Module One: Dashboards: What and Why

Defining Dashboards

- Continuum
- Self-Service Dashboards
- Engineered Dashboards
- Scorecard Definition

Dashboards in Context

- Business Context
- BI and Analytics Context
- Technology

Discussion

- Dashboard Use

Module Two: Dashboard Foundations

Measures and Metrics

- Measurement Concepts – Why Measure?
- Measures, Metrics, Performance Indicators, and KPIs

Implementing Metrics   Process Overview

- Useful Metrics
- Definition – Naming and Description
- Definition – Calculation

Metrics Applications

- Business Impact
- Capabilities

Exercise 1

Dashboard Brainstorm

Visualization Foundations

- Choosing the Right Visual
- Example

Module Three: Dashboard Design Techniques

Multiple Paths

- Self-Service Vs. Engineered

Engineered Dashboard Development

- From Planning to Production
- The Design Phases

Dashboard Requirements

- Business Scope

- Stakeholders
- Technical Requirements
- Performance Indicators
- Cascading and Dependency

Dashboard Design

- Design Tips
- Item Placement
- Element Layout
- Filters
- Drill-Down
- Help
- Keep it Simple
- Adapt Charts to Fit Viewers
- Formatting Tables
- Pre-attentive Processing
- Choosing Fonts

Dashboard Examples

- Balancing Sparsity and Density
- A Good Example
- A Bad Example

Exercise 2

Critiquing Dashboards

Self-Service Dashboards

- Process Framework
- Collaboration

Module Four: Performance Management

Defining Performance Management

- Performance + Management
- Why Performance Management?

Performance Management Processes

- Goal Setting and Measurement
- Analysis and Action
- Monitoring and Feedback

The Balanced Scorecard

- PM Foundation
- Variations

Exercise 3

Scorecard Structure

Strategy Mapping

- A Cause-and-Effect View of the Business
- Map Components

- From Balanced Scorecard to Strategy Map
- Leading and Lagging Indicators

Performance Indicators

- From Mapping to Metrics
- From Nodes to Numbers
- Using the Business Model Canvas
- KPI Library
- Choosing KPIs

Business Impact

- Feedback and Evolution

Module Five: Summary and Conclusion

Summary of Key Points

- A Quick Review

References and Resources

- For More Information