

Data Visualization

Roles, Responsibilities, and Handoffs



Undefined roles cause rework, disputed ownership, and late-stage changes



Delivery chain: source → data model → semantic layer → design → build → release → maintain



Core roles: analyst, dashboard designer, data owner/steward, product manager



Adjacent partners: data engineering, governance, QA, accessibility



Shared vocabulary: handoff, RACI, definition of done, data contract

Course Objectives and Audience Alignment



Analysts

Analysts need scope clarity.



Designers

Designers need design authority.



Data Owners

Data owners need definition control.



Product Managers

Product managers need priority and acceptance authority.



Learning outcomes: assign owners, write clear handoffs, resolve cross-role conflicts



Root problem: confusing governance roles stalls programs and predicts failure



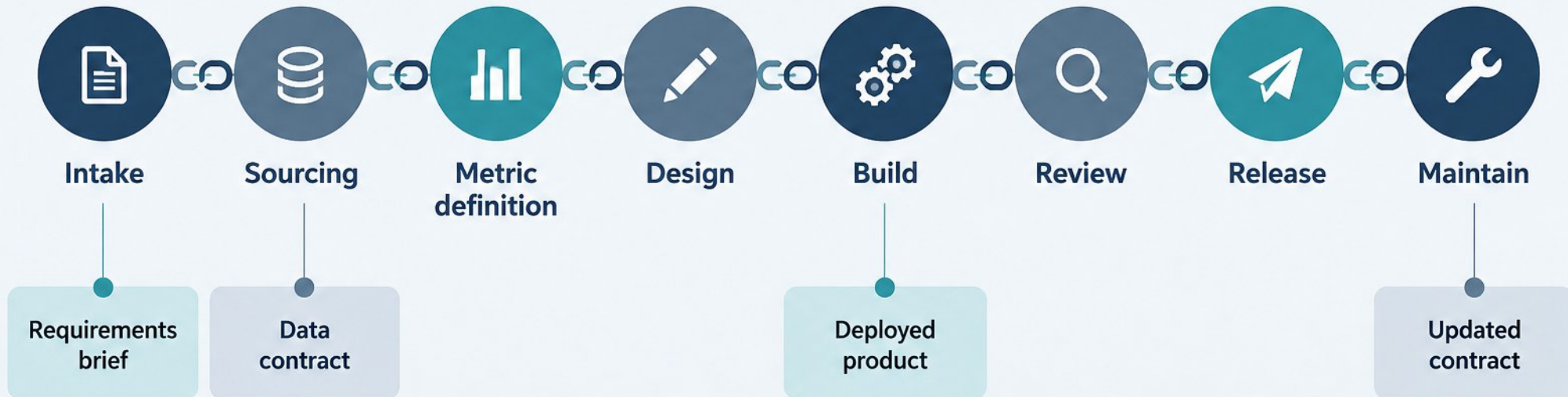
Participation: bring a current dashboard or reporting initiative as your working example



Assessment: a handoff template exercise and a role-mapping scenario

The Visualization Delivery Lifecycle

From data to decisions
Through shared ownership



- Eight stages: intake, sourcing, metric definition, design, build, review, release, maintain
- Deliverables per phase: requirements brief, data contract, deployed product, updated contract
- RACI covers discovery, delivery, governance, and enablement — not just build tasks
- Make the lifecycle explicit first: rows are activities, columns are function-based roles
- Mirrors the data product lifecycle: discover, design, deliver, operate, refine



Role Map Across the Lifecycle



Activity	Product Manager	Designer	Data Owner	Delivery Lead	Engineering	Stakeholders
Define requirements	A	R	C			I
Design layout	C	A			R	I
Prepare data	C		A		R	I
Build and test		C	R		A	I
Release	C			A	R	I
Post-release support				R	C	I

A

Accountable: one owner per row, owns the outcome and final decision.

R

Responsible: does the work; at least one per row, never duplicate.

C

Consulted: two-way input before action; keep lean, two or three max.

I

Informed: one-way update after decisions; stakeholders who only need status.



Common blur zones:

metric definitions, data quality fixes, layout changes, post-release support.



Decision rights:

Scope → product manager
Visual design → designer
Metric change → data owner
Release → accountable delivery lead

Analyst and Dashboard Designer Responsibilities



Analyst: requirements, exploration, metric logic, validation, and the analytical narrative



Designer/developer: information architecture, visual encoding, interaction, performance, accessibility



Building vs. using: developers build the reporting system; analysts use it to answer questions



Split the labor: who owns the query, the visual, and the narrative

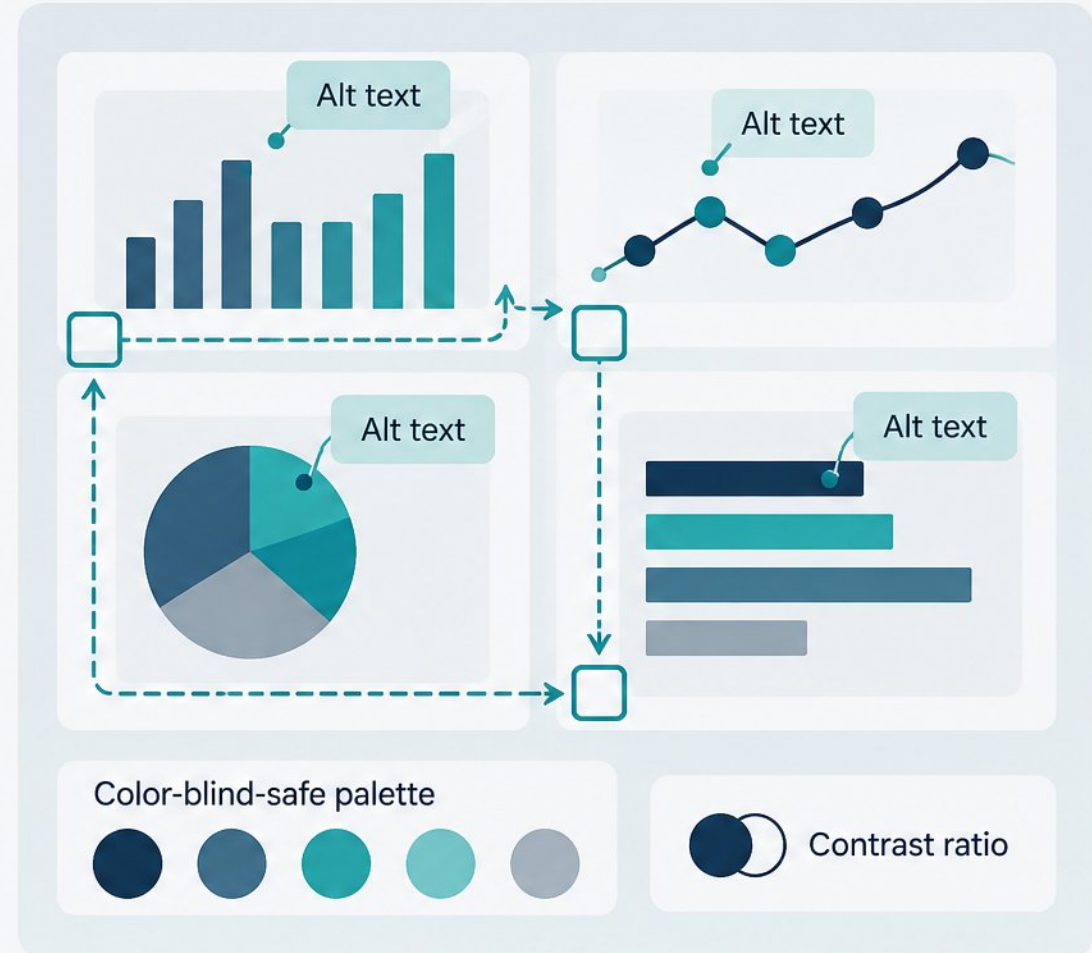


Tension: analysts want data-model fidelity; designers want audience clarity

Accessibility and Visual Standards as Shared Responsibilities

PEOPLE + DATA + INCLUSIVE DESIGN
BETTER INSIGHTS FOR EVERYONE

- WCAG 2.1 AA is the baseline; inaccessible dashboards create legal and adoption risk
- Core requirements: alt text, 4.5:1 contrast, keyboard navigation, no color-only encoding
- Designer owns the design system and visual standards
- Analyst and data owner validate that meaning survives the encoding
- Definition of done: accessibility check, tab order, documented design decisions



Definition of done:

accessibility check, tab order,
documented design decisions



SHARED RESPONSIBILITY.
MORE POSSIBILITIES.

Data Owner and Product Manager Responsibilities



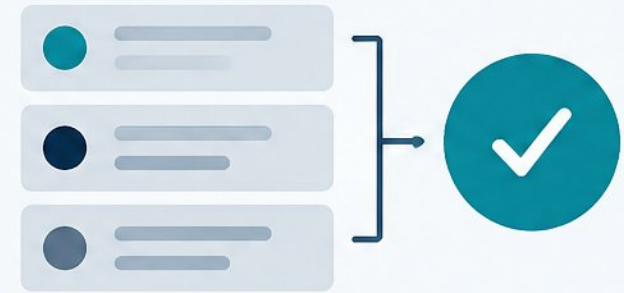
Data Owner



- Data owner: accountable for policy, definitions, quality thresholds, and access rules



Product Manager



- Product manager: outcome framing, prioritization, scope trade-offs, acceptance criteria



- Data steward: executes the policy day to day
- Definition authority sits with the business owner of the measure
- Acceptance authority (PM) stays separate from definition authority (owner)

Handoff Artifacts and Definition of Done

CLEARER HANDOFFS. HIGHER QUALITY OUTCOMES.



1

Artifact set per handoff: requirements brief, metric definition sheet, layout spec, data contract, acceptance criteria, release checklist

2

A good handoff states intent, constraints, open questions, known risks, and a named decision owner

3

Seven fields decide a number: aggregation, expression, population filter, anchor timestamp, grain, empty period, source of record

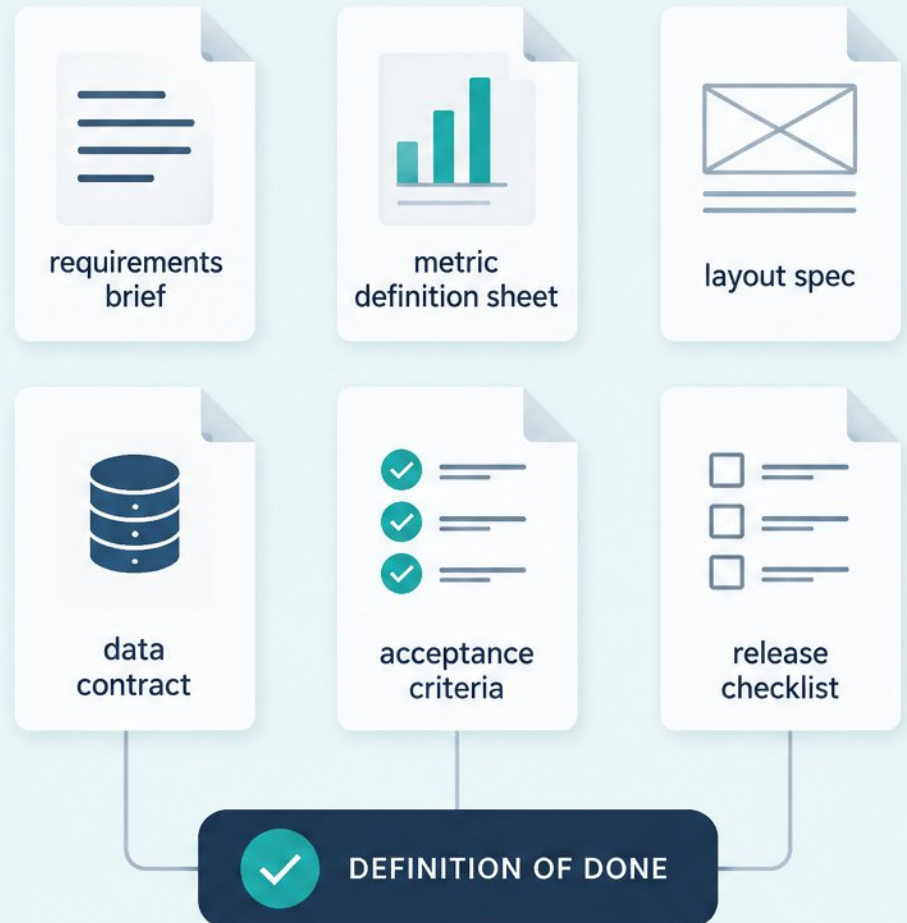
4

Define "done" per stage; never hand off an undefined metric or unsigned-off metric

5

Size handoffs by dashboard criticality; version artifacts and keep change history

HANDOFF ARTIFACT KIT



Coordination Workflow and Communication Cadence

ALIGN / COORDINATE / DELIVER TOGETHER



Intake and triage: one front door, structured form, request taxonomy, triage rule



P1–P4 priority tiers with S–XL effort sizing set predictable response times



Cadence: kickoff, design review, data validation checkpoint, release review, retro



Every recurring meeting produces or approves a named artifact



Async handoffs: tickets, comments, annotations, decision log

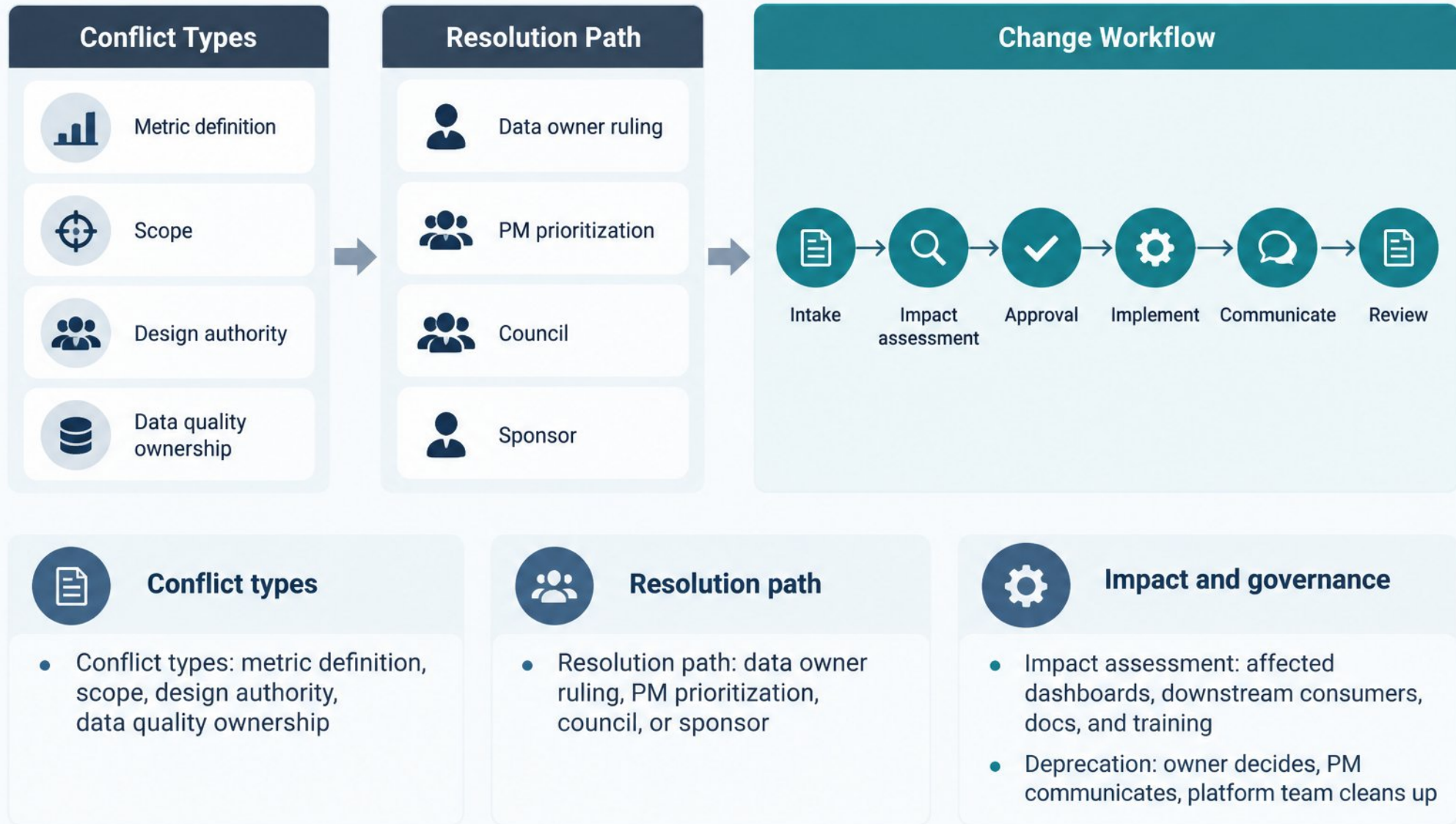


Failing signals: silent assumptions, repeated clarification, unapproved scope creep

Meeting to Artifact Workflow



Escalation, Conflict Resolution, and Change Control



Dashboard Sprawl and Lifecycle Governance

Dashboard Sprawl

Duplicate and conflicting dashboards hide what is official.



- Sprawl erodes trust: conflicting KPIs and duplicate dashboards hide what is official
- Lifecycle policy: create, review, certify, deprecate, and archive

Lifecycle Governance

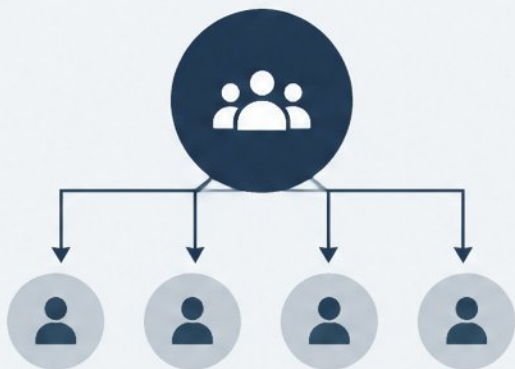
A clear policy keeps dashboards trusted and useful over time.



- Governance KPIs: dormant dashboard rate, certification lag, definition conflict rate, issue resolution time
- Surprise deprecations erode trust—announce changes and offer safe alternatives

Operating Model Options and Right-Sizing

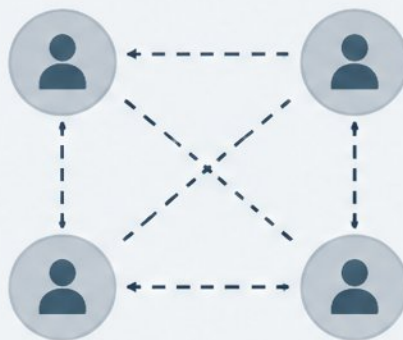
Centralized



Handoff
frequency

Governance
overhead

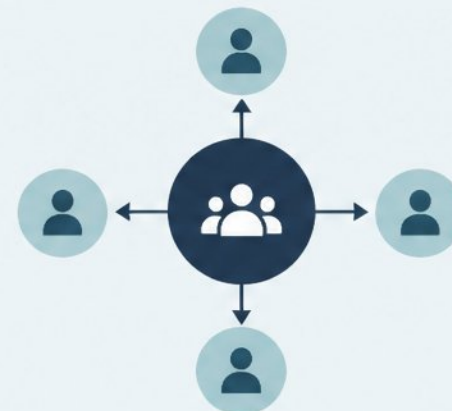
Federated



Handoff
frequency

Governance
overhead

Hub-and-spoke default



Handoff
frequency

Governance
overhead

- Centralized: one team owns platform, pipelines, and governance
- Federated: domains own delivery, but risk metric and tool drift
- Hub-and-spoke default: central hub owns platform, guardrails, and shared truth
- Spokes own domain data products, definitions, and delivery
- Right-size: lightweight for one dashboard, formal RACI for enterprise reporting
- Add dashboard designer, analytics engineer, or steward when scale demands it

Diagnosing and Fixing Broken Handoffs

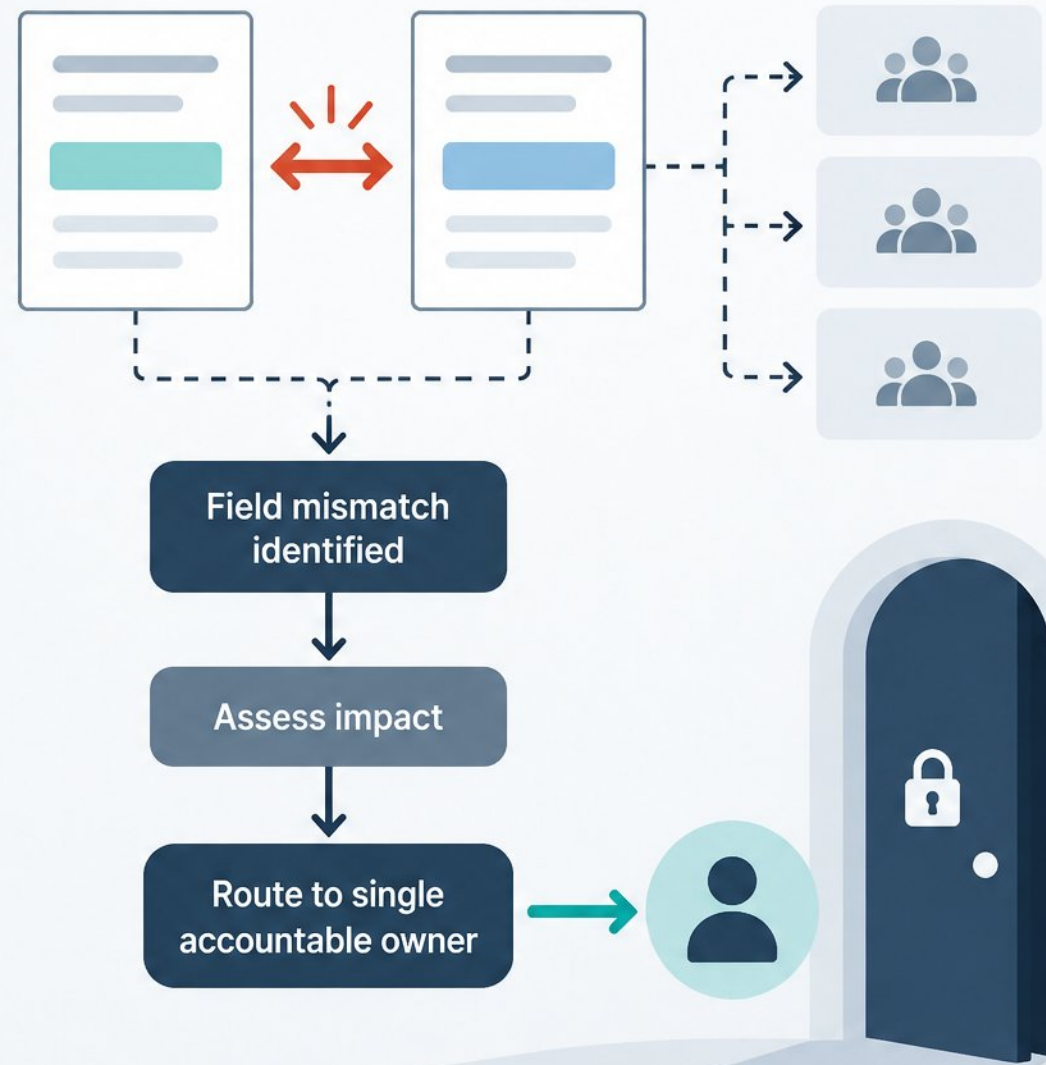
1 Ownership failure signatures: multiple assumed owners, accountability vacuum, no approval record

2 When two numbers disagree, name the exact field they diverge on

3 Detect conflict, assess impact, route decision to the single accountable owner

4 Coordination failures: pipeline lands unusable data, interface shows unreconcilable numbers

5 Root cause is fragmented visibility and ungoverned policy, not tooling



Applied Practice: Building a Role and Handoff Plan

1

Exercise: map roles and handoffs for a dashboard you own

Lifecycle Stage	Responsible	Accountable	Consulted	Informed

2

Draft a RACI using earlier lifecycle stages: one Accountable per row

3

Write one artifact end to end: metric definition sheet or acceptance criteria

Metric Definition Sheet

Metric Name

Description

Calculation Logic

Inputs

Output

Notes

4 Name your top three coordination risks and proposed mitigations

Risk	Proposed Mitigation
	
	
	

5 Next: adapt the template, pilot one initiative, review after one release cycle



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/cd991b92/public