

25 Excel Dashboard Design Principles

Excel Dashboard Design principal is essential method to present your data in effective manner. This manner will help the viewers to analyse the KPIs (Key performing Areas) as they are referred by analyst. These Excel Dashboard design principles are must to have with anyone creating reports using Microsoft Excel Here are some of the essential steps which will help you to accomplish the required goal and task.

Here are the some of the important points which are necessary to make your dashboard presentable to audience.

- Keep your Data Short and Simple
- Focus on the main Areas of the Data. Each and every part is not important. Only some parts are more important. Analyse those parts and present your data. The important parts may vary from dashboard data to data. For Example in sales data Total Gross Sales figure makes it key important information but the sales from individual customer is not that important to the analyst. Biggest Customer's name and portfolio is important as they contribute to majority of your Gross Earnings.
- Analyse the Heat Maps. Heat maps are often referred as most viewed parts of the dashboard. People often like to read the topmost and the leftmost part of the dashboard. This is because the area which users look first is most important. Hence one should cover relevant data (information) in that section of dashboard.
- Analyse who is going to read the dashboard. Purpose of dashboard is most important. Prepare dashboard according to their requirements
- Use Less Gradient fill. Gradient fill often looks good many times because it is a nice graphical representation of colors. But in reality the gradient fill does not look professional in business kind of dashboard.
- Use less colors. Limit the usage of colors. I would suggest to use maximum of 3 colors per dashboard which will make it look consistent and easily viewable. Use lighter shade in chart for less important data and darker shade for important data. Example if you are presenting quarterly sales then use darker shade for the highest sales and remaining use lighter shade.
- Try to fit dashboard in one page. The most important thing required is to fit dashboard in one page as the whole scenario is presented.

- Remove the extra unnecessary gridlines which by default appear when you create your chart. The gridlines are useful when you have lots of data ex. Share/ Stock prices.
- Shortcut: Quickly create one page graph from your data. Select your data and press F11 (Function Key 11). This will insert a new chart sheet and you are ready to present in minutes. (Recommended charts in Excel 2013 also works great.)
- Remove sheet gridlines. Have a light background color. Which makes your dashboard look neat and clean. I usually use white background color for dashboard which makes it clean and minimalistic.
- Best place to show KPI (Key Performance Indicator) is the top most position of the dashboard which is viewed by many of the people (Basically when people / clients / viewers open they see that section first.
- For a multipage dashboard it is important to have easy navigation to your dashboard. The top portion of the dashboard one can insert links inside a shape to navigate.
- For a wizard type dashboard placing the next link is suitable at the bottom. A wizard type dashboard is a multipage dashboard where the first priority is on the first page and so on.
- Place the name of the creator in the last line of dashboard. Please note don't make it dark black color. Use light grey shade which is readable to the viewer. You could also place a social media link or website link so that the viewers can easily contact you.
- Sharing your dashboard: you could host your dashboard on website but what if you don't have it. You could do it for free either creating a free website or uploading on online host (one drive , dropbox) I would suggest to use onedrive because it gives more storage than dropbox and it support showing dashboard created in Excel which depicts the same dashboard picture as normal. Post / Share with clients friends etc.
- Print Your dashboard if the dashboard is static.
- Protect your dashboard VBA code and formulas so that people cannot copy your hard word.
- If your dashboard is complex and hard to understand do include help page where people can understand how to use this dashboard.

- Before Sending dashboard remember to click save on the page where you want your dashboard to open. Excel opens the saved page at the cell where it was saved hence if you want your dashboard to open in dashboard sheet then click on any cell in dashboard sheet and click save or press ctrl + S (Command + S on Mac) to save and open it in the same Page.
- Use IFERROR formula which will protect from displaying #NA from displaying on the sheet.
- Check every possible problem which can arrises from your project and rectify it.
- This is not the important step but many tends to forget this step. Save Macro Enable book as .xlsm or .xlsb format .
- If you have lots of data and the size of excel sheet increased till 15 – 20 Mb then I would suggest to change file format from xlsx , xlsm (macro Enable) to xlsb (binary format) Binary formats supports both normal and Macro file. It basically reduces the size of the workbook (around 40 % size is reduced)
- If you are creating dashboard for first time then be sure to ask the seniors / Experts regarding how to create dashboard
- Don't add a lot of dynamic nature in dashboard. People by viewing dashboard should easily draw conclusion of the report.