

# Creating a Dashboard is a lot like Online Dating

Creating a dashboard is a lot like online dating. Here are some of the similarities between them

## Finding Out the Needs of the Stakeholders

In the case of online dating – you are the stakeholder. You need to understand what it is that you are looking for. What do you expect out of a relationship? One rule you can borrow from sales 101 is to ask yourself “why” until you can no longer provide an answer to it. By examining and uncovering what it is that you truly need, the process of finding someone to fulfill that becomes much easier.

This process also holds true when building a dashboard, whether it is for your personal use or for an entire department. You need to discover what people are trying to solve or change with dashboards and what they want to get out of a dashboard solution. You can use the “why” exercise for this as well. Once you find out the root factors that are driving the dashboard initiative the process of building it becomes that much easier.

## Making a Connection

Online dating, or dating in general, is all about making those connections, right? You need to filter through a number of people, try to reach out to people in creative ways, and at the same time not be creepy (you know that guy/girl, don’t be that guy/girl). You eventually establish some communication with a handful of people, or maybe even just one, and build a connection.

The same is true for dashboards. You need to ensure that you can connect to your data sources before building out a dashboard. In some cases the data may not be that “clean”, meaning it has not been stored in a way that allows you to easily pull the information. A simple example of this would be an excel spread sheet that has no data in certain fields, or where columns/rows change the type of information they contain. Like online dating, you might have to sort through a bunch of crap before you are able to build that connection.

## Choosing your Key Performance Indicators (KPIs)

Yes this is a dashboard term, and it might seem laughable, but it is needed. In order to determine whether or not you can have a successful relationship with someone, you need to have that "check-list", right? When going on a date, or even when talking to someone online, you should have a set of measures based on what you determine your needs are. If those needs involve marriage, kids, and wilderness excursions, then perhaps the career-focused, technology-dependent person whose longest relationship is a couple of weeks, isn't going to be the best match. If your needs involve getting attention more than giving it, you might want to be wary of how many times the person talks about themselves vs. asks about you.

KPIs are a must in dashboards. If you know what your stakeholders need from a dashboard, it is easier to choose the key performance indicators (KPIs) you wish to visualize, but it doesn't make it instantaneous. Based on the needs that you have access to you can determine what measures will best help your stakeholder(s) achieve their goals from the dashboard. For example; if the need is to save money you might want to use KPIs that would allow the stakeholder(s) to spot operational efficiencies, redundancies, and monitor savings.

## Selecting Your Visuals

No, this doesn't have to do with visual appearance. You should have been able to address that with the first point. This has to do with selecting the right person, or people, who can help you realize your goal or needs. Selecting the right person is critical to the success of any relationship.

Selecting the right visuals is also critical to the success of any dashboard. You need to be able to display the information in the most effective way possible to the viewer. The purpose of a dashboard is to provide information at a glance that enables the users to take action. If the information is not presented in the most concise and efficient way possible, you increase the amount of time it takes to glean actionable insight from the dashboard, and detract from meeting the needs of your stakeholders.

## Building on the Momentum

As you browse through hundreds of profiles and the person on the other side does the same, it's crucial that you follow-up on a good discussion and quickly move onto the next stage to see if this can be a good fit. While, most discussions start the same way with your usual spiel that works well, it is key for your success to be able to keep on impressing and find interest in each other past that first contact. Of course, you want to ensure that you engage in an authentic way without sharing false information.

For dashboards, you also have to start with a great first impression – a picture is worth a 1000 words. But if all you have is a good first impression with no substance behind it, stakeholders will quickly lose interest. This is where a well-designed dashboard allows users to further interact with the data and uncover more of the value it gives as they further explore. Being able to improvise and customize to stakeholder desires can also help ramping up the relationship.

## Maintenance

For online dating this should be self-explanatory. Every relationship requires work, some more than others, in order to be successful. You need to communicate and check in to ensure that you're on the same page, that you're still on course, and that you're meeting each other's needs.

Just as every relationship requires maintenance, so too does every dashboard. The needs of the stakeholder(s) can change over time and you need to update your dashboard accordingly. This is also true of online dating. Ideally one's needs won't change, but in reality they do and you need to adjust accordingly.

