

EFFECTIVE STRATEGIES FOR DESIGNING DASHBOARDS IN POWER BI

Empowering organizations to make data-informed decisions that have a positive and holistic impact.

In a world where data and analytics is rapidly evolving and becoming essential in business success, it is crucial to ensure the appropriate tools are available to meet and exceed Client requirements. Because Trexin strives to empower its employees by providing access to valuable software, my fellow colleagues and I are actively pursuing a Power BI certification to not only assist Trexin in achieving Microsoft partner status, but also equip us as Advisors with relevant experience for future career projects. Having gained an appreciation for the importance of data and analytics, and currently working toward Power BI certification, I decided that the primary focus for this Trexin Insight Paper will be Power BI dashboards and the strategies we can employ to craft highly informative dashboards that lead to effective business decision-making.

POWER BI AND ITS BENEFITS

Released as a stand-alone product in 2015, Power BI is a unified, business analytics tool that connects to unrelated data sources and turns the contents into comprehensible, engaging data visualizations. This scalable software uses data dashboards, reports, charts, and a variety of other visualization techniques to effectively communicate data insights to viewers.

Power BI offers several benefits, including the capability to work with interactive data and charts as well as the option to refresh data. Interactive data and charts empower the user to design highly customized dashboards tailored precisely to Client requirements. Moreover, the ability to seamlessly incorporate real-time cloud data through data refresh is immensely valuable for dashboard accuracy, ensuring that the most current and valid data is available.

DASHBOARDS AND EFFECTIVE STRATEGIES FOR CREATING THEM

While it's common to underestimate the significance of a dashboard's visual design, it can arguably be considered the most crucial element in comprehending a dataset. The fundamental goal of a dashboard is to provide a concise and comprehensive overview of the data's current status on a single page. Thus, at a glance viewers can understand the most important takeaways of the dataset. Listed below are four essential strategies that business analysts can use when designing effective and quickly comprehensible dashboards.

1. Consider the Audience

It is important to consider who the intended audience of the dashboard design will be, to ensure they can derive maximum value from the final product. Some relevant questions to ponder include:

- Who will be utilizing the dashboard?
- What data will empower our viewers to make effective business decisions?
- On what device will they access it?
- What key metrics help the audience in their decision-making process?

These questions will help gauge the layout of the dashboard and the appropriate amount of content to include.

2. Keep it Simple

Though it may seem straightforward, as the saying goes, it is easier said than done. As previously stated, the primary goal of a dashboard is to communicate data concisely. Therefore, an overcrowded dashboard results in confusion and misinterpretation for the viewer. Dashboards are built upon underlying reports and datasets, which often contain a wealth of detail. Keep in mind that users have the option to delve deeper into the reports directly from the dashboard, so only incorporate details into the dashboard solely if they are vital for viewer monitoring. Consider implementing concepts such as minimizing visual elements like borders and images, opting for a light background color, or refraining from excessive typography enhancements like italics and bold formatting.

3. Use Purposeful Color and Font

Opting for a unified color scheme and font style across the dashboard not only imparts a professional appearance, but also enhances its comprehensibility and user-friendliness. Excessive use of color and font style can lead to distraction and hinder understanding. Power BI offers the capability of choosing a theme, ensuring a harmonious and polished look for the entire dashboard. This feature is accessible in the "View" section located on the top ribbon. Within this section, there is an option to choose specific colors and font styles that will be applied consistently across the entire dashboard.

4. Display the Right Charts

Selecting the right visualizations to effectively convey meaningful insights from the data and integrating them into the dashboard can be a complex task. It is crucial to grasp the nature of the intended data and select visual elements accordingly. Consider these guidelines when making decisions about visualizations:

- Avoid using a wide range of chart types and steer clear of charts that are challenging to interpret, such as 3D charts.
- Make use of bar and column charts when comparing values, as they facilitate easy side-by-side comparisons.
- Choose pie charts when dealing with fewer than eight categories, as they are ideal for representing part-to-whole relationships rather than comparing individual parts.
- Utilize gauge charts to effectively display the current status within the context of a specific goal.
- Don't exceed three or four numerals when displaying numbers.

Using these guidelines when contemplating which charts would be best for the dashboard will ensure that it effectively communicates the most critical insights from the data in an optimal manner.

SIGNIFICANCE AND PLAN OF ACTION

In the business culture of today, where making data-driven decisions drives growth, it is crucial to understand the data being collected and possess the capability to present its vital insights in the most effective manner. Ultimately, grasping insights from the data can be leveraged to instigate change and achieve success in business endeavors. Actively keeping these four strategies in mind while designing dashboards in Power BI will not only help viewers comprehend the data, but it will also contribute to making data-driven decisions, resulting in company success.

[Connect with a Trexin Advisor](#) and learn how we can help you make a positive and holistic impact with Power BI.



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