

Business Intelligence Dashboard Software: Selection, Requirements, and Workflow



- Practical path: choose software, define requirements, run a repeatable dashboard workflow



- For analytics leads, BI analysts, operations managers, and planning teams



- Dashboards fail from unclear requirements, weak governance, and broken workflows



- Session covers market, criteria, requirements, workflow, governance, evaluation, lifecycle



The Mid-2026 Dashboard and BI Landscape

- - Dashboard software forecast: \$13.41B by 2030, 14.2% CAGR
- - Broader BI market growing at roughly 11.6% CAGR
- - Key shifts: cloud-first, mobile-optimized, embedded analytics
- - AI-assisted and conversational interfaces are becoming table stakes
- - Selection means workflow, governance, and architecture fit



Dashboard Categories and the Current Vendor Landscape



- ▶ - Self-service, enterprise governed, embedded, and operational categories
- ▶ - Power BI for Microsoft estates; Tableau for visualization depth
- ▶ - Looker for governed modeling; Qlik for associative exploration
- ▶ - Domo for all-in-one needs; Metabase for lightweight open-source
- ▶ - AI-native interfaces are table stakes: Copilot, Pulse, Sage
- ▶ - Match ecosystem fit to how teams actually consume decisions

Selection Criteria That Match How Your Team Works

- Data connectivity, governance, ease of use, performance, deployment, cost
- Weight roles: analyst depth vs. manager simplicity, self-service vs. governed
- Total cost: licensing, capacity, implementation, maintenance, training
- Prioritize adoption, governance, and TCO alongside visualization features



A Practical Requirements Framework for Dashboard Projects



- Move from a vague ask to audience, decision, question, and action



- Define each metric: source, calculation logic, update frequency, and owner



- Capture access needs: viewers, permissions, alerts, exports, and refresh SLA



- Use a short written brief and require stakeholder sign-off before construction

REQUIREMENTS BRIEF



AUDIENCE



DECISION



QUESTION



ACTION

METRICS DEFINITION

ACCESS & DELIVERY NEEDS

STAKEHOLDER SIGN-OFF

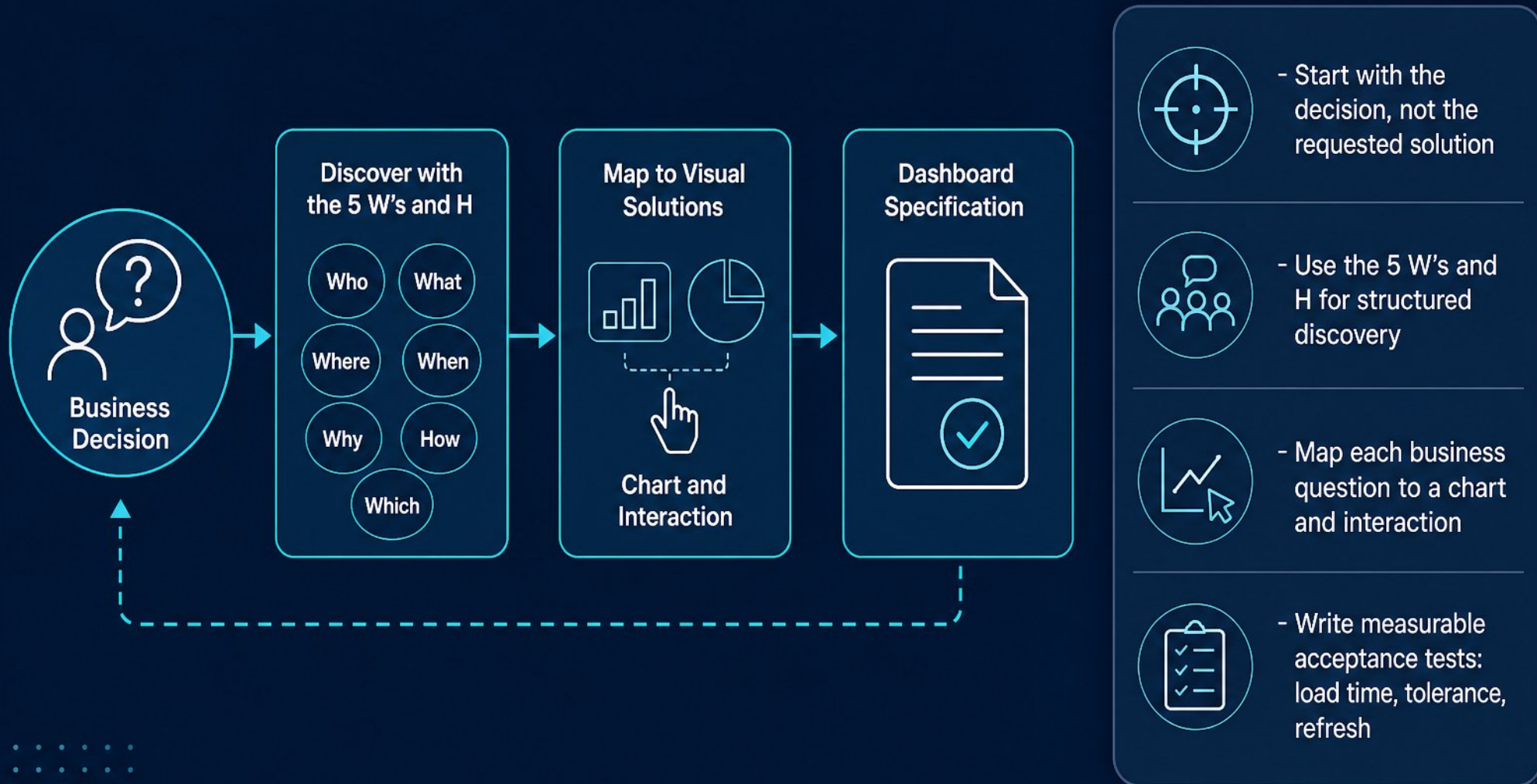
Who needs the dashboard and why?

What decisions will it support?

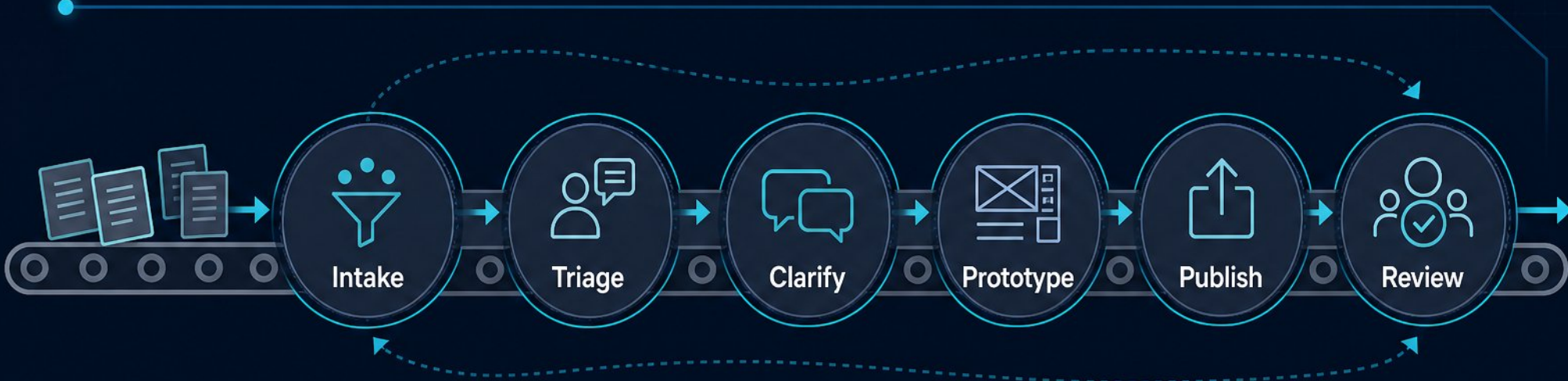
What key questions must it answer?

What actions should it enable?

From Questions to Dashboard Specifications



Building the Workflow: From Request to Operating Decision



- Intake flow: triage, clarify, prototype, publish, review



- Roles: managers request, analysts build, leads approve



- Use wireframes and mockups for fast feedback loops



- Gather requirements as structured interviews:
process tracing, five whys, edge cases

Design and Usability Standards for Adoption



- Use consistent layout, visual hierarchy, and KPI-first design grounded in the five-second rule



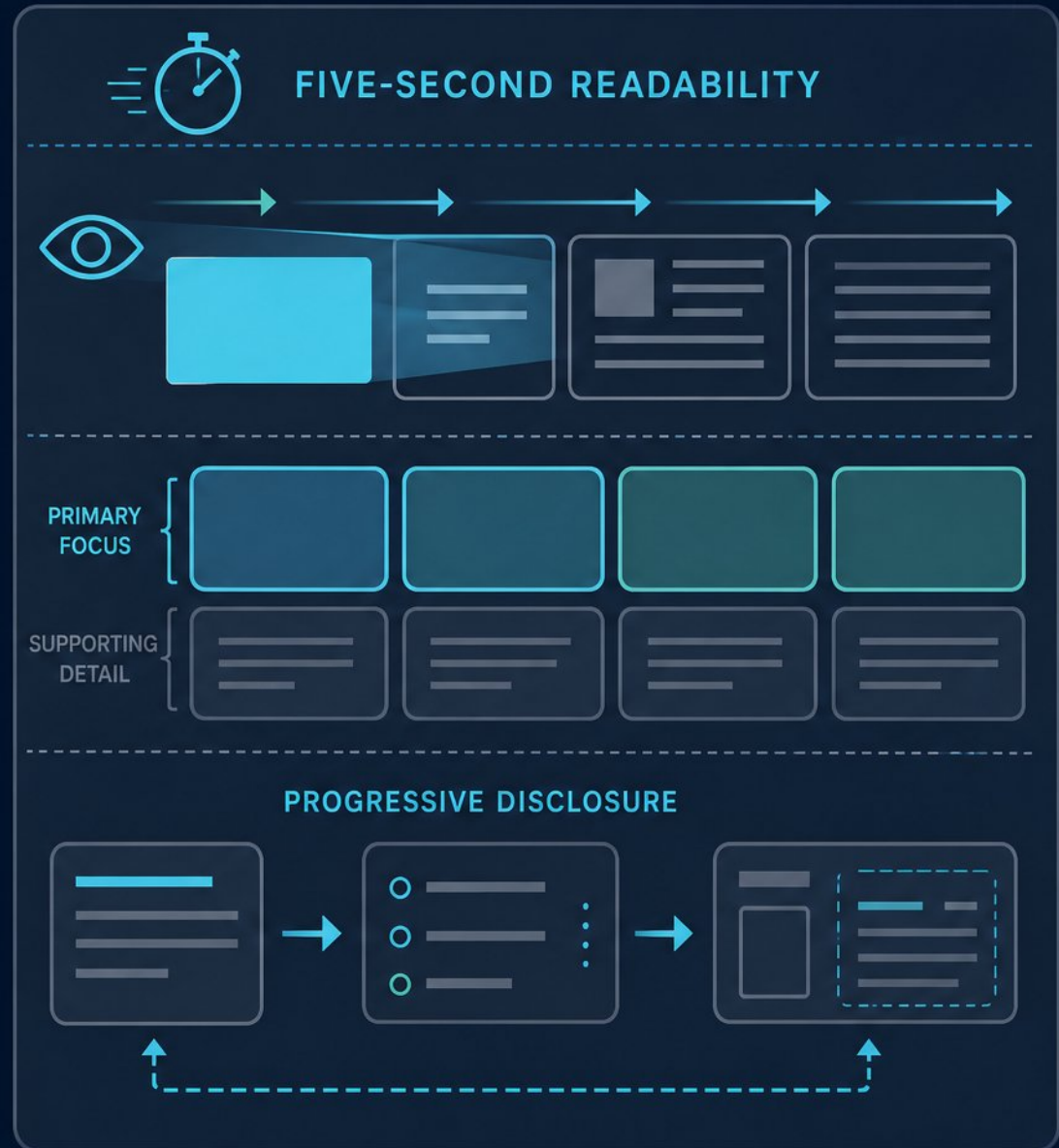
- Enforce chart-type and color standards that reduce user error and support color-vision accessibility



- Apply progressive disclosure: summary first, detail on demand



- Plan for mobile and embedded views where operational managers actually consume data



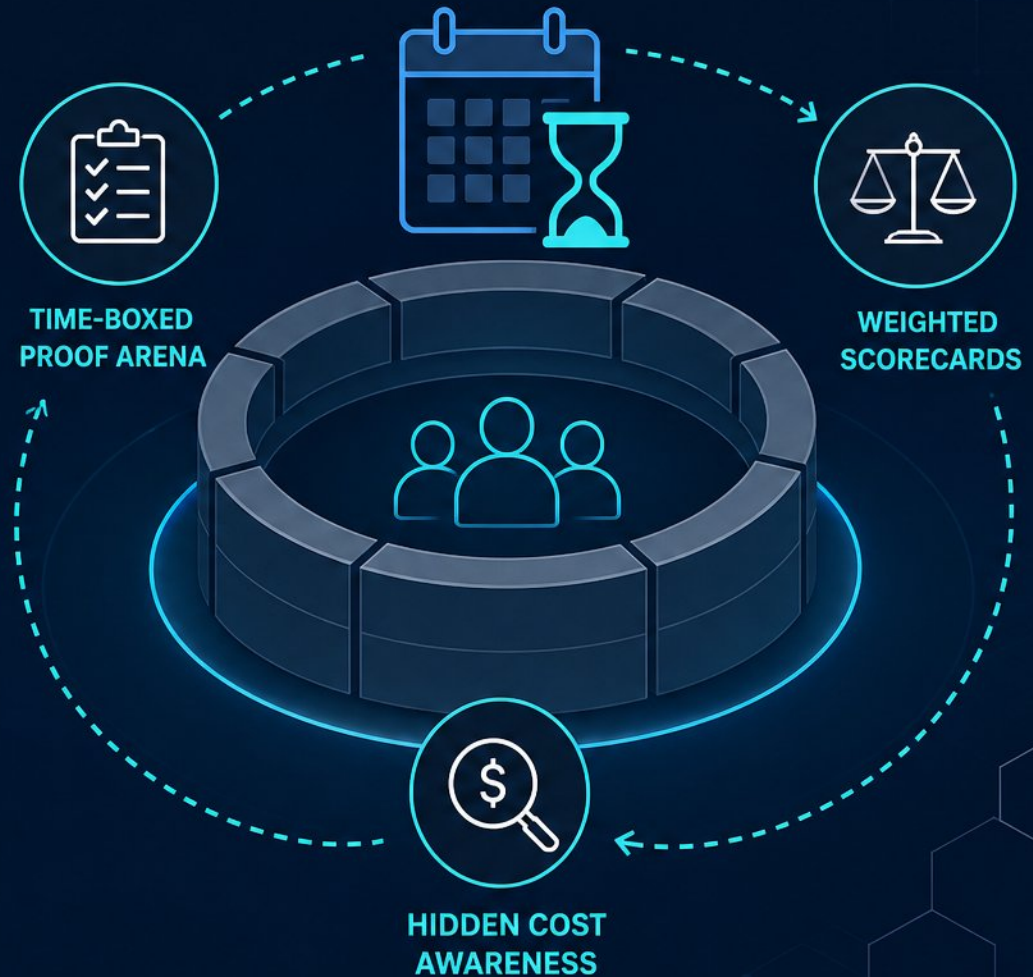
Data Quality, Refresh, and Governance

- Match data freshness to decision speed and impact
- Validate before publishing; automate quality checks
- Assign metric owners and document definitions clearly
- Manage changes through a governed semantic layer
- Use governance to enable adoption, not block it



Evaluating and Proofing Dashboard Software

- - Run a time-boxed 30-day evaluation against pre-agreed success scenarios
- - Involve analysts and operations managers in proof exercises with real data
- - Score against weighted criteria: time-to-insight, query coverage, semantic correctness, governance, adoption, TCO
- - Document hidden costs early: viewer seats, compute or credit pricing, premium connectors, SSO



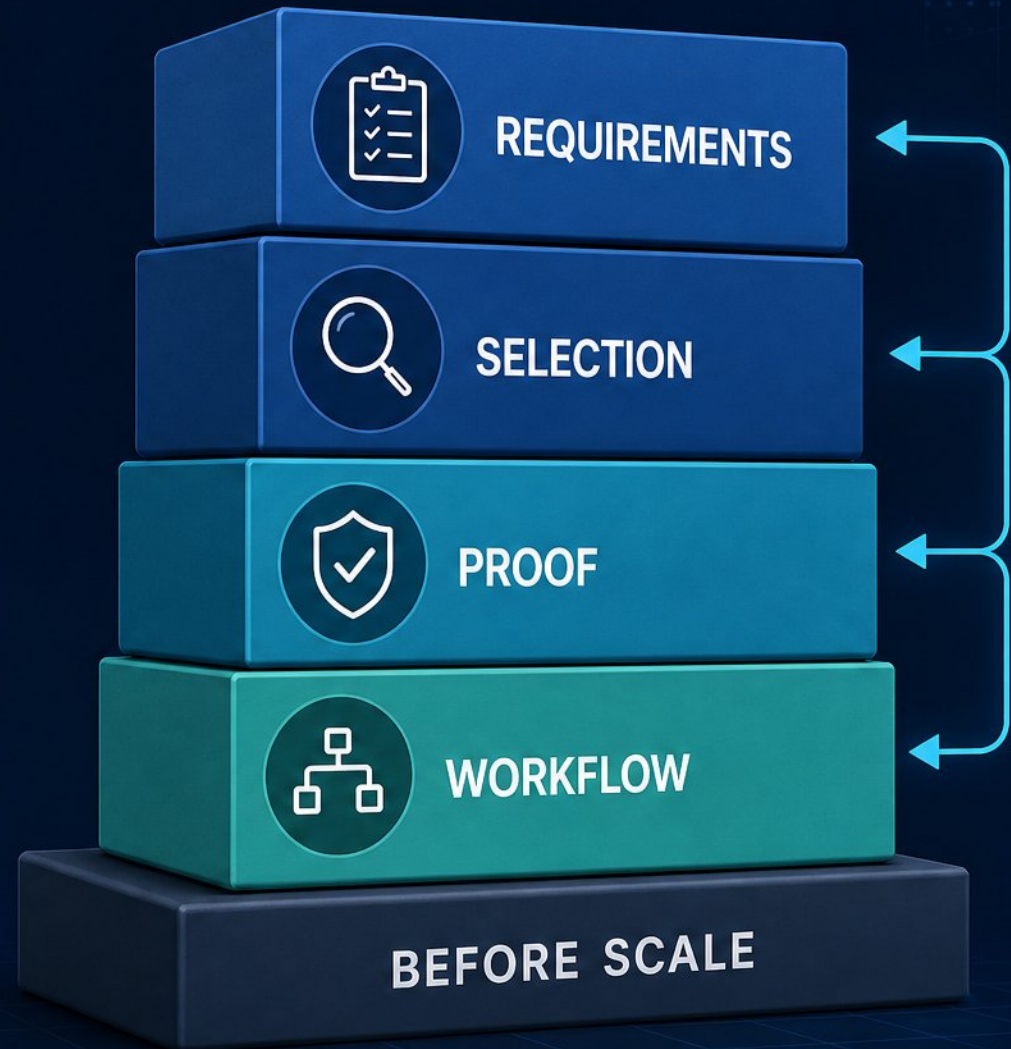
Operating, Maintaining, and Retiring Dashboards



- Manage launch, usage monitoring, maintenance, and retirement
- Improve existing dashboards using usage signals
- Apply versioning, deprecation rules, and feedback loops
- Track adoption by business impact, not dashboard count

Putting It Together: Selection to Working Workflow

- Sequence: requirements before selection, proof before purchase, workflow before scale
- Decide early where metric definitions and governance will live
- Plan adoption from day one: role-based views, alerts, mobile access, feedback
- Prepare next steps by team maturity level and current gap



Workshop: Drafting Your First Dashboard Requirement



- Convert one real request into a concise one-page brief



- Define decision, audience, KPIs, sources, refresh, and tests



- Assign roles: requester, builder, approver, and maintainer



- Use the brief to expose gaps that cause rework

DASHBOARD REQUIREMENTS BRIEF

One-Page Brief



DECISION



AUDIENCE



KPIs



SOURCES



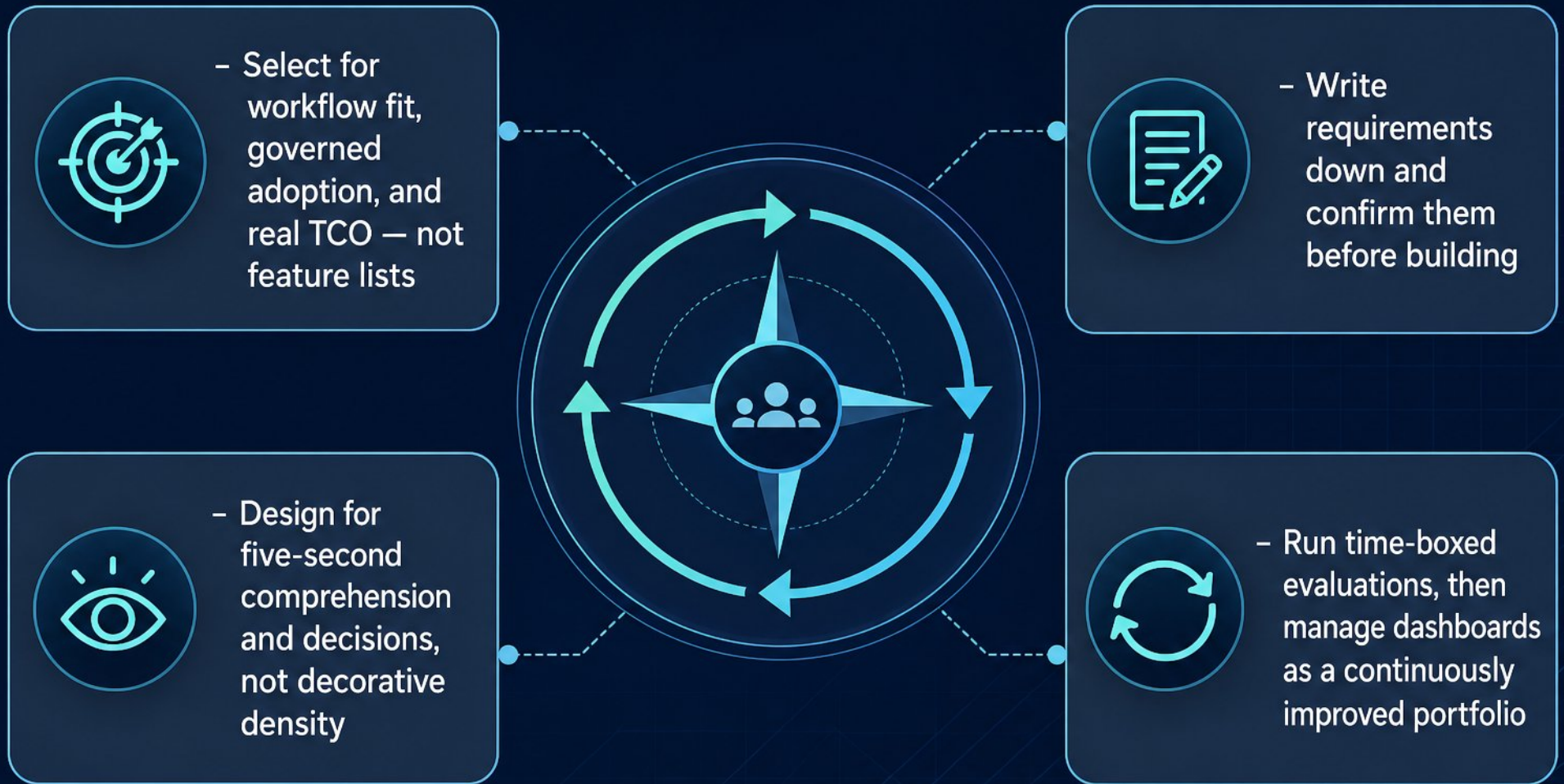
REFRESH



TESTS



Action Plan and Key Takeaways



PersonWise.

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personwise.ai/t/46e47c4e/public