

1. Define Your Purpose and Audience

- **Understand Goals:** Clearly define the dashboard's purpose and what decisions users need to make from the data.
- **Know Your Audience:** Tailor the dashboard to your audience's experience level and their specific goals. Look at the dashboard through the end user's eyes. (i.e. PQI, CFO, CEO, Fund development or Program managers).

2. Data and Content

- **Select Relevant KPIs:** Choose only the most important metrics and Key Performance Indicators (KPIs) that directly relate to the dashboard's goals.
- **Provide Context:** Give data context to help users understand if numbers are good, bad, normal, or unusual.
- **Use Clear Labels:** Keep labels short and self-explanatory to ensure quick understanding.
- **Group Related Data:** Organize and group related metrics and information logically for a better flow.
- **Maintain Data Accuracy:** Ensure the data is accurate, up-to-date, and relevant to user needs to build trust.

3. Design and Visualization

- **Keep it Simple and Clean:** Avoid unnecessary clutter, decorative elements, or "non-data ink" that distract from the data.
- **Choose the Right Visuals:** Select chart types that best represent your data and message.
- **Use Color Thoughtfully:** Employ color to convey meaning and for branding but do so consistently.
- **Leverage Whitespace:** Use whitespace to separate elements and prevent information overload.
- **Consider Size and Position:** Use the size and position of elements to show hierarchy and highlight the most important information.

4. User Experience

- **Ensure Mobile Responsiveness:** Design the dashboard to adapt and display well on various devices, including mobile. Design for mobile first.
- **Incorporate Interactivity:** Add interactive features like filters and the ability to "dive deeper" to enhance user engagement and exploration.
- **Test with Users:** Validate your design by getting feedback from your target audience.

5. Maintainability and Evolution

- **Keep Evolving:** Continuously gather feedback and iterate on the dashboard to ensure it continues to encourage the right behaviors and remains relevant.