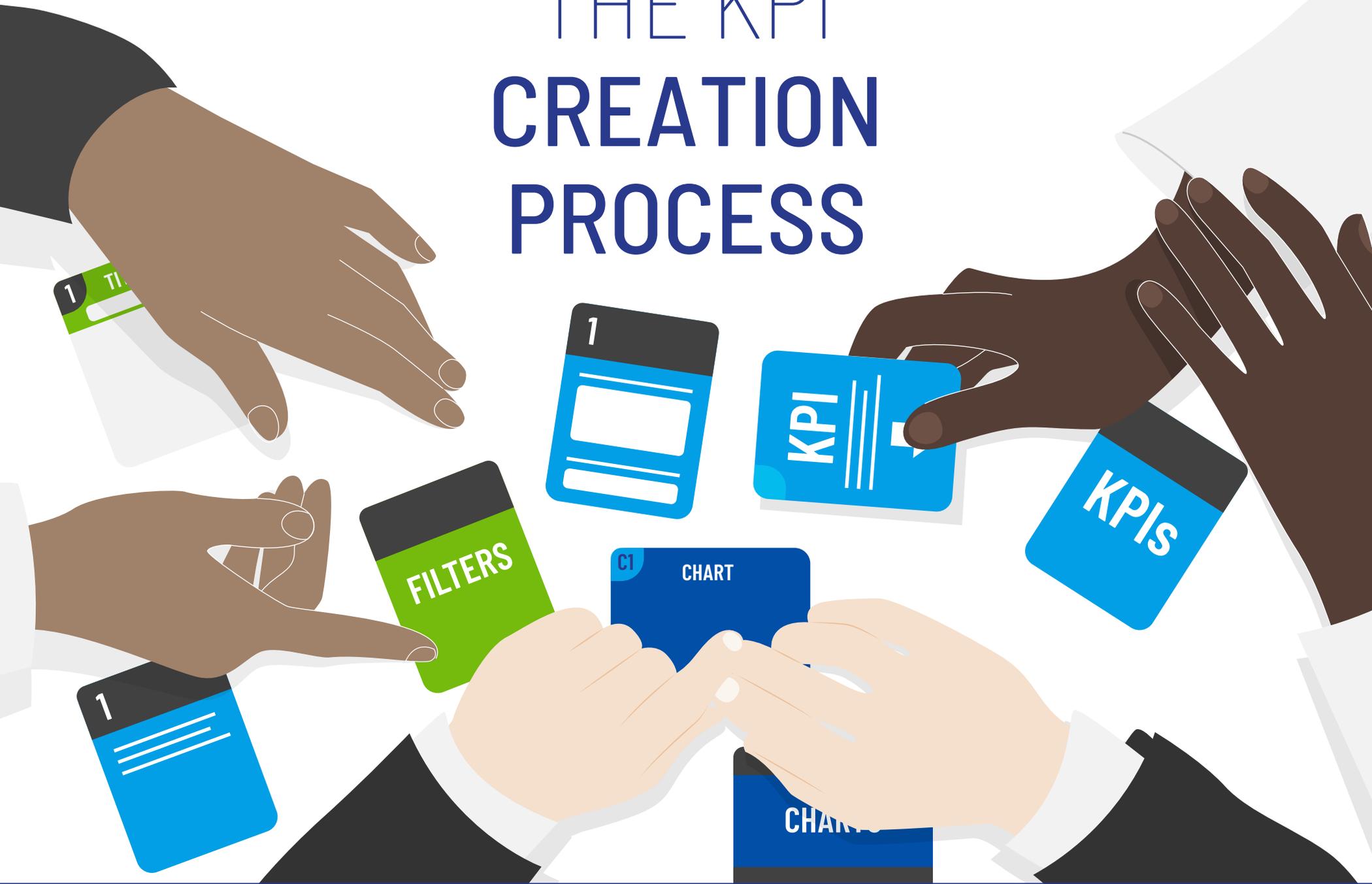


# THE KPI CREATION PROCESS



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OVERVIEW:

## Mapping out dashboard success

Before map apps became mainstays of mobile devices, planning a roadtrip often meant gathering data from disparate sources. A traveler could have consulted a physical map and asked others for directions, but even then they might not have picked an optimal route or known about evolving traffic conditions. With software, all such info is in one place.

Analytics dashboards pull off a similar transformation, but for the crucial KPIs reflective of business performance. A well-designed dashboard distills useful and actionable information from even large datasets, turning them into at-a-glance insights for key stakeholders and end users.

Like mapping software that's always updating with new street names and roads, dashboards aren't mere snapshots of moments in time. They're virtually organic creations, with dynamic designs and data sources that, as part of a structured creation process, are regularly re-adjusted to match changing requirements.



## Avoiding common roadblocks to dashboard adoption

Populating a dashboard with germane KPIs, charts and filters that drive adoption requires a rigorous process, with much of the pivotal work occurring prior to development. It's not enough to simply have the latest technologies for organizing and presenting your data; you also need real buy-in, and that's not always easy to attain, especially with tight time constraints.

Less than one-third of enterprise employees use any BI solution<sup>1</sup>, and their reasons for holding out are as varied as they are valid, including:

- ▶ Wrong KPIs: KPIs that are meaningful to executives might be meaningless to users; this can lead to the dashboard having only a niche audience and little overall utility.
- ▶ Information overload: Many dashboards are built only with power users in mind, resulting in overly busy designs that alienate everyone else.
- ▶ Stale data: A dashboard that surfaces outdated data is no more useful than a map that shows boundaries from decades ago

These and other issues create a disconnect between audience expectations and dashboard realities, resulting in disappointing adoption and minimal behavioral change throughout the organization. With better planning and wireframing, especially during the pre-development stages of formulating KPIs, you can avoid them. It's a matter of making all of the correct turns on your project itinerary.



TURN #1:

## Understanding dashboard purposes through interviews

Imagine if your maps app didn't automatically update your location. The information at your fingertips would be useless for navigation. In building a dashboard, you need a design that meets your stakeholders and users where they're at and addresses the details of their particular journeys.

Making sure they have useful KPIs, without all of the obstructions highlighted above, is only possible by interviewing users and stakeholders directly using accessible, natural language. That way, you get a clear sense of their particular pain points, which KPIs would best speak to them and the typical scenarios in which the dashboard would be used. A thorough interview process that collects input from a representative sample also reduces biases in KPI selection, such as picking overly niche metrics.

The interview stage is similarly useful in clarifying the overall purpose of the dashboard. Will it be a strategic creation, meant to influence executive decisions by highlighting high-level trends? Or will it be more operational and track day-to-day fluctuations in granular KPIs? Answering these questions is one of the most important steps in the creation process, since confusion about user and stakeholder requirements is a common route to subpar results.

While a higher risk approach, if time is tight these interviews can be fast tracked through a facilitated workshop.



TURN #2:

### Aligning stakeholder and end-user requirements

It's common for stakeholders and end users to work from different assets. Reconciling their requirements might entail designing separate dashboards for each group, or instead zeroing-in on something relevant to both of them.

For instance, let's say you're constructing a dashboard whose intended KPIs track the client churn rate at a marketing agency. The stakeholders want to prioritize cost savings by reducing churn; however, the creatives who are instrumental to making this happen have no incentive to do so, since churn is immaterial to their commissions and employment status.

Ensuring the relevance of the KPIs could mean focusing on how the company budget for projects and salaries is affected by churn. Finding this common ground is easier through persona creation, which builds on the findings from the interview process above. Personas let you identify what upfront questions key groups need answered, the subsequent actions their members will take, and the data that will drive their decisions.



TURN #3:

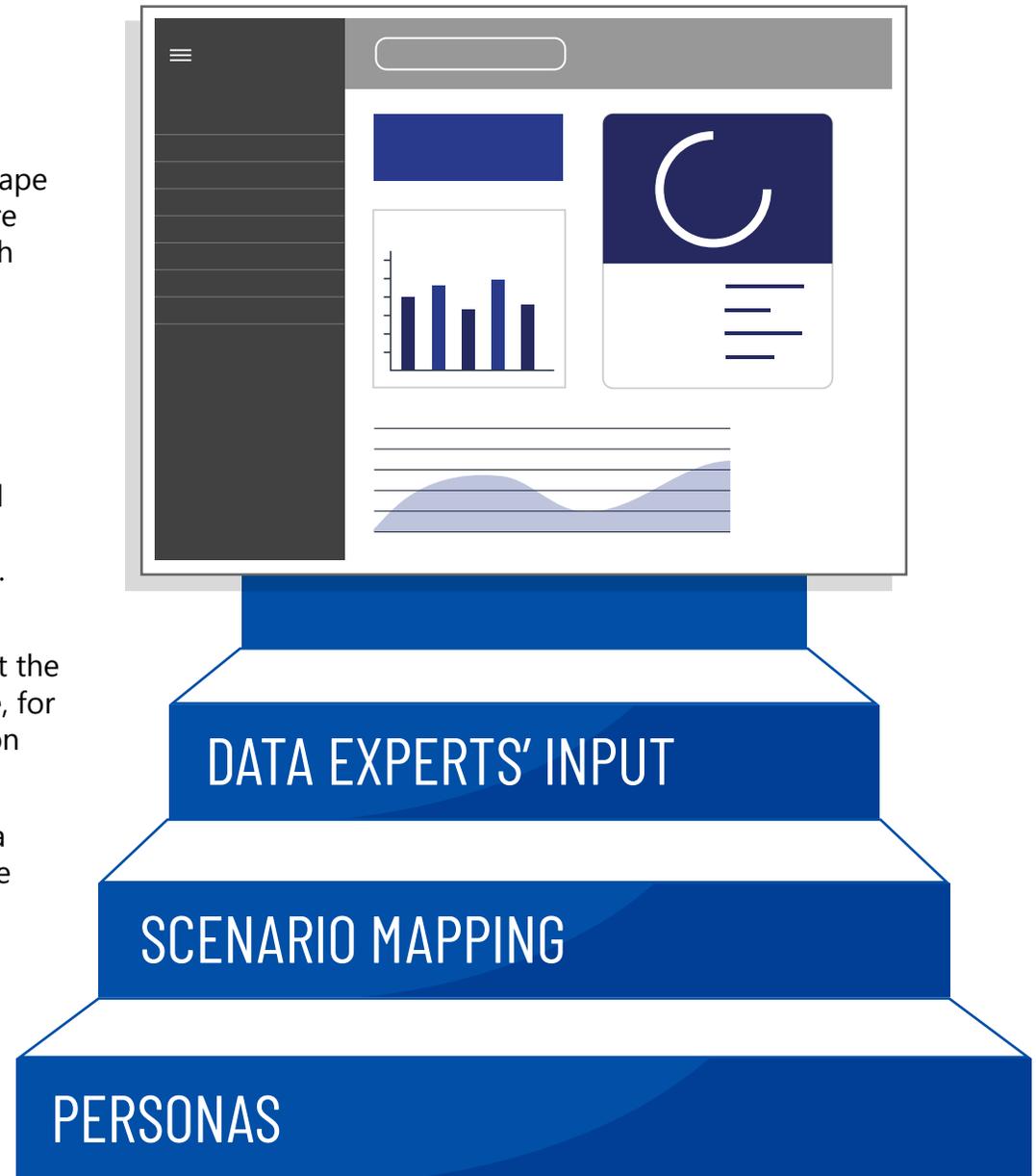
**Scenario mapping and data verification**

Creating personas and reconciling their requirements will shape the eventual design of your dashboards. Along the way, there are opportunities to further refine your KPI selection through scenario mapping.

Returning to our marketing agency example, you might draw up a list of “Top 5 Reasons Clients Cancel Their Plans” based on specific examples. For each of those reasons (scenarios), you could track KPIs such as how much was spent on outbound and/or inbound marketing, time allotted to creatives for client-facing projects, and length of the onboarding process, to see what really contributed to churn. You’re then better-equipped to pick meaningful KPIs.

The next step is to ensure you have the right data to support the selected KPIs. It’s crucial to get input from data experts here, for maximum visibility into potential issues with stale information or siloed sources, like legacy systems without flexible APIs.

With their insights, v1.0 of the dashboard can be built atop a strong technical foundation that makes KPI insight accessible as well as reliable. Creating successful dashboards with relevant KPIs is an inherently iterative process, but it still pays to get off on the right foot. Retooling them down the line is easier if the correct data is available on day one.



TURN #4:

### Wireframing the project

Now that you have a sense of stakeholder and end-user needs along with what data you can draw upon to meet them, it's time to begin wireframing. Wireframing will map out a vision of what the audience will see on the completed dashboard.

Effective wireframing matches specific visualizations to the requirements of key personas and creates clear calls to action for users. It can be done with a whiteboard or a specialized kit, ideally the latter. Proper alignment of data and business requirements is much more straightforward with purpose-built tools.

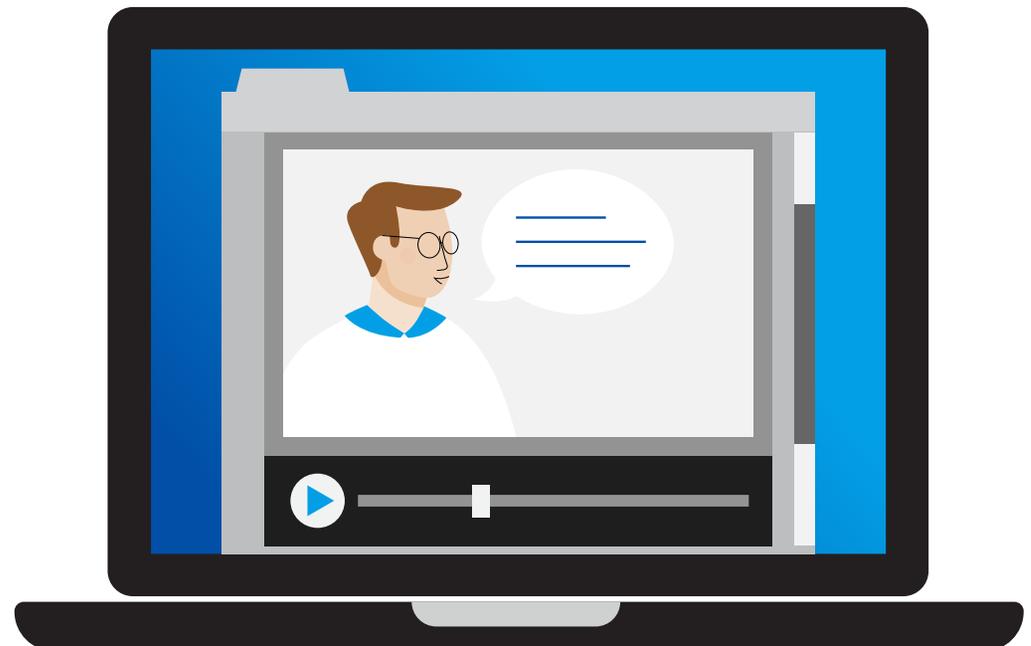
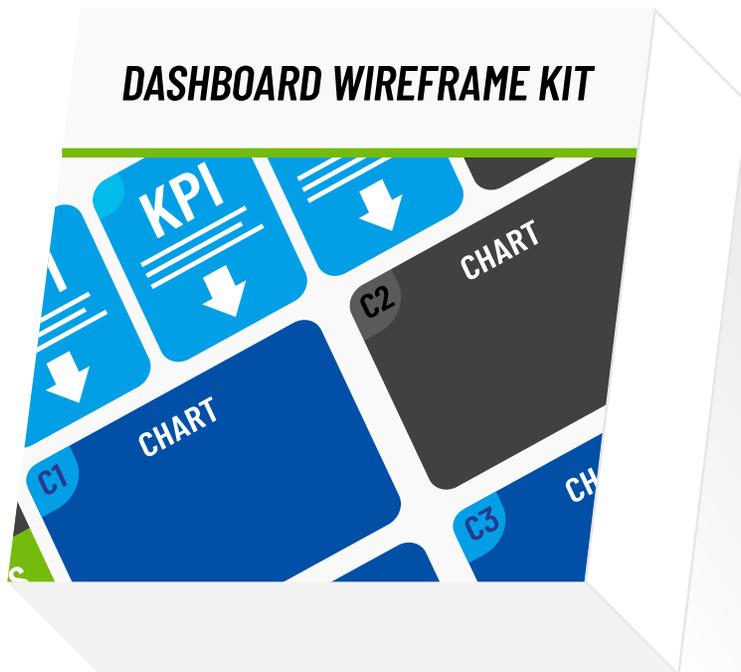


## Streamlining dashboard creation with Logic20/20

The Logic20/20 Dashboard Wireframe Kit and Dashboard Design Process are the perfect tools for ensuring that actionable insight reaches everyone who needs it. Optimized for the rapid iteration of dashboards, it's an accessible solution for both technical and nontechnical personnel, from data analytics to line-of-business managers.

Each basic version comes complete with a template and collections of charts, KPIs and filter cards. Plus, Logic20/20 provides workshops and webinars to optimize your dashboard creation process. Our expert teams will cover the reasons dashboards fail and succeed, what actionable information really looks like, step-by-step wireframing and much more.

We want to ensure you can increase analytics adoption and usability by crafting data narratives with real-world relevance. Our trainers will guide you through every step necessary for making that a reality.



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