DAY 2

INTERACTIVE DASHBOARDS

Using Excel

Check-in!

Interactive Dashboard in Google Sheets or Microsoft Excel?

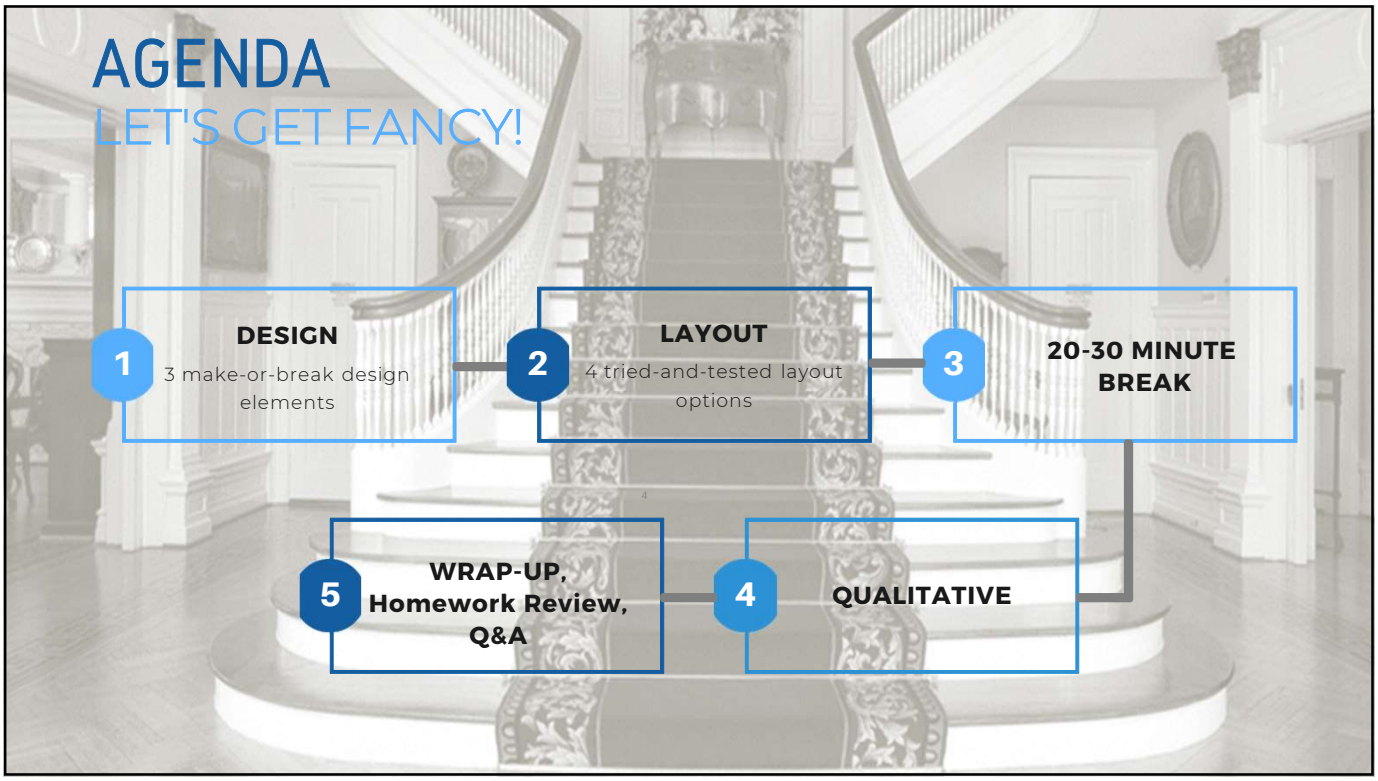
1- Not at all comfortable

2- Somewhat comfortable

3- Comfortable

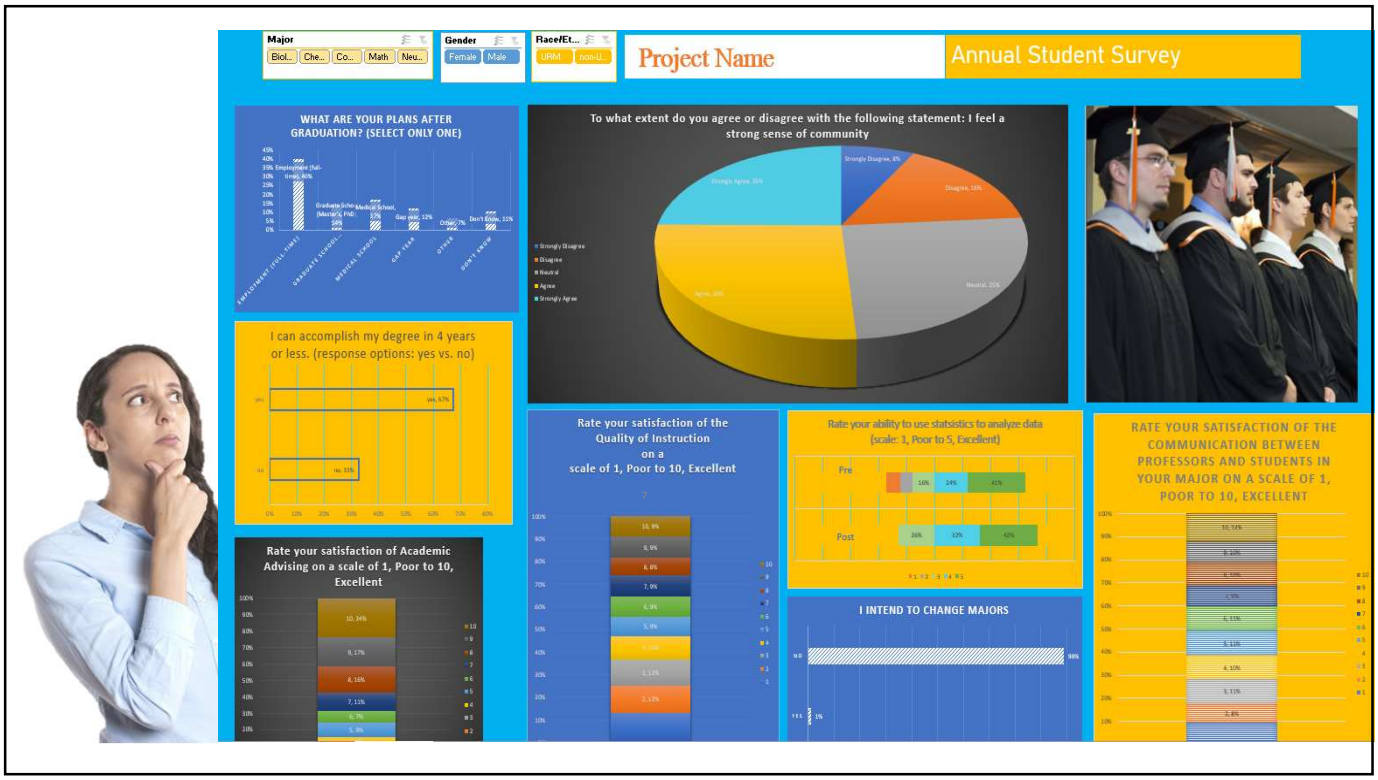
4- Very comfortable

Copyright 2021


AGENDA
LET'S GET FANCY!
1
DESIGN
3 make-or-break design elements
2
LAYOUT
4 tried-and-tested layout options
3
20-30 MINUTE BREAK
5
WRAP-UP, Homework Review, Q&A
4
QUALITATIVE

www.shellyphd.com
HOME
ABOUT
SERVICES
SAMPLE DASHBOARDS
DASHBOARD WORKSHOPS
SAMPLE
INTERACTIVE DASHBOARDS
COPYRIGHT © 2020 SHELLY ENGELMAN, PHD
CLASSIC DASHBOARD
DOWNLOAD
DASHBOARD WORKSHOP MATERIALS
BEGINNER WORKSHOP
CLASSIC DASHBOARD:
SLIDES:
CLASSIC DESIGN
POWERPOINT SLIDES
EXCEL PRACTICE DATA SET:
GOOGLE SHEETS DASHBOARD:

DESIGN



Copyright 2021

③ KEY DESIGN ELEMENTS…

THAT SEPERATE THE AMATEURS FROM THE PROFESSIONALS!

COLOR

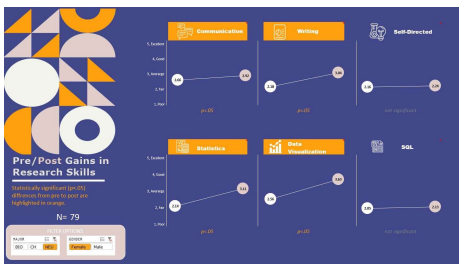
CHARTS

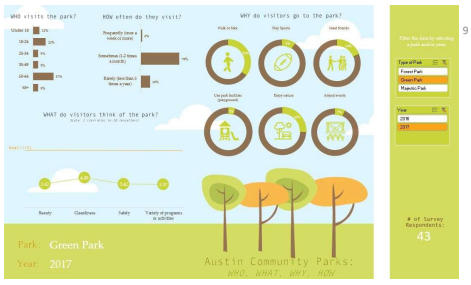
LABELS

+ 2 Design Principles

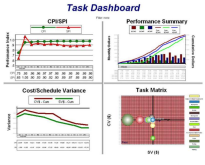
COLOR

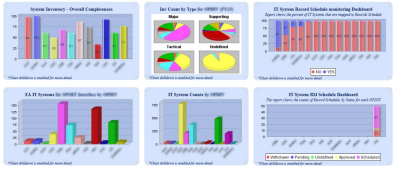
Do this!





Not this!





COLOR

- 3-4 COLORS ONLY!
- LET YOUR LOGO OR BRAND DICTATE THE COLORS OF YOUR DASHBOARD
- USE YELLOW, RED, ORANGE FOR DRAMATIC EMPHASIS!

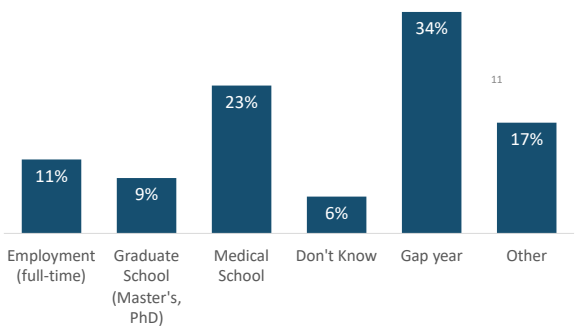
10

COLOR

- Add a color contrast to your charts to draw attention

A

Plans after Graduation

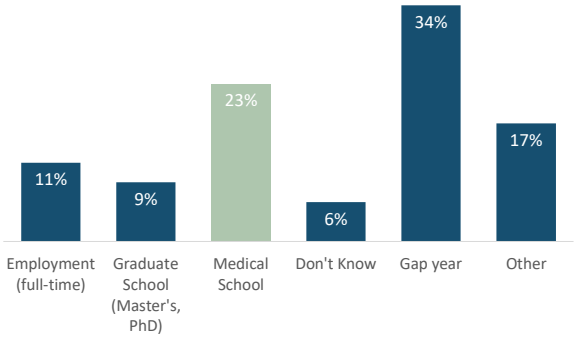


11

B

Plans after Graduation:

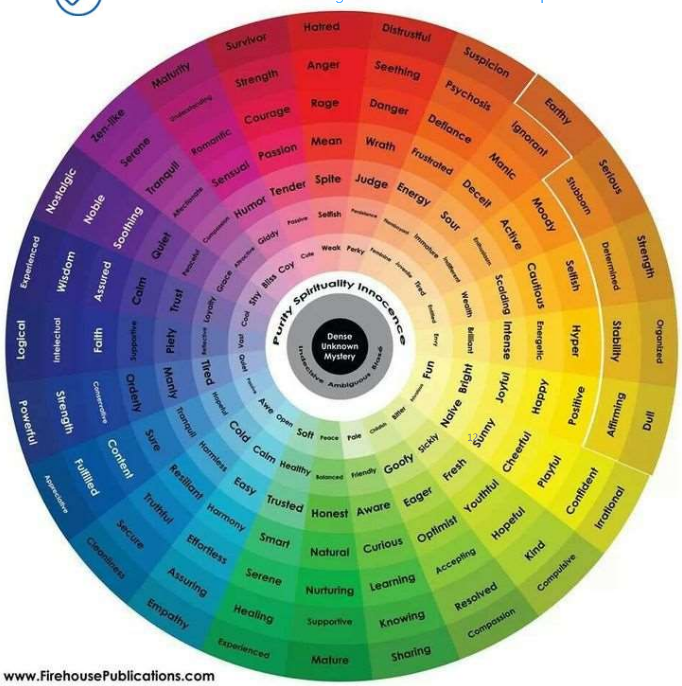
*Is **Medical School** the most popular 'next step' for students?*



Copyright 2021

COLOR

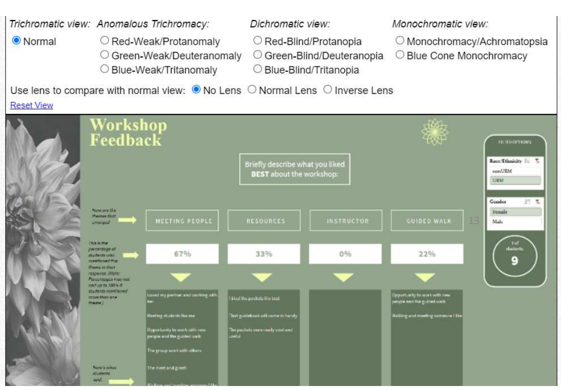
Make sure that your colors capture the emotion or vibe that you intended.



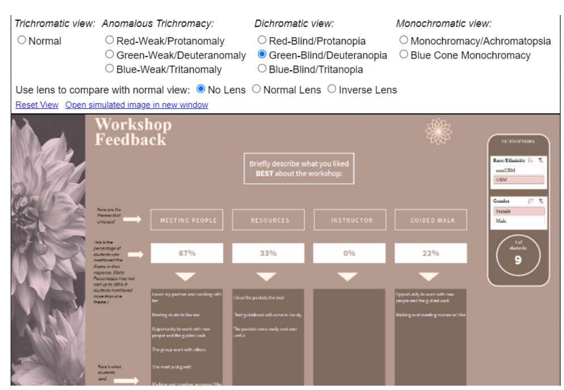
COLOR

https://www.color-blindness.com/coblis-color-blindness-simulator/

Normal View

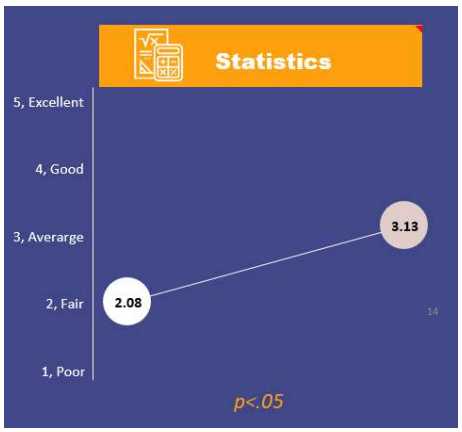


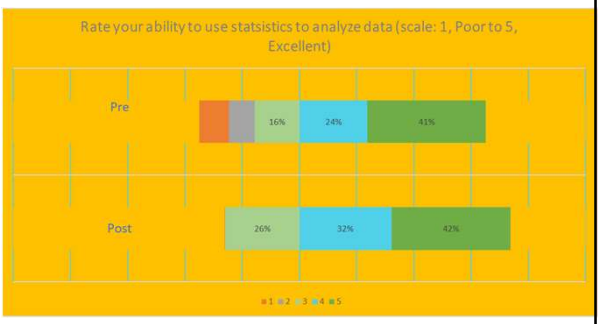
Color-blind Version



CHARTS & LABELS

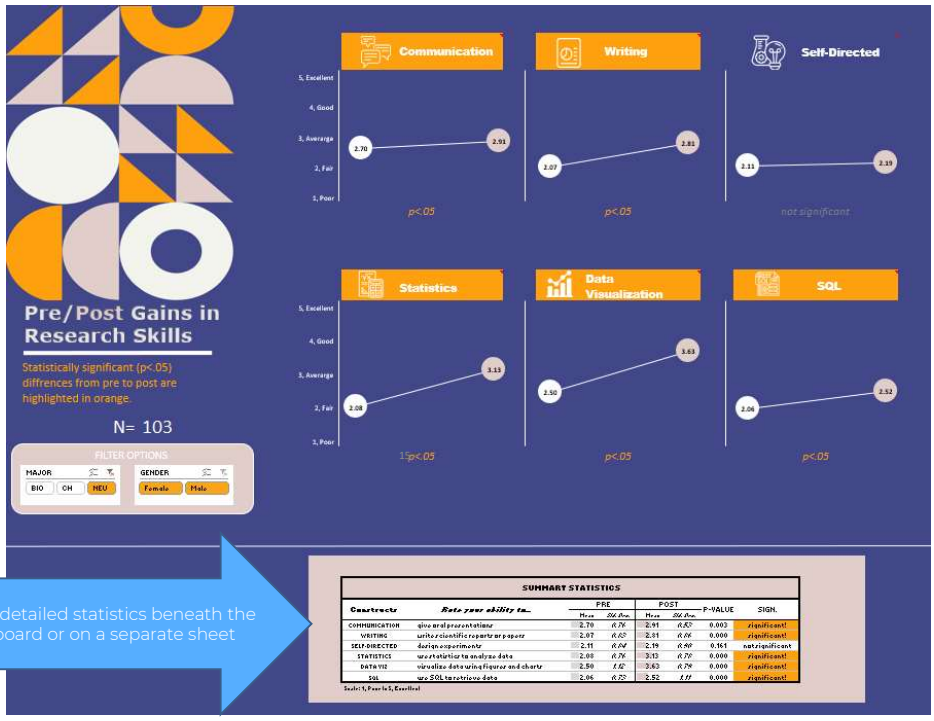
Do this!





Not this!

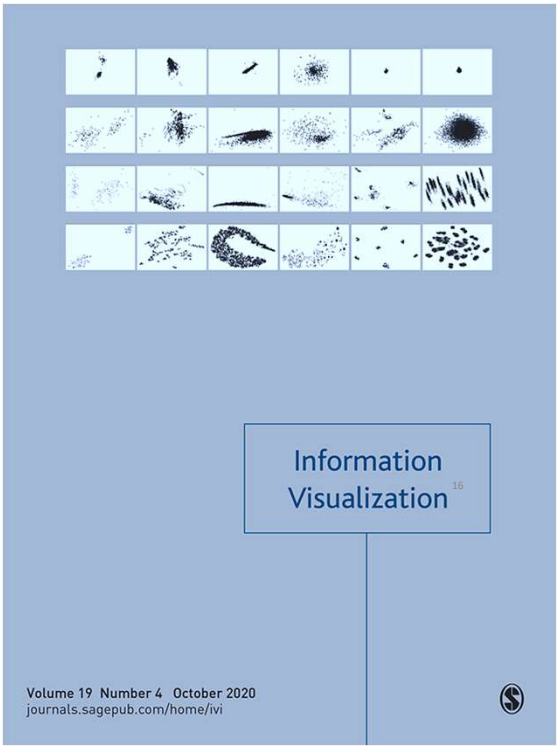
CHARTS



Include detailed statistics beneath the dashboard or on a separate sheet

Copyright 2021

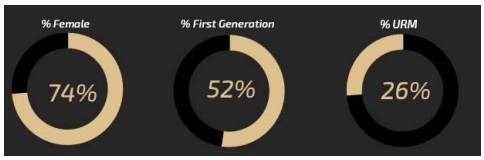
CHARTS



TOP 3 MOST "EFFECTIVE" CHARTS

CHARTS

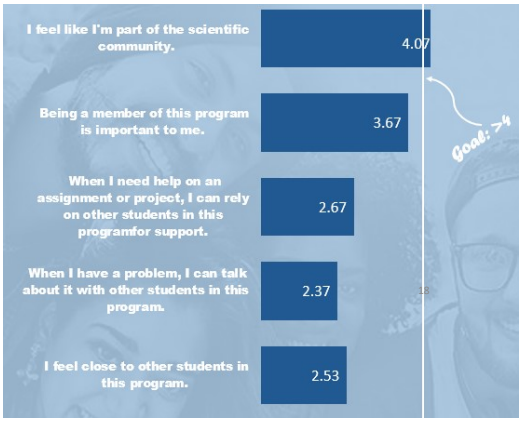
#1: DOUGHNUT CHARTS
...in groups of 3



Copyright 2021

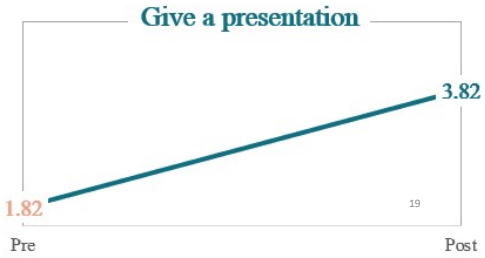
CHARTS

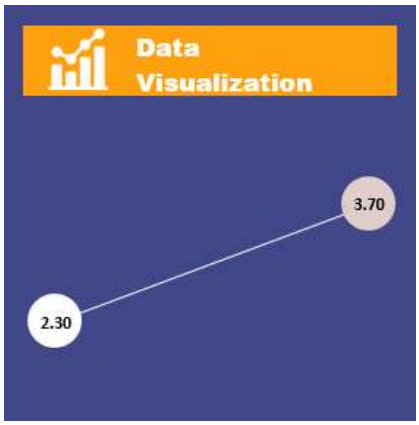
#2: Charts with GOAL or REFERENCE LINES



CHARTS

#3: Lines Graphs with SLOPES





Copyright 2021

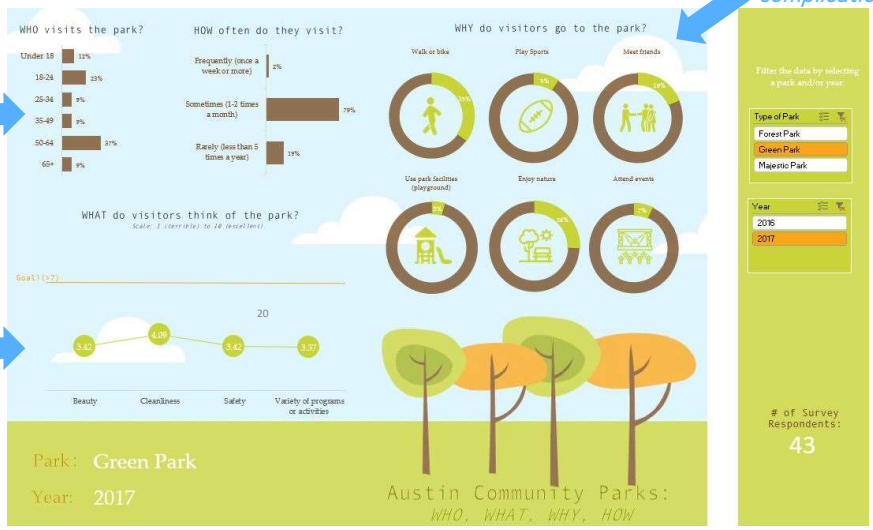
Tell a story

Design Principle #1: Storify

Show complication

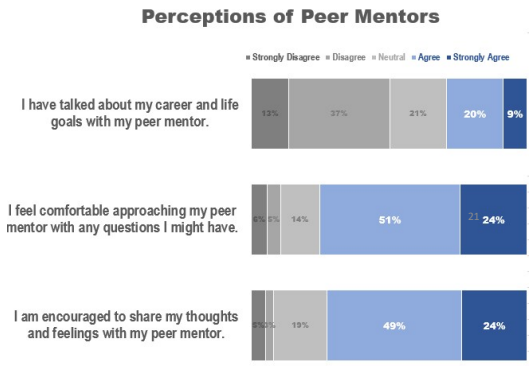
Set the scene

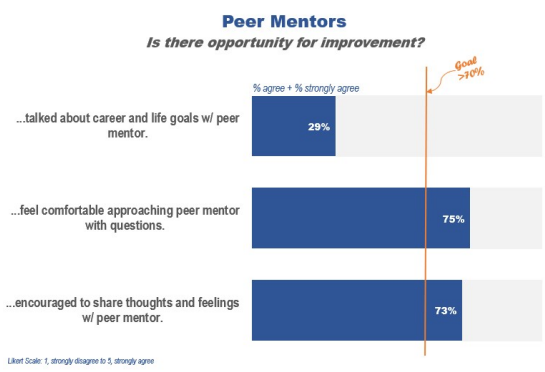
Opportunities for Action



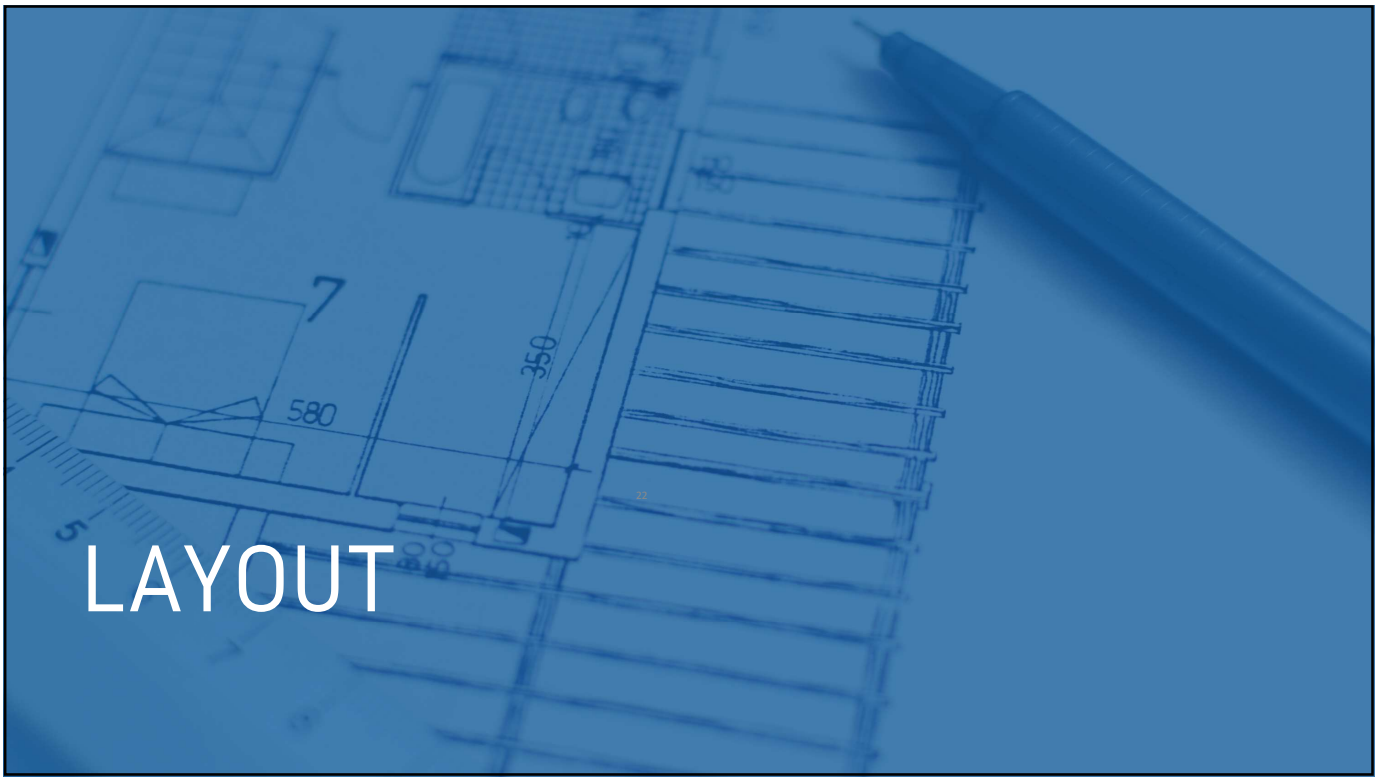
Clarity over Clutter

Design Principle #2: Give Meaning (avoid the dreaded data dump!)





Copyright 2021

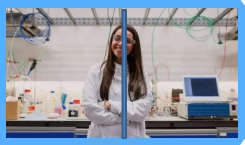


4 LAYOUT OPTIONS...

1 BACKGROUND

2 DRAMATIC

3 SPLIT-IMAGE



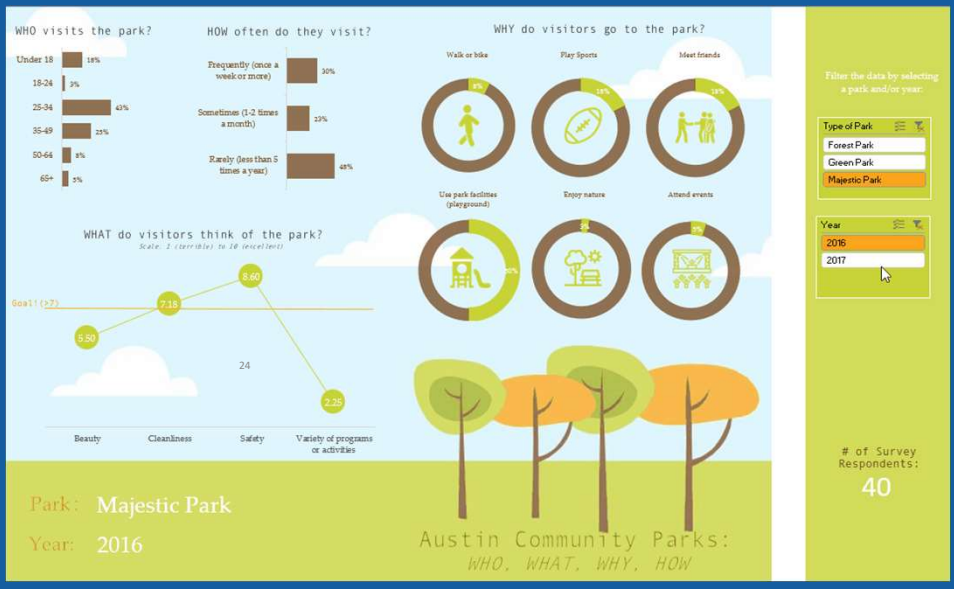
4 MULTI-CONSTRUCT

Copyright 2021

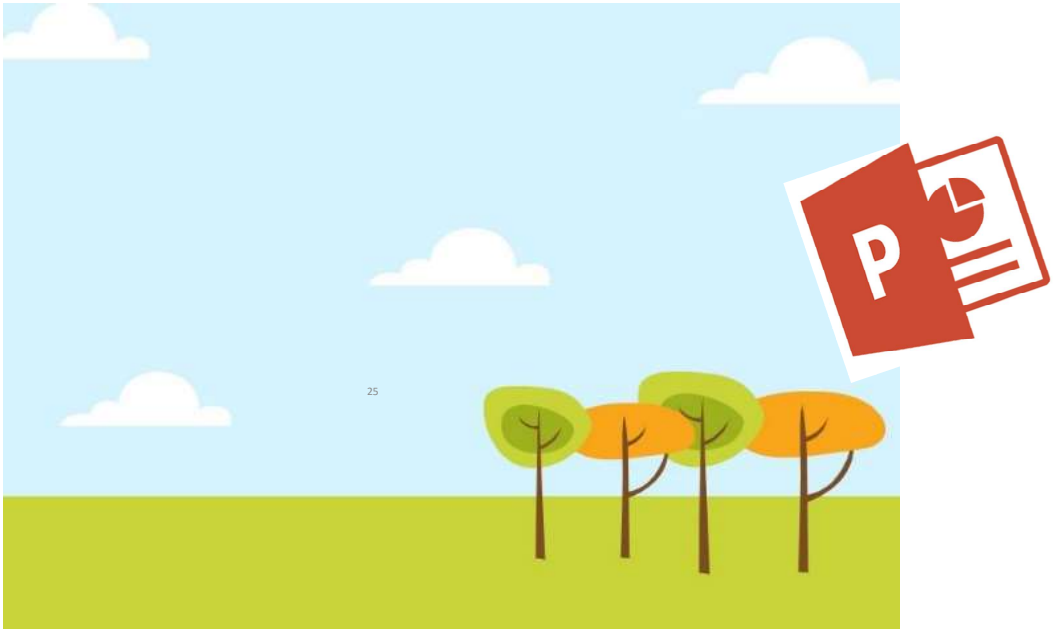
BACKGROUND DRIVEN LAYOUT

Ideal when…

1. project is not "branded"
2. dashboard will be shared with a broader audience
3. you need to immediately convey context



BACKGROUND LAYOUT

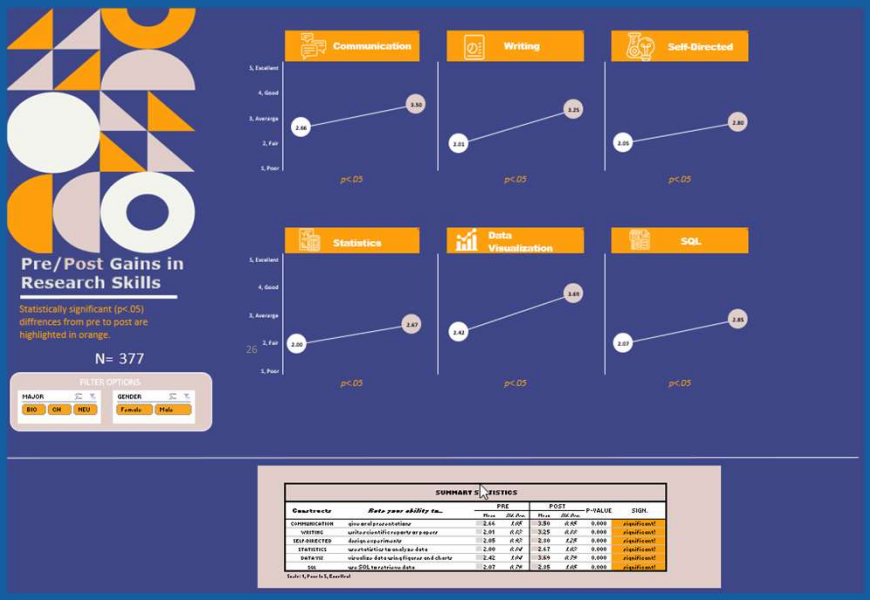


Copyright 2021

DRAMATIC LAYOUT

Ideal when…

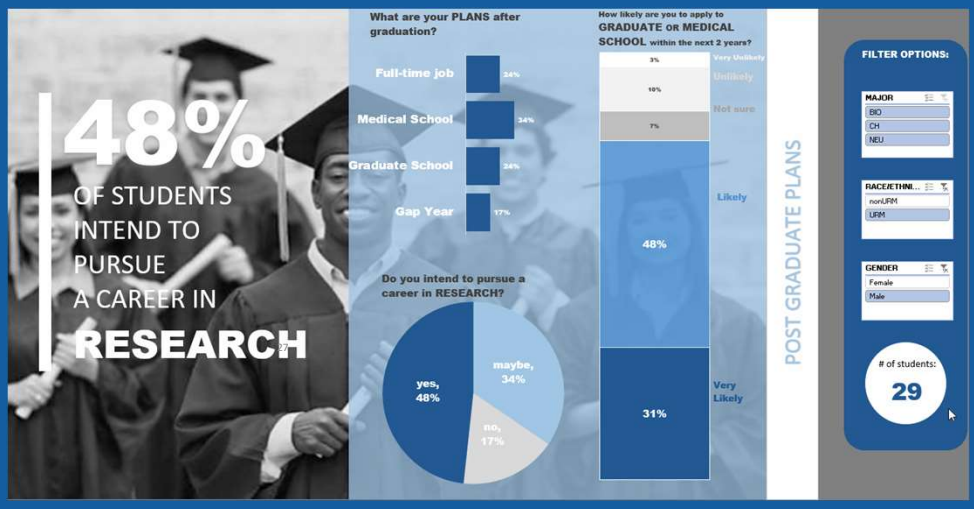
1. you want to call attention to a specific finding! (contrast effect)
2. You want the "brand" to take center stage (the power of the left hand corner!)



SPLIT IMAGE LAYOUT

Ideal when…

1. you want to highlight a particular number or research question
2. your client just wants the main points, please!



Copyright 2021

MULTI-CONSTRUCT LAYOUT

Ideal when…

1. Your survey or data is large and contains multiple themes or constructs

2. you want users to "choose their own adventure"

Reflection Questions

1. Within your **role**, how can you use interactive dashboards in your own work? Consider specific projects.

2. Within your **organization**, how can interactive dashboards improve internal communication of data?

3. Is there an organization-specific **style guide** or **"theme"** that you can share internally to help standardize your products, including dashboards?

4.What **challenges** do you anticipate when using dashboards with your team/stakeholders?

5. What is the best way to **share** dashboards, both internally and externally?

Copyright 2021

More resources…

https://www.excel-university.com/slicers-as-an-alternative-to-conditional-drop-downs/

https://chandoo.org/wp/excel-dashboards/

https://pivotdatadesign.com/

https://nonprofitviz.com/

http://www.bigbookofdashboards.com/index.html

https://www.datarevelations.com/

https://stephanieevergreen.com/design/

https://depictdatastudio.com/

https://www.shellyphd.com/

https://coolors.co/232d64-009ddc-acedff-79b473-ffce00

https://support.office.com/en-us/article/create-and-share-a-dashboard-with-excel-and-microsoft-groups-ad92a34d-38d0-4fdd-b8b1-58379aae746e

Copyright 2021