An Effective Performance Dashboard Template

cbsolution.net/techniques/ontarget/an_effective_performance_dashboard_template

Dashboards are the preferred user interface to monitor performance. Every day new dashboards are created with different layout and style.

Why reinventing the wheel? Here is a dashboard template that will match most needs. It is simple and effective and adheres to good design principles. You can use it as a guide or simply as source of inspiration.

A performance dashboard are used to monitor groups of performance indicators, usually called KPI(s).

Please notice that this template has the specific scope to monitor a set of indicators or KPIs. It is not a generic template to display sales statistics, top clients or similar things!

Goals

Before entering template details, let's state some objectives for our dashboard:

- **Simple**: Simple things work. We try to apply KISS principle whenever possible!
- **Intuitive**: The user shall understand how it works with about no effort.
- **Flexible**: Shall allow an undefined number of indicators, dimensions, perspectives ... without layout intervention and can be easily expanded to link to other applications (to implement, for example drill-through facility).
- **Ergonomic**: the user shall be able to navigate information with a minimum number of mouse clicks.
- **Visually effective**: To clearly communicate at a glance performance we will follow blueprints of effective Dashboard and Graphics design (see previous post).

Template Organization

Now let's take a first look at our template that is organized using well known sidebar approach:
- **Control panel** (left sidebar) used to capture user interaction (tasks, selection ...)
- **Monitoring Panel** (right) used to display performance indicators:

The sidebar itself is composed of multiple selectable sliding panels. At least two (“Perspective” and “Context”) are required. Other, like “Preferences” may be present depending on your application.

**The Perspective Panel**

**Perspective panel** allows the user to select a specific perspective. Each perspective is associated to a group of indicators and each indicator or KPI can participate to multiple perspectives.

You can have, for example, “Profitability” (financial indicators) perspective, “Growth” perspective and “Client Satisfaction” perspective. A “Profit Increase” indicator would be related to first and second one (both economic and growth) but obviously not to client satisfaction.
If you followed my blog and use KPIStudio (freely available) to define your KPIs you can recognize perspectives as special kind of Categories.

Using a perspective selector gives user agility to quickly switch between different business views and focus on those indicators that are related to that view. If there is a single view you can simply call it “General”, but stay with the possibility to grow in future.

Also perspective visibility will obviously depend (like specific indicators and dimensions) on user's profile and hierarchic level.

**The Monitoring Panel**

So your dashboard will initially select first perspective change it depending on user's selection. Whenever a perspective is selected its associated KPIs will be displayed inside Monitor Panel:

Monitoring panel displays KPIs in a table associated with selected perspective (usually from most to least important). The table is scrollable, so it can fit different screen resolutions and there is no need to layout each KPI.

Let's take a look at different columns of the table.
**Alert Indicator**

Indicates current situation in terms of goals and limits. Red means out of limits requiring immediate intervention. Yellow means acceptable but not optimal.

I strongly suggest **not to use green to indicate “good”**. Alert indicator shall attract attention if and only if needed. If value can be considered good, do not show any indicator! That would reduce visual pollution. The fact that we use red and yellow does not mean that the indicator is a traffic light!

Also notice that the indicator is the only really “colored” (chromatic) visual element we use, exactly to catch attention. Other elements are differentiated through gray-scale (or saturation). State can be also visually assessed through bullet graph (see below) but it doesn't catch attention like a colored bullet.

<table>
<thead>
<tr>
<th>Measure Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is the standard name you gave to KPI (Column A of KPIStudio spreadsheet).</td>
</tr>
</tbody>
</table>

Measure name is actionable. Clicking on it will open a window with description, meaning and interpretation of the measure:

![Bullet Graph Diagram](image-url)
**Sparkline** Sparklines allow immediate visualization of trend along time, and are a better alternative to up/down arrows. Sparkline is actionable: clicking on it will open an evolution graph with allowed measure ranges:

| **Value** | This is last KPI value, and possibly variation from previous observation. Variation (and possibly observation date) can also be provided as pop-up tip triggered by mouse-over. A click on value can (depending on application) perform a drill-through or jump to another application depending on case. |
**Bullet graph** is an effective graphic invented by Stephen Few as a convenient alternative to gauges and meters. Bullet graph shows in a simple and intuitive strip actual value, target value and control ranges.

Bullet graph is also actionable and, if clicked shows actual value of all associated measures, including formulas used to compute the measure:

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**The Context Panel**

Finally let's now look at **context panel**. As name says it indicates the context to which indicators refer through a series of selectors (one for each dimension - Column D in KPIStudio spreadsheet) initially set to “Any”.

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So let's say that user decides to investigate the performance of a specific sales representative or product. It simply combines those dimensions on context panel and monitoring panel redisplay indicators to reflect that filter. This is called “slicing” in multidimensional terminology.
Obviously if a specific indicator is not associated with a filtered dimension its global value is shown.

**Looking ahead**

This is enough for today, but this subject will go on. In future post it will merge with KPIStudio to produce **KPInstant**: a free KPI dashboard that can be deployed as an embedded RIA and feed itself from usual spreadsheets. You will be able to design and deploy a performance application in few hours with no IT expertise.

This post, including how to use the KPInstant is now available [here](#).