

ARE WE ON PACE TO REACH OUR GOALS DASHBOARD.

Alistair Williams

AGENDA.

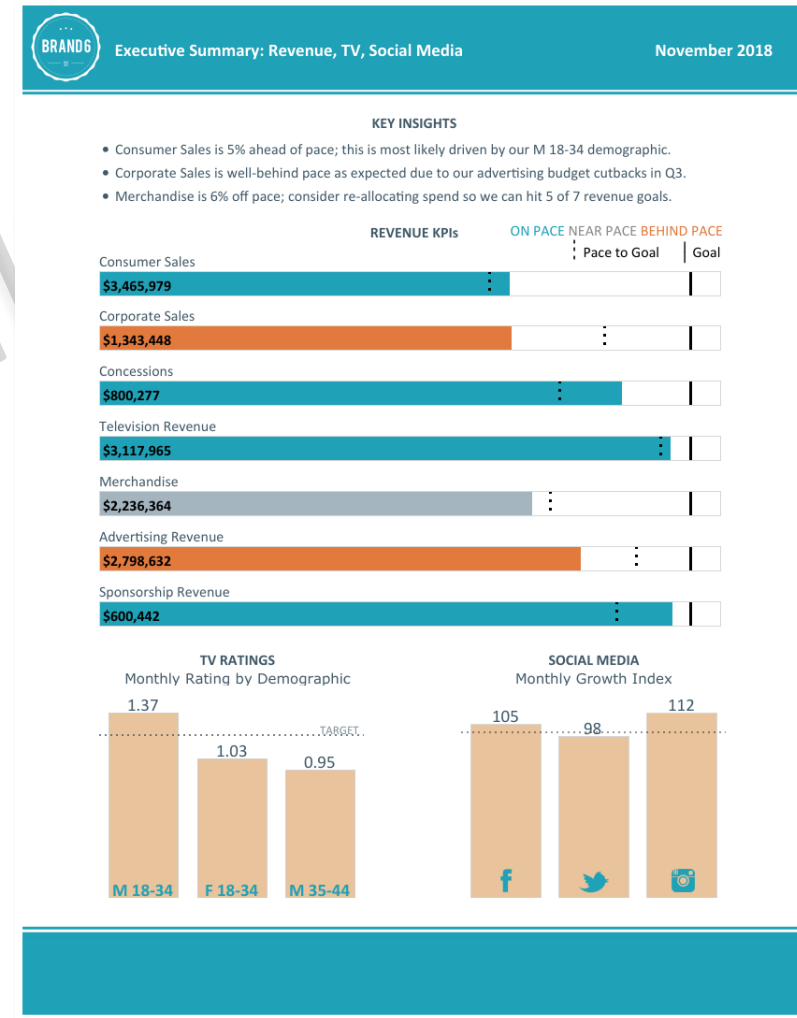
- Accessing Tableau Public And The Example Pace Dashboard
- Scenario – Big Picture
- Specifics
- How People Use The Dashboard
- Why This Works – Pace Chart Illustrates Progress
- Why This Works – Reference line / Growth Index
- Commentary – Steve Wexler
- Commentary – Andy Cotgreave

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ACCESSING TABLEAU PUBLIC AND THE EXAMPLE PACE DASHBOARD.

- Click below to access the public dashboard:

[Pace Dashboard](#)



SCENARIO – BIG PICTURE.

- Despite valiant efforts to get everyone in your organisation to rely on **interactive dashboards**, executives insist on receiving a **weekly one-page summary** of key revenue, TV ratings, and social media **measures**.
- Although your organisation tracks hundreds of measures, each executive asks for a **custom report** that contains only certain measures.
- The executive using this dashboard doesn't want to spend more than two minutes **reviewing** the findings and is **particularly concerned** with seeing **if revenue key performance indicators** are **on pace** to reach the **company's goals**.

SPECIFICS.

- You need to provide an '**at-a-glance**' executive summary of key measures to executives **via email**.
- You need to show how the organisation is **performing** now but also in the context of how the organisation is **performing** for the entire year.
- You need to **normalise** different measures so that **performance** is **easy to compare** even though scales for the various measures are different.
- Executives need to see **progress toward a goal** for various revenue measures as well as period-specific TV and social media ratings.

HOW PEOPLE USE THE DASHBOARD.

- This is an example of a personalised, **explanatory** dashboard.
 - The dashboard is personalised in that measures presented are of **specific interest** to the executive receiving the dashboard.
 - The dashboard is **explanatory** in that it gets delivered via email to the executive's inbox.
- There's **no interactivity** or **exploration** in this case, just the key metrics **presented very clearly**.
 - The goal is to make it as **easy as possible** for the executive to see, at a glance, which key measures are **performing well**, and which are **performing poorly**.
- Notice that the dashboard author also **telegraphs** the key findings with bullet points at the top.
 - These are likely the three questions that come into the executive's head when he or she reviews the dashboard, and the **bullets** provide the **context** to better understand the numbers.

WHY THIS WORKS – PACE CHART ILLUSTRATES PROGRESS.

- Note that the revenue measures have been **normalised** based on the **goal**, not on the actual revenue amounts.
- That is, **bar length** is **based on** what **percentage** of the goal has been achieved.
- This explains why the corporate sales revenue bar, at \$1.3M, is **shorter** than the concessions revenue bar, at \$800K.

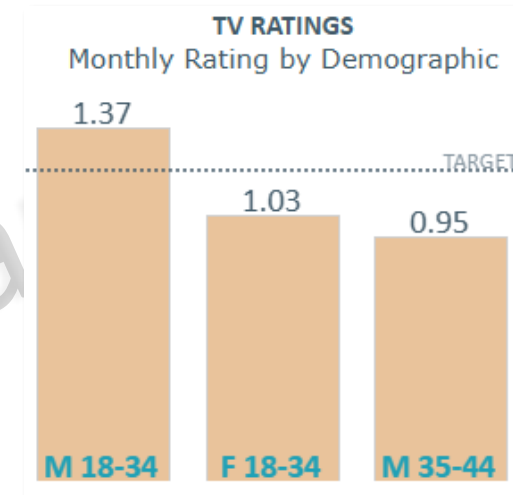


The pace chart shows progress toward a goal (the heavy black line) as well as whether the organisation is on pace to achieve that goal (the dotted line).

WHY THIS WORKS – REFERENCE LINE / GROWTH INDEX.

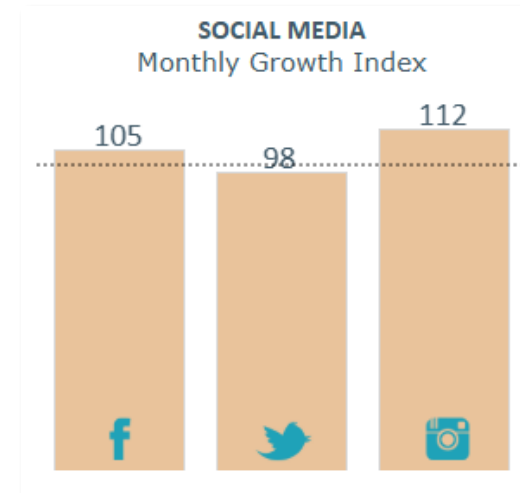
- **Reference line clarifies ratings.**

- We can see immediately that TV ratings for males between the ages of 18 and 34 are above target while ratings for the other key demographics are **below** target.



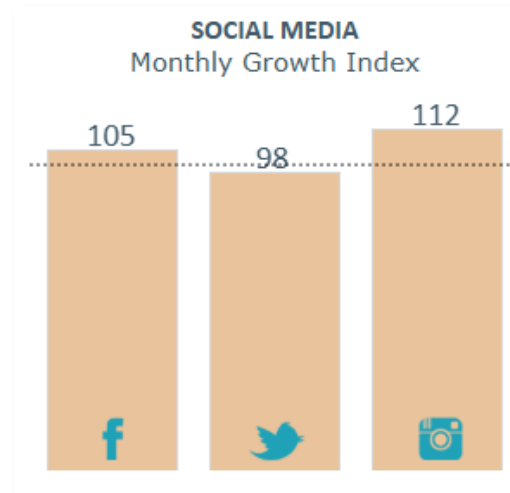
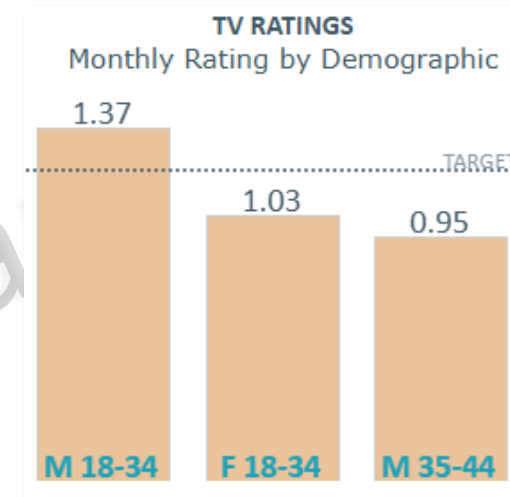
- **Monthly growth index offers an easy comparison.**

- Here's a case where the dashboard author assumes that the dashboard recipient understands the index.
- Here a value of 100 indicates that the **growth** for the current month is the same as the previous month.
- The value of 105 for Facebook indicates that there was a 5 percent **increase** in new likes from the previous month.
- For example, in the previous month, there might have been 1,000 likes, but in the current month, there were 1,050 likes.



WHY THIS WORKS – REFERENCE LINE / GROWTH INDEX.

- As with the revenue comparison, the growth index **normalises** the raw counts, as the number of Instagram users is likely to be **considerably smaller** than the number of Facebook users.
- By using a **common index**, it's easy to compare growth rates and see that Twitter growth is **down** compared to the previous month while Instagram growth is **up** by 12 percent.



COMMENTARY – STEVE WEXLER.

- Even without any advance understanding of the nature of the business, we were able to figure out almost all of what was going on with the dashboard **without any explanation** from the author.
 - The only place where we needed help was in understanding the Social Media Monthly Growth Index.
- Although we may have needed some handholding, we're **confident** that the target executives of this dashboard **would not need any explanation**.
 - Indeed, the **cherry-picked** measures and their **associated presentation** demonstrate a deep and **thorough understanding** of what the consumers of the report want to see.
- Notice that we used the word "**report.**"
 - Although this endeavor definitely fits our definition of a dashboard, the key findings, commentary, layout, and brevity suggest this is something that should take no **more than two minutes** for the target **audience to consume**, most likely via email.

COMMENTARY – STEVE WEXLER.

- We particularly liked the **pace chart**, which takes seasonality into account.
 - Also noteworthy is the **clean** and **uncluttered design** as well as the **simple** and **instantly recognisable** icons for Facebook, Twitter, and Instagram, all embedded within the bars.
- One thing I do question is why the bars along the bottom are **not colour coded** based on being ahead of or behind target.
 - Although colour coding is not necessary because it's easy to see which bars are above and below the reference line, coding based on colour might be a **welcome addition**.

COMMENTARY – ANDY COTGREAVE.

- This dashboard could be **condensed** in order to take up less space.
 - However, in this instance, the requirement was very clearly to create a printable dashboard with just these key pieces of information.
 - If we managed to convince our executives to switch to looking at these on their cellphones, then we could create something **much denser** to fit into a small space.
- The first thing I would change is to move the labels on the bars to the left of the bars rather than above them.
 - This **improves** the **readability** of the chart.
 - Now, with a single sweep of my eye, I can read down the categories and identify the one I want to look at.
 - I can quickly read down the numbers too with a **single sweep of the eye**.
 - With the labels positioned above the bars, I have to work **harder** to cast my eye over the categories or values.

