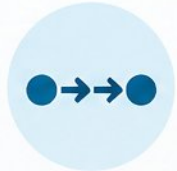


Building a Data Visualization Roadmap



Roadmap urgency: dashboard sprawl, conflicting metrics, request-driven whiplash



14-step path: audit → sequence → govern → communicate



Roles: analytics leads, visualization managers, data product owners, business owners



Connects to analytics strategy, data product goals, platform modernization



Deliverable: horizons, owners, metrics, review cadence — with success measures



Why Visualization Portfolios Drift and What It Costs



The predictable lifecycle: adopt, enable, proliferate, never retire, fragment, rebuild



Only 5–10% of dashboards serve top decisions; 20–35% show zero users in 90 days



Conflicting KPI values are a governance symptom, not a charting problem



Duplicated compute, license overspend, and analyst time lost to reconciliation



Rationalization retires 30–70% of reports; BI operating cost falls up to 40%

Target Audience, Roles, and Decision Rights



Analytics lead

- Analytics lead: owns roadmap process, sequencing, capacity, and trade-off transparency



Visualization manager

- Visualization manager: owns design standards, reusable components, and authoring discipline



Data product owner

- Data product owner: owns adoption, user research, and outcome metrics



Governance lead and business owner

- Governance lead and business owner: own metric definitions, certification, and escalation paths



RACI shortcut

- RACI shortcut: business owner approves meaning; technical owner maintains logic; steward triages; custodians deploy



Portfolio Inventory: What You Have and Who Uses It



Instrument first: extract usage telemetry from every BI platform into one register



Minimum columns: dashboard name, audience, owner, decision supported, 90-day views



Combine automated discovery with surveys and interviews — neither alone is complete

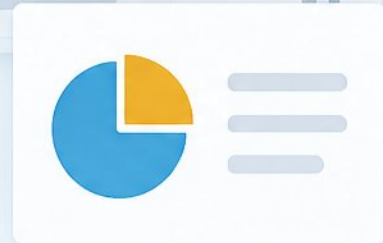


Tag the top 100 assets by recent views with audience, owner, authoritative metric

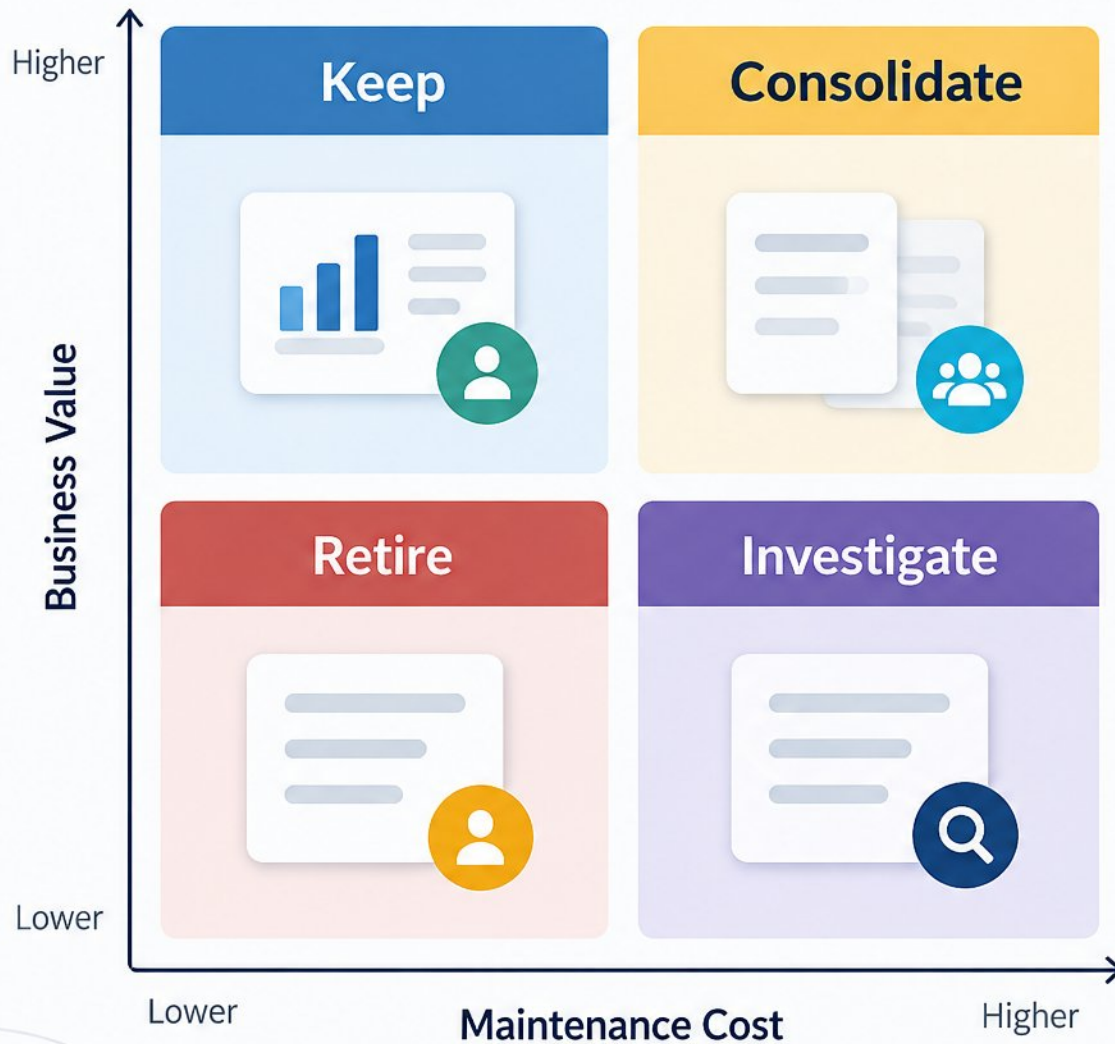


Time-box the initial audit: a scoped two-week engagement is a realistic start

Dashboard Name	Audience	Owner	Decision Supported	90-Day Views



Scoring and Classifying the Estate



- Four buckets with business owners: Keep, Consolidate, Retire, Investigate
- Trust tiers stay scarce: certified few, team-owned, personal, archived
- Score on business value, technical health, utilization, cost efficiency
- Low traffic can still be decision-critical — judge why, not just how often
- Archive rule: under five views in 90 days, no owner, no inbound links

Trust tiers stay scarce



certified
few



team-
owned

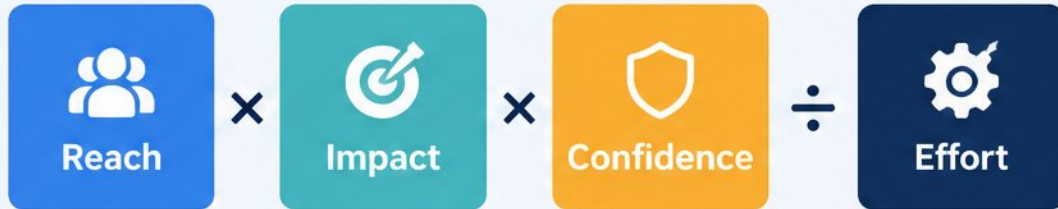


personal



archived

Prioritization Frameworks Adapted to Visualization Work



RICE: Reach × Impact × Confidence ÷ Effort, in person-months



Score honestly: 100% measured,
80% strong evidence, 50% reasoned guess



Below 50% confidence — research
before scoring



Value vs. effort 2x2: quick wins first,
cut low-value/high-effort



Separate compliance and regulatory work
from discretionary demand



Keep the honest score; document every
override and its reason

Value vs. Effort 2x2



Design Standards and the Reusable Component Layer



Bar Chart



Line Chart



Scatter Plot



Heatmap



Table

KPI Tile

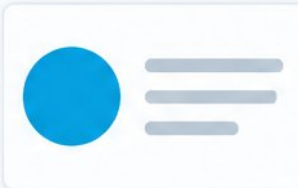


Chart selection rules: bar for comparison, line for trend, scatter for correlation



Pie charts only under five categories; tables when exact values matter



Accessibility is a compliance baseline now: WCAG 2.2, EAA, 4.5:1 contrast, keyboard navigation



Design tokens for color, spacing, typography, and status states, updated in one place



Reusable KPI tiles and chart primitives render in dashboards, PDFs, and emails alike



Registry discipline: ownership, version history, review status, deprecation policy

Design Tokens

Color



Spacing



Typography

Aa

Status States



Semantic Layer and Metric Definitions as Roadmap Dependencies



Ratify the metric register before building: name, definition, logic, grain, source, owner



One authoritative system per KPI — document which wins when systems disagree



Raw-schema models fail ~50% of the time; semantic grounding lifts accuracy past 90%



Route definition changes through change control with effective dates and user notice



Semantic and data-foundation work precedes visualization delivery — rebuild without it and re-bloat follows

Metric Definition



Name



Definition



Logic



Grain



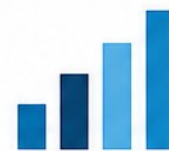
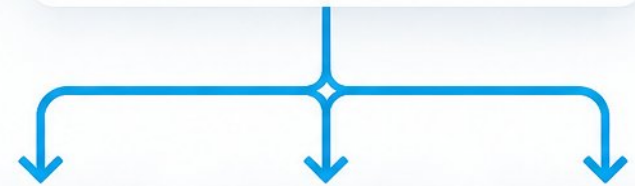
Source



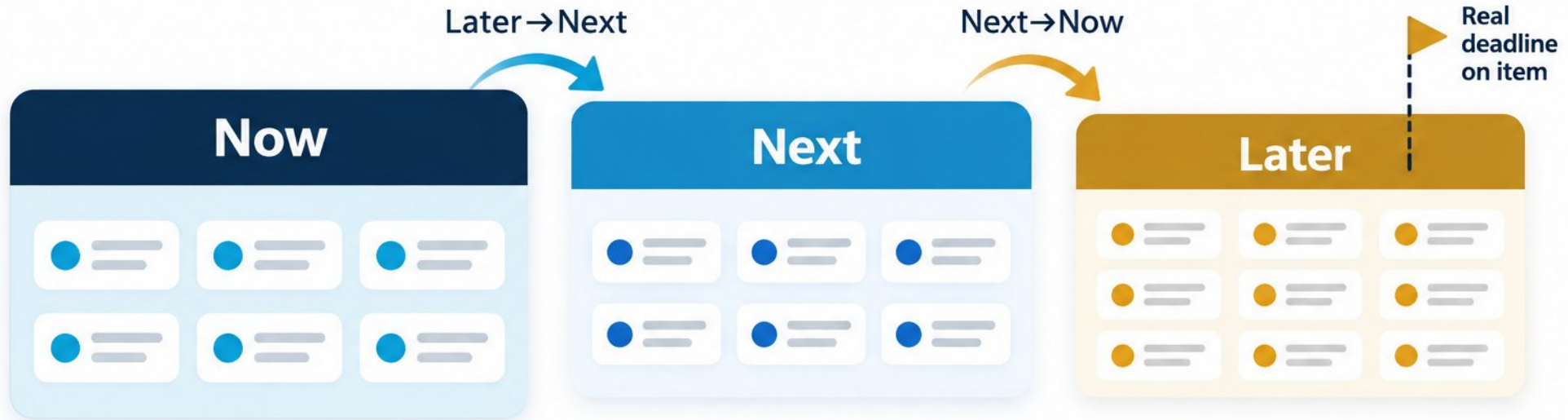
Refresh cadence



Owner



Horizon Planning and Delivery Sequencing



- Now–Next–Later organizes by confidence, not calendar
- Now: committed and in flight, roughly 3–6 items
- Next: validated priorities, 5–8 items; Later: up to 10 themes
- Promotion criteria: Later→Next when linked to an objective
- Next→Now when scope is cut and a success metric is agreed
- Flag real deadlines on the item — layer a separate execution plan

Technology and Platform Decisions That Shape the Roadmap



In 2026, design and governance discipline matter more than tool choice



Evaluate capabilities, not checklists: semantic layers, natural-language querying, anomaly detection



Also assess narrative summaries, embedded analytics, and open or headless rendering



AI features carry license and capacity prerequisites — verify tier, region, and private networking



Governed context is the accuracy lever: NL and agentic tools are only as good as their metadata



TCO spans licenses, capacity, authoring upkeep, enablement, and migration — rationalize first, migrate second

Capability	Platform A	Platform B
Semantic layers	●	●
Natural-language querying	●	●
Anomaly detection	●	●
Narrative summaries	●	●
Embedded analytics	●	●
Open or headless rendering	●	●
Total cost of ownership	●	●



Adoption, Enablement, and Change Management



Adoption is product work: fit assets into existing decision rituals



Author training covers authoring and governance; consumers need navigation and Q&A



Start with 10-15 change champions, then scale on documented wins



Retirement needs advance notice, owner sign-off, and published replacement list



Budget 30-50% for change management; structured programs reach 70%+ adoption



Unmanaged rollouts typically stall near 30% usage



84% of organizations now formalize D&A change management programs



Governance, Ownership, and the Operating Model

- Govern definitions, ownership, change control, and reliability — not just dashboards
- Lifecycle states: Draft, Certified, Needs Review, Deprecated, Archived, with visible badges
- Certified means fit for a named decision: owner, definitions, sources, support path
- Cadence: weekly Now check, monthly Next review, quarterly portfolio and certification review
- Pick federated, centralized, or hybrid; start narrow with one domain end to end

Lifecycle States



Operating Model Options



Federated



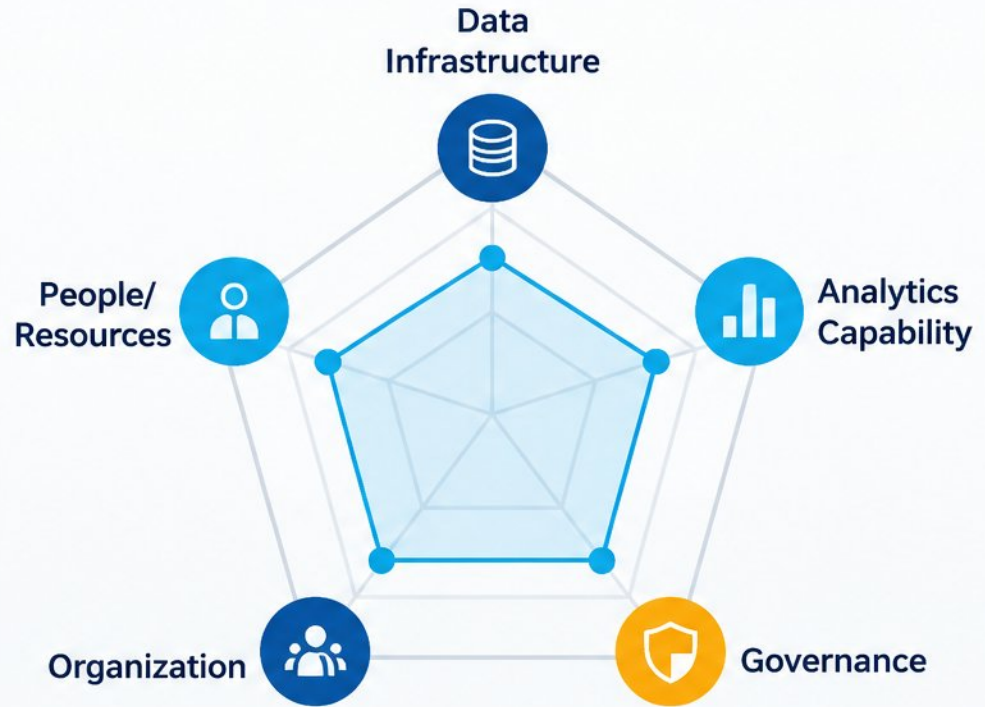
Centralized



Hybrid

Measuring Maturity, ROI, and Roadmap Progress

- 1 Assess maturity across five dimensions, not one score
- 2 Track leading indicators: owner coverage, dispute resolution time, retired duplicates
- 3 Watch lagging indicators: adoption, decision speed, operating cost
- 4 Re-baseline every six to twelve months to keep the budget case honest
- 5 A roadmap with no movement between horizons is a warning sign



Leading Indicators



Lagging Indicators



Re-baseline



Composing and Communicating the Roadmap



One-page artifact:
objectives, key results,
then Now, Next, Later
with owners



Add a "how to read this
roadmap" note: horizons
are not ship dates



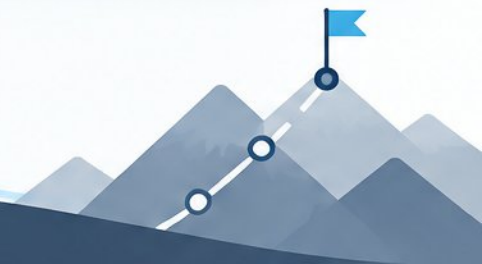
Tailor the narrative:
executives, delivery
teams, and business
partners



Prepare answers for
"why is this later" and
"why was this retired"



Publish the first 30 days
of work and name the
review meeting



PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/7e244bef/public