

Chapter 1

Dashboards Matter

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What Is a Dashboard?

If you were to ask 10 people who build dashboards and 10 people who use dashboards to define the term *dashboard*, you would probably get 20 different definitions.

Here's how we defined the term in *The Big Book of Dashboards*, and we'll continue to rely on this definition:

A dashboard is a visual display of data used to monitor conditions and/or facilitate understanding.

Yes, it's a broad definition. As with our first book, there will probably be some protests about it. Andy covers these probable objections in Chapter 30, "What the Heck Is a Dashboard?"

Nick Desbarats, author of *Practical Charts* and an expert in dashboard design, created a taxonomy of 13 different types of data displays that all fit under the umbrella term *dashboard*. Each one has a distinct use case and design.

He makes a good point. Think of a vehicle. Literally, imagine one right now. What did you come up with? Truck? Train? Sports car? Bus? Helicopter?

Dashboards are the same.

We don't think your stakeholders need to understand this dashboard taxonomy or the names of all the different display types. *But you and your stakeholders must be in complete agreement as to what the deliverable you're creating will look like and how it's going to work.*

We cover this alignment of expectations in depth in the discovery chapters (Chapters 5 and 6).

Don't Be One of the 71% of People Who Fail

As we were writing this book, we conducted a survey of more than 450 dashboard creators and users and asked them this question:

To what degree do you agree with the statement "most dashboards fail."

71% indicated that they agree or strongly agree with this statement (Figure 1.1).

That's a *lot* of failure.

71% of People Surveyed Agree That Most Dashboards Fail

Strongly Agree | Agree | Disagree | Strongly Disagree

n=465 (+/- 4 point margin of error with 95% confidence level)

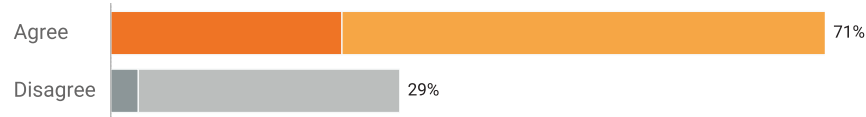


FIGURE 1.1 Percentage of people who agree or disagree that most dashboards fail.

If There's So Much Failure, Why Create Dashboards?

IF 71% of dashboard creators and users indicate that most dashboards fail, why bother to make them?

It's because companies that are effective at dashboarding outperform companies that aren't.

That was the finding of a 2022 MIT Sloan School of Management study, which stated

that companies with top-quartile dashboard effectiveness *significantly* outperformed bottom-quartile companies on five internal and five external measures of performance.¹

This aligns with our own experiences. The four of us have each helped build dashboards that have completely transformed organizations for the better.

But just what do we mean by failure? In our survey, we said failure occurs when the intended users don't adopt the dashboard at all or stop using it before it fulfills its purpose.

There are many reasons why people won't use a dashboard. Maybe the charts were too confusing. Perhaps the metrics on the dashboard were of no interest to the stakeholders. Maybe the performance was too sluggish, or the data was obsolete. Maybe users didn't even know there was a dashboard.

Reflect a bit on the last dashboard project you worked on that didn't have the impact you hoped, and then answer the following questions:

- How closely did you work with your stakeholders? Were they only involved peripherally, or were they active collaborators?
- Did you agree ahead of time on a way to measure whether your dashboard was successful?

¹dtdbook.com/link1

- Did you set up a system for modifying the dashboard as users' needs changed?
- Were the business leaders behind the project charismatic champions who pushed for widespread adoption?

If you answered *no* to any of these questions, then that beautiful dashboard you and your team created was probably weighted toward failure.

We don't want you to be part of the 71% that fail. That's why we wrote this book.

But How?

"Know your audience."

"Design for your user."

"Get feedback early and often."

Okay great, but how?

If you create dashboards and occasionally read blogs, books, or LinkedIn carousels of well-intentioned advice around building better dashboards, you may have seen at least one of those recommendations.

No objection to those big ideas, but if you're new to dashboard design, how exactly are you supposed to *do* any of those things? And if you do find ways to *do them*, how do you know when you have enough feedback or have gone through enough iterations to click Publish on your new dashboard?

This book was born out of a gap in the dashboarding world. We love to admire dashboards that inspire an "ooh-ah" response for their elegance *and* spark an "ah-ha" by effectively answering a question. But we seldom dive into just how these dashboards get built. Books and blogs talk big picture ("Know your audience!") or get into the weeds of how to do *one thing*, often within a particular set of tools. But the list of resources that walk through, step-by-step, on how to deliver on these user-centered dashboards is...limited.

Filling that information gap – which will help you avoid dashboard failure – was another reason we wrote this book.

The Big Questions We Address

We wrote our first book, *The Big Book of Dashboards*, to answer this question:

Given this business predicament, what kind of dashboard should I create?

We tackled this question by presenting 28 different scenarios, each with an accompanying dashboard that addressed the challenges of each scenario.

In *Dashboards That Deliver* we offer 15 new scenarios and address another critical question:

How do I make sure people use the dashboards I create, and get value from them?

For that question, we'll delve into the *process* of building dashboards. Part I will dive deep into a framework we've created based on our own combined 50+ years' experience, along with interviews

with dozens of people who build dashboards for organizations of all sizes. It's a process that addresses what you need to make dashboards that people will want to use, that will make people think differently, and that will make people act.

Should You Read *The Big Book of Dashboards* First?

You do not have to read *The Big Book of Dashboards* before reading this book. In fact, you don't have to read it at all (although we certainly would like you to). While complementary, both books stand on their own.

However, if you are brand new to data visualization, then we recommend either reading the first section of *The Big Book of Dashboards* or reading one of the myriad primers on data visualization. We share a list in Chapter 8.

We wrote this book so that you can learn from our successes and failures as you embark on developing new dashboards and learn from other experts across the field who contributed their thoughts in our interviews and dashboard scenarios.

If you're a dashboard developer, we know you'll find practical advice over the next 34 chapters around how to understand your audience, fail fast, and deliver a great product. We also encourage you to use this framework in your conversations with

your stakeholders around ways to build connections between the data team and dashboard users.

If you're a data leader or team member, we hope you'll find ways to take a step back, take stock of your current delivery process, and think through how some of our ideas can help you deliver on the promise of impact every company aspires to with their data.

We all benefit from tools that help us analyze data more efficiently. Whether you call them dashboards, data apps, or "algorithmic cockpits" as we saw referenced by one AI company, they still have the potential to transform how we use data in our work.

This Book Is Tool Agnostic

The book is agnostic about what tools you use to create dashboards. You won't find step-by-step instructions about how to make anything. This goes for artificial intelligence (AI) tools as well. As we'll explore in Chapter 32, AI will play a big part in dashboard design, beyond exploratory data analysis, and its capabilities are changing rapidly.

Will AI replace many if not all the human factors that go into making a dashboard succeed? We'd never say never, but at the time of this writing you still need humans who know what good looks like to direct and drive the decisions. So, no matter the tool and no matter your reliance on, or avoidance of, AI, we'll show you what you should build, why you should build it, and the process that should go into designing, developing, and deploying it.

Downloadable Dashboards and Additional Resources

FOR downloadable dashboards, additional examples, information about workshops, and other resources, please visit DashboardsThatDeliver.com.

A Path Toward Fewer Failures and More Successes

The four of us have probably failed more than many of you in designing and launching different dashboards, and through those failures, we've refined

and improved our own approaches. We've learned a lot from those failures, and we want to do what we can to help you avoid the missteps and failures we and many other practitioners have made.

In *Dashboards That Deliver*, we give you scenarios and coping-with-the-real-world essays. But more importantly, we arm you with a comprehensive, comprehensible, and customizable process – a process that will help you succeed.