Dashboard Design

Strategics recognize the value of dashboards, but more importantly recognize that dashboards as a project management tool have to have a purpose and be 'simple.' You don't want the dashboard to be something to manage as opposed to being the tool for managing…

So, the question becomes, why are you using a dashboard?

- *Keep projects on track*
- *Identify issues BEFORE they are unmanageable*
- *You also can use dashboards to track key measures of success (and failure). These are post-event analyses.*

So, how do you go about designing a useful dashboard?

As an issues manager, I find that extra time put into creating and managing a dashboard is worthwhile. As such, I've put together some useful guidelines to follow: for when many meetings start on the hour.

1. **IDENTIFY KEY MARKERS**
   BEFORE developing the dashboard, identify key markers that can impact the outcome of the project. Pretending there is no pandemic, one example would be what key reporters have been covering.

   For each key marker, ask the question: IS IT MEASURABLE? Ensure that the people or function responsible for that marker can measure it and offer how best they can measure it. A marker is not helpful if it can't be measured.

2. **CONSISTENCY & ACCOUNTABILITY**: Make sure the markers are measured on a regular basis—daily, weekly, monthly.

   Implement whatever rule/guideline is reasonable and makes sense to ensure you can act on it. That means establishing a balance—not so often that it becomes a key job just to

measure it, but not so infrequent that it means it's too late to fix. This takes a little bit of fine-tuning, but it should be able to fit within a traditional job without causing too much stress either on the organization or the person.

3. MONITOR the key markers; note any changes

   Evaluate changes in the markers – notice trends and determine if that means anything. Not all changes mean anything and if that's the case, you may want to consider not following that marker. This is where you begin to notice if any change or attention is required. This is also where you may begin to act on variation.

4. MEET WITH YOUR TEAM; report and SHARE what you find.
   You should meet or touch base with your team regularly, specific to the entire project, and put the markers together to see if there's any link or cause-effect. Here you need to be careful to not mis interpret any potential links; but if you watch trends, then after a while you may see something you can change.

Don't let the information and knowledge you've gained go to waste – **share findings and insights with your leadership** so that this knowledge (what works and what doesn't) can be applied to other functions within the organization.

Key Take-Aways:

In a nutshell, creating a dashboard is important and offers value, but only if you keep a few things in mind:

a) Don't measure everything – only key markers

b) Measuring and evaluating should not be overly time-consuming – don't create another "job"

c) Make sure you leave enough time and resources to act upon any marker that can make a difference to the outcome.