DASHBOARDS

A useful dashboard answers “what needs attention?” before it answers “what exists?”

A simple, reusable operating tool for teams that want clearer handoffs and less status chasing.

Use this on one real workflow

- ☐ What decision is this dashboard supposed to support?
- ☐ What qualifies as normal work?
- ☐ Which age/threshold changes an item into an exception?
- ☐ Which readiness gates matter?
- ☐ What risk or financial exposure should surface?
- ☐ Who owns each exception?
- ☐ What next action/date must be visible?
- ☐ What can leadership safely ignore?
- ☐ What trends require weekly review?
- ☐ What drill-down link takes the manager to the source record?

Design notes

- Do not make every KPI red/yellow/green without a defined threshold.
- Avoid duplicating data entry just to feed a dashboard.
- Every exception should point to an actionable source record.

> **How to use it.** Do not complete this from memory in a conference room. Pull up one active or recently completed record and test the checklist against what actually happened. Any item that repeatedly needs a text, a side spreadsheet, or an owner stepping in is a candidate for workflow redesign.

Want a real answer for your workflow? Book a free 30-minute Workflow Assessment at bradleyhankins.com/contact.