University Analytics and Institutional Reporting
THE UNIVERSITY OF UTAH

DASH DASHBOARD ANALYSIS & STRATEGY HUB

# A Quick Start Guide to Dashboard Quality

*Guiding questions, a five-step process, and checklist categories*

**Prepared by UAIR · October 2026**

## Purpose

This guide is here to help you get started building a dashboard quality process that fits your office. It is not a one-size-fits-all approach. It is a starting point you can tailor to your own institutional research team.

The guide has three sections:

- Guiding questions to get you started
- The five-step process we followed, and how to adapt it
- Our current QA/QC checklist categories, for inspiration

## Guiding Questions

Questions to ask yourself, or your team, before you build anything.

### What are we trying to accomplish?

- What are the guiding principles of our team?
- What are the immediate and long-term goals for our department?
- Where are our deliverables falling short of stakeholder needs?
  - Are those shortcomings systemic across teams?
- Identify a few areas where measurable improvements could be made.
  - For example: branding, data validation, or data source consistency across products.

### Who will be involved?

- Who on our team should be part of building this, and of improving it over time?
- How do we create a process where feedback is welcomed and acted on?

### How are we going to do it?

- What software do we already have that works well for us? Excel, Jira, SharePoint, and so on.
  - How could we build something inside that existing framework?
- What is our timeline?
- How will we measure success?

## The Process We Followed

The five steps we took at UAIR to get where we are today. Each step is adaptable, and none of them required new software.

| The step | What we identified and learned |
|---|---|
| **STEP 1**<br>**Needs assessment by management**<br>*Evaluate where the team can improve and where deliverables are missing the mark.* | **Identified needs:**<br>• Dashboard standardization, consistency, branding, quality assurance, quality control, and data accuracy.<br>• A process that meets the needs of the analysts, without purchasing a new tool. |
| **STEP 2**<br>**Needs assessment by analysts**<br>*Evaluate which parts of the dashboard building process are cumbersome, challenging or inconsistent.* | **Identified needs:**<br>• Something that fits the current workflow, needs no new software, and is time effective.<br>• Less redundancy between dashboards, and more consistency across them.<br>• Fewer silos between teams, with cross-training opportunities. |
| **STEP 3**<br>**Build an initial process**<br>*Build a first version with analyst and manager feedback.* | • Formed a committee, mostly analysts.<br>• The committee created a simple checklist and began giving feedback on new dashboards before publication.<br>• This led to an initial style guide and template. |
| **STEP 4**<br>**Iterate and improve**<br>*Put the process into real-world use, iterating as needed.* | • Weekly committee meetings to discuss experiences and give feedback, as both dashboard creators and reviewers.<br>• Identified the need for more standardization, including at publication.<br>• A more detailed checklist was developed. |
| **STEP 5**<br>**Live with the process**<br>*Keep implementing. Iterations slow as the process stabilizes, but feedback is still solicited and valued.* | • Multiple dashboards run through the process every week.<br>• Monthly meetings with all dashboard analysts and all managers. Feedback is welcomed, and it has led to continued iteration.<br>• Managers are seeing fewer mistakes and fewer questions from stakeholders. Dashboards are built with intentionality. |

## Our QA/QC Checklist Categories

The categories below are what our checklists cover today. The specific items are tailored to our tools and our data, but the categories should translate to most offices.

### Quality Assurance (QA)

Two main parts, completed by the analyst developing the dashboard together with an assigned mentor.

- **Purpose, plan and data**
  - Evaluate the content of the dashboard against its purpose and audience, especially the level of aggregation.
  - Verify data sources, accessibility, logic, and the figures themselves.
  - Document decisions.
- **Visualization, design and build**
  - Assess chart choices, and check branding against templates and accessibility requirements.
  - Test filters, tooltips, export functionality, and overall performance.
  - Clean up the workbook and draft documentation for future analysts.

### Quality Control (QC)

Double and triple checks by a peer reviewer.

- Additional data validation
- Overall look and feel, colors, and navigation
- Tooltips, filters, functionality, load times and performance
- Small things such as naming conventions and spelling, which get special attention

### Deployment

Two main parts, completed by the analyst together with an assigned publisher.

- **Pre-deployment**
  - Complete final testing of interactive elements such as exports and filters.
  - Update documentation for reproducibility: design decisions, analyst notes, dashboard descriptions and tags.
- **Publishing and promoting**
  - Publish the dashboard to its final destination.
  - Create data refresh schedules and adjust permissions.
  - Promote the dashboard, internally and externally.

**A note on where to start**

**Start small, stay curious, and iterate often.** Ours began as one checklist and one committee, piloted on real dashboards. The checklist got us started. Everything since came from asking what needed to change.