

Data Dashboard Development Process

At Transform Consulting Group, we work with various clients to create data dashboards. The following questions guide our dashboard creation.



1. Determine the Purpose

- What is the main goal of the dashboard?
- How will you know the dashboard is successful?
- How will this dashboard add value to the field you serve/ work within?

2. Clarify the Audience

- Who is the primary audience?
- Who is the secondary audience?
- How do you anticipate the audience will use the dashboard?

3. Confirm Key Questions

- What questions need to be answered?
- What is the story you want to tell?
- What metrics need to be used and analyzed?
- What do you need to know?

4. Determine Data Collection

- What data are you already collecting?
- Of the data you collect, what do you want to highlight?
- What data (internal / external) are you already monitoring?
- What other data do you want to collect, and why?

5. Identify Features and Utilization

- Do you have any data dashboard inspirations? Why do you like these dashboards? What features do you appreciate?
- How do you want to drill down your data? (County, race/ethnicity, economic status, etc.)
- How often do you want the dashboard to be updated? (Monthly, yearly, quarterly, etc.)
- How will the dashboard be shared? Will it be shared on your website?
- How will the dashboard be used internally and externally?
- Do you want the dashboard printer-friendly?

6. Confirm the Decision-Maker

- What is the decision-making process?
- Who has the final approval?

7. Disseminate

- Internally: What's your plan to ensure the dashboard is utilized and maintained?
- Externally: Do you have a plan for sharing this dashboard with stakeholders?

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