



What is a data dashboard?

A **data dashboard** is an information management tool that visually tracks, analyzes and displays [key performance indicators \(KPI\)](#), metrics and key data points to monitor the health of a business, department or specific process. They are customizable to meet the specific needs of a department and company. Behind the scenes, a dashboard connects to

your files, attachments, services and API's, but on the surface displays all this data in the form of tables, line charts, bar charts and gauges. A data dashboard is the most efficient way to track multiple data sources because it provides a central location for businesses to monitor and analyze performance. Real-time monitoring reduces the hours of analyzing and long line of communication that previously challenged businesses.

How do data dashboards work?

Firstly, users need to know that [dashboard definition](#) is dependent on the role it plays within an organization. Everyone uses data dashboards differently. Not all business dashboards serve the same purpose, which is why it's important users understand what KPIs to track and why. This section will answer the following questions:

- What kinds of business questions do dashboards answer?
- What type of data are tracked on dashboards?
- How are dashboards interactive?
-

Dashboards are fueled by Business Questions

The best data dashboards answer important questions about your business. Unlike advanced business intelligence tools, dashboards are designed for quick analysis and informational awareness. The most common approach to designing a business dashboard is to build it using a question-answer format.

- What's our Quick Ratio? Where is our Quick Ratio compared to where it should be?
- How many calls has the call center done this week? Was it more or less than last week?
- What are the top 5 products in Sales Revenue? Where are there opportunities?
- What are the traffic sources to the website? Has there been an increase in search?
- What does our marketing funnel look like? Is it on target?

Dashboards can focus on presenting operational and analytical data

The business questions a dashboard answers depends on industry, department, process and position. Analytical dashboards are typically designed to help decision makers, executives and senior leaders, establish targets, set goals and understand what and why something happened with the same information they can use to implement appropriate changes. An analytical dashboard does this based on insights from data collected over a period of time determined by the user (i.e. last month, quarter or year).

Dashboards present interactive data visualizations

Data is visualized on a dashboard as tables, line charts, bar charts and gauges so that users can track the health of their business against benchmarks and goals. Data dashboards surface the necessary data to understand, monitor and improve your business through visual representations. Depending on how you decide to design your dashboard, even straightforward numerical data can be visually informative by utilizing intuitive symbols, such as a red triangle facing downward to indicate a drop in revenue or a green triangle facing up to indicate an increase in website traffic.

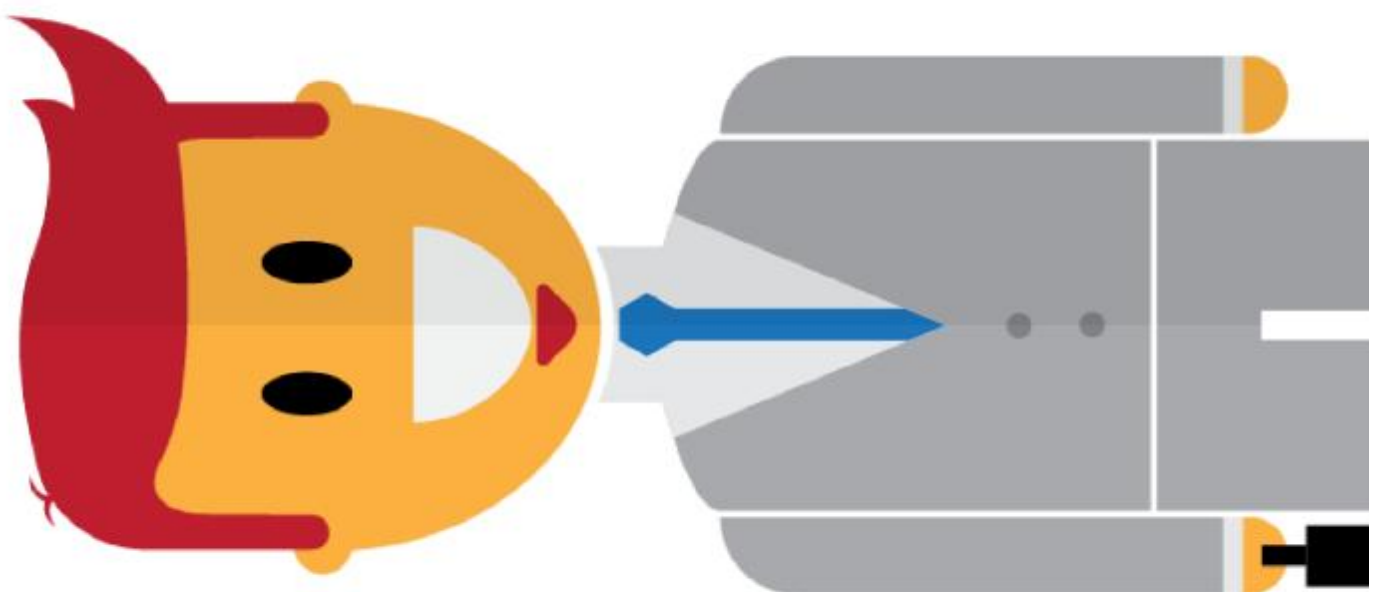


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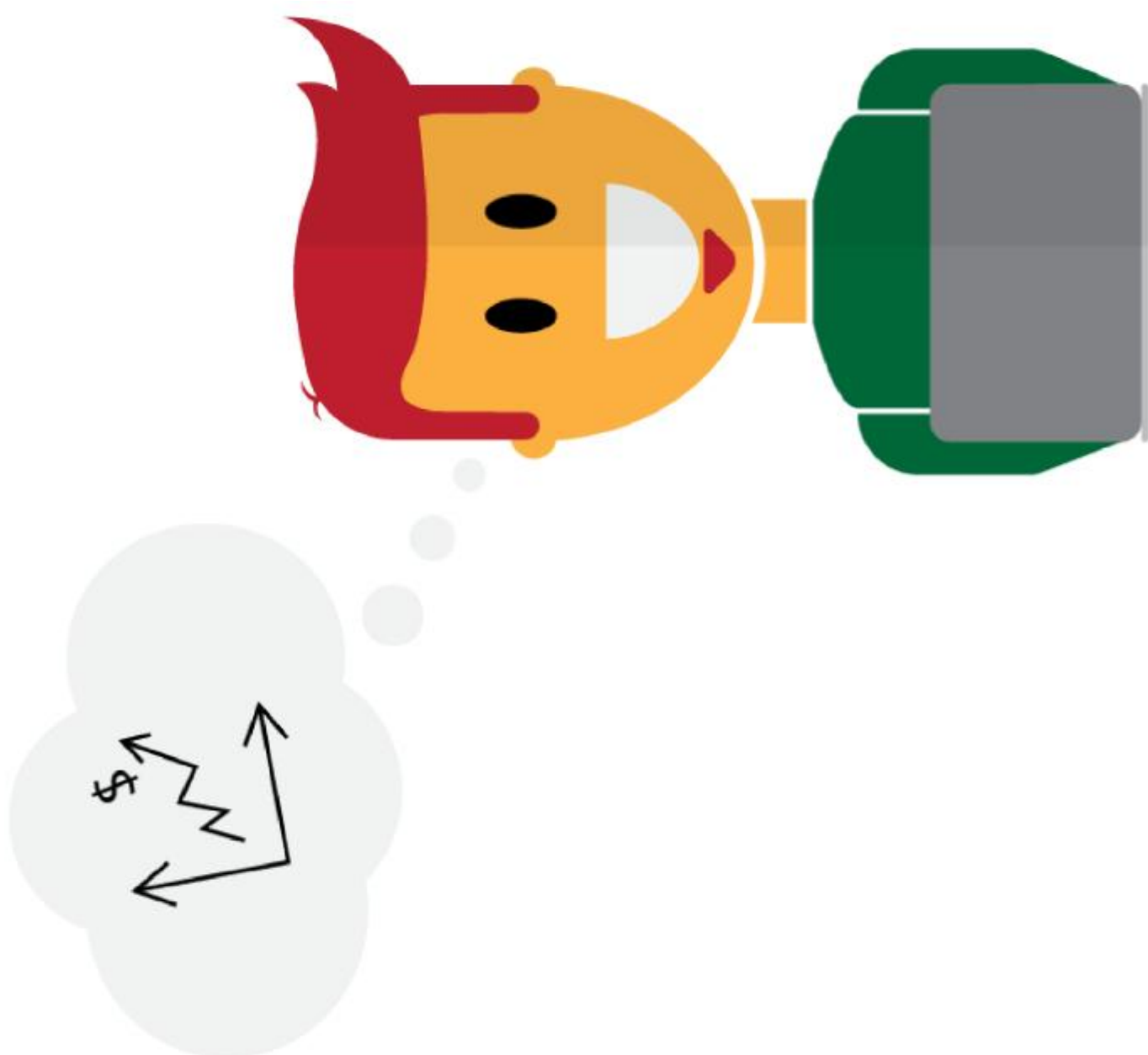




How are data dashboards used in business intelligence and analytics?

According to **Wikipedia**: “Analytics is the discovery, interpretation, and communication of meaningful patterns in data. Especially valuable in areas rich with recorded information, analytics relies on the simultaneous application of statistics, computer programming and operations research to quantify performance. Analytics often favors data visualization to communicate insight.”

Dashboards are a data visualization tool that allow all users to understand the analytics that matter to their business, department or project. Even for non-technical users, dashboards allow them to participate and understand the analytics process by compiling data and visualizing trends and occurrences. Data dashboards provide an objective view of [performance metrics](#) and serve as an effective foundation for further dialogue. A dashboard is a [business intelligence tool](#) used to display data visualizations in a way that is immediately understood.



Why should your business visualize data on a dashboard?

Most businesses use multiple services to track KPIs and metrics, which takes up time and resources to properly monitor and analyze. Dashboards use raw data from these sources, spreadsheets and databases to create tables, line charts, bar charts and gauges in a central dashboard that users can look at and immediately understand the key metrics they are looking for. Data dashboards simplify end of month reporting by allowing users to communicate information at any time without hours of preparation and analyzing.

Monitor Multiple KPIs and Metrics at Once

Changes to any aspect of a business, whether it be in marketing, sales, support, or finance, has an impact on the business as a whole. People have been monitoring their businesses without dashboards for ages, data dashboards make it a heck of a lot easier. With dashboards, users are able to dig deeper into the big picture to correlate this impact alongside specific KPIs and metrics to understand what works and what doesn't. Whether your businesses data is stored on a web service, attachment or API, a dashboard pulls this information and allows you to monitor all your data in one

central location. Additionally, dashboards are capable of correlate data from different sources in a single visualization if the user so chooses. By monitoring multiple KPIs and metrics on one central dashboard, users can make adjustments to their business practices in real time.

Easy to Read

Dashboards display KPIs and metrics using visualizations like tables, line charts, bar charts and gauges. Effective dashboard design utilizes colors, symbols and visualizations to highlight important data points This allows users to quickly scan a dashboard and get the information they need without sifting through spreadsheets, emails, or signing into a web service. Data dashboards are useful because they visualize information in a way that is accessible to everyone. Even if you don't work in marketing, eg, you can understand their numbers. This is key: **You do not have to be an analyst to use and understand a data dashboard.**

Cloud Accessibility - Share you dashboard With Everyone

A dashboard keeps every member of a business on the same page. Users can share dashboards in real-time and periodically. Dashboards bring a business's data to the cloud, making key metrics and KPIs accessible to your entire time on desktop, mobile and tablet. There are a number of ways to share data dashboards: on wallboard tv's, email reports, printable reports or direct access. Users can create a public link to their dashboard which gives anyone access, or through private link that allows only those with the link to access your data. It has become increasingly popular to display dashboards on wallboard tv's in offices as a way to keep everyone on the same page about performance and objectives. Data dashboards are becoming increasingly common because they allow for virtual work environments and make it easier for teams to collaborate.

Dashboards make reporting more efficient

Data dashboards save time. Users no longer need to go to multiple, disconnected, sources to track their data. Getting the data, creating a spreadsheet, generating and designing the report, and sharing it -- dashboards do all this automatically. There are a number of reasons why reporting is typically done at the end of the month, one being because it takes up time and resources. All you need to do is invest a bit of time setting up your dashboard, which is peanuts compared to

what a typical manual reporting will take. Dashboards can automatically generate reports with it's data, at anytime, anywhere. No longer do users need to gather, analyze and format data. You can create PDF, email and live reports using a dashboard: choose the KPI you want to analyze, select your report format and present.



In addition, dashboards allow for constant communication between all levels of a business. Data dashboards can be accessed by as many users as a business chooses, so need to know information is at everyone's fingertips. No longer do executives and managers need to request data from analysts. Analysts can work in the background to ensure a smooth operation, while users access this information whenever they want.

Email this Dashboard

Use this form to send a dashboard as an email attachment, or [set up or manage an existing recurring scheduled email](#).

To:

Enter one or more email addresses, separated by commas

Notes:

Optional

Format:

PDF

Options

PDF Settings

Layout:



Size:

Fit to one page



Annotations:

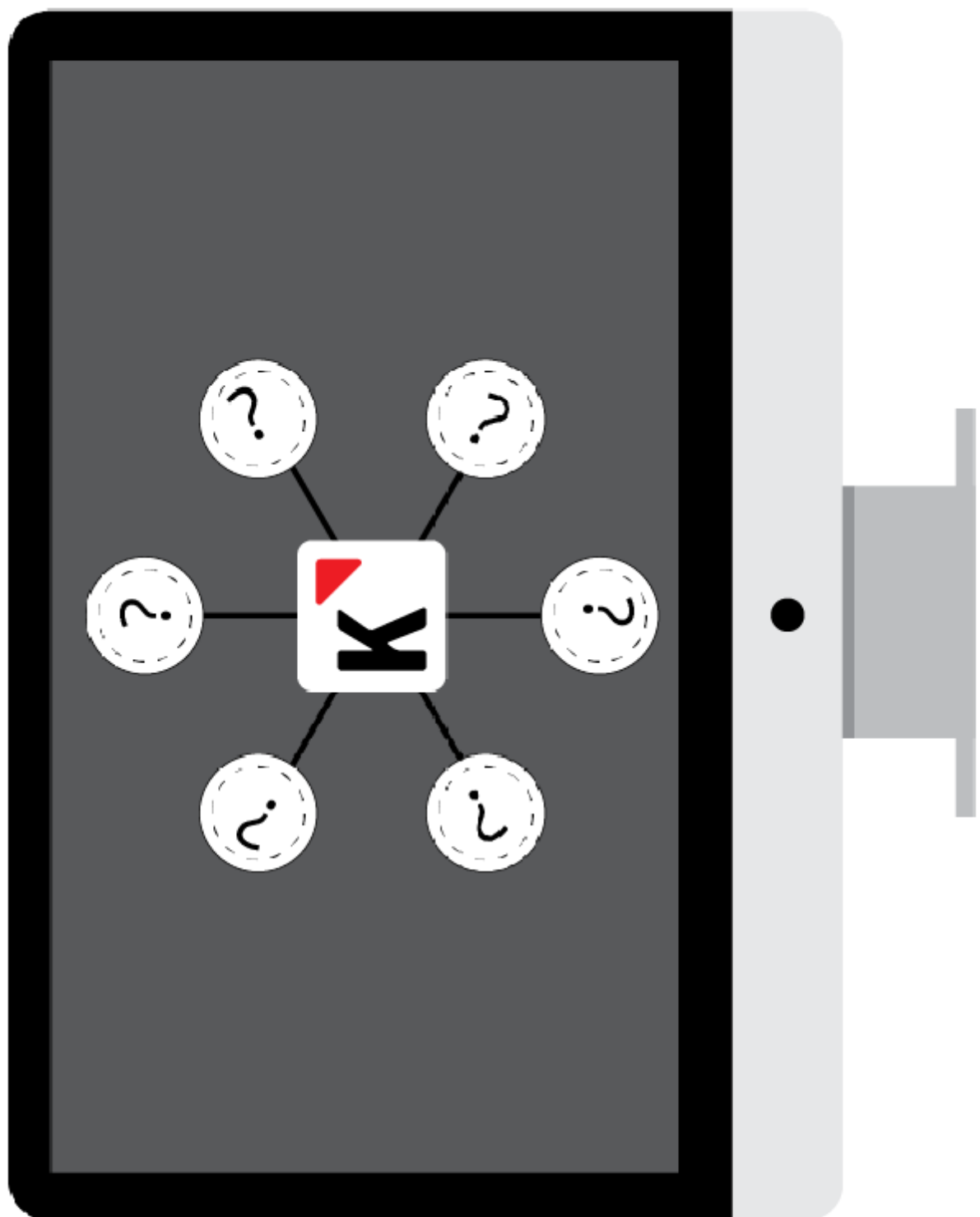
☐ Include annotations

Quality:

☐ Low (better for large images)



Finished



What types of KPIs and metrics are tracked using a data dashboard?

Deciding which KPIs and metrics to track on a data dashboard is an important part of designing a dashboard. It's important to remember that dashboards must be built as a direct response to the needs of your team and business. The versatility of dashboards make them useful for any industry and department, including, but not limited to: executives, sales, marketing, social media, SaaS, development, supply, call centers and healthcare. Data dashboards track the KPIs and metrics unique to these areas of business, but ultimately the ones that meet your specific analytics needs.

Marketing Dashboards

Whether you are looking to track digital marketing performance, [SEO traffic](#), or your social media growth, having measurable marketing metrics and KPIs set up can help your business reach targets month-over-month.

Marketing departments operate across multiple channels. From social media, to email marketing, to lead generation, your digital marketing strategy will include a number of activities. With such a wide variety of channels being used, it's important for marketing teams to actively track progress and performance in real-time with the right [digital marketing](#)

KPIs. When choosing the right marketing metrics, you should keep in mind which channel you are using and who will be using the data to make business decisions. The types of metrics you want to track will vary for different marketing roles. Executives will want to see an overview for every marketing channel, while managers will want to dive into the metrics for a deeper understanding of day to day performance. In some cases however, KPIs are useful for all levels of an organization. For example, [return on marketing investment](#) is an important metric for everyone to track for a full understanding on where the budget is paying off, and where it's not. This KPI would be useful to track on a [social media dashboard](#) and a [SEO performance dashboard](#). Learn more: [Marketing metrics and KPIs](#)

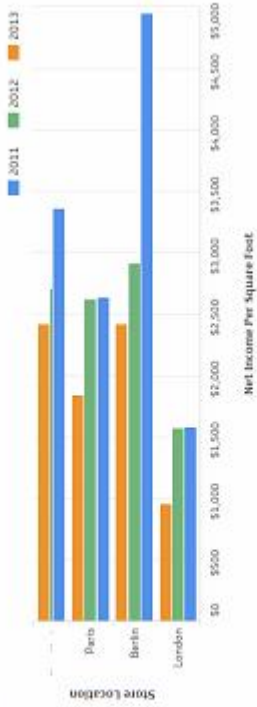
List Performance

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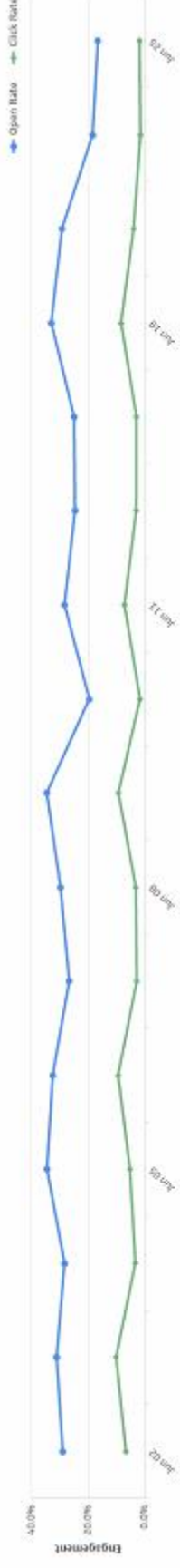
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Jan 04	Newsletter	What's in store in 2014 from Awesome Company!
Jan 05	Blog Subscribers	Blog Post: 3 tips to help achieve your New Year's Resolution
Jan 05	White Paper Downloads	Get your free copy of 2014 trends
Jan 06	Customers	14 reasons to stick with Awesome Company in 2014

13,245	3,841	25.0%	879	6.0%
17,547	5,467	31.2%	1,708	10.1%
13,247	3,756	28.4%	435	3.3%
18,664	6,453	34.6%	970	5.2%
23,542	7,655	32.5%	2,201	9.3%
8,657	2,312	26.7%	241	2.8%
3,245	967	29.8%	102	3.1%
32,457	11,243	34.6%	3,009	9.3%

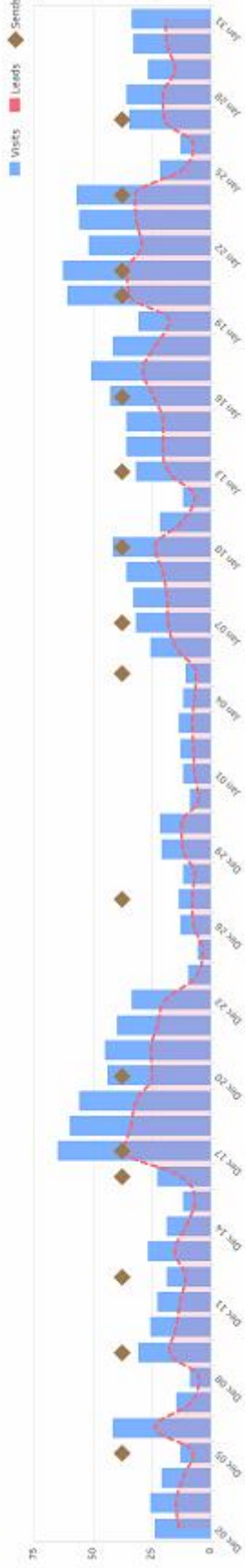
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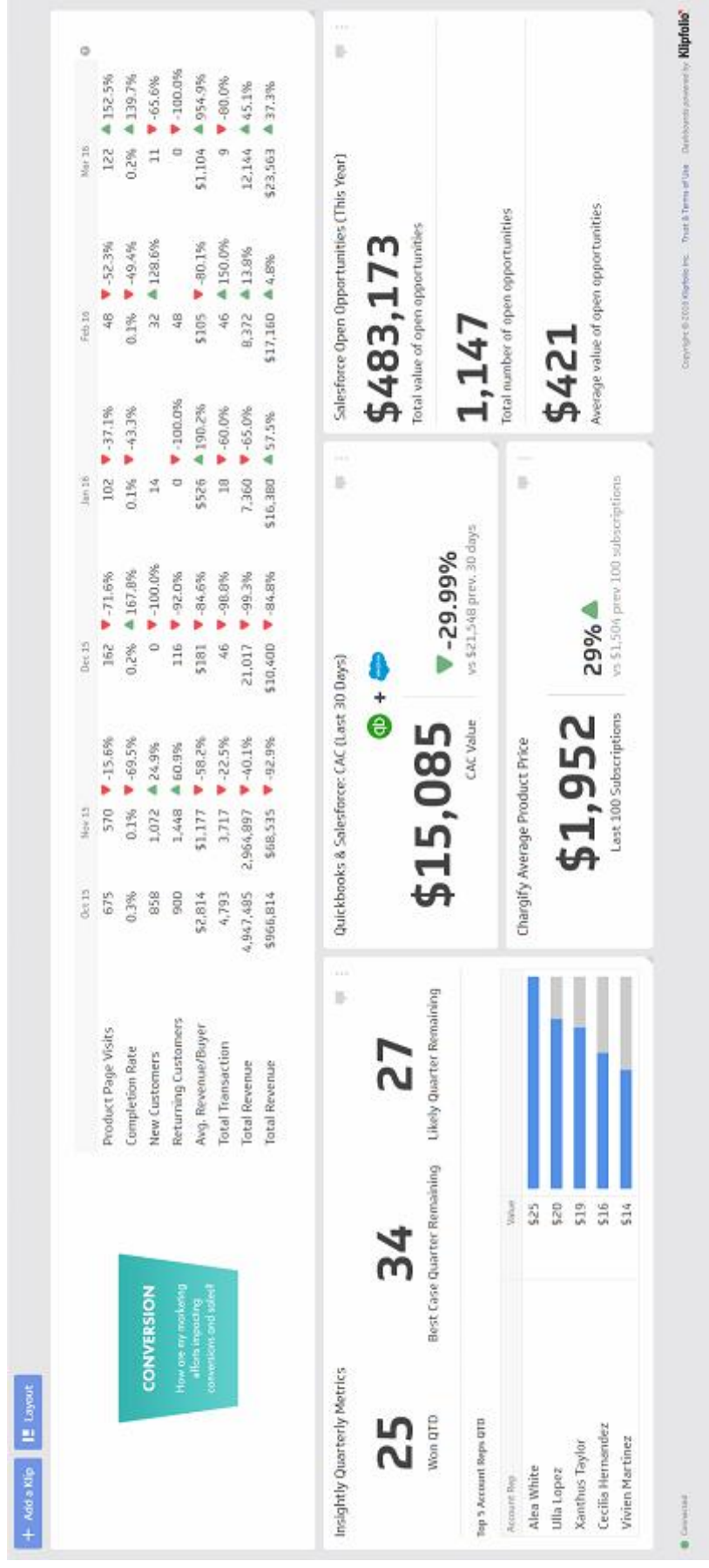


Email & Web Performance



Sales Dashboards

In today's ultra competitive business ecosystem, only the strong survive. In order to keep your sales team on top of their game, you need to cultivate a data-driven culture by sharing the right performance indicators and business metrics with your team. Learn more: [Sales Metrics and KPIs](#)



Executive Dashboards

Data dashboards are a powerful tool for executives because they summarize complex information and present it in an easily digestible way. For an executive, a data dashboard allows them to track, monitor and manage the most important metrics of the business. Learn more: [Executive Dashboards](#)



Free course: How to build dashboards

In 5 minutes a day, you'll learn everything you need to know about dashboards.



How does data get into a dashboard?

Multiple ways. You can upload computer files the old fashioned way, pull in data from web services like Facebook and Google Analytics, push in data from API, or as an email attachment, and access data from databases and servers. If the data dashboard you are using does not have a pre-built connector for your data source, you can still connect to a dashboard. For example, you can upload CSV or Excel files. Learn more about building an [Excel dashboard](#).

Klipfolio has an open API connector that provides access to 100s of other services for which we don't currently have a pre-built connector. In fact, we're aware of at least 439 services that customers have connected to. Learn more about these [data source integrations](#). If you have a question about a data source you don't see listed here, drop us a line and we'd be happy to help.

Dashboards automate data collection

Data dashboards enable users to choose a duration of time to track their data. All dashboards track data, but there is a specific name given to a data dashboard that is leveraged by managers and employees to assist in a businesses everyday

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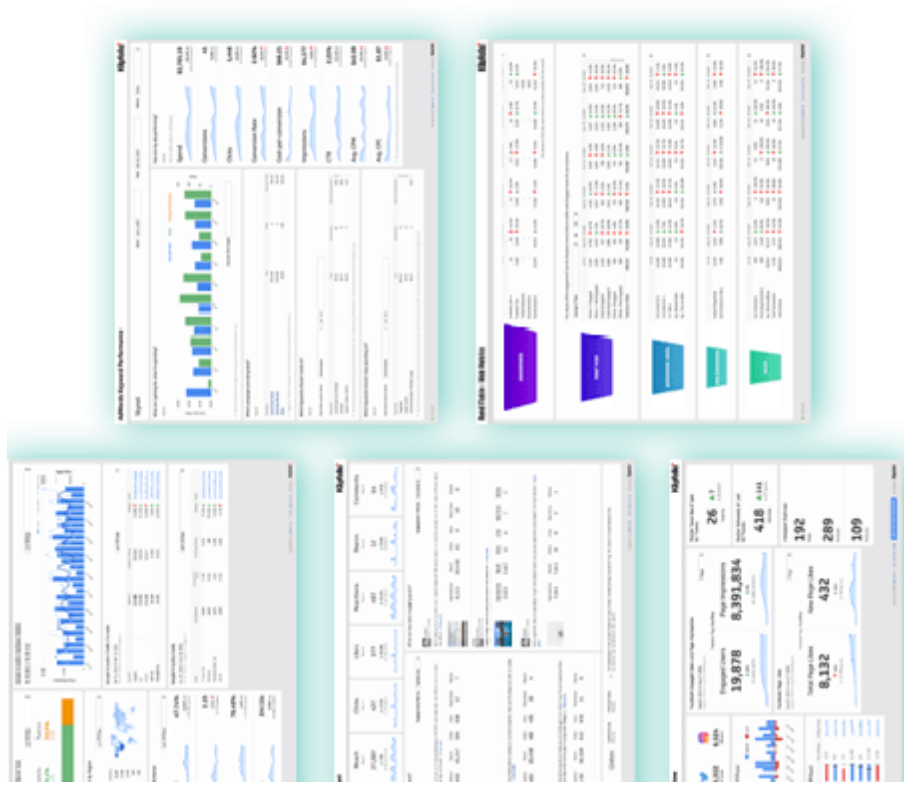
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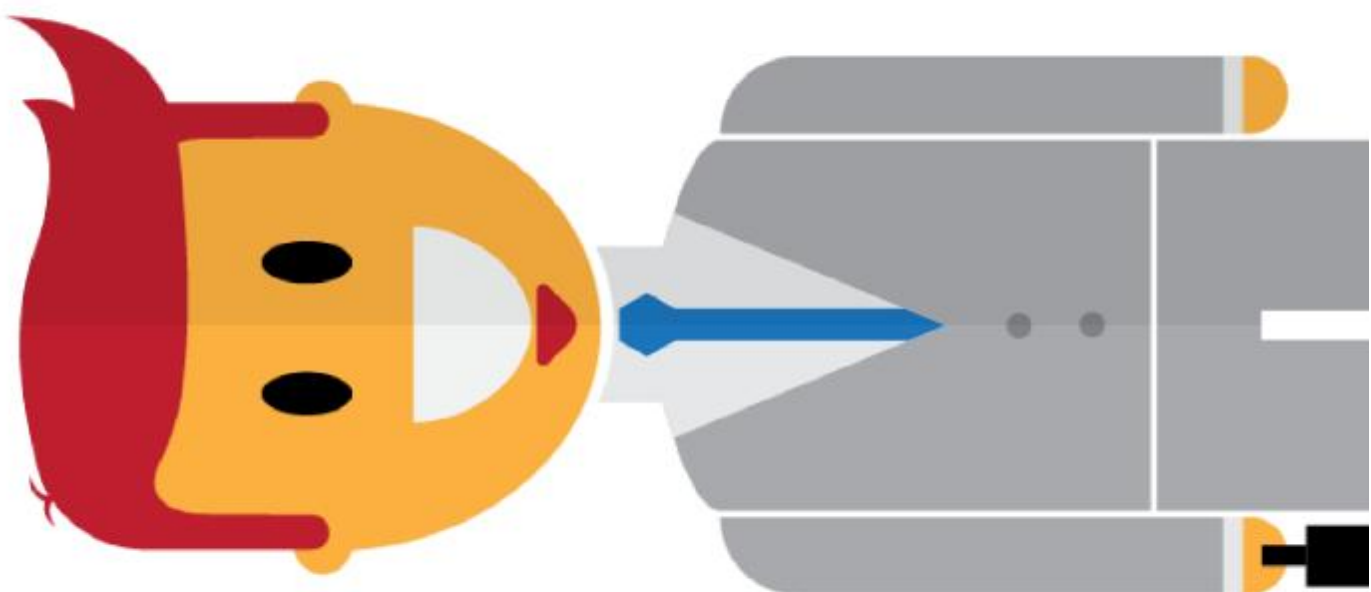


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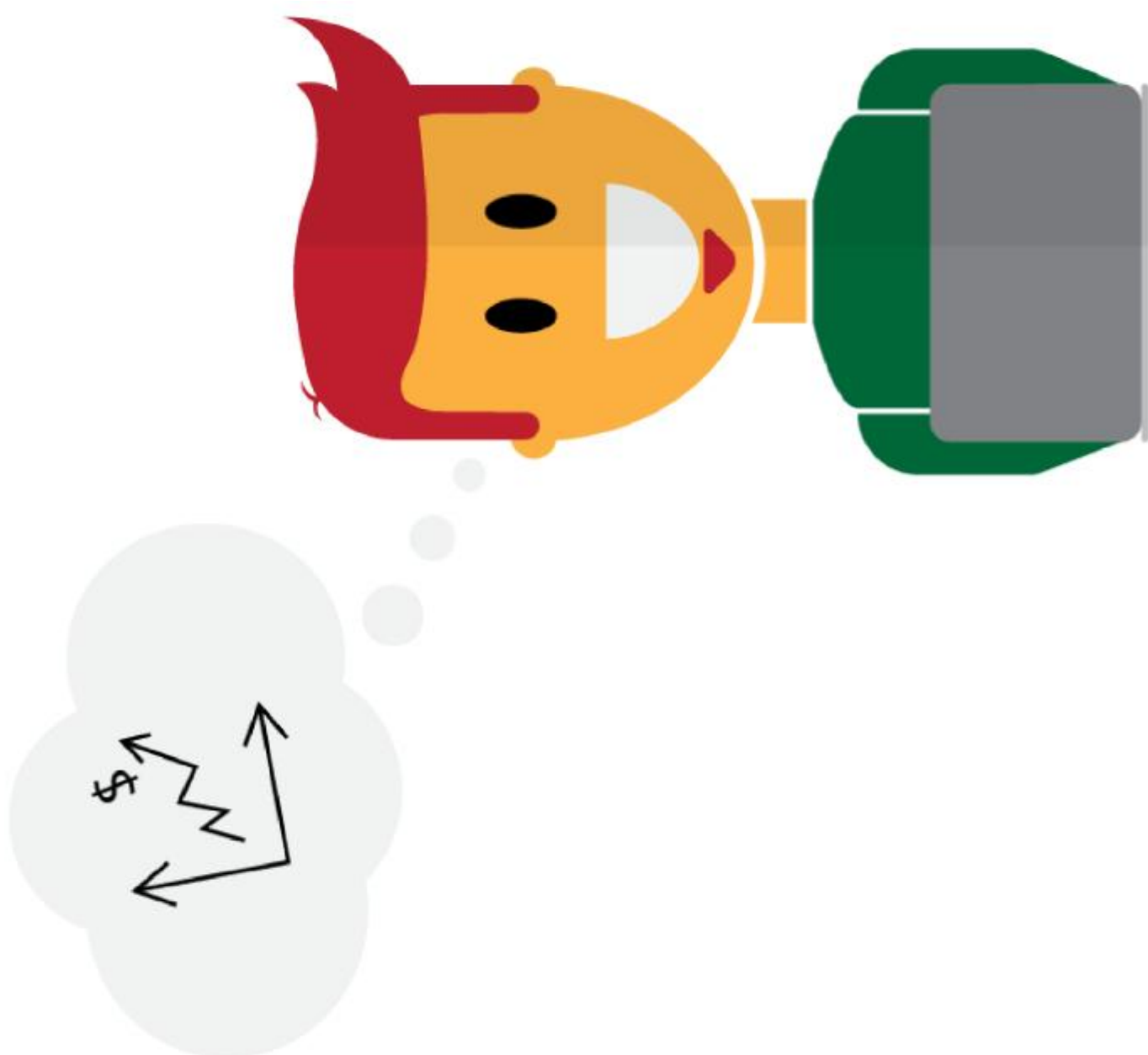




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PDF

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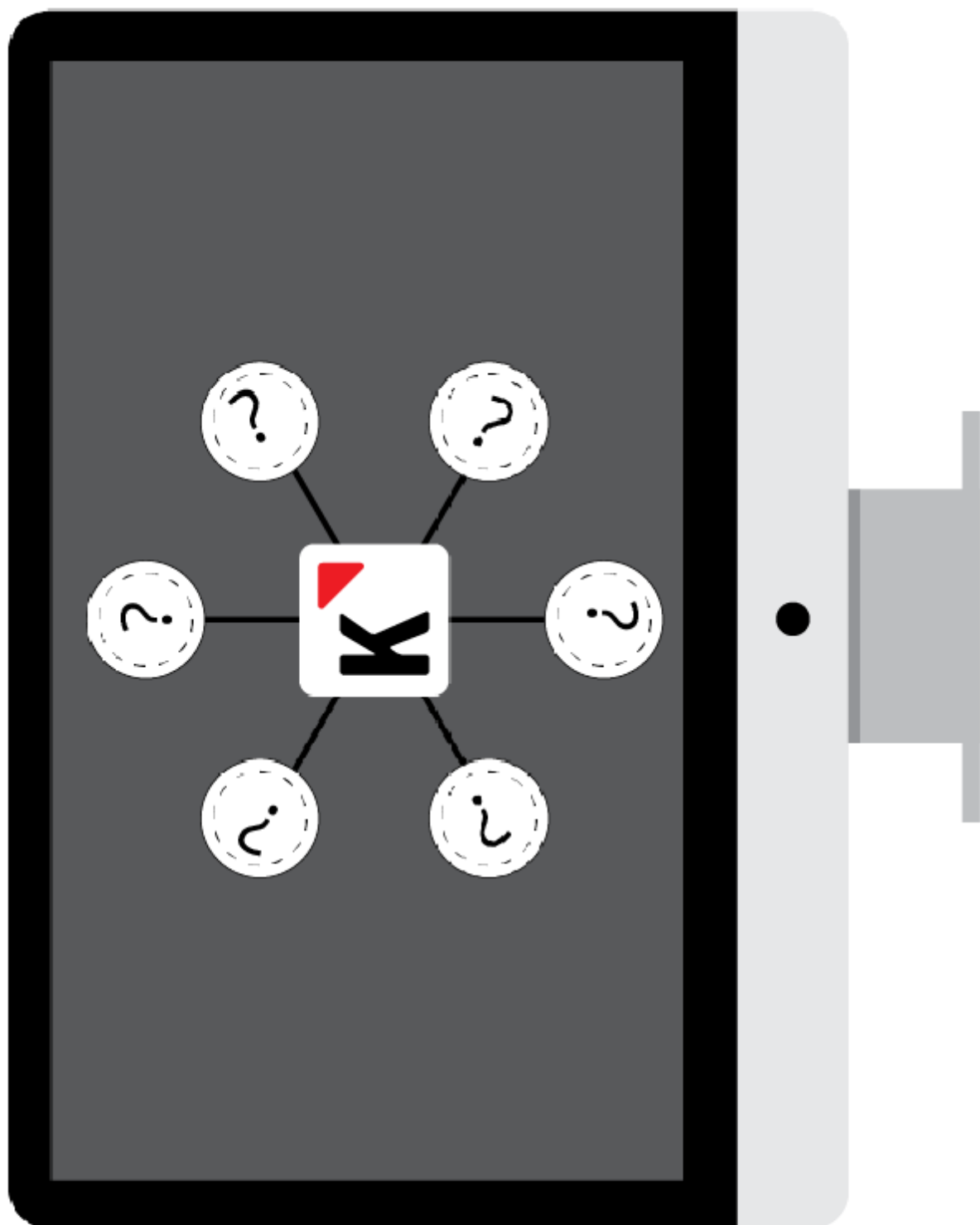
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Finished



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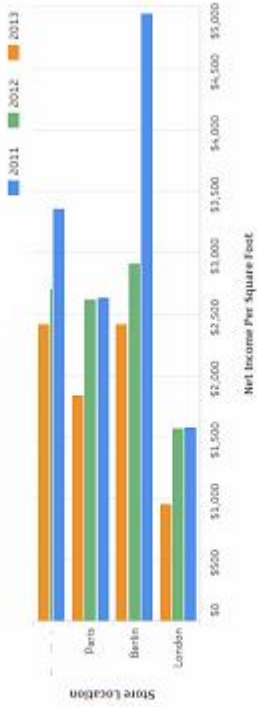
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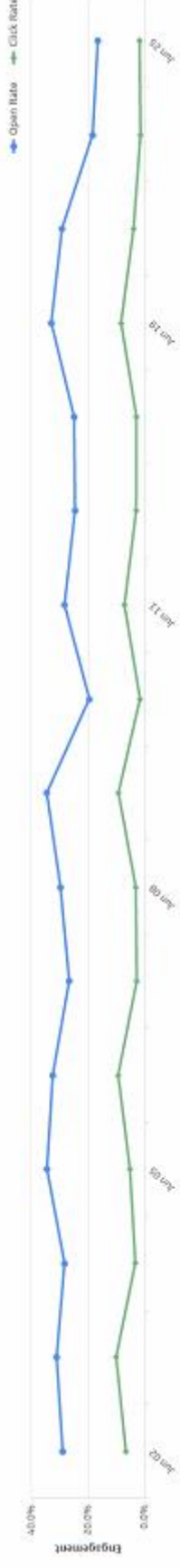
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Jan 05	Blog Subscribers	Blog Post: 3 tips to help achieve your New Year's Resolution
Jan 05	White Paper Downloads	Get your free copy of 2014 trends
Jan 06	Customers	14 reasons to stick with Awesome Company in 2014

13,245	3,841	25.0%	879	6.0%
17,547	5,467	31.2%	1,708	10.1%
13,247	3,756	28.4%	435	3.3%
18,664	6,453	34.6%	970	5.2%
23,542	7,655	32.5%	2,201	9.3%
8,657	2,312	26.7%	241	2.8%
3,245	967	29.8%	102	3.1%
32,457	11,243	34.6%	3,009	9.3%

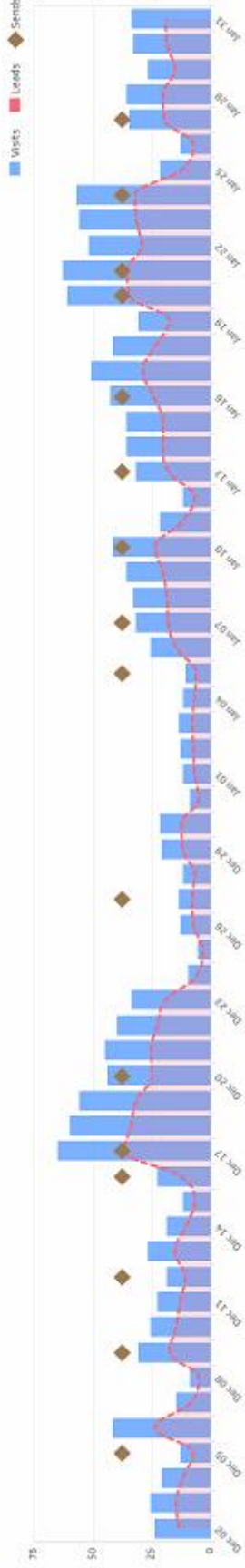
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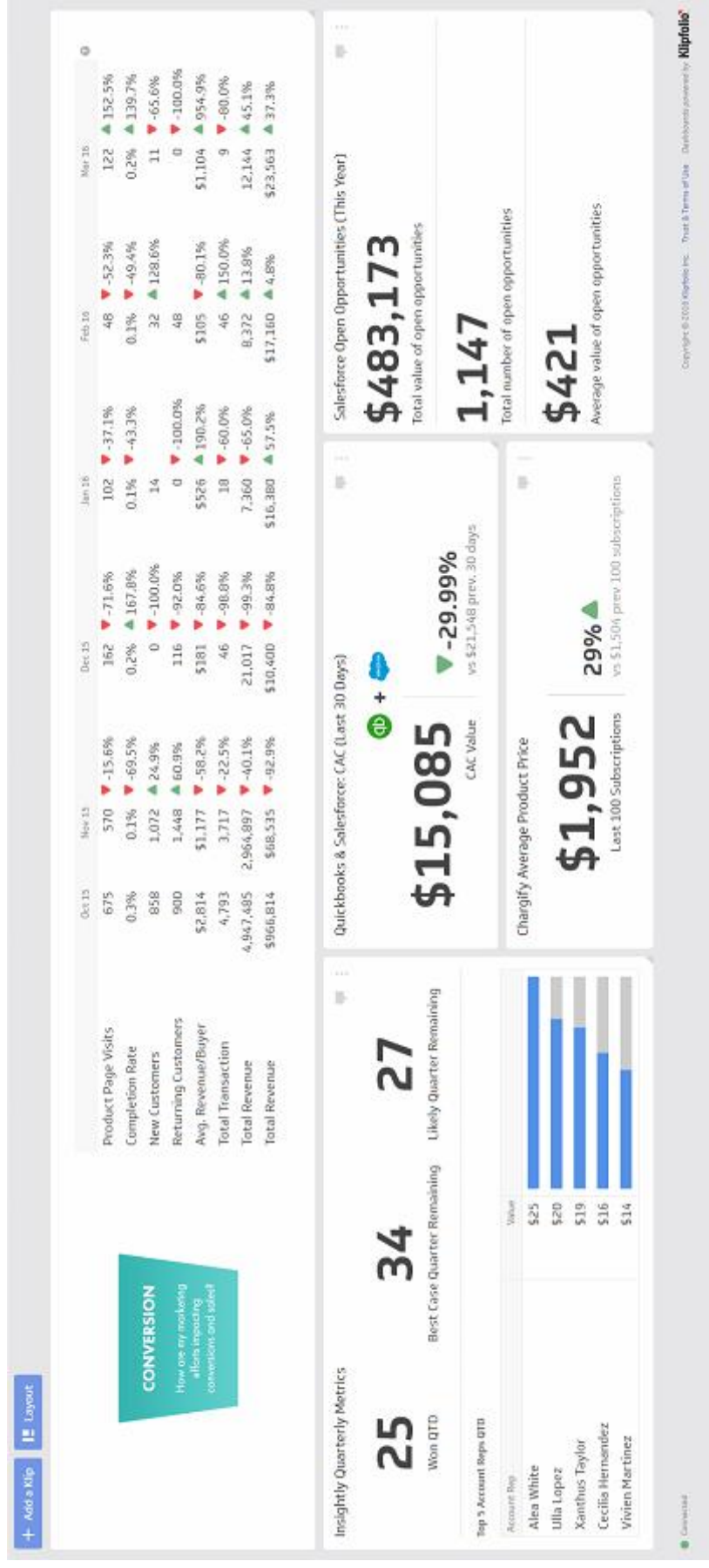


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