DESIGNING TABLEAU DASHBOARDS YOUR AUDIENCE LOVES TO USE

TUCSON TUG ◍ AUGUST 19, 2020 ◍ ERIN WALDRON FROM DATA DOZEN

EASY TO USE

SPOILER ALERT

Your audience loves intuitive dashboards that answer their questions.

RELEVANT

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SPOILER ALERT

Just like all simple and obvious goals that hinge on effective communication, this one breaks down constantly.

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FRUSTRATING

SPOILER ALERT

Your audience does not love cryptic dashboards that answer our questions.

IRRELEVANT

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DESIGNING TABLEAU DASHBOARDS

YOUR AUDIENCE LOVES TO USE

STEP 1: LISTEN

GOALS

Ask your audience how they will use the dashboard

STEP 2: BUILD

BUILD

Build a great dashboard (or the step we all talk about constantly)

STEP 3: EXPLAIN

FOOTHOLDS

Explain to your audience how to decode the data you've encoded

STEP 4: LISTEN

CRITIQUE

Ask your audience how to make the dashboard better

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STEP 1: GOALS

_____WHO_____ (audience) will use this dashboard about
_____WHAT_____ (content) to _____WHY_____ (purpose).
They will interact with this dashboard
on a _____WHERE_____ (platform)
for _____WHEN_____ (duration) on a _____WHEN_____ (frequency) basis.

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STEP 1: GOALS

_____ (audience) will use this dashboard about
_____ (content) to _____ (purpose).
They will interact with this dashboard
on a _____ (platform)
for _____ (duration) on a _____ (frequency) basis.

WHO
WHAT
WHY
WHERE
WHEN
WHEN

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STEP 1: GOALS

_____ (audience) will use this dashboard about

class enrollment _____ (content) to _____ (purpose).

They will interact with this dashboard

on a _____ (platform)

for _____ (duration) on a _____ (frequency) basis.

STEP 1: GOALS

The school board (audience) will use this dashboard about class enrollment (content) to allocate funds (purpose).
They will interact with this dashboard
on a paper report (platform)
for 3 hours (duration) on a semi-annual (frequency) basis.

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STEP 1: GOALS

The cafeteria staff (audience) will use this dashboard about class enrollment (content) to prepare each day's lunch (purpose).
They will interact with this dashboard
on a web portal (platform)
for 5 minutes (duration) on a daily (frequency) basis.

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STEP 4: CRITIQUE

The best time to get feedback is before you feel ready.

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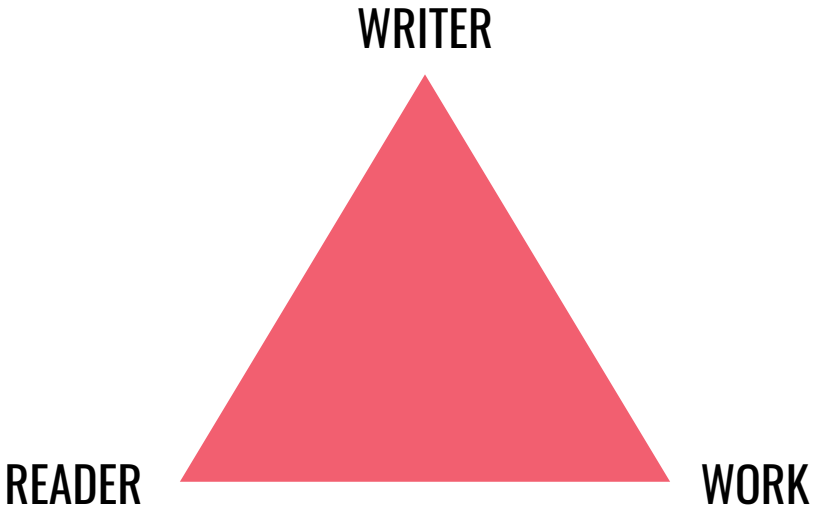
STEP 4: CRITIQUE

Here's where literary theory and dashboard design meet.



STEP 4: CRITIQUE

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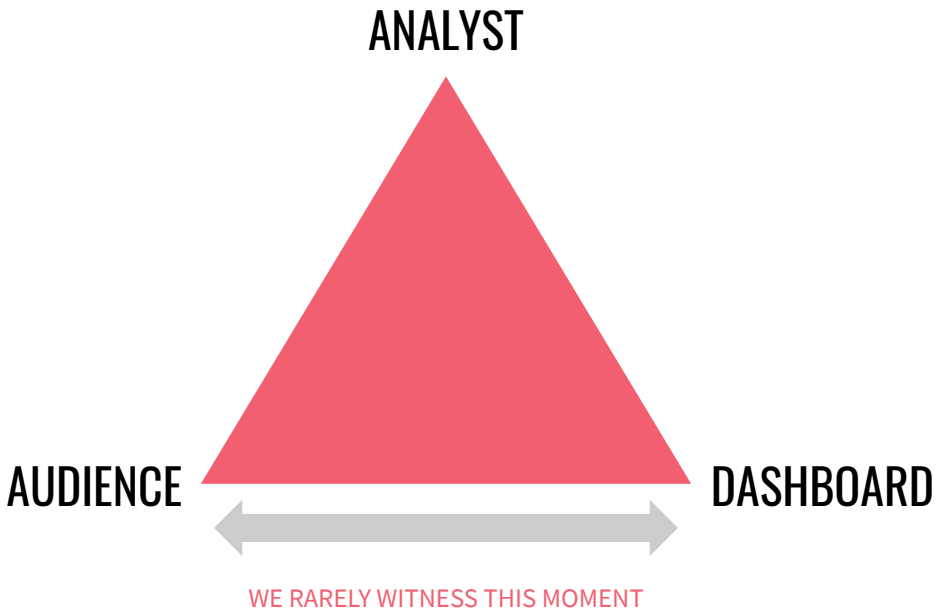

STEP 4: CRITIQUE

The fastest way to learn what's working and what's not is to workshop the dashboard.

STEP 4: CRITIQUE

Here's how a typical writing workshop or architecture pin-up works.

WHAT WE LIKE
ENGAGING, PRODUCTIVE, MEMORABLE

WHAT WE DON'T LIKE
DISTRACTING, CONFUSING, OUT OF PLACE

AUTHOR DOES NOT SPEAK
LISTEN, COLLECT IDEAS, NOTE DISAGREEMENTS

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STEP 3: EXPLAIN

Every chart we build visually encodes the data.

And then our audience has to decode our charts.

STEP 3: EXPLAIN

The primary goal of footholds is to share with the audience what we know about the dashboard.

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SLOW & STEADY

WE READ THE INSTRUCTIONS

- Titles as questions
- How to read this chart
- Annotations
- Tableau tutorial

JUST IN TIME

WE DIDN'T READ THE INSTRUCTIONS

- One example
- Tooltip sentences
- Tooltip instructions
- Icon information

WIND AT YOUR BACK

WE WOULD HAVE NOTICED IF YOU DIDN'T DO IT

- Templates
- Style guide
- Ranges + containers
- Hide the unhelpful

THREE CATEGORIES OF FOOTHOLDS IN TABLEAU

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ENOUGH THEORY.

Let's build.

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THANK YOU!

DOWNLOAD ALL THE SLIDES HERE

www.datadozen.com/tableau-dashboard-design-your-audience-loves/

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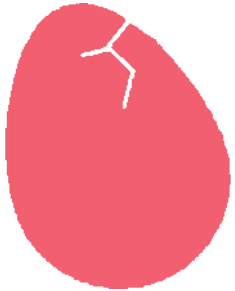

DATA DOZEN

DATA VISUALIZATION EDUCATION

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