

Data Visualization Checklist

- Content – Do you have content people are interested in?
 - “The Numbers” are the most important thing you are sharing
 - What is your Key Metric?
 - What are helpful ways to slice it? (Key Fields)

- Format – What delivery format do your viewers prefer?
 - PDF, Excel, PowerPoint, Web, iPhone, Mac
 - What format is currently in use?
 - What format would be better?
 - Transition to new format by providing both

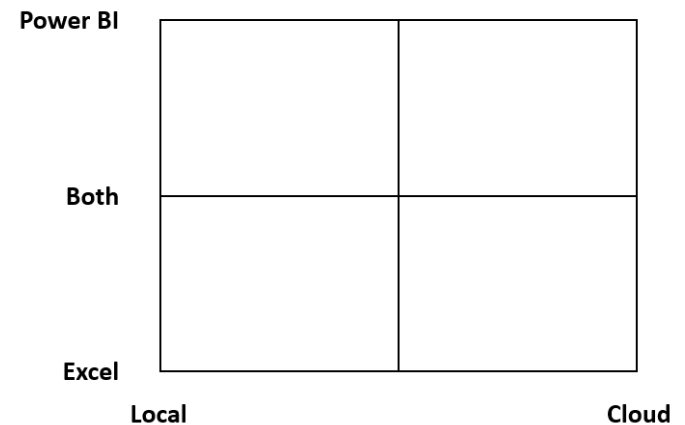
- Design – How should I structure my report/presentation?
 - Be a museum curator
 - Think about the “data-to-ink” ratio - emphasize what is important, remove what is not
 - Take things away until you have gone too far and put one thing back
 - Don’t skew the results
 - “Above all else show the data” – Edward R. Tufte

- Color
 - Make notes of colors you like
 - Red, Yellow, Green carry meaning...
 - Consider color blindness
 - Use PowerPoint to find the RGB
 - Use RGB to Hex converters online
 - Create your own themes
 - Use your companies/customers branding

- User Experience/Flow
 - Are you telling a story? Or creating a dashboard that automatically updates?
 - Dashboard/Email: KPIs → Summary → Detail
 - Story/Presentation: Intro → Tension → Conflict → Resolution
 - Layout: Title and most important numbers at top left because people read from left to right and top to bottom

- Chart Types – What charts will effectively communicate?
 - Have a good reason not to use a bar chart
 - See next page for ideas

- Technology – What combinations of desktop software and cloud services are you going to use to create a solution?



- Add Content – After you visualize, it is time to add more content.
 - What feedback did you receive?
 - What did you discover as you visualized?
 - Get creative!

Chart Suggestions—A Thought-Starter

