

Part 1 – UX FOR ANALYTICS & BI

INTRODUCTION

- What is the problem being solved
- How did we get here
- People, value and data
- What to expect
- Activities and exercises

MODULE 1: USER EXPERIENCE

- What is UX?
- The impact of the UX approach
- A brief history of UX
- Value as a path to data insight
- User benefits and outcomes
- UX applied to data

MODULE 2: INSIGHT STRATEGY

- Goals and objectives
- The process
- Measuring success
- The Insight Template: Understanding the landscape
- Assessing people, data, and change needs

MODULE 3: ALIGNING STAKEHOLDERS & USERS

- The roles involved
- Who is a stakeholder
- Who is a user
- The question approach
- Value through action and behavioral change

MODULE 4: PERSONAS & INTERVIEWS

- What is persona?
- How to create personas
- The interview process
- Tactics for interviews
- Actions and the “so what?”
- The stakeholder interview and questions
- The user interview and questions
- Persona template and feedback

MODULE 5: DATA ASSESSMENT

- Bringing stakeholders on the journey
- Mapping questions to data
- Rapid approach to scoring
- Assigning questions to iterations
- Completing the Insight Template

MODULE 6: SUMMARY

- Summary
- Application
- Conclusion

Part 2 – DASHBOARD & REPORT UI DESIGN

INTRODUCTION

- What is the problem being solved
- How did we get here
- What to expect
- Activities and exercises

MODULE 1: VISUALIZATION BEST PRACTICES

- The elements of good design
- UI design applied to visualization
- Types of visualizations and reporting
- The composition of a visualization
- Drawing attention to the important
- The data-to-ink ratio

MODULE 2: VISUAL STORY TELLING

- Designing for behavioral change
- Understanding the users
- Driving action from a visualization
- Connecting KPIs to charts
- Focus on value and outcomes
- Examples of good storytelling

MODULE 3: WEAVING CHARTS, KPIS & ACTION

- Three types of dashboard layout
- Common design patterns
- User design preference
- Chart selection hierarchy
- Key Performance Indicators

- Filters and filter placement
- Reducing chart junk

MODULE 4: WIREFRAMING & VALIDATION

- What is a wireframe
- Why wireframe, an indispensable tool
- How to wireframe rapidly
- User feedback
- Real world application
- Examples of bad visualization
- Examples of good visualization

MODULE 5: SUMMARY

- Bringing stakeholders on the journey
- Summary
- Application
- Conclusion

Part 3 – DATA & DASHBOARD ADOPTION

INTRODUCTION

- What is the problem being solved
- A change management approach to adoption
- What to expect
- Activities and exercises

MODULE 1: MANAGING CHANGE

- The impact of an effective dashboard
- What does adoption mean
- Measuring adoption
- Start with the end in sight
- The pillars of adoption

MODULE 2: ADOPTION STRATEGY

- The common pitfalls
- Planning for success
- Adoption roadmap
- Adoption gap analysis

- The adoption process

MODULE 3: ENABLEMENT, TRAINING & LAUNCH

- Building trust through engagement
- Training materials
- The overview tab
- Feedback and social proof
- The dashboard launch approach

MODULE 4: SCALING ADOPTION

- The maturity journey
- Scaling insight
- The BI & Analytics knowledge ecosystem
- A single place for all dashboards and related content
- Dashboard taxonomy

MODULE 5: SUMMARY

- The adoption journey
- Summary
- Application
- Conclusion