



User Experience Best Practices

Dashboards and Scorecards

PROJECT DESCRIPTION

The visual presentation of dashboards allows executives and managers to quickly identify and remedy problem areas within the organization. All tools must be designed with the end user in mind and with a specific purpose. These best practices are intended to help guide a successful user experience.

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Best Practice Overview

WHAT IS A BEST PRACTICE?

A best practice is a technique or methodology that, through experience and research, has proven to reliably lead to a desired result. The User Experience Dashboard and Scorecard Best Practices are intended for both business and technology audiences to help identify the key elements and context which make a digital dashboard useful.

While you can design a digital dashboard however you wish, the following practices result in a much more useful, efficient, and aesthetically pleasing dashboard. These practices are also extremely useful when starting the design process of a dashboard project.

A digital dashboard is a collection of data visualization tools that provide the means to quickly get an overview of how an organization or a section of an organization is performing and the reasons behind the performance. A digital dashboard achieves this by allowing a user to monitor important business activities and processes that give insight into a company's activities.

The advantage of a dashboard is that it is easy to use, provides timely data and, most importantly, gives an idea as to how to go about implementing potential improvements and solutions. The components used when creating a digital dashboard include charts, gauges, maps, diagrams, tables and scorecards.

Getting started

KNOW YOUR AUDIENCE AND SCOPE

Distinguishing your **users and their roles** will help to define the dashboard, organizational levels and views of information the user will need to make informed decisions. Usually metrics cascade down from the top of the organization to the bottom, while data rolls up from the bottom to the top. For some metrics it is straightforward but each layer may have different initiatives and processes, each with distinct measures which will influence the corporate metric. Data correlation is also an important consideration.

Defining your audience is more complex than aligning with a departmental goal, for example. It is about understanding the motivations, behaviors and meanings which lead to connections with user goals and the dashboard or scorecard.

Supporting the way a user thinks and uses the dashboard will lead to ease of use if you include the following:

Familiarity. The user's interaction is primarily based on experience. Use clear and common language or provide a contextual legend with the data or the visuals.

Simplicity. Show fundamental components of the task. Although there may be details associated with a given task, the basic components should not have to compete with the details for the user's attention.

Availability. An uncluttered user interface is essential, but the availability of certain key features and settings the user needs is equally so.

User Experience Dashboard Best Practices

Discoverability. Encourage your users to discover functionality by providing cues about how to use user interface elements. If an element is clickable, for example, it must appear that way, or a user may never try clicking it.

<Note: The majority of content was removed for confidentiality>