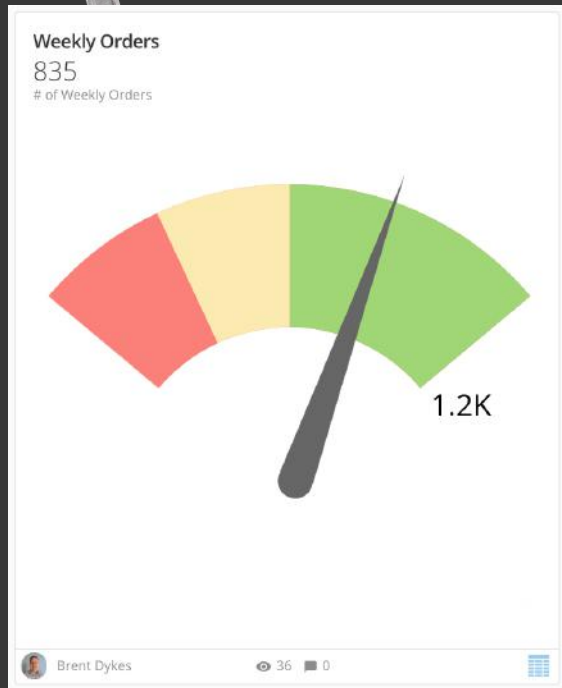
CONTEXT



POLARITY



VARIANCE



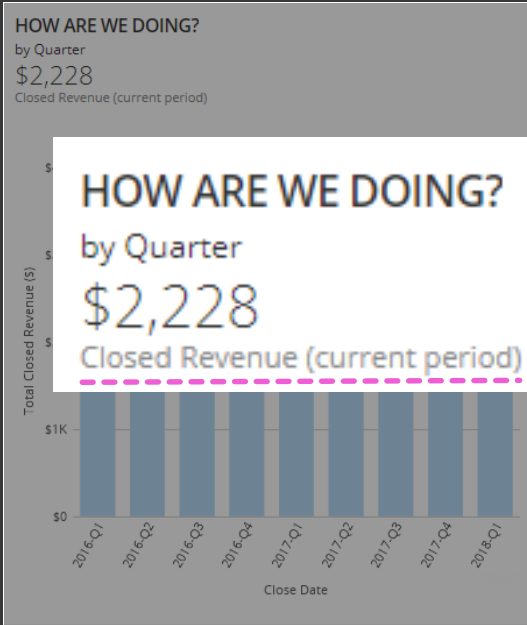
1. Bar
2. Progress bar
3. Lollipop
4. Bullet
5. Line
6. Period-over-period
7. Single value
8. Face
9. Comparative
10. Comparative filled
11. Filled

## 12. Radial

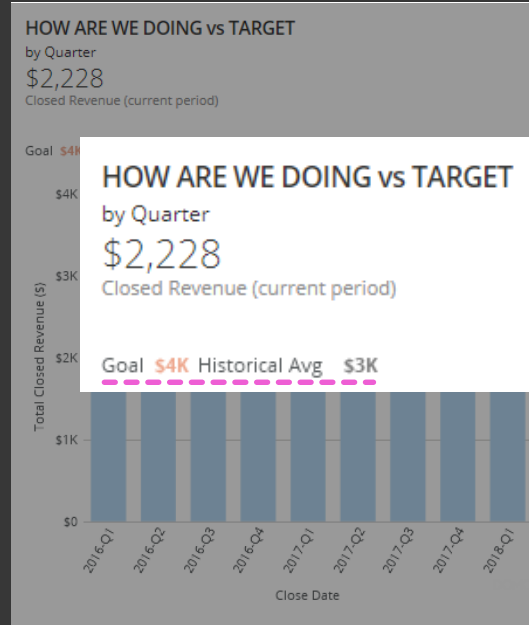
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# OVERVIEW: OPTIMISING YOUR SUMMARY NUMBERS

## 1. Descriptive labels



## 2. Goals & scale markers

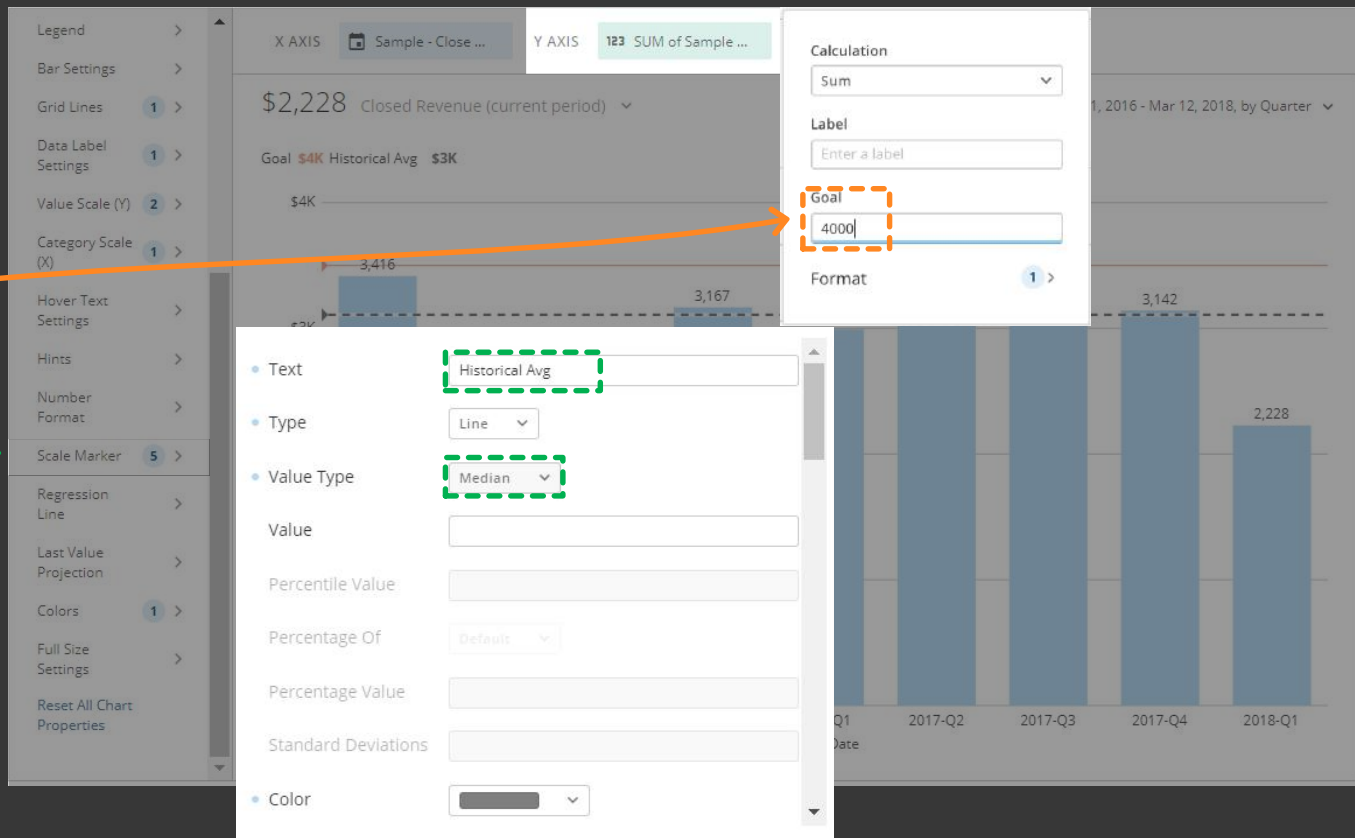


FOR  
THE GOOD  
OF THE  
COMPANY™

# OVERVIEW: OPTIMISING YOUR SUMMARY NUMBERS

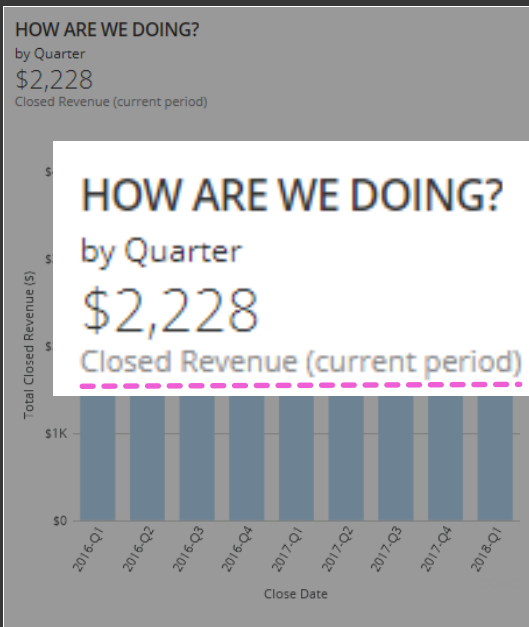
**HOW ARE WE DOING vs TARGET**  
by Quarter  
\$2,228  
Closed Revenue (current period)

Goal **\$4K** Historical Avg **\$3K**

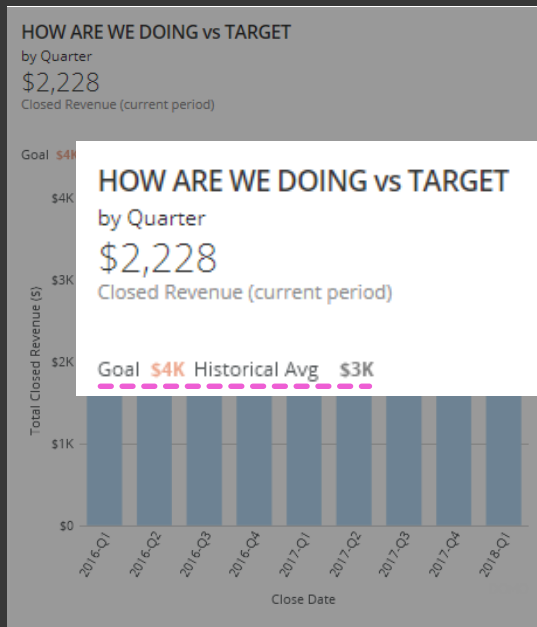


# OVERVIEW: OPTIMISING YOUR SUMMARY NUMBERS

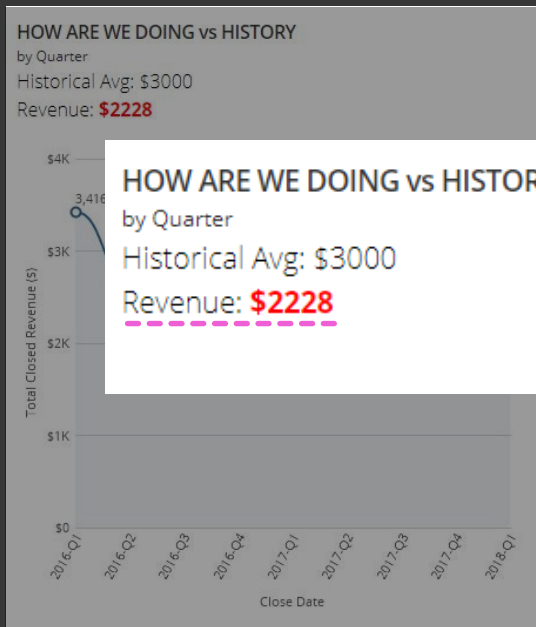
## 1. Descriptive labels



## 2. Goals & scale markers



## 3. Customized



FOR  
THE GOOD  
OF THE  
COMPANY™



# OVERVIEW: OPTIMISING YOUR SUMMARY NUMBERS

HOW ARE WE DOING vs HISTORY

by Quarter

Historical Avg: \$3000

Revenue: **\$2228**



CONCATENATE

+



HTML

+

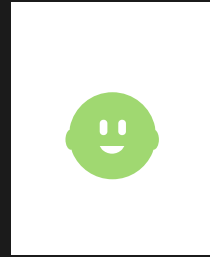
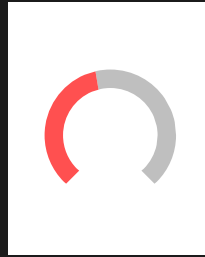
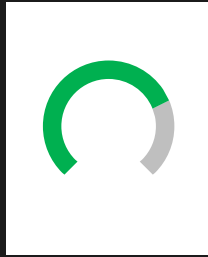
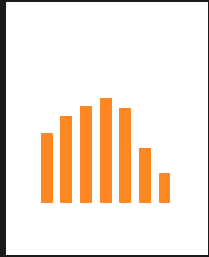
CASE Statement



```
CONCAT(  
  '<div style="color:black;font-size:medium;">  
    <div>  
      Historical Avg: $3000  
    </div>'  
  , '<div style="color:black;font-size:medium;">  
    <div>  
      Revenue: '  
  , CASE  
    WHEN  
      count(  
        case  
          when MONTH(`Sample - Close Date`) in('02','03','04')  
            and YEAR(`Sample - Close Date`) = 2018  
            then `Sample - Revenue`  
          end) >= 3000  
        THEN '<span style="color:green;">'  
        ELSE '<span style="color:red;">'  
      END  
    , '<b>', '$', sum(case  
      when MONTH(`Sample - Close Date`) in('02','03','04')  
        then `Sample - Revenue`  
      end)  
    , '</b>', '</span> <div/>')|
```

# OVERVIEW: FOUR KEY TAKEAWAYS

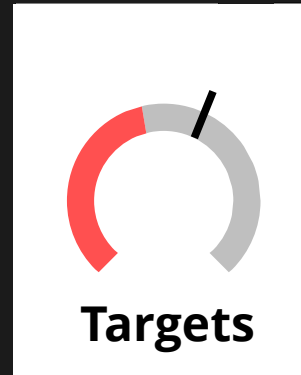
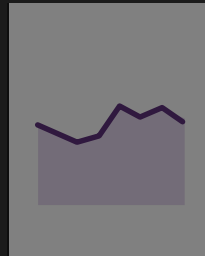
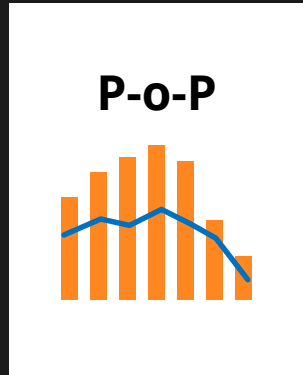
## #1 - Keep the cards simple



Clean, intuitive visuals

# OVERVIEW: FOUR KEY TAKEAWAYS

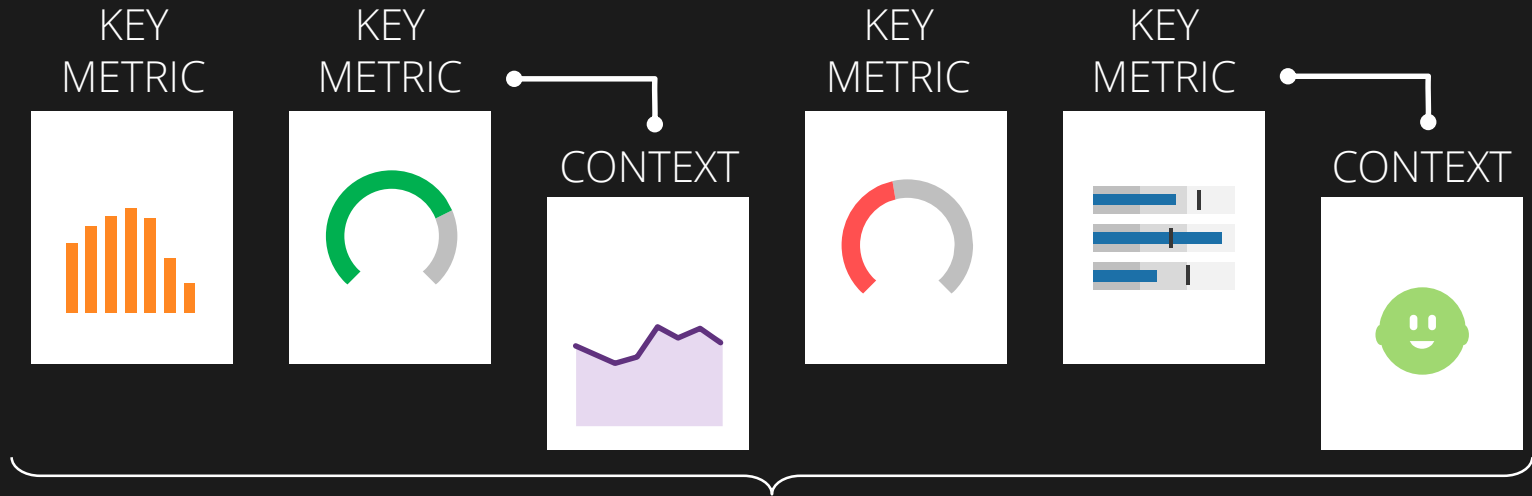
## #2 - Build the cards to inspire action



Context, polarity, & variance

# OVERVIEW: FOUR KEY TAKEAWAYS

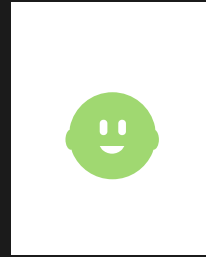
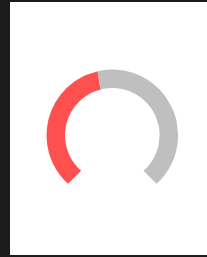
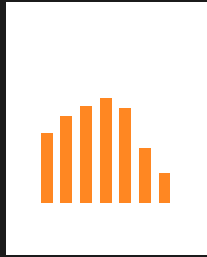
## #3 - Ensure every card pulls its weight



Either show results or provide context

# OVERVIEW: FOUR KEY TAKEAWAYS

#4 - Signal can come from a single card or a combination of cards



Single



Combination



***LET'S DIG A LITTLE DEEPER WITH BREAKDOWNS***

# BREAKDOWN OPTIONS IN DOMO

## Filters

Manager

- Select All
- Manager A
- Manager B
- Manager C
- Manager D

Region

- Select All
- Domestic
- International

## Drill paths

Quarterly Revenue

Manager Details

Top Dashboard

## Collections

Quarterly Revenue by Quarter

Revenue by Manager by Quarter

Revenue by Quarter

Contributing Factors

Revenue (Median) by Quarter

Average Deal Cycle by Quarter

## Related cards

Revenue (\$)

Quarter	Revenue (\$)
2016-Q1	\$3,416
2016-Q2	\$2,665
2016-Q3	\$2,566
2016-Q4	\$3,416

Link Related Card

Average Deal Cycle

Average

## Hover text

Revenue (\$)

Quarter	Revenue (\$)
2016-Q1	\$2,480
2016-Q2	\$1,564
2016-Q3	\$1,178
2016-Q4	\$1,515

2016-Q3 : \$2,566



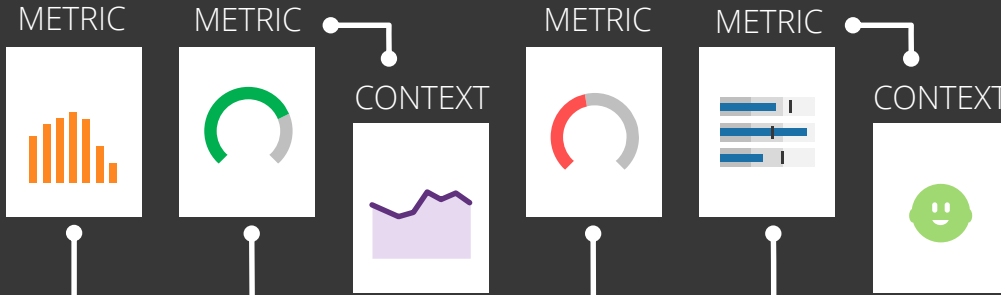
FOR  
THE GOOD  
OF THE  
COMPANY™

# BREAKDOWN: EVERYTHING IS CONNECTED

## OVERVIEW



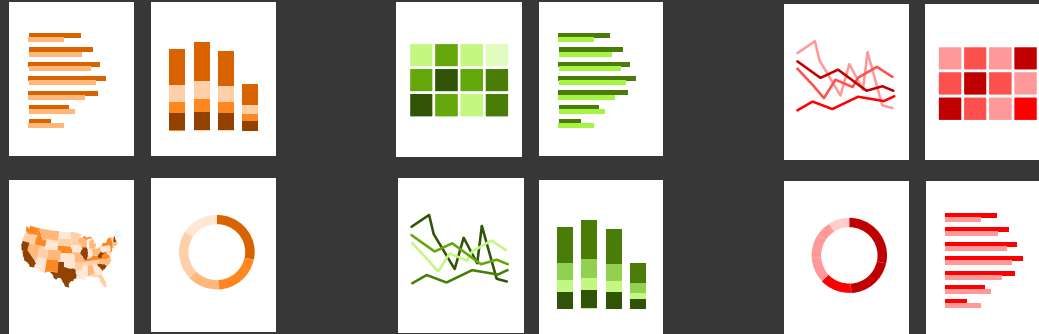
HOW ARE WE DOING?



## BREAKDOWN



WHAT'S HAPPENING?



FOR  
THE GOOD  
OF THE  
COMPANY™

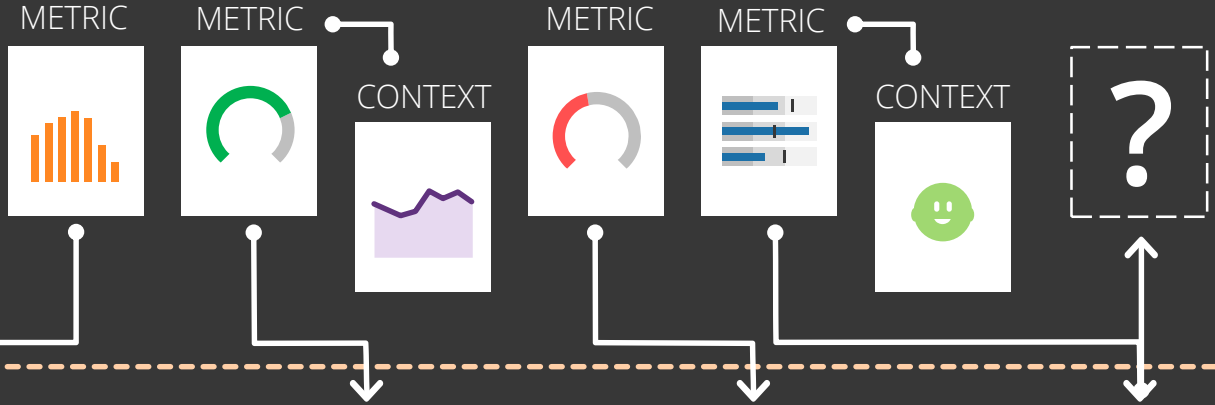


# BREAKDOWN: EVERYTHING IS CONNECTED

## OVERVIEW



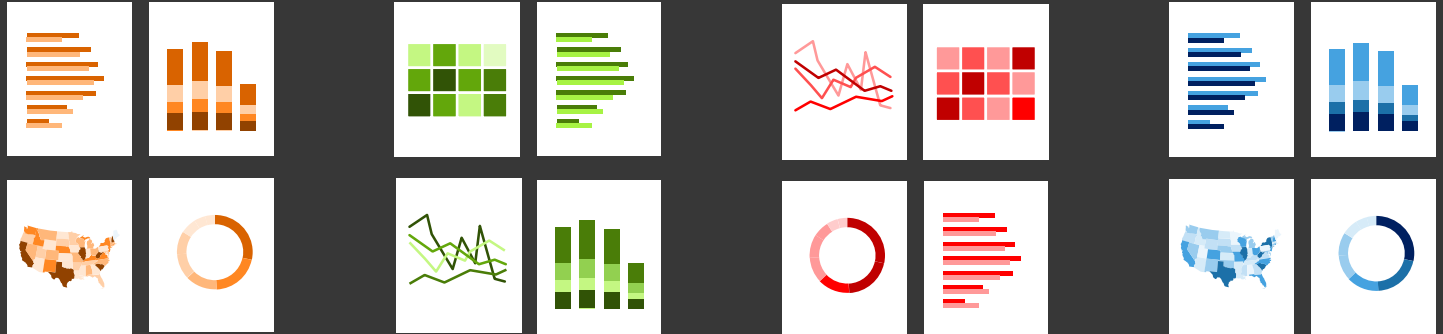
HOW ARE WE DOING?



## BREAKDOWN



WHAT'S HAPPENING?



FOR THE GOOD OF THE COMPANY™

# BREAKDOWN: ANTICIPATING THE NEXT QUESTION(S)

## OVERVIEW



HOW ARE WE DOING?

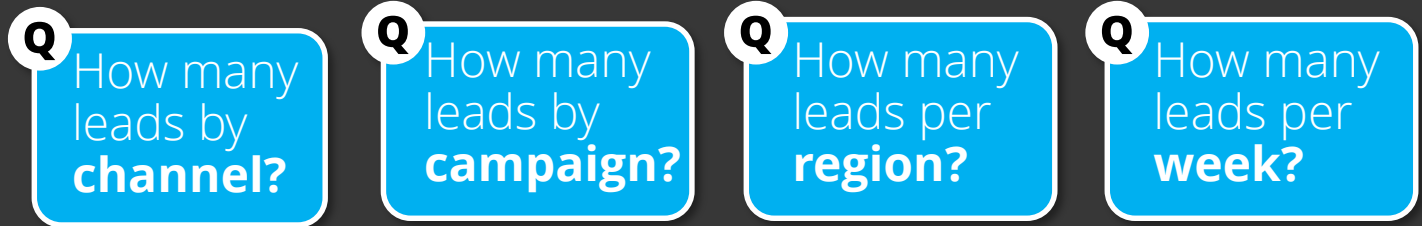
## MARKETING DASHBOARD

Q How many leads were generated?

## BREAKDOWN



WHAT'S HAPPENING?



# 4 COMMON TYPES OF DIMENSIONAL BREAKDOWNS



## TIME

- Hourly
- Daily
- Weekly
- Monthly
- Annually



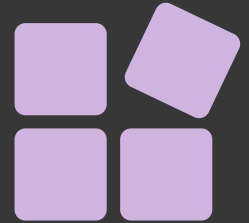
## PEOPLE

- Customer types
- Segments
- Roles / positions
- Groups / teams
- Demographics



## PLACES

- Countries
- Regions
- States
- Cities
- Stores

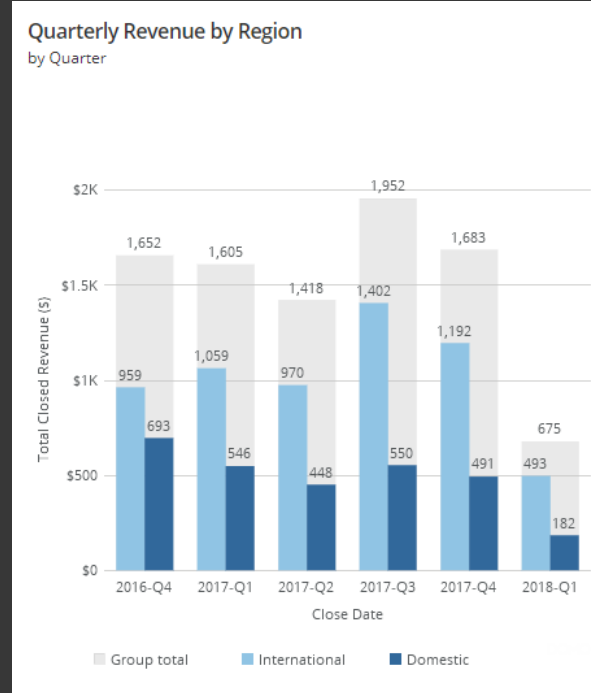
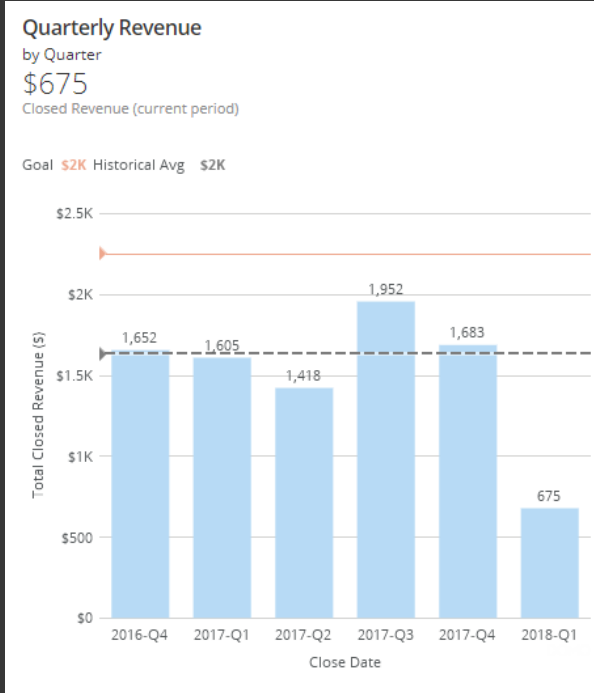


## THINGS

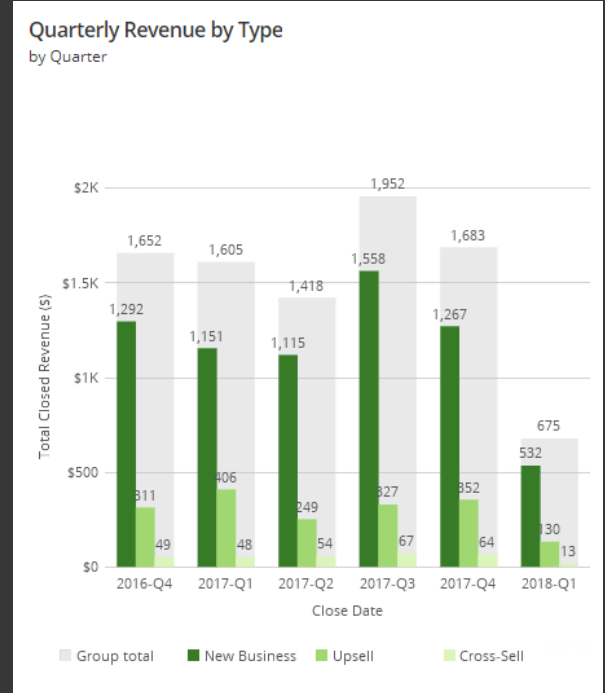
- Products
- Categories
- Services
- Process stages
- Industries

# BREAKDOWN: TYPICAL EXAMPLES

## BY REGION



## BY REVENUE TYPE



# BREAKDOWN: SUBTLE CONTEXT TECHNIQUE

## Conversion Rate (Batting Average)

by Quarter

71 %

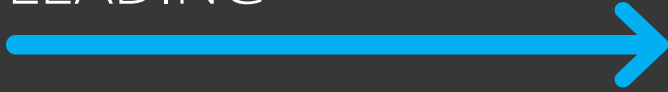
Overall Conversion (current period)



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OF THE  
COMPANY™

# METRICS: LEADING VS. LAGGING INDICATORS

LEADING



LAGGING



Measure the **inputs**  
of your key business  
processes



Measure the **outputs**  
of your key business  
processes

Help predict **future**  
performance



Show **past** results

**Easier to influence**  
but harder to measure



**Easier to measure**  
but difficult to influence



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# LEADING AND LAGGING INDICATOR EXAMPLES



Focus Area	Leading Indicator	Lagging Indicator
Sales	Qualified opportunities →	Closed deals
Marketing	Click-throughs →	Leads
Human Resources	Employee sentiment →	Employee turnover
Manufacturing	On-time delivery →	<u>Customer satisfaction</u>
Customer Service	<u>Customer satisfaction</u> →	Customer churn

# BREAKDOWN: LEADING AND LAGGING INDICATOR CARDS

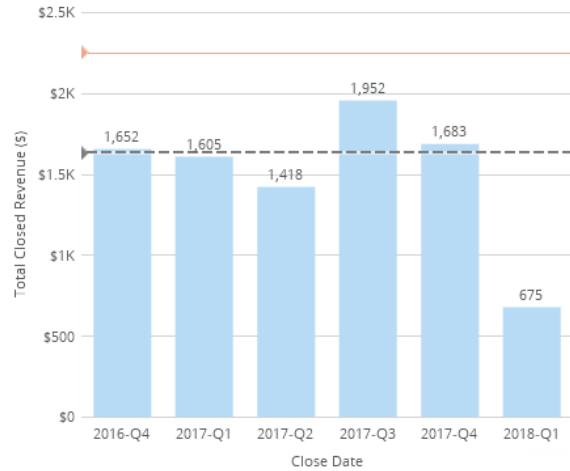
## Quarterly Revenue

by Quarter

\$675

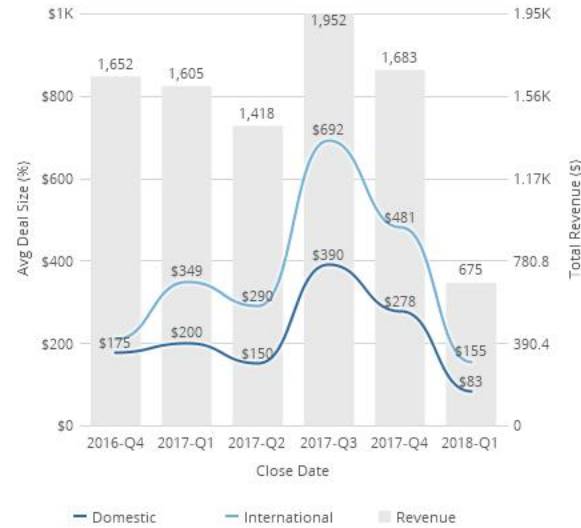
Closed Revenue (current period)

Goal \$2K Historical Avg \$2K



## Average Deal Size

by Quarter



## Average Deal Cycle

by Quarter





# GOOD DASHBOARD DESIGN IS IMPACTFUL

## DASHBOARD DESIGN



**OVERVIEW**



HOW ARE WE DOING?



**BREAKDOWN**



WHAT'S HAPPENING?



**EXPLORE**



HOW CAN I LEARN MORE?



FOR  
THE GOOD  
OF THE  
COMPANY™

***QUESTIONS?***



FOR  
THE GOOD  
OF THE  
COMPANY™