How to Build Marketing Dashboards That Don't Suck

Best Practices for Building Better Dashboards

Life's Too Short for Dashboards That Suck

A good dashboard is the data-driven marketer's best friend. Nothing does a better job of showing campaign performance ASAP, so you can make smart decisions faster.

The only problem? Too many of us aren't using good dashboards. We're stuck with visualizations that are difficult to use and fail to answer our most important questions. (Plus, a lot of these dashboards are just plain ugly.)

But it doesn't have to be that way. You can create better, most useful visualizations simply by applying a few basic strategies. These are the same guidelines that our company, Alight Analytics, uses to design dashboards for North America's leading brands and agencies.

In this guide, you'll learn:

- What a dashboard is and what it's really for
- What you should (and shouldn't) do first
- How to make your dashboard beautiful
- How to help users get the most from your dashboard

Let's get started!

What A Dashboard Really Is And What It Is For

A dashboard is a visualization that showcases your most important KPIs, using data that is constantly refreshed, so you can run your organization. (What counts as "constantly" will vary, but as a rule, it's good to refresh data on a daily basis.)

There's a big difference between dashboards and reports. A dashboard is like the dashboard of your car. It has a few metrics that will change regularly (like speed and fuel level) and knowing those numbers will help you operate your car as you drive, especially if you're checking the dashboard from moment to moment.

A report is something that you will look at less frequently—sort of like the reports that your mechanic gives you a few times a year. Reports are important to making a singular decision or set of decisions on a specific topic. Sort of like a printout when they check your car's alignment. You use that printout to make one decision and move on. Reports are important, but they're not as timely as your dashboard is.
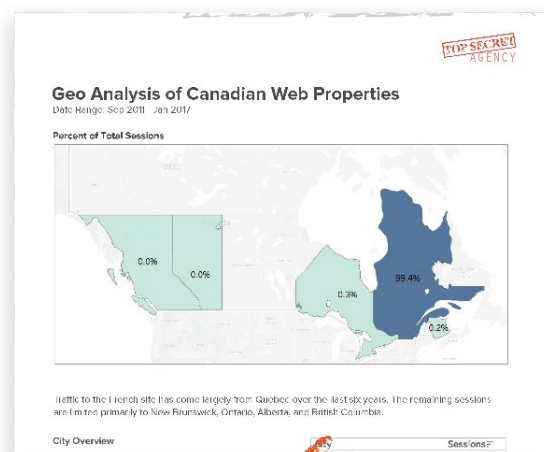
Both dashboards and reports can be useful for marketing teams as they track campaigns and make business decisions. Just make sure you — and your users! — understand how they're different and how they should be used.

Dashboard
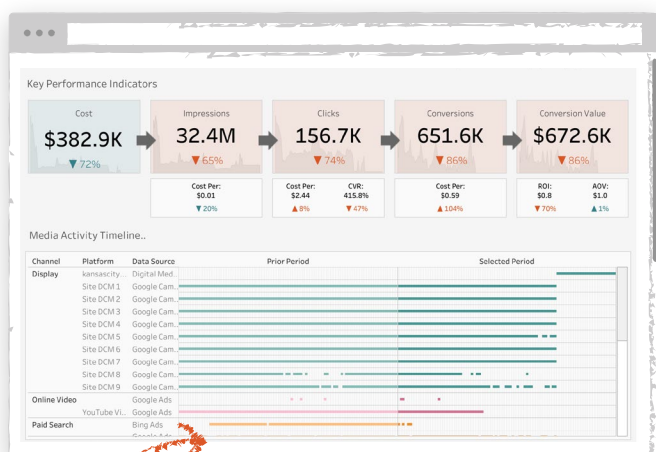
Dashboards regularly update based on constantly refreshing data.

Report

Reports are often static and much less timely.

Planning Your Dashboard Build

Before You Do Anything Else: Gather Requirements

You might be so excited about creating your dashboard that you jump in and just start building.

But you've got to fight that urge. Slow down. Talk to your users, and get a clear understanding of how they're going to use the dashboard. What do they need? Gathering these requirements early in the process will help you avoid rounds of revisions and ultimately design a more useful visualization.

If you rush this step, you could end up building something that doesn't meet your audience's needs.

Three Essential Questions

When you gather requirements, there are three big questions you should answer:

- Who is going to be using the dashboard? The answer shouldn't be "everyone" — your senior leadership and your front-line analysts will have different needs and will require different dashboards.

- What specific business questions do they need to answer?

- What data sources, dimensions and metrics are required to answer those questions?

While you're here to serve your client or stakeholder, it's also a good idea to lead them, too. They should talk, and you should listen — but you should give them a framework to work within. Help them determine which data points they will need so they can answer the key questions. What about segmentation? Keep drilling down until you get to the metrics that truly matter and that are indicators for the campaign's success.
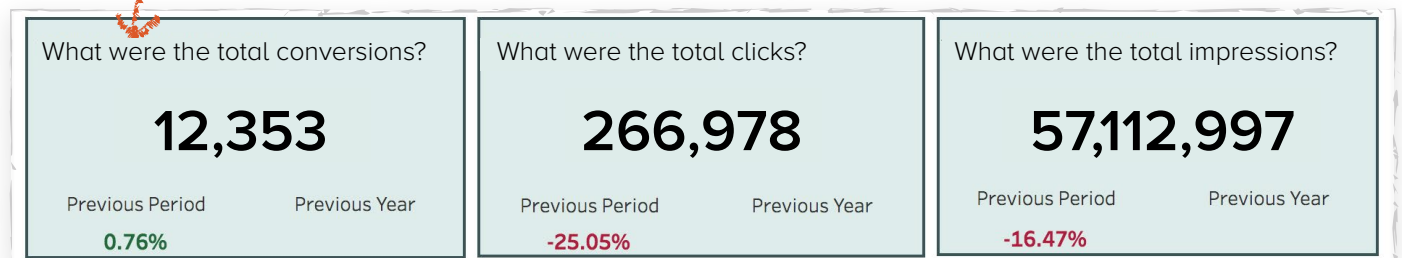
No, What Do They *Really* Need?

Be careful: Dashboards shouldn't include too much data. Resist the impulse to include metrics that aren't going to be used to make decisions. Think about what your dashboard users really want to know about.

For example, a lot of marketers like to showcase how many impressions their campaigns yielded (because this is usually a big number) and then mention how many conversions or sales were generated (which, uh, isn't always as big).

It all depends on who will be using your dashboard. If your user is a CEO, CMO or some other C-suite denizen, then KPIs like conversions, sales and revenue should take priority. But if the dashboard is for a channel manager or media buyer, they'll probably be more interested in impressions and engagements.

Once you know the data points your dashboard should include,

Conversions, in this case, are the most valuable metric - lead with it!

What were the total conversions?	What were the total clicks?	What were the total impressions?
12,353	**266,978**	**57,112,997**
Previous Period Previous Year	Previous Period Previous Year	Previous Period Previous Year
0.76%	**-25.05%**	**-16.47%**

Can You Picture It?

its intended audience and the questions it should answer, you can create a mock-up -- rough sketches of how the dashboard will look, how you'll visualize specific measures and how you'll lay things out. (Whiteboards are awesome for this.) Spend a little extra time here, and the process of building the dashboard will go much faster.

As you sketch things out, look for ways to illustrate correlations between different types of data. An easy example would be: Do higher numbers of sessions on your website indicate higher conversion rates?

Keep time and seasonality in mind. How will your users look at results — by year, quarter, month, day or even hour? If possible, you might want to give users the power to filter results by different units of time.

After you've outlined your answers to all these questions, send them back to your client for approval. Get everyone on the same page. Then, and only then, are you ready to design and build your dashboard.
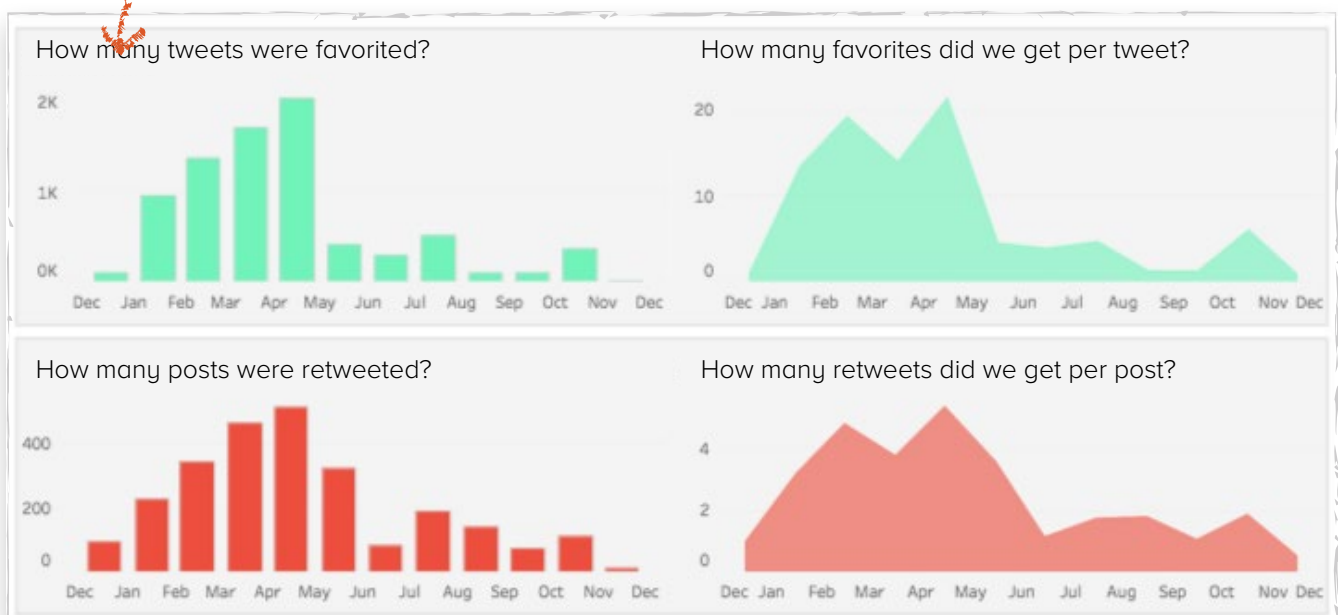
It's critical to get buy-in on the design concepts before you start building. This will help you dodge so much heartache down the road because you'll avoid silly layout changes, identify missing data points early and prevent an overcrowded dashboard when everyone comes to you with "one more change."

Presenting Your Dashboard to Stakeholders

U-G-L-Y / Why You Need to Simplify

- Aim for simplicity. Give users a sound bite they can walk away with. Use easy-to-understand numbers

- Don't try to do too much. Answer one business question with a visualization.

- White space is a good thing. Spread things out, and your users won't feel overwhelmed.

- Use questions (not titles) to label graphs. Ensure the graphs answer the question.

- Larger fonts will be easier to read.

Lead with a question. It'll be easier for the viewer to identify with when looking at the report.

How many tweets were favorited?

How many favorites did we get per tweet?

How many posts were retweeted?

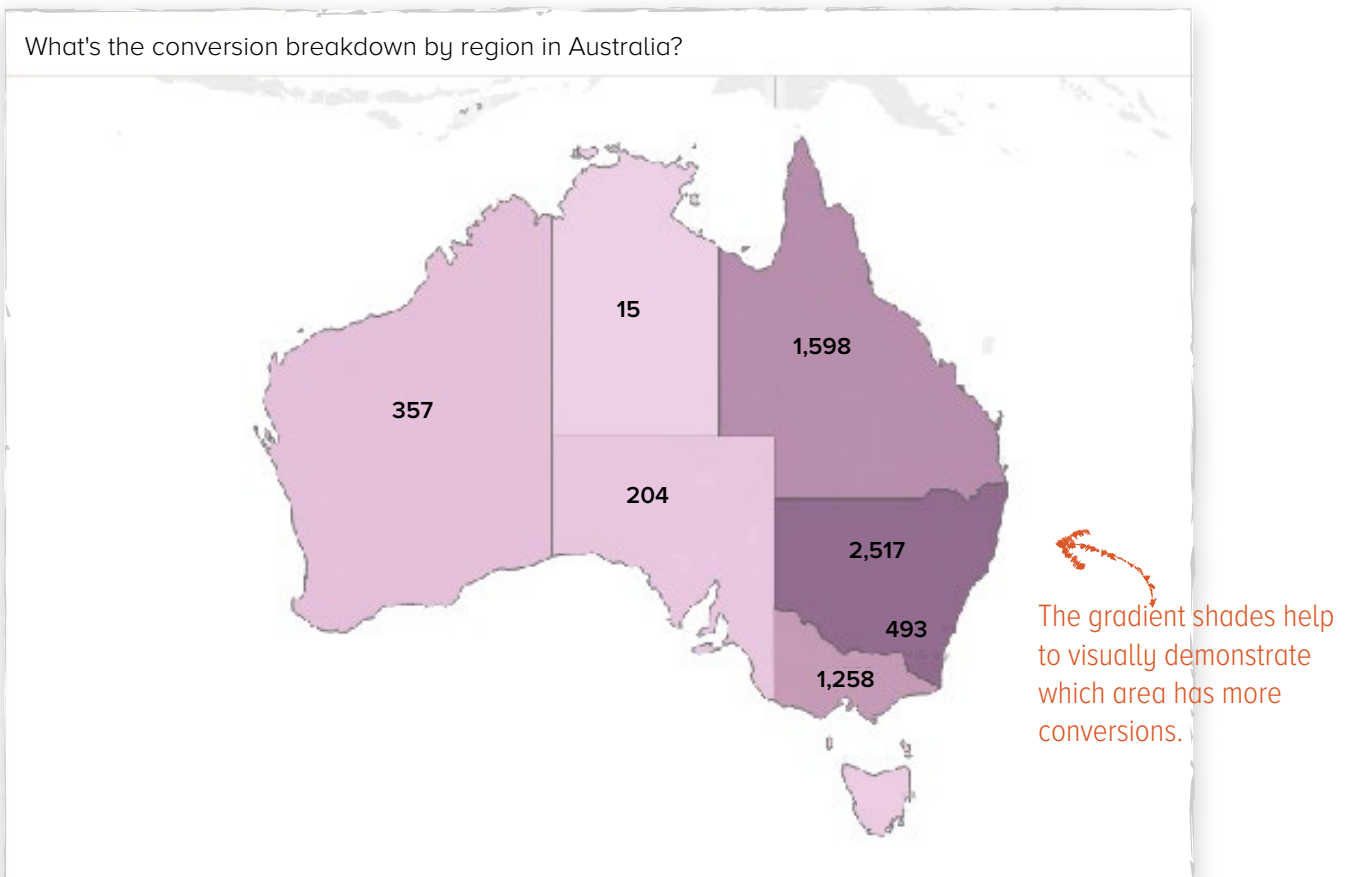How many retweets did we get per post?

True Colors

Use color to communicate:

- Choose brand colors when possible.

- Use solid, differentiating colors when you need to include different categories.

- But gradients -- or shades of the same color -- can be used to show degree or rank.

- Be consistent with color. Don't use the same color for different measures.

Simple, easy-to-understand icons can help you communicate quickly. Use the Facebook logo instead of spelling out "Facebook."

What's the conversion breakdown by region in Australia?

15

1,598

357

204

2,517

493

1,258

The gradient shades help to visually demonstrate which area has more conversions.

Paid Social Report

Select Client
All

What's the social reach?

40M
20M
0M

February   April   June   August   October   December

What's the post frequency?

1.0   1.2

1.0
0.5
0.0

February   April   June   August   October   December

How many impressions did we get?

40M
20M
0M

February   April   June   August   October   December

What's the cost per thousand impressions?

$15.69

$15
$10
$5.45
$5
$0

February   April   June   August   October   December

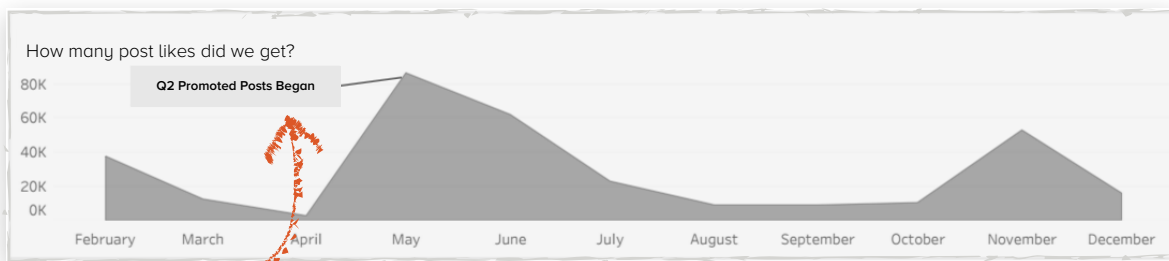Notice how the colors follow Top Secret Agency's branding.

Different colors denote different categories.

Context, Please

Try to put results in context. Use benchmarks or progress numbers. Are your latest results up 10 percent compared to the previous quarter?

Annotations -- noting when important campaign-related events occurred -- can be very powerful for helping users understand the story behind your data.

How many post likes did we get?

80K
60K
40K
20K
0K

Q2 Promoted Posts Began

February   March   April   May   June   July   August   September   October   November   December

Annotations like this really make storytelling easier.

Data labels -- text boxes that list numbers for certain points in time -- can be very effective. This is especially true when you're listing dollars. It's less important when you're visualizing impressions.

What's the click-through rate?

What's the cost per click?

$100.00

$82.09

$50.00

$0.00

$1.54

0%

February   April   June   August   October   December

February   April   June   August   October   December

Find ways to explain terminology or information that might be confusing. That might be a "definitions" page that spells out what certain terms mean. Or you could create a pop-up box that includes clarifying info.

Know how your end user is going to consume your visualization. If your work is probably going to appear in print, make sure charts are sized so they won't split across two pages. If a viz is most likely going to be viewed on a mobile device, check to see if it reproduces well.

What if a client asks you to create a monstrous-looking, spreadsheet-style report? Build two versions: one like what they requested, and one that looks sexy. Sometimes people don't know what they want until you show them. Once your users see your awesome-looking version, they may very well choose it instead.

So, You've Built a Great Dashboard. Now What?

Testing, 1, 2, 3...

You might have built your visualization, but your work isn't done yet. Here are a few things you should consider before you break out the cigars and Courvoisier.

Super important!
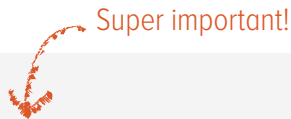
A Good Visualization Should Meet The 5-1-5 Rule

Within 5 seconds, a user should be able to understand what a visualization is displaying. Within 1 minute, a user should be able to extract a business insight. Within 5 minutes, the user should be able to make a decision. Does your viz meet this standard?

Don't Blindly Trust What The Dashboard Displays

Go back and check the underlying data to make sure your visualizations are accurate. You don't want to create a dashboard that uses daily numbers for a monthly viz, or vice versa.

Quality Assurance Is Paramount

After you've built your dashboard, go through it with a fine-tooth comb. Invite someone who isn't involved with your project to take a look, and ask them to point out things that don't make sense.

Set Your Users Up For Success

One of users' biggest mistakes is not interacting with their dashboards. That includes failing to check them as frequently as they should and failing to use a dashboard's built-in tools to sort and engage with the data.

Your dashboard is (obviously) self-explanatory, but as you send your masterpiece out into the world, it might be worthwhile to walk the end users through your visualization and show them everything it can do and how to extract powerful insights.

Another great tactic: When you present the dashboard to users, help them answer the three following questions:

- Why should I care about the dashboard?
- What should I do with it?
- What is the business impact?

Making sure people understand this is a good way to get them engaged.

So, what have we learned?

Planning Prevents Poor Performance

The more time you spend on planning, the less time you'll need to actually build the dashboards -- and with fewer revisions down the road.

Focus on the dasbhoard users' most important metrics. (Hint: It's usually going to be conversions, sales or something adjacent.)

And spend time sketching things out before you ever sit down to your viz tool.

Keep It Simple And Clear

Resist the urge to jam your dashboard full of every single chart.

Look for ways to give your users the information they need to understand the data and its context.

Sometimes, you can do that with labels or annotations.

Other times, you can communicate visually, with icons or color.

Your Dashboard Is Useless If People Don't Use It

Double-check your work. Is everything accurate and understandable?

Does it pass the 5-1-5 Rule—can your users understand your viz in 5 seconds, glean an insight in 1 minute and use it to make a decision in 5 minutes?
And be ready to give your users a "test drive" of your dashboard—show them all it can do.

We love dashboards, and we hope you do, too. If you've got questions about this guide—or you need more help—please contact us at hello@alightanalytics.com.
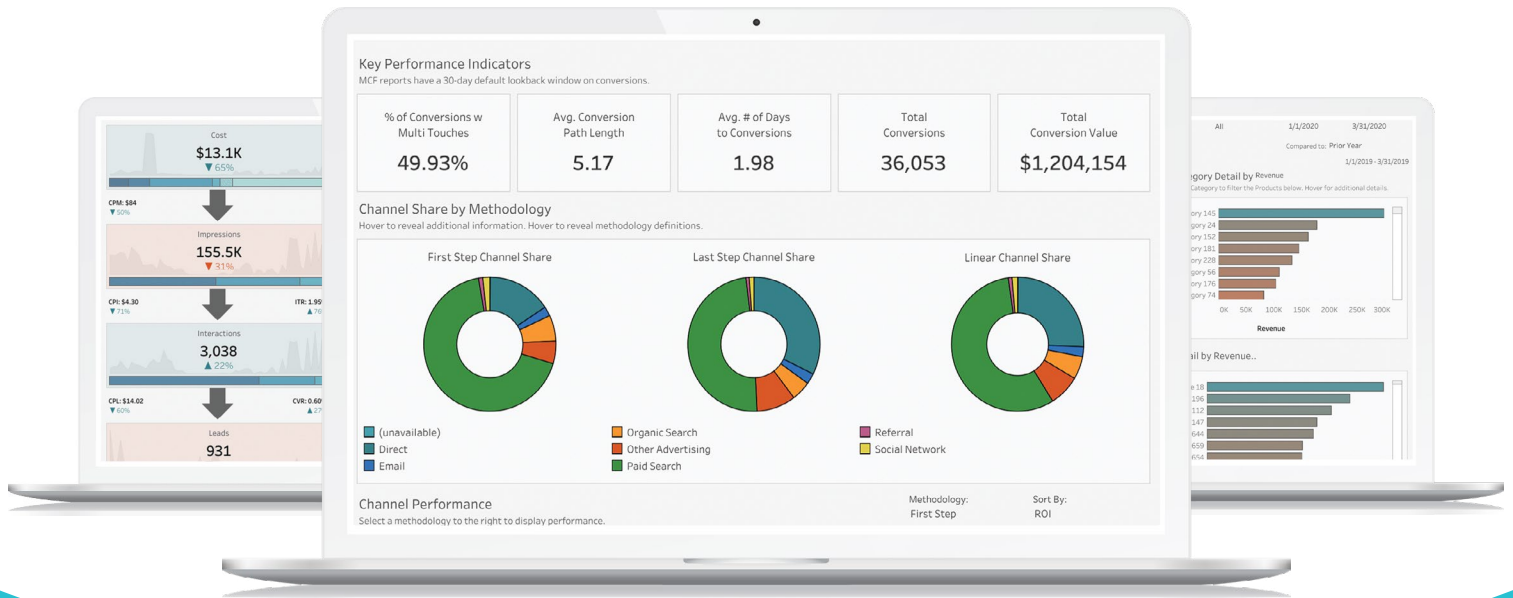
Marketing Dashboards You Can Count On

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