

UNIFORM DASHBOARD FOR NEW WAY OF WORKING¹

Supporting a tech team to develop a uniform dashboard that supports the new way of working and is desirable for all 100 team leads

¹: some content is censored to protect the privacy of my client's employees

CHALLENGE

Assisting the Data Analytics team of a large bank in developing a user-centric, uniform Power BI dashboard for the team leads of 100 different teams. The dashboard was part of a bigger “new way of working” project aimed to improve collaboration, enhance decision-making, and streamline operations across the organization.

MY ROLE

- UX research
- Prototyping
- Training the Data Analytics team in UI + UX design

THE TEAM

- Project lead
- Change consultant
- Business process transformation consultant
- Dashboard UX designer (me)
- 2 analysts from Data Analytics team

PROJECT DURATION

- Mar 2023 - present

TOOLS USED

- Figma
- Power BI

APPROACH

The project is currently in the discovery phase, where we are actively gathering insights to inform the design and development of the uniform dashboard.

First we conducted an internal research on the current landscape of dashboards. We discovered that there were over 120 different dashboards being used across the organization. The Data Analytics team also admitted that they are almost too “user-centric” and keep on adding new features and dashboards. The lack of consistency and standardization made us understand the current hurdle in achieving a uniform way of working.

To gain a comprehensive understanding of the team leads' needs, we have initiated interviews with several team leads. These interviews aim to uncover their work processes, challenges, and requirements. Through this process, we will create personas and employee user flows to better understand their preferences and pain points.

In addition, we conducted a KPI workshop with a group of team leads. The workshop enabled us to collaboratively identify and prioritize the key performance indicators (KPIs) that are most relevant to their teams. By involving the team leads in this process, we ensured that the dashboard provides valuable insights and aligns with their specific goals and responsibilities.



Artefacts from the KPI workshop

Simultaneously, I focused on training the Data Analytics team to adopt a more user-centric approach in their work and provided them with tips and tricks in dashboard design and data visualization.

NEXT STEPS

After the interviews the following actions will take place:

1. Map insights
2. Create persona's & journey maps
3. Create information architecture
4. Create standardized Dashboard design system
5. Develop dashboard in Power BI

