smartsheet

ENGAGE

Dashboard Design

Building Engaging, User-Centric Dashboards

smartsheet
ENGAGE

v.07/16

Legal

Certain information set forth in this presentation may be “forward-looking information.” Except for statements of historical fact, information contained herein may constitute forward-looking statements. Forward-looking statements are not guarantees of future performance and undue reliance should not be placed on them.

Such forward-looking statements necessarily involve known and unknown risks and uncertainties, many of which are and will be described in Smartsheet’s filings with the US Securities and Exchange Commission, and these risks and uncertainties may cause actual performance and financial results in future periods to differ materially from any projections of future performance or results expressed or implied by such forward-looking statements. Although forward-looking statements contained herein are based upon what Smartsheet management believes are reasonable assumptions, there can be no assurance that forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Smartsheet undertakes no obligation to update forward-looking statements except as required by law.

This presentation is proprietary to Smartsheet and the content herein is confidential and intended for permitted internal use only. This content shall not be disclosed to any third party that is not under an obligation of confidentiality to Smartsheet.

Smartsheet is a registered trademark of Smartsheet Inc. The names and logos of actual companies and products used in this presentation are the trademarks of their respective owners and no endorsement or affiliation is implied by their use.

Meet your speaker

Kendra Michaels

Senior Solutions Consultant

smartsheet
ENGAGE

Learning objectives

1

You will be able to **effectively apply color to a dashboard**.

2

You will be able to **optimize your dashboard for your use case**.

3

You will be able to **organize the information on your dashboard so that it can be consumed and understood at a glance**.

smartsheet
ENGAGE

Table of contents

1 Insightful layouts

2 Stunning design

3 Broad accessibility

4 Wrap up

smartsheet ENGAGE

What this session IS and IS NOT

This session IS

- **Guidance** on intuitive and logical content organization
- **Recommendations** on strategic and thoughtful color usage

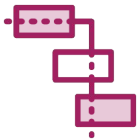
This session IS NOT

- A **tutorial** on how to put a widget on a dashboard
- Lessons on **solution set up** to prepare for dashboard data usage

Have you ever created an **effective** dashboard?

smartsheet ENGAGE

What makes a dashboard effective?

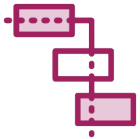


Clearly organised

Information is laid out logically, telling a coherent story

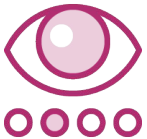
smartsheet
ENGAGE

What makes a dashboard effective?



Clearly organised

Information is laid out logically, telling a coherent story

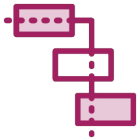


Easy to read

Labels and data are clearly separated, leaving no questions about what is shown

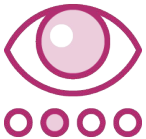
smartsheet
ENGAGE

What makes a dashboard effective?



Clearly organised

Information is laid out logically, telling a coherent story



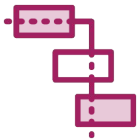
Easy to read

Labels and data are clearly separated, leaving no questions about what is shown

Strategically colored

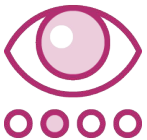
Cohesive color stories highlight data and keep the experience consistent

What makes a dashboard effective?



Clearly organized

Information is laid out logically, telling a coherent story



Easy to read

Labels and data are clearly separated, leaving no questions about what is shown

Strategically colored

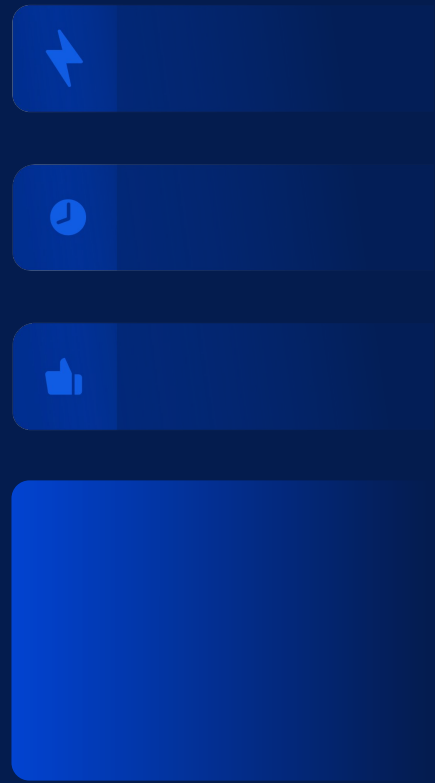
Cohesive color stories highlight data and keep the experience consistent

Engaging

Audience wants to view and dig deeper

1

Insightful layouts



smartsheet
ENGAGE

Layout tips

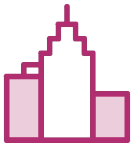
Tools to guide layout choices

Five-second rule

If a viewer has only five seconds to look at your dashboard, what do they need to know?

Headline rule

Treat your dashboard like an old newspaper — put the most important story front page above the fold.



Real estate rule

Location, location, location — is your information in the right location for your reader?

smartsheet
ENGAGE

Pick up where we left off

Project Dashboard

Project Health

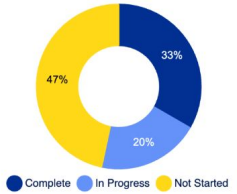
Kendra Michaels
Project Manager

05/09/25	05/12/25	Design
Original End	Projected End	Current Phase
$221,400	$219,500	2 days ahead
Actual Spend	Planned Budget	of schedule

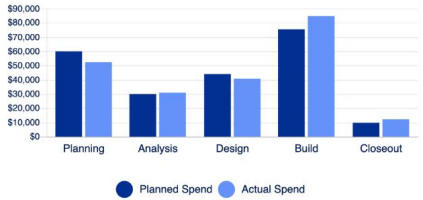
Last Status:

On track. North American and European upgrades are done, and the APAC phase will begin next week, despite minor delivery delays that have not impacted the timeline or budget. Ongoing attention to managing potential risks in the APAC region.

Tasks by Status

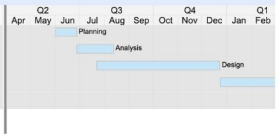


Planned vs. Actual Spend



Milestones

Phase / Task	Start Date	End Date
Planning	06/01/24	06/27/24
Analysis	06/28/24	08/12/24
Design	07/23/24	12/23/24
Build	12/24/24	03/10/25
Closeout	03/11/25	05/12/25

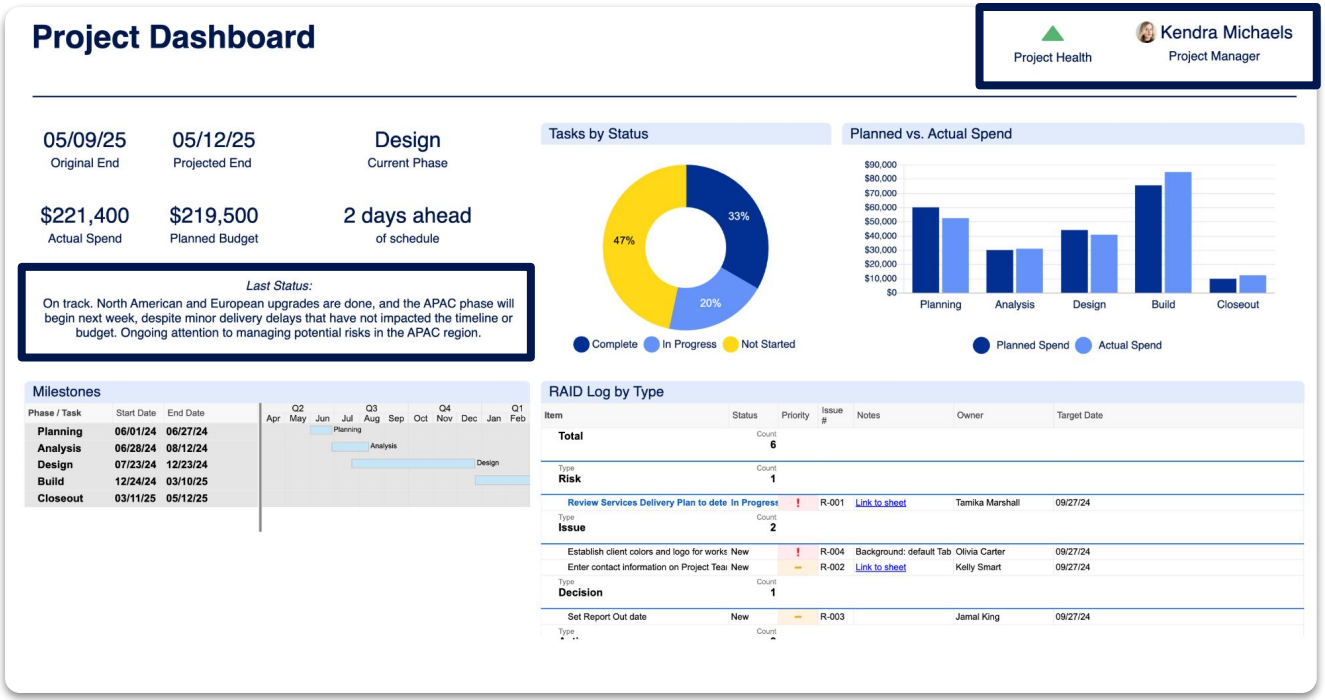


RAID Log by Type

Item	Status	Priority	Issue #	Notes	Owner	Target Date
Total Count 6						
Type **Risk** Count 1						
Review Services Delivery Plan to dete	In Progress	!	R-001	Link to sheet	Tamika Marshall	09/27/24
Type **Issue** Count 2						
Establish client colors and logo for works	New	!	R-004	Background: default Tab	Olivia Carter	09/27/24
Enter contact information on Project Tea	New	–	R-002	Link to sheet	Kelly Smart	09/27/24
Type **Decision** Count 1						
Set Report Out date	New	–	R-003		Jamal King	09/27/24
Type Count						

smartsheet ENGAGE

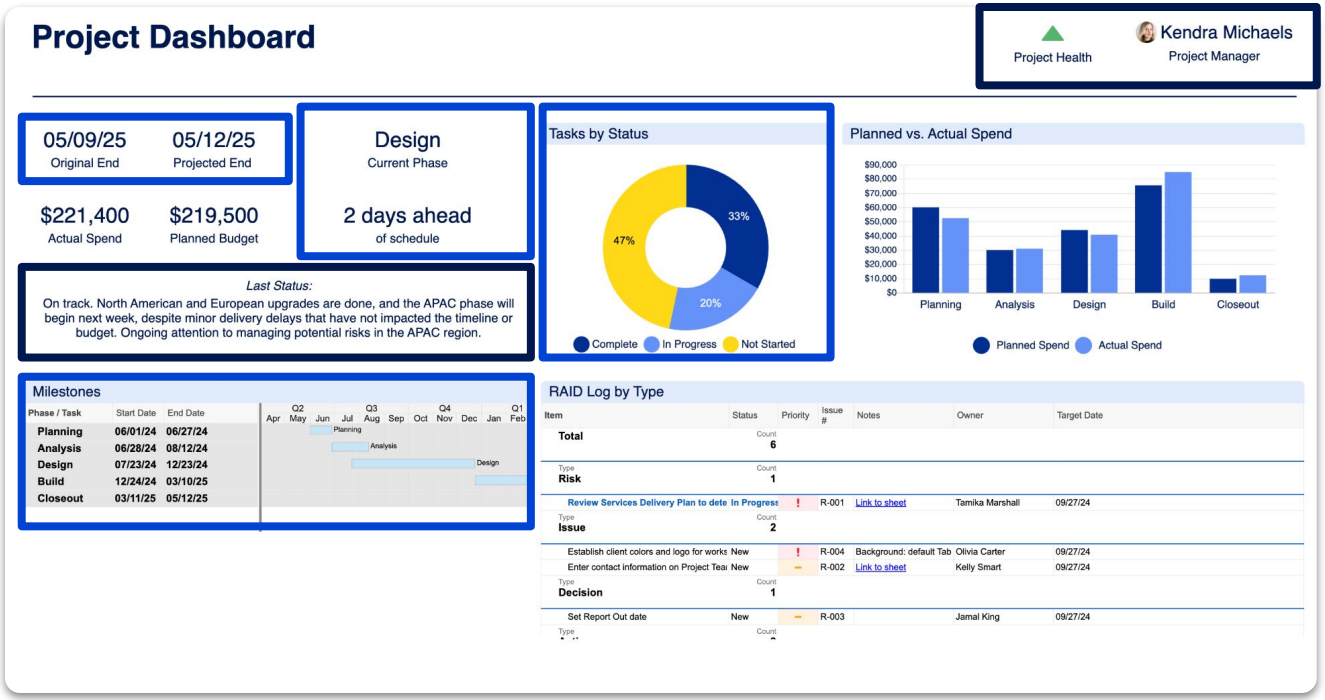
Categorize information



Basics

smartsheet ENGAGE

Categorize information

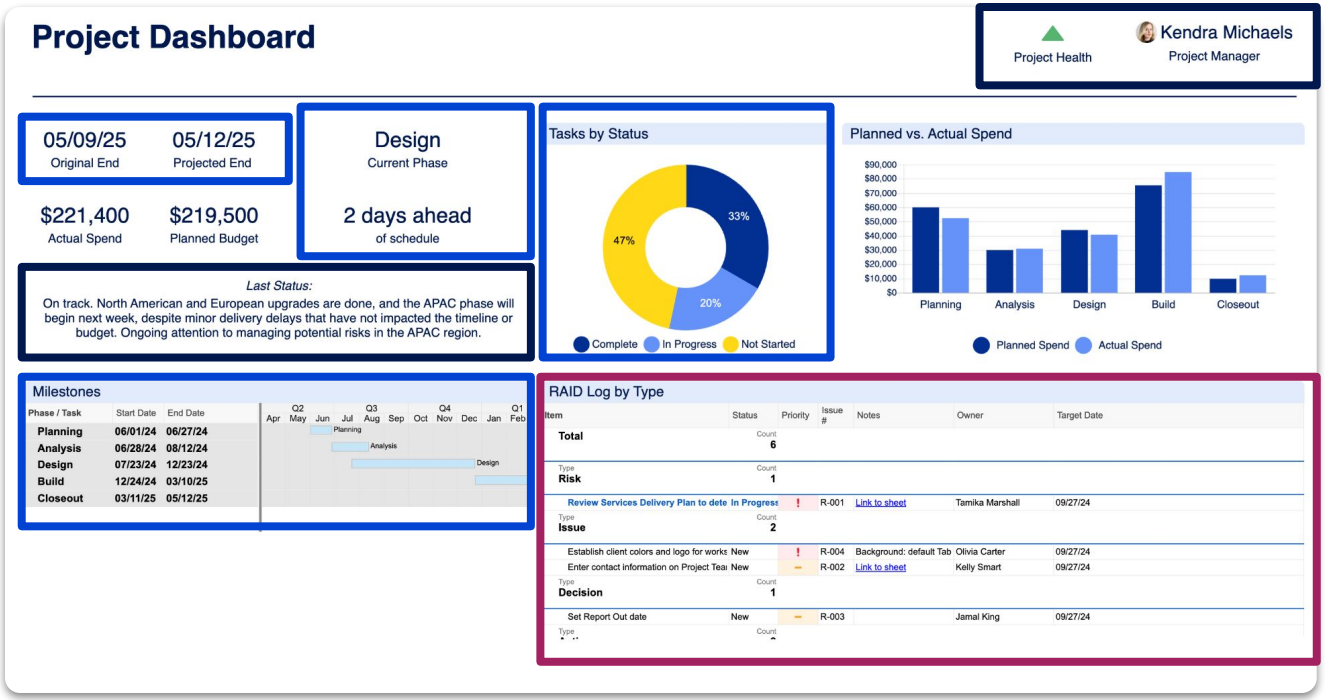


Basics

Schedule

smartsheet ENGAGE

Categorize information



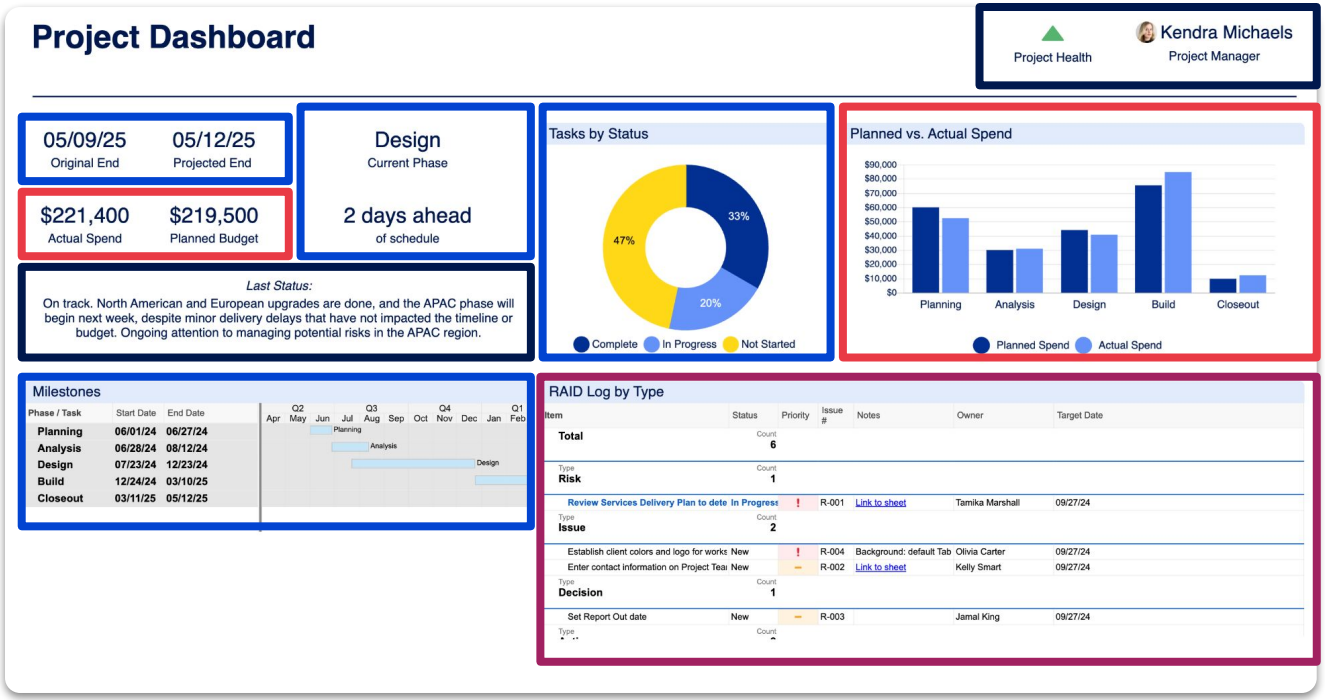
Basics

Schedule

RAID

smartsheet ENGAGE

Categorize information



Basics

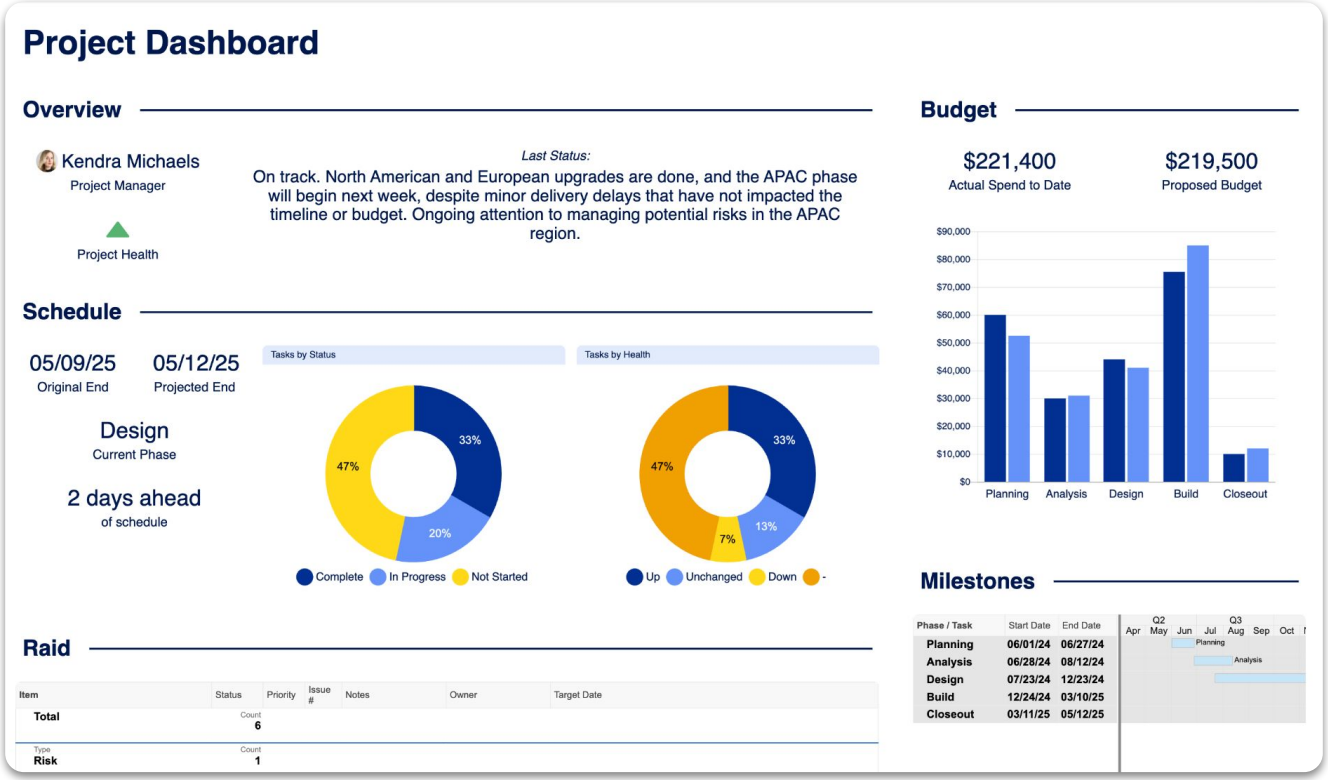
Schedule

RAID

Budget

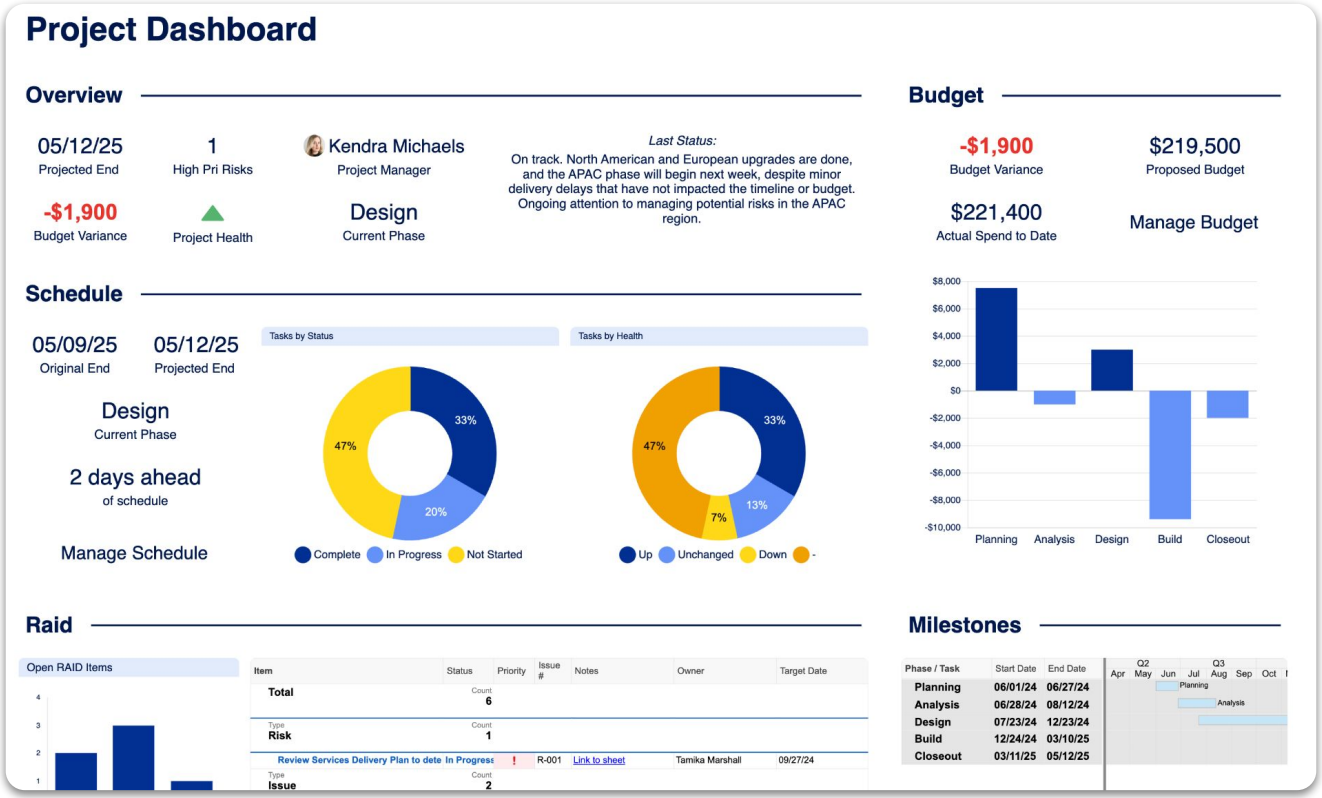
smartsheet ENGAGE

Organize by category



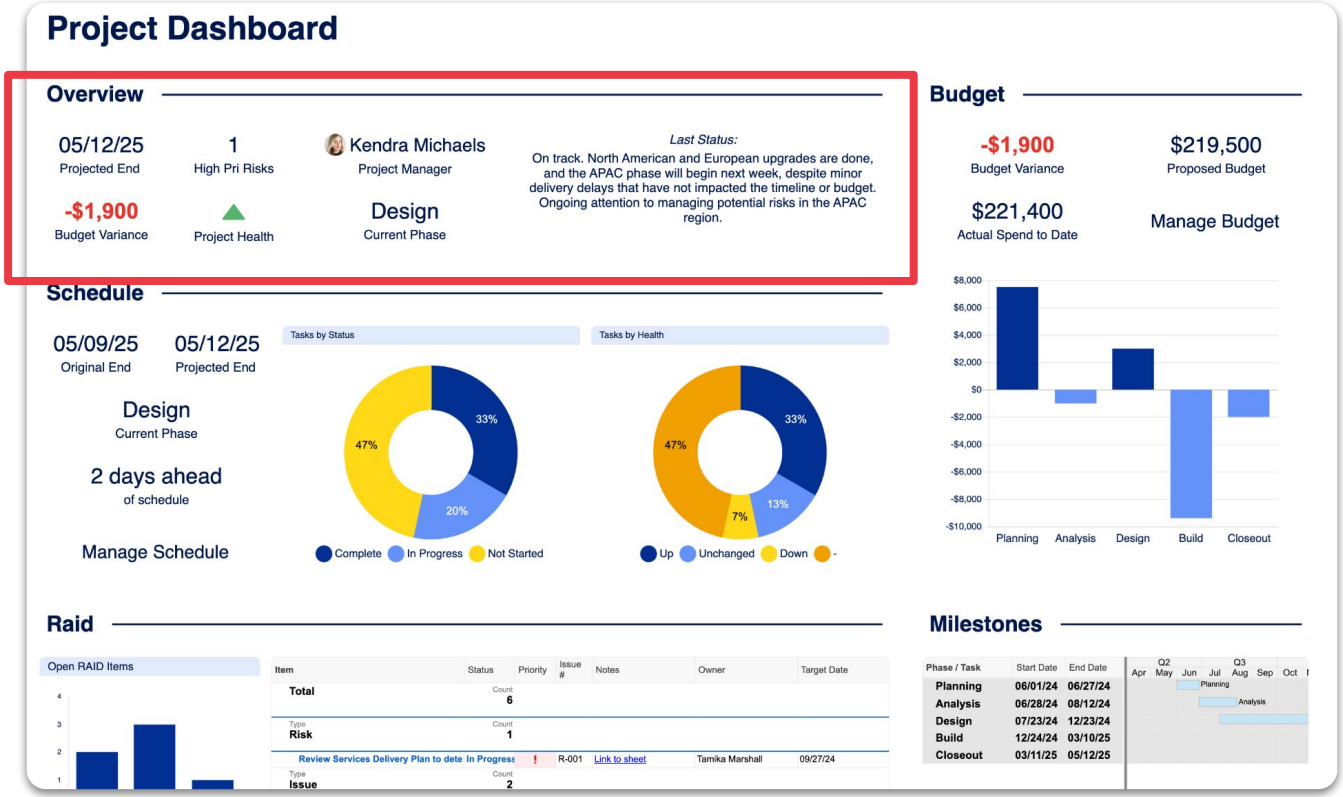
smartsheet ENGAGE

Expand information



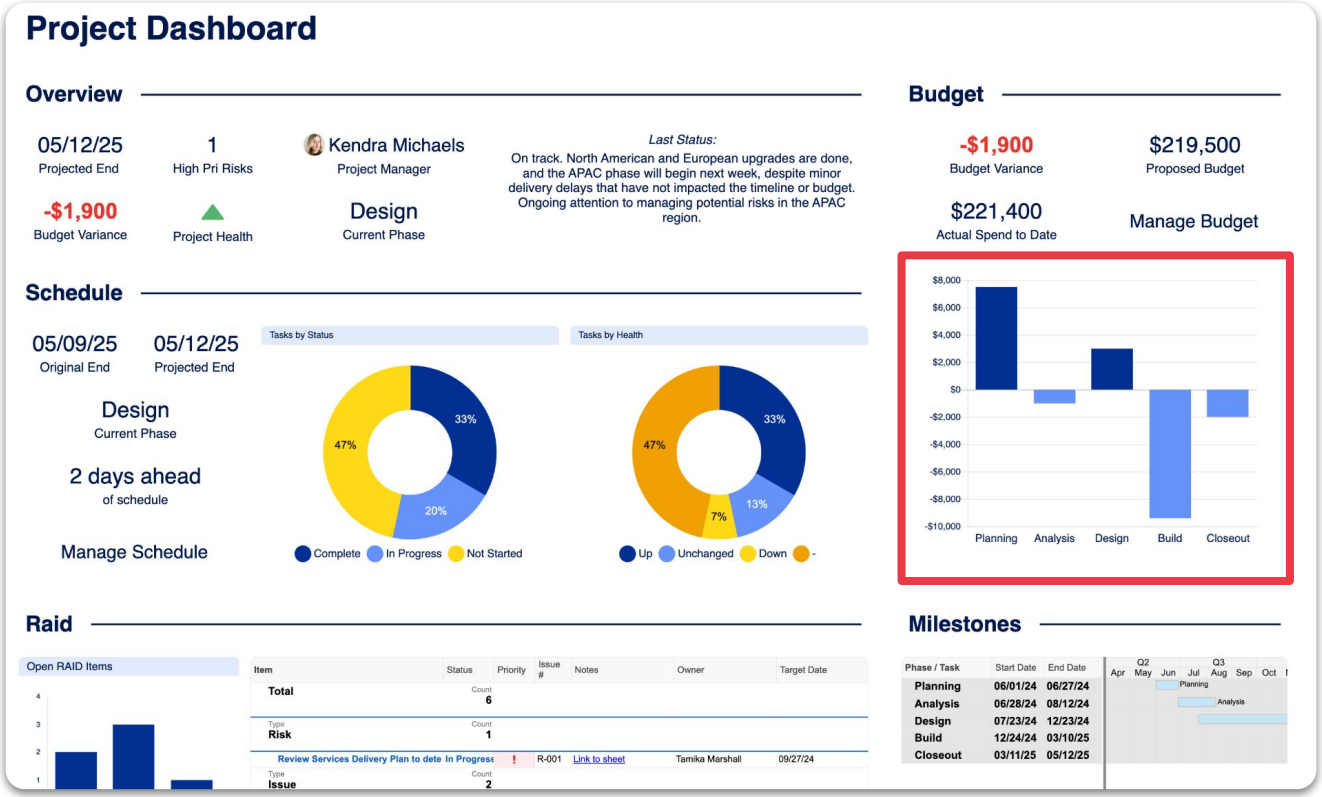
smartsheet ENGAGE

Expand information



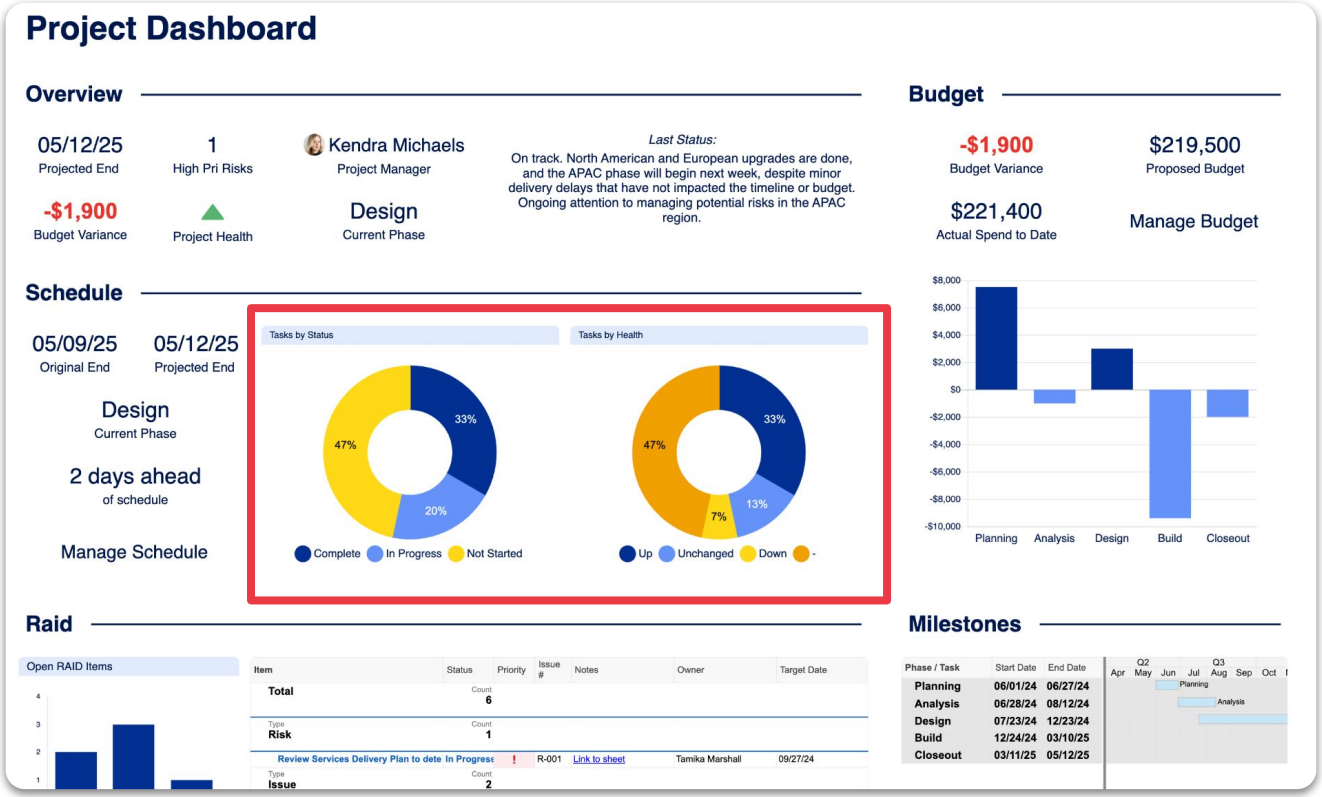
smartsheet ENGAGE

Expand information



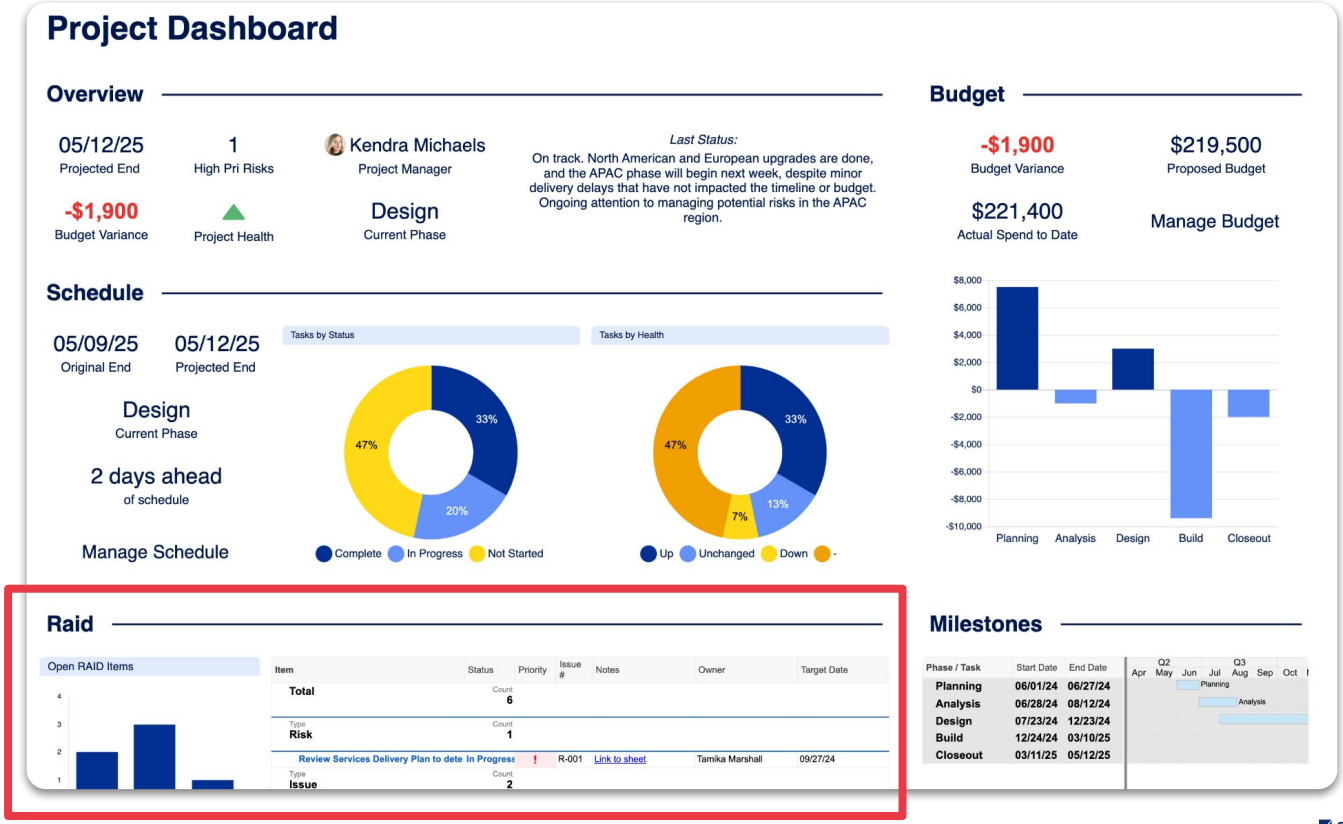
smartsheet ENGAGE

Expand information



smartsheet ENGAGE

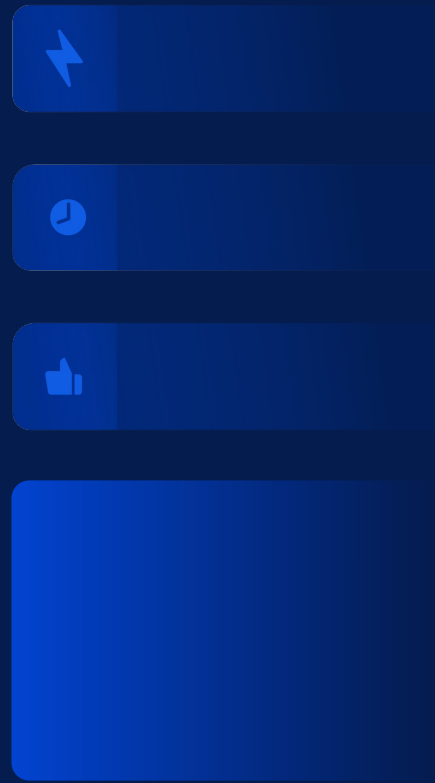
Expand information



smartsheet ENGAGE

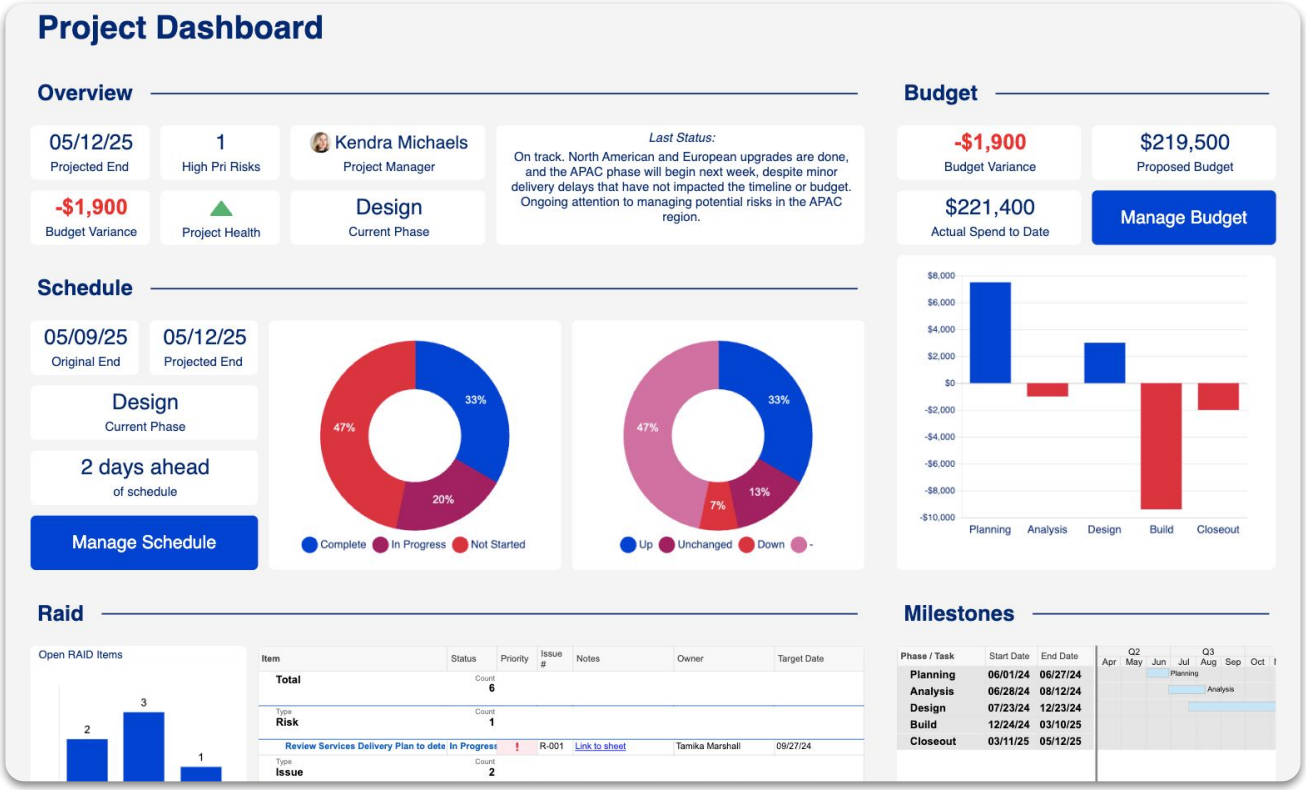
2

Stunning design



smartsheet
ENGAGE

Apply theme



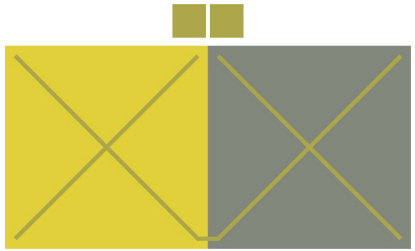
smartsheet ENGAGE

Color is deceptive

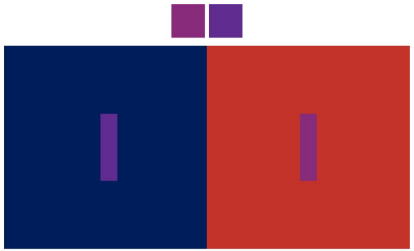
Exploring the fundamentals

How color behaves in relation to other colors and shapes is a complex area of color theory.

Color perception can be deceptive and influenced by a variety of factors, including the light, culture, and surroundings in which the color is viewed.

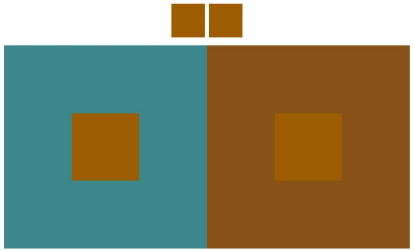


One color appears to be two colors



Two colors appear to be one color

Two colors appear to be one color



One color appears to be two colors

smartsheet
ENGAGE

Color harmony

Make your colors mesh

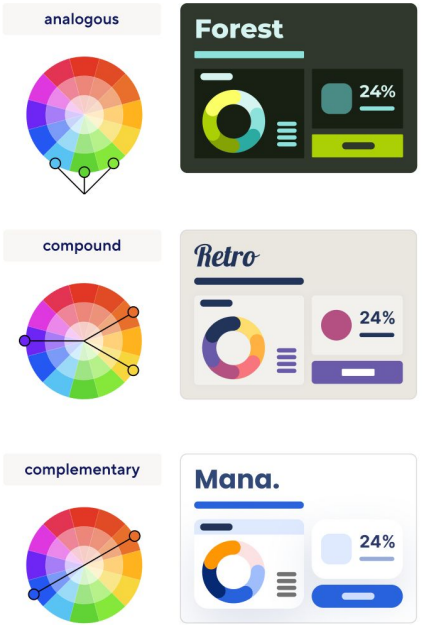
The colors chosen should be visually pleasing and harmonious, creating a cohesive overall look and feel.

smartsheet
ENGAGE

Functionality

Make your colors work

Use colors strategically to highlight important information, building hierarchy, creating visual cues, and providing visual feedback — this ensures that the color palette serves a functional purpose and enhances the overall experience.



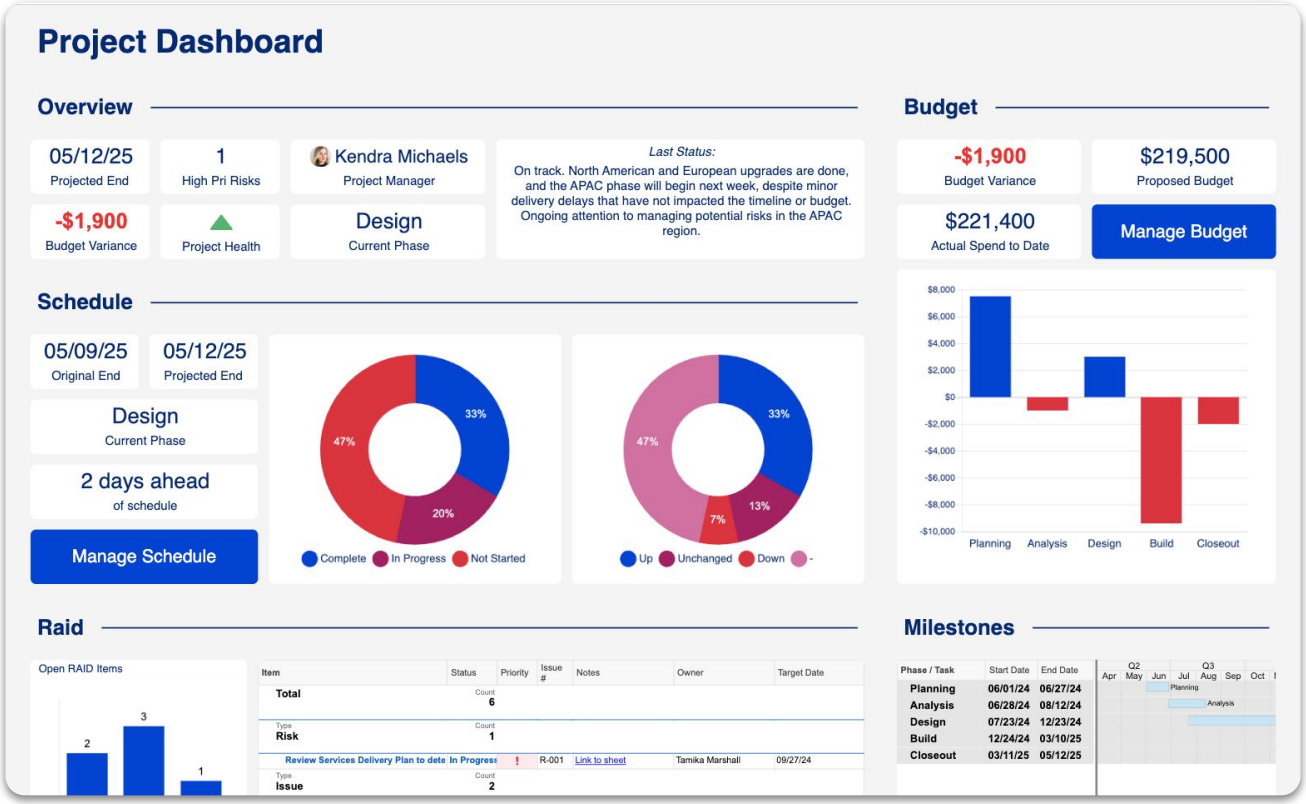
Readability

Make your colors distinguishable

Color themes should aid in the efficient digestion of information.

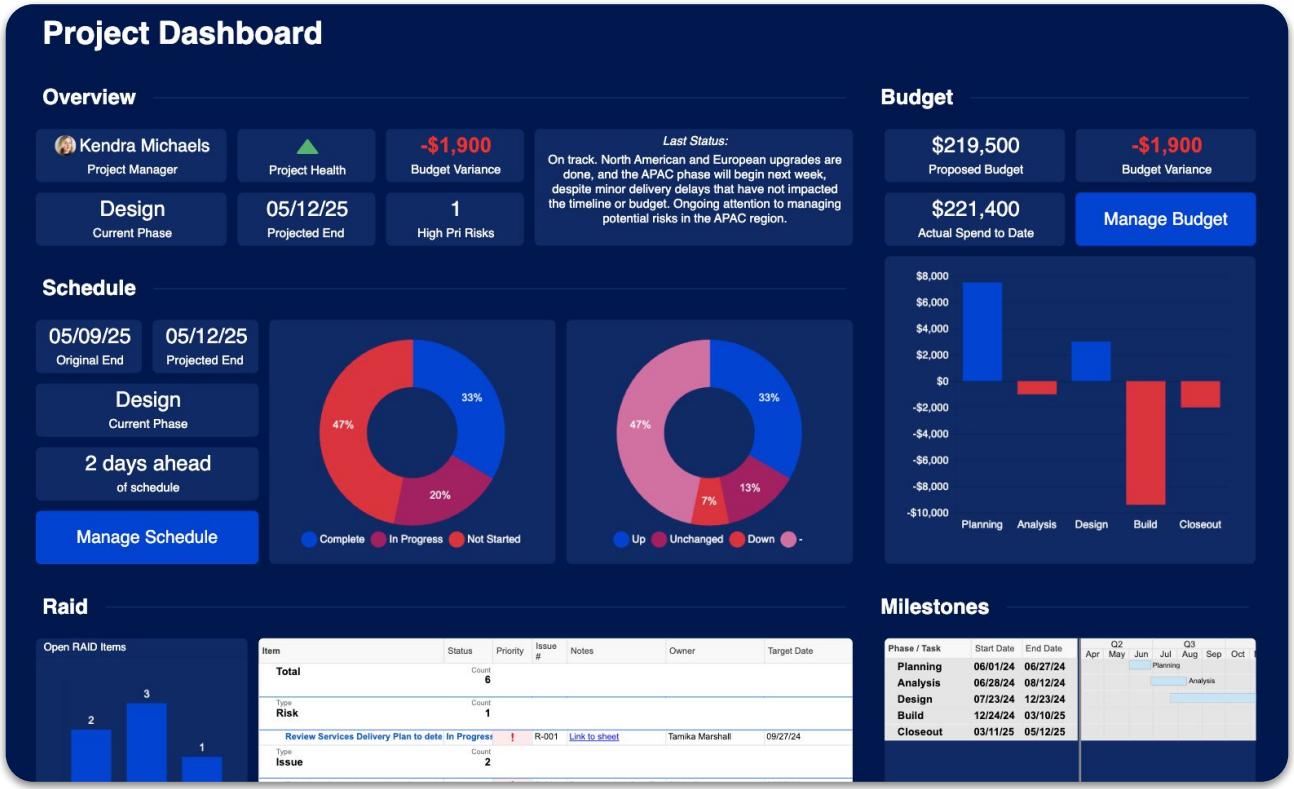
smartsheet
ENGAGE

Apply theme



smartsheet ENGAGE

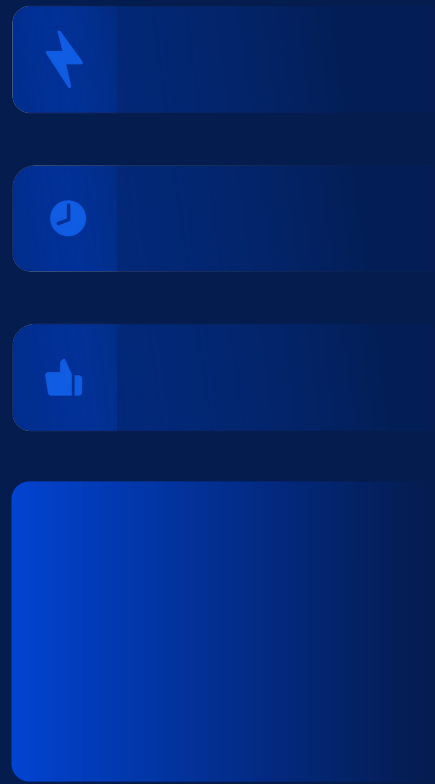
Alternate coloring



smartsheet ENGAGE

3

Broad accessibility

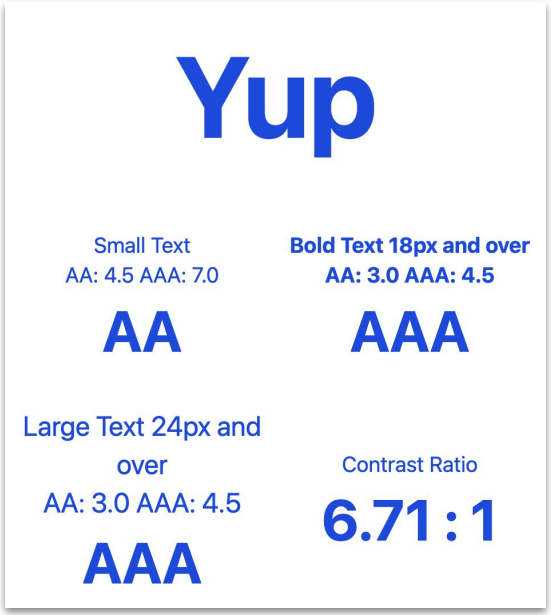


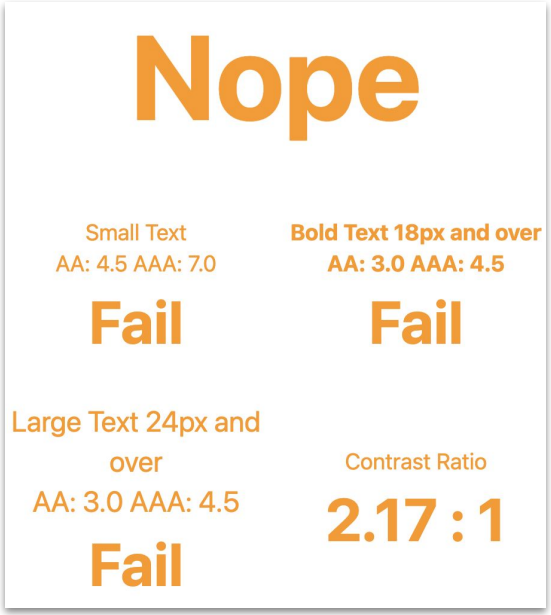
smartsheet
ENGAGE

Accessibility

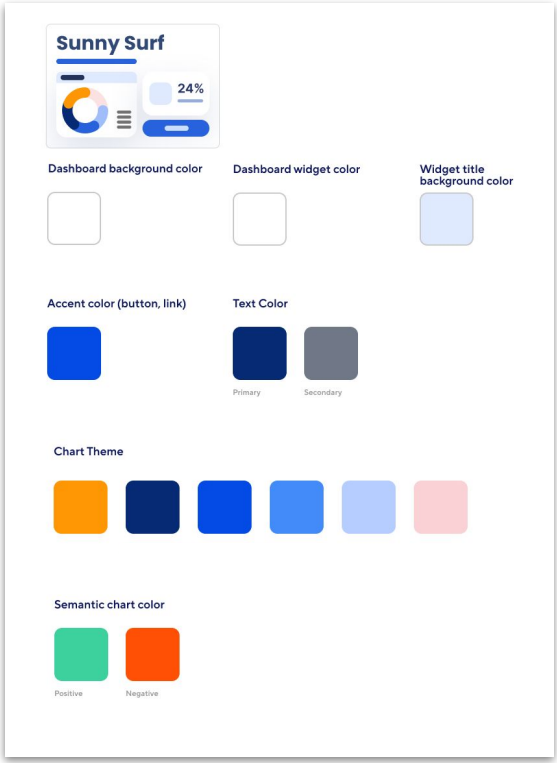
Make your colors accessible for all

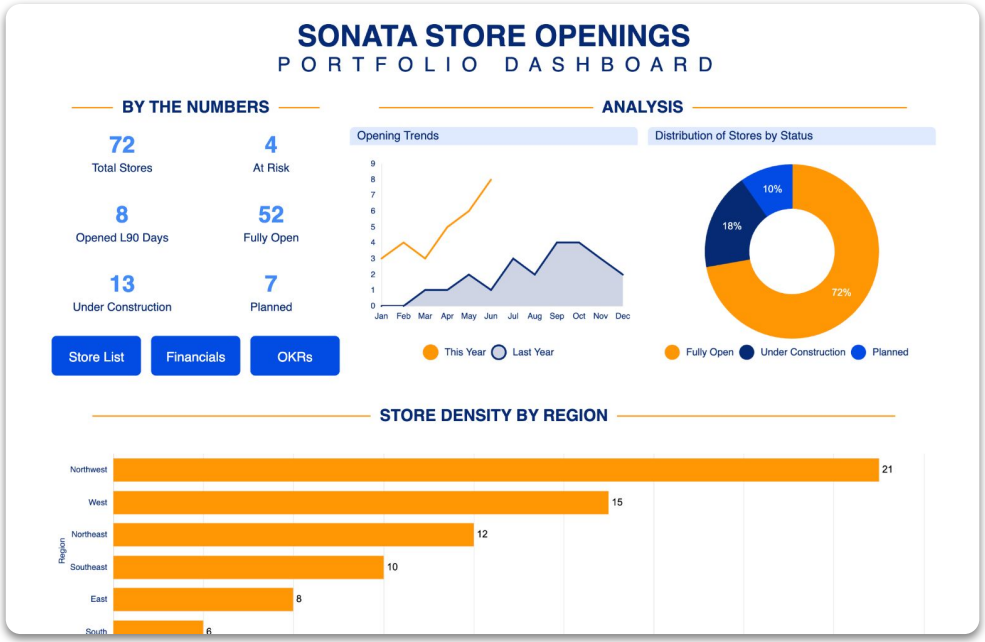
All people should be able to read your dashboard, even those with color impairments. Accessible color decisions enable that.





smartsheet
ENGAGE



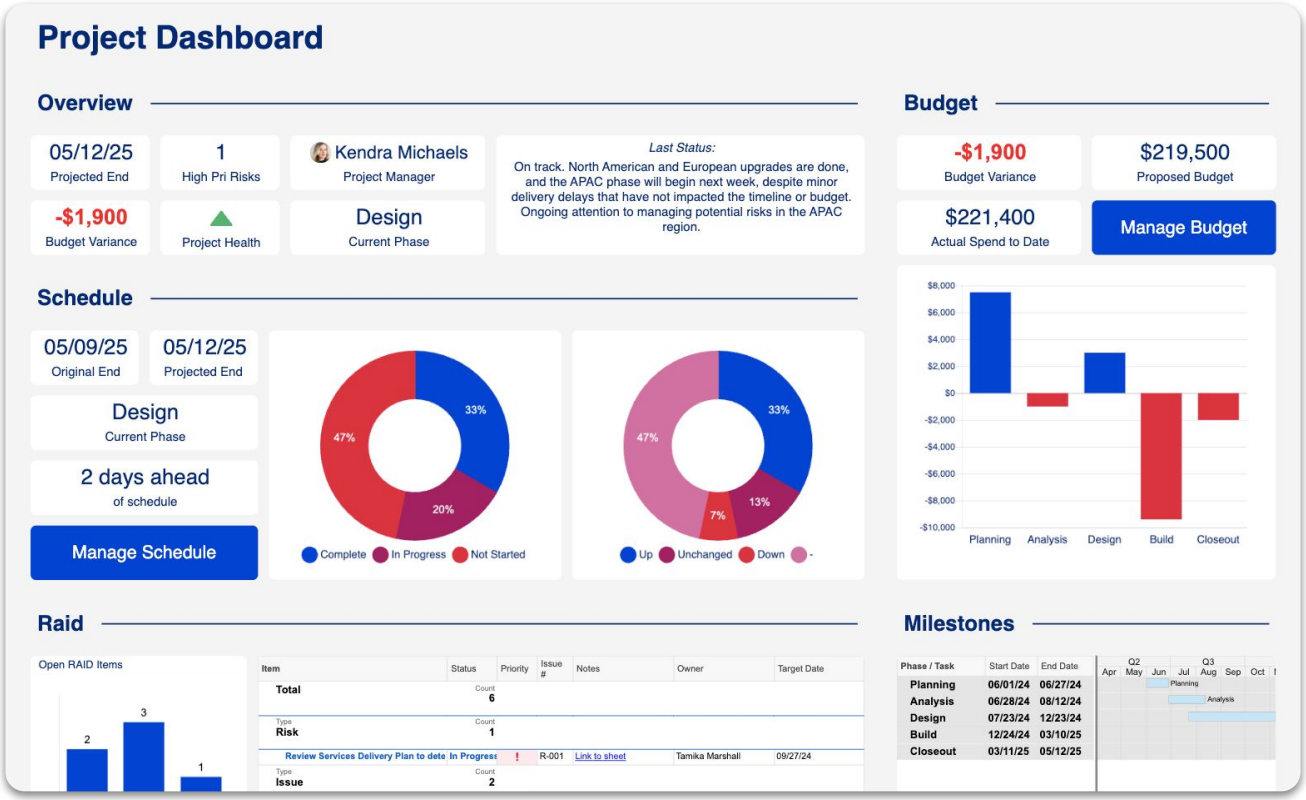


smartsheet ENGAGE

Apply theme

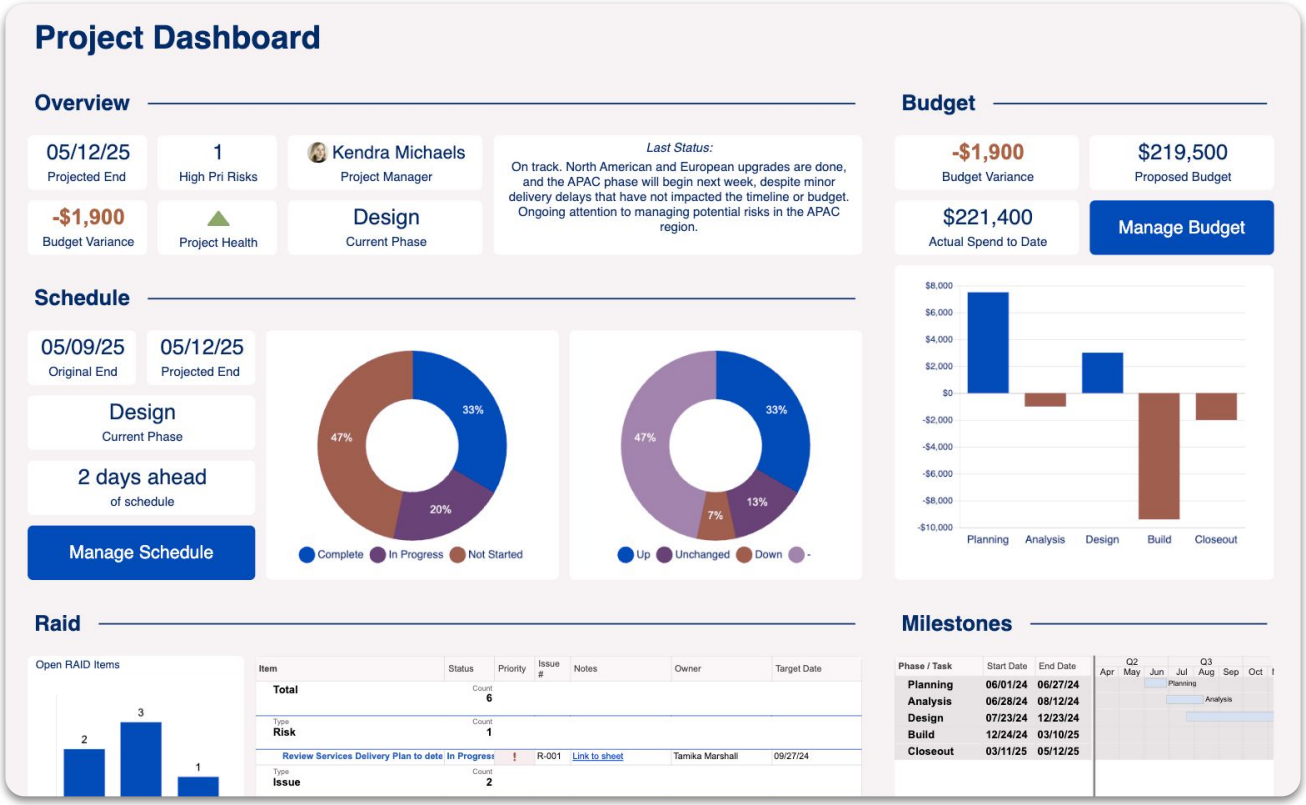
smartsheet
ENGAGE

Apply theme



smartsheet ENGAGE

Apply theme



smartsheet ENGAGE

4

Wrap up

smartsheet
ENGAGE

Wrap up

What have we learned?

1

How to **effectively apply color to a dashboard**.

2

How to **optimise your dashboard for your use case**.

3

How to **organise the information on your dashboard so that it can be consumed and understood at a glance**.

smartsheet
ENGAGE

Dashboard design resources

Design guide

Dashboard design resource

Dashboards feedback

Feedback form

Strategic color use

Blog post

smartsheet
ENGAGE

Next steps...

- Visit Dashboards booth
- Download Dashboard resources
- Update one of your dashboards

Take the survey

We'd love to hear your thoughts on the session.

Open this session in the mobile app, click "Survey," and answer two questions — it's that easy!

Thank you.

smartsheet
ENGAGE

Share your experience at ENGAGE

by participating in the conversation on social media!
Use **#SmartsheetENGAGE** and tag Smartsheet
in your posts all week long.

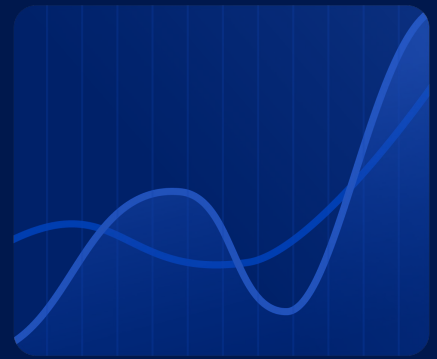
@smartsheet

@smartsheetplatform

@smartsheet

@smartsheet

@smartsheet



smartsheet
ENGAGE