Build Your Own Dashboard of Key Indicators

by

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One of the most important responsibilities of the CEO is to communicate the current and projected future performance of the organization. A well accepted technique for this is called a "dashboard of key indicators." If you sit on a Board of Directors, you want to see regular updates of key indicators in an easily accessible, simple, visual format. I've found that Prezi provides a perfect platform to do this.

Corporations have the capital to purchase and deploy fancy enterprise systems (or cloud-based systems) and the financial staff to take care of this kind of thing. But if you're an entrepreneur or small business person, you've got to figure out a way to do this for yourself. I will show you a way to do this using Prezi and other common off-the-shelf tools (software) that you probably already have access to.

But first, let me show you what the end product can look like and talk about the benefits of using Prezi.

The beauty of the Prezi dashboard

Online, anytime, anywhere, on any mobile device: I think this benefit is pretty self-explanatory.

Click on the following link and it will take you to a public dashboard which we can use as a demonstration:
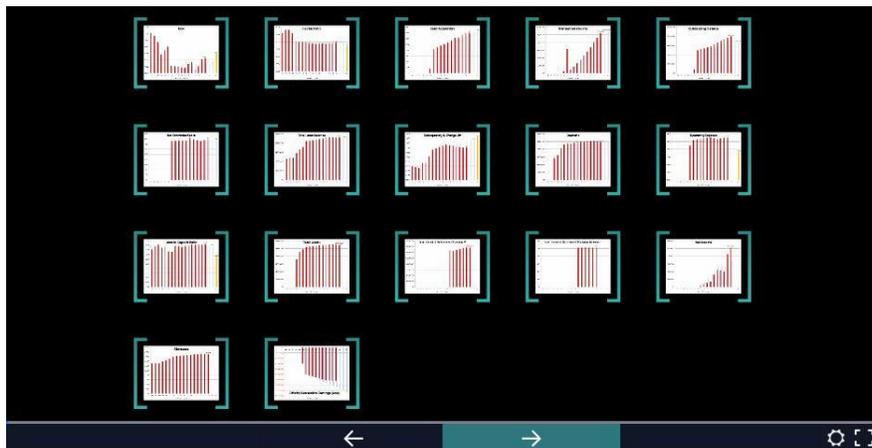https://prezi.com/ot85bbsaiqon/dashboard

The picture below shows you that a Prezi dashboard looks great on any device: PC, laptop, iPad, and smartphone.
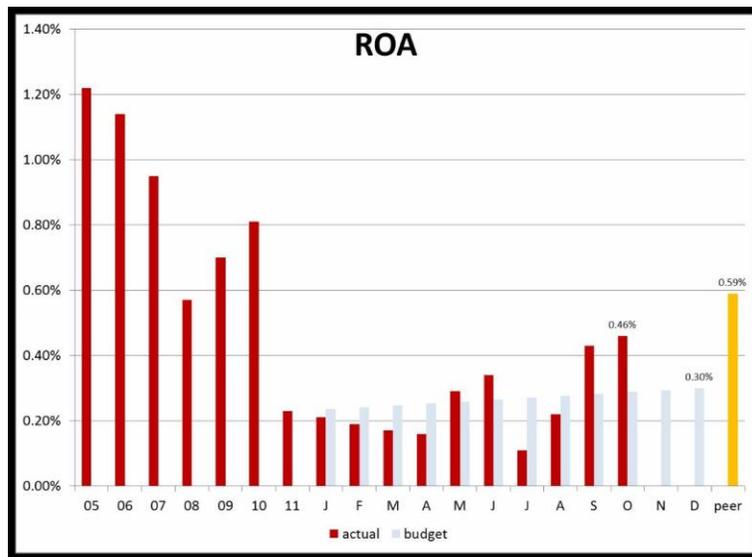
The infinite whiteboard: Prezi is famous for what they call the "infinite whiteboard" concept. The navigation functionality made possible by this is what makes it so powerful and appealing as a presentation tool.

The first thing most users will do is click on the home icon along the right-hand border of the window which will pop the entire dashboard inside the window giving you the big picture overview of the dashboard.

From this vantage you can navigate one of several ways:

Click on the full-screen mode icon and a slide will fill the monitor screen (similar to presentation mode in PowerPoint). This is the preferred mode when making a presentation to an audience.

The user can either manually advance through each slide by clicking on the right or left arrows on the bottom of the window; or, the user can set "autoplay" to one of several different timing intervals.

On any given slide, the user can zoom in or out at will thanks to the "infinite whiteboard" of Prezi. Back-and-forth, zoom in and out, pop back to home, this is the kind of easy flexibility a user wants when navigating a dashboard.

Privacy: You can share online your dashboard using Prezi's three-level privacy functionality:
- Private: only you can view and edit.
- Hidden: you can view and edit. Collaborators can view if they have the link.
- Public: it can be viewed by the world if they have the link.

DIY dashboard

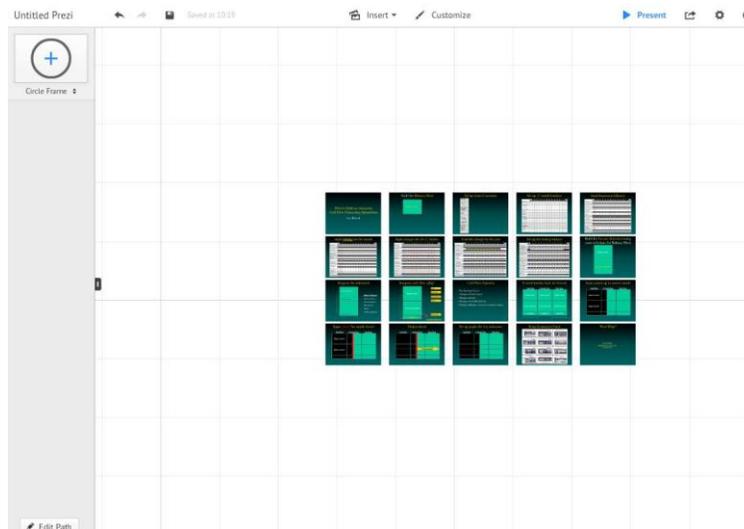To get started you need the following:
- Microsoft Excel spreadsheet
- Microsoft PowerPoint
- Adobe PDF maker
- Prezi

Creating the graphs: Microsoft Excel gives you everything you need to set up all of your key indicator data and then convert that data into visually impactful graphs and charts. Each chart can be copied and pasted into a PowerPoint presentation file as an image.
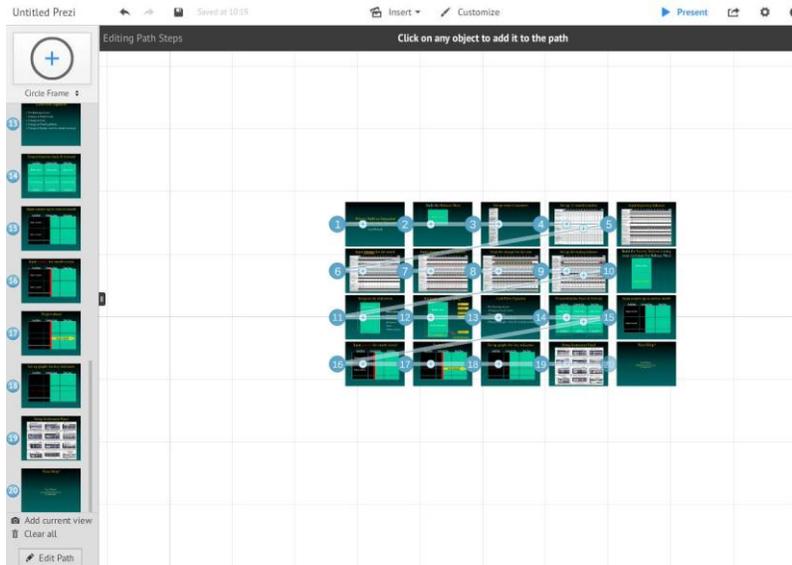
build graphs in excel

copy graph into power point

Once all your slides are transferred into PowerPoint, you then need to "save as" the PowerPoint file as a PDF file. It is true that you can directly import a PowerPoint file into Prezi but I have found that sometimes formatting of the slides can be lost. By converting it to a PDF file, the formatting of each slide is "locked" and when you import the PDF file into Prezi, each slide comes out perfect.

Next, you import the PDF file into your new Prezi presentation space which you have created online. When you do this, Prezi magically unbundles each slide within the PDF file and arranges them separately in their correct original order.

And finally, you click "edit path" in the lower left-hand corner of your Prezi window to then click on each slide in the order you want them presented, and then click "done".

You have now created a world-class dashboard!

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