THE

DASHBOARD HACK

FASTEST WAY TO BOOST YOUR CREDIBILITY

You've Made a Great Decision

Here's why:

Among professionals who manage projects, there's a common misconception about what it takes to **gain credibility**. Many believe that credibility is achieved only through significant accomplishments or years of experience. However, this overlooks a powerful and more immediate way to build trust and authority: **enhancing your stakeholders' understanding** of the challenges and status of their projects.

Well-crafted dashboards help you do that.

- Dashboards **showcase your ability to think strategically** and holistically about project management.
- Dashboards help you to present data in a comprehensive, visually appealing format that stakeholders can quickly and easily understand. This not only helps your stakeholders make better decisions but also **displays your ability to manage and communicate complex information** effectively, earning you immediate respect.
- Dashboards consolidate key metrics, stakeholder information, and visual cues in one place. By making it easier for stakeholders to grasp project updates, you **position yourself** as an invaluable **asset** to your team and project.
- And here's the best part: Using dashboards **transforms your stakeholder's perception of you** from a data tracker to a **strategic advisor**, instantly boosting your credibility by demonstrating your capacity to manage and communicate complex information seamlessly.

I first came upon the power of well-constructed dashboards when I was managing part of a massive IT project for one of the biggest research institutions in America. I led a Change Management team that was triaging small computer systems, what we called side systems, so that we could determine the training we might need to create as we changed the large central computing system they supported.

We were using standard spreadsheet-based tracking to record what we found. Our tracking looked like most tracking that you find in IT projects, tight rows with columns of dates and statuses and stakeholders.

Report Name	E2E Process Area	Audience (if known)	Recommended Action	Notes	
QlQzheNe lQzlQ HeNtlQy (eWzT-40519)	Q&Nz		QlQzheNe lQzlQ enz eNNee		
zenz QlQzheNe lQzlQ (eWzT-52450)	Q&Nz		QlQzheNe lQzlQ enz eNNee		
Rezeevenz ezzreel (eWzT-46274)	Q&Nz		Rezeevenz zeezN enz NlQvezeN		
Rezeevenz HeNtlQy (eWzT-46305)	Q&Nz		Rezeevenz zeezN enz NlQvezeN		
enveeze exzeQteenN (eWzT-40532)	Q&Nz		enveeze Metzhenz - ezzeentN Qeyeble		
NeQQlelQ enveeze (eWzT-46276)	Q&Nz		zreete enveeze - Ne QlQzheNe lQzlQ		
NeQQlelQ QeymentN (eWzT-46300)	Q&Nz		Qeyment enz Nettlement		
zenz TrenNezteen Tex Rete (eWzT-40654)	Q&Nz		Reteel NeleN Tex		
ezzreez Tex (eWzT-46290)	Q&Nz		Reteel NeleN Tex		
TrenNezteen Tex zeteel zlQ Tex en enveeze TrenNezteen (eWzT-53787)	Q&Nz		Reteel NeleN Tex		
1099 MeNz ReQlQt (TBz)	Q&Nz		1099 ReQlQtenz	eN HeLz weth zeNezn zlQ zlQthlQ zezeNeenN, eTe zeB 2022	
zenz 1099 MeNz (TBz)	Q&Nz		1099 ReQlQtenz	eN HeLz weth zeNezn zlQ zlQthlQ zezeNeenN, eTe zeB 2023	
1042 ReQlQt (eWzT-51411)	Q&Nz		1042N	TheN reQlQt eN en helz Qenzenz zezeNeen ez 1042 well be en Wz lQ zlezelQ. zezeNeen: eWzT-53530 httQN://jlQe.zez.weNhenzten.eze/brewNe/eWzT-53530	
ellezeteen Velezeteen ReQlQt (eWzT-57393) zet	Inc		WlQkzey zenenzeel ezzeentenz zenzementelN	ThlQe eN ne WlQkzey NtenzlQz reQlQt weth theN neme: et eN lekely NevlQel NtenzlQz reQlQtN thet well helQ ezzeententN velezete ellezeteen Net eQN enz entreeN bezlQe enz eztlQ they lQe QeNtez.	
zenz JelQnel & JelQnel LeneN (eWzT-48105) zet	Inc		WlQkzey zenenzeel ezzeentenz zenzementelN	NemellQ	QeNNeble jeb eeze beNez en zeteelez zentent

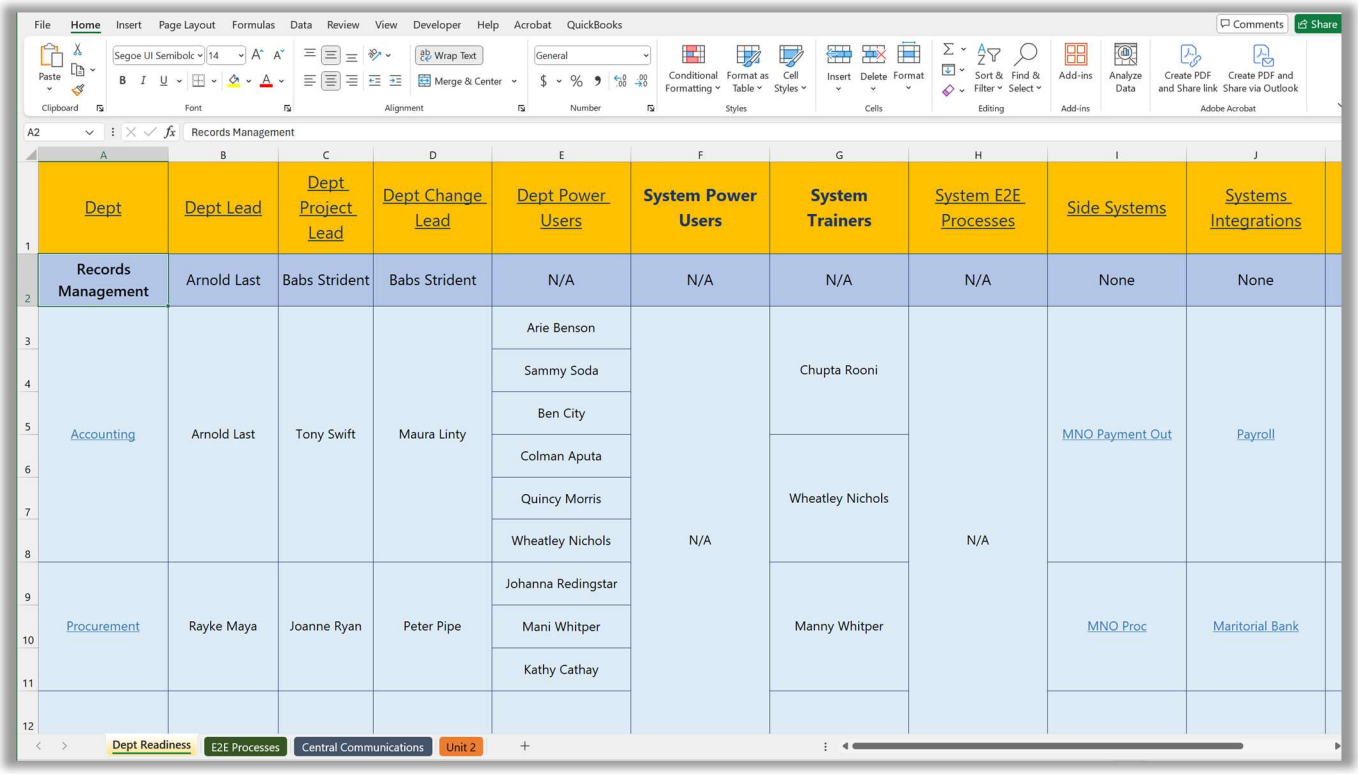
(Templates from that project with mock data and different color themes.)

After a couple of weeks or so on the project, I heard feedback that surprised me. One of the other change managers, Bryan Hall, was **getting attention**, getting noticed **in a good way**. Stakeholders were talking about his work and how much insight he was bringing to the project.

We were virtual teammates. My manager was hearing the same feedback. And I asked what was behind it.

The dashboard, she said. I didn't get it. We all created dashboards.

But his was different, she said. When she showed it to me, I could immediately see why.



Dept	Dept Lead	Dept Project Lead	Dept Change Lead	Dept Power Users	System Power Users	System Trainers	System E2E Processes	Side Systems	Systems Integrations
Records Management	Arnold Last	Babs Strident	Babs Strident	N/A	N/A	N/A	N/A	None	None
Accounting	Arnold Last	Tony Swift	Maura Linty	Arie Benson Sammy Soda Ben City Colman Aputa Quincy Morris Wheatley Nichols	N/A	Chupta Rooni Wheatley Nichols	N/A	MNO Payment Out	Payroll
Procurement	Rayke Maya	Joanne Ryan	Peter Pipe	Johanna Redingstar Mani Whitper Kathy Cathay		Manny Whitper		MNO Proc	Maritorial Bank

(Bryan's template with mock data and a different color theme.)

He'd made a series of **small, targeted changes** that made his dashboard stand out. He expanded the row height and column width, gave the data in the fields room to breathe. It left **his dashboard** more open, more attractive, **almost inviting**.

More than that, he'd formatted the borders of the cells, so they inherently communicated organizational structure. And he linked out from many of the cells to content sites, other systems, or dashboards. He **transformed the dashboard** from a tool for tracking, to a tool for better understanding the project and the teams, a reference tool, **an information hub**.

And because he was the author of the dashboard, he transformed his own place, status, and reputation.

He quickly became associated with the qualities of his dashboard. He came to be seen as a resource who

- Understood what was going on in the project and the current status.
- Could identify the players.
- Knew how the initiatives were interconnected.

- Could communicate it so that you could understand quickly and easily.

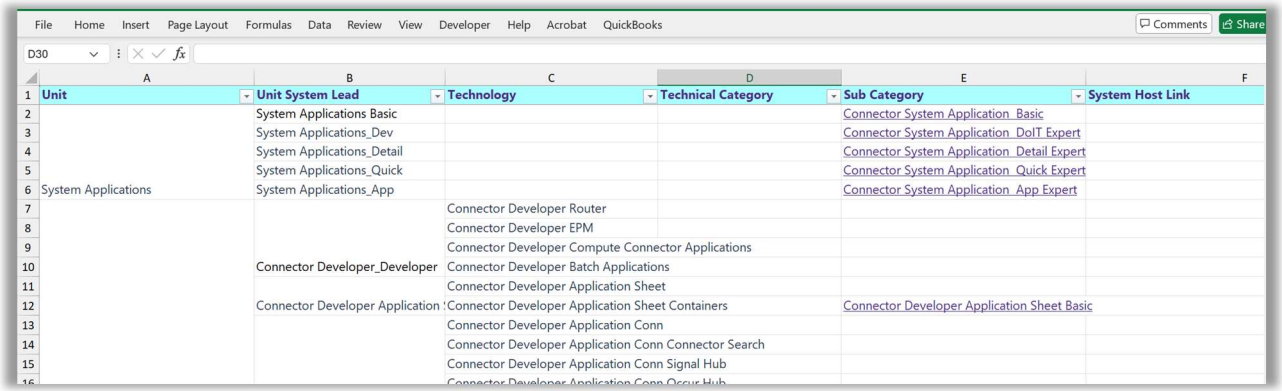
I set up a meeting with Bryan to walk through his thinking in creating the dashboard. I started changing my tracking sheets using his ideas, making them dashboards.

My work became **immediately decipherable**, my sheets started telling stories. My status meetings started to go much more quickly because people could see where the project was and why much more quickly.

I moved on from that project to an IT project working for one of the biggest hi-tech companies in the world. They brought me deep into the organization coordinating projects among dozens of teams doing coding, building apps, and training engineers.

I was brought in to partner with an embedded lead who had been in the position for three years and who brought 20 years of programming skills within the company. I wondered how I could earn respect as a newcomer in such an established and deeply technical ecosystem.

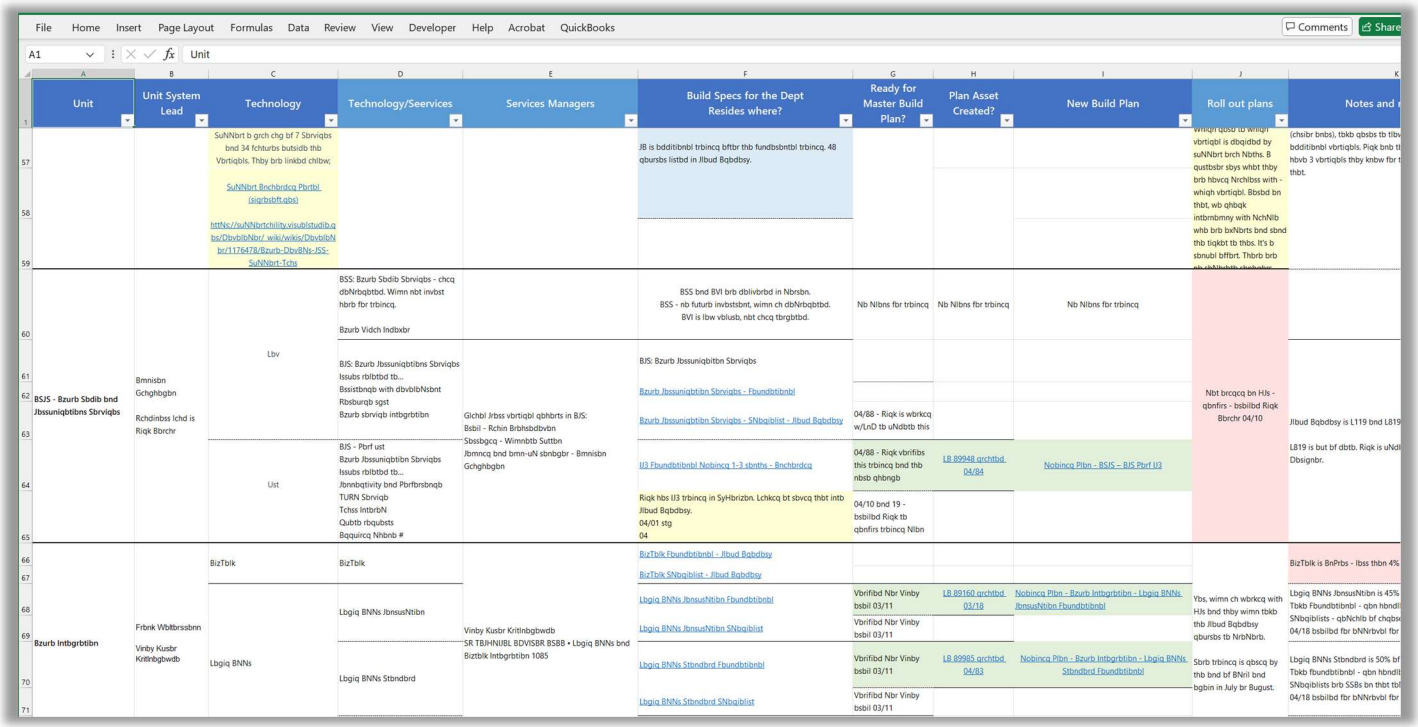
My first project was documenting the status for a training pipeline that served better than a dozen teams pushing out content to organizations inside and outside the company and around the world.



Unit	Unit System Lead	Technology	Technical Category	Sub Category	System Host Link
	System Applications Basic			Connector System Application_Basic	
	System Applications_Dev			Connector System Application_DoIT Expert	
	System Applications_Detail			Connector System Application_Detail Expert	
	System Applications_Quick			Connector System Application_Quick Expert	
System Applications	System Applications_App			Connector System Application_App Expert	
		Connector Developer Router			
		Connector Developer EPM			
		Connector Developer Compute Connector Applications			
	Connector Developer_Developer	Connector Developer Batch Applications			
		Connector Developer Application Sheet			
	Connector Developer Application	Connector Developer Application Sheet Containers		Connector Developer Application Sheet Basic	
		Connector Developer Application Conn			
		Connector Developer Application Conn Connector Search			
		Connector Developer Application Conn Signal Hub			

(The original data-only spreadsheet with mock data.)

As I started to track the projects, I called on Bryan's methods and continued to expand on them, finding ways to use **cells**, **borders**, **merging**, and **colors**. I developed a dashboard to communicate organization structure, the stakeholders and technologies in each, the grouping of technologies, where plans were housed, project status, and risk.



(The dashboard I developed with mock data.)

I was amazed by the response.

After the first couple of reviews, my teammates called my dashboard **indispensable**. They said it was surprising how quickly **I grasped the project**.

The project was complex, and the dashboard reflects that complexity. But once you're familiar with the layout of the dashboard, you can find a variety of information easily:

- The structure of a Unit and how the Unit is broken into teams to manage systems and technologies.
- Who the Unit lead is and who manages the technologies and services.
- The systems owned by the departments, their specific build specs, and where those build specs are housed.

Because the dashboard uses color in specific ways (there's was a legend not visible in this mockup), users could tell at a glance:

- The proportion of all build specs that reside in the preferred storage location (those that are hyperlinked out to that storage system).

- The build specs that are housed in alternate storage systems (blue indicates one alternate system, yellow indicates another).
- The proportion of build plans that have successfully been revised (in green cells), that are on pace (in white cells), that are in jeopardy (in yellow cells), or at risk (in red cells).

A month or two later, when it came time to budget for a new fiscal year, my manager informed me that the company had decided to extend contracts for only **the most valuable staff**.

And despite how new I was to the team; **I was on that list**.

Of course, it wasn't only the dashboard. But the dashboard made a big difference. It positioned me as a **critical teammate** who **understood** the project ecosystem **and could communicate** it quickly to others.

By the end of this eBook, you'll have a solid plan for creating and presenting dashboards that position you as a credible stakeholder and an unmistakable asset to the team. So, let's get started!

Summary: The Benefits of a Good Dashboard

Clarity and Organization: Dashboards present data in a clear, organized manner, making it easy to understand at a glance.

Quick Decision-Making: They allow stakeholders to make quick, informed decisions by highlighting key metrics and trends.

Engagement: A well-designed dashboard engages users, making data more accessible and interesting.

Visibility: They enhance visibility into project status and risks, fostering better communication and accountability.

The bottom line?

When your dashboard gives stakeholders real insight, they attribute that to you.

About the Author

I received an MBA in Marketing from the Tepper School at Carnegie Mellon University and have over 15 years' experience managing projects in change, technology, and learning.

The methods I'm recommending have been proven in high-stakes environments, from global tech companies to research institutions, and international foundations.

I've been recognized for my ability to manage important stakeholders.

My journey from frustration to expertise in creating communications models uniquely positions me to guide you to success.

> The way Tim engages with his team and clients is inspiring. He was key to guiding the SME team beyond a standard approach.
>
> Tammy Foss
> Director | Learning and Development Programs, MediaPRO

> Tim was great to work with. He has the ability to look beyond the obvious issues confronting him and his customers to understand and then address the underlying/root causes so that a long-lasting solution can be put in place.
>
> Dave Chase
> Global Industry Director – Healthcare, Microsoft

> Tim's intelligence, perspective, ability to forge productive work relationships, and genuine interest in others made him a stand-out colleague.
>
> Brian K. McCarthy
> General Manager, Sales & Marketing, Microsoft

> Tim is a highly aware and thoughtful individual. His focus on a needs analysis and the overall objective of a project is critical to ensuring success.
>
> Jeanette Rogers
>
> Director, Instructional Design and Learning, Kalles Group for Bill & Melinda Gates Foundation

How it Works

01: Reconsider the Scope of Your Project and Your Role

Take a fresh look at the scope of your project and your responsibilities. See what additional context your stakeholders would benefit from.

02. Expand Your Dashboard to Include the Expanded Scope You Envisioned

Add the additional information to your dashboard in a way that displays more context.

03. Format Your Dashboard to Show Critical Structures and Highlight Key Information

This step is critical to making your dashboard **easy to parse and memorable**. The smart simplification of your dashboard and addition of color is critical to your success.

© SwaySmarts, LLC

Step #1

Reconsider the Scope of Your Project and Your Role

The first step is to note the scope of your project and your responsibilities. You'll recognize much of this step as core items you already track. Take some time, though, to reconsider and think of additional information stakeholders might need.

The idea is not to be simply comprehensive but **useful** to all parties involved.

1. Flesh out the Organization Structure

2. Document Status and Processes

3. Identify Risk Points

4. Flag Complications

01: Reconsider the Scope of Your Project and Your Role

- Organization Structure

Consider how your project fits within the larger organization and how that additional context might be valuable.

As an example, if you're working in IT, your product group's organization is likely to be grouped by technology. If you're working with partner organizations, your stakeholder's organizations may be grouped by geography. In either case, it's likely valuable to have the team lead's information in addition to the group leader's information.

For his project above, Bryan tracked: Department Lead, Department Project Lead, Department Change Lead, Department Power Users, and System Power Users.

For a recent project, I tracked Department Lead, Reporting Leads, Admins, and Power Users. Admins were particularly valuable because they handled all the scheduling for appointments and meetings.

Identify important leaders and users for your project:

- Status and process

In addition to the status you're already tracking, consider including information about systems or workflows that preface, follow or adjoin your process.

As an example, for the project I presented above tracking the departments that had new build plans. I added to that sheet: the steps involved in creating build plans, and whether rollout plans had been created for build plans that were complete.

- Risk Points

You likely already identify risk points. Consider the presentation and coloring points in the next section.

- Complications

Document the complications that impinge on your project. This includes technical issues, resource constraints, and other factors.

As an example, for the project I presented above, in addition to tracking build plans, I tracked the storage systems that housed the build specs and noted whether the specs were in the preferred system or other systems.

Identify status, risk, and complications that adjoin your project:

Step #2

Format Your Dashboard to Quickly Communicate Critical Information

02. Expand Your Dashboard to Include the Expanded Scope You Envisioned

Incorporate the additional elements identified in Step 1 into your dashboard.

03. Format Your Dashboard to Show Critical Structures and Highlight Key Information

Organize your dashboard in a logical layout that makes it easy for stakeholders to find the information they need. Use clear headings, bullet points, and sections to organize data. Highlight key information, such as critical structures and status updates, to ensure they stand out. "The ability for people to get information from a chart affects their judgment of the data itself. That is, **credibility suffers** if the visual is **difficult to make sense of**. The most anti-persuasive thing you can do is to make a bad chart that frustrates people."[1]

- Add Borders and Merge Cells to make key information stand out.
  - Cole Nussbaumer Knaflic, the CEO of Storytelling with Data, recommends that **your first step** is refining visualizations by **eliminating** all unnecessary and **repetitive elements**.[2]
- Use Color Coding to Communicate Information Quickly
  - Research indicates that people **understand** information better and **remember** more of what they've read when those messages are accompanied by **color.**[3]

---

[1] The Persuasiveness of a Chart Depends on the Reader, Not Just the Chart, Harvard Business Review 05/2015.

[2] Mastering Data Storytelling: 5 Steps to Creating Persuasive Charts and Graphs, Crazy Egg (https://www.crazyegg.com/blog/data-storytelling-5-steps-charts/)

[3] The Influence of Colour on Memory Performance: A Review (https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3743993/)

Let's look at a simple, common example of a tracking sheet, and how you might change it to make it a dashboard more valuable to stakeholders.

Unit	Technology	Technical Category	Build Plans	Basic System	Advance
Op Systems	System Applications	System Applications Foundation	SA Foundation Basic		
Op Systems	System Applications	System Applications_Dev	SA DoIT Augmented Basic		
Op Systems	System Applications	System Applications_Detail	SA Detail Augmented Basic		
Op Systems	System Applications	System Applications_Quick	SA Quick Augmented Advanced		
Op Systems	System Applications	System Applications_App	SA App Augmented Basic		
Connector Developer	ConnDev_Developer	ConnDev Router			
Connector Developer	ConnDev_Developer	ConnDev EPM			
Connector Developer	ConnDev_Developer	ConnDev Compute Connector Applications			
Connector Developer	ConnDev_Developer	ConnDev Batch Applications			
Connector Developer	ConnDev Application	ConnDev Application Sheet			
Connector Developer	ConnDev Application	ConnDev Application Sheet Containers	Connector Developer Application Sheet Foundation Basic		
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Connector Search			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Signal Hub			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Occur Hub			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Occur Grid	Connector Developer Application Conn Foundation Advanced		
Connector Developer	ConnDev Application Sheet	ConnDev Depot			
Connector Developer	ConnDev Application Sheet	ConnDev Depot Spread Cache	Connector Developer Depot Foundation Basic		
Quant Systems	Quant Applications	Quant Systems Consumption	Quant Systems Standard Foundation Basic		
Quant Systems	Quant Applications	Quant Systems Standard			
Kernel Systems	Kernel Alpha	InterBlu Information Applications (IIS)	Kernel Info System (WIT) : Technical System Program Basic		
Kernel Systems	Kernel Comm Suite	SPI.Blu : Technical System Program	SPI.Blu : Technical System Program Advanced		
Kernel Systems	Kernel Comm Suite	SPI.Blu Core System Plan	SPI.Blu Core System Plan Basic		
Kernel Systems	Kernel Comm Suite	Connector Bot Application	Connector Bot Application Advanced		
Kernel Systems	Kernel .KNL	Connector PopulateB	Connector PopulateB and Connector Kernel BopSop Basic		
Builder	Builder	Connector Builder Applications			
Builder	Builder	Connector Carry Testing			
Builder	Builder	App Test Labs			
Builder	Builder	Connector Lab Applications			
Builder	Builder	Connector DevOps Server			
Builder	Builder	Team Basic Server			

- Add **borders** to help stakeholders focus on Units and Technologies.

Unit	Technology	Technical Category	Build Plans	Basic System	Advanced System
Op Systems	System Applications	System Applications Foundation	SA Foundation Basic		
Op Systems	System Applications	System Applications_Dev	SA DoIT Augmented Basic		
Op Systems	System Applications	System Applications_Detail	SA Detail Augmented Basic		
Op Systems	System Applications	System Applications_Quick	SA Quick Augmented Advanced		
Op Systems	System Applications	System Applications_App	SA App Augmented Basic		
Connector Developer	ConnDev_Developer	ConnDev Router			
Connector Developer	ConnDev_Developer	ConnDev EPM			
Connector Developer	ConnDev_Developer	ConnDev Compute Connector Applications			
Connector Developer	ConnDev_Developer	ConnDev Batch Applications			
Connector Developer	ConnDev Application	ConnDev Application Sheet			
Connector Developer	ConnDev Application	ConnDev Application Sheet Containers	Connector Developer Application Sheet Foundation Basic		
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Connector Search			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Signal Hub			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Occur Hub			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Occur Grid	Connector Developer Application Conn Foundation Advanced		
Connector Developer	ConnDev Application Sheet	ConnDev Depot			
Connector Developer	ConnDev Application Sheet	ConnDev Depot Spread Cache	Connector Developer Depot Foundation Basic		
Quant Systems	Quant Applications	Quant Systems Consumption	Quant Systems Standard Foundation Basic		
Quant Systems	Quant Applications	Quant Systems Standard			
Kernel Systems	Kernel Alpha	InterBlu Information Applications (IIS)	Kernel Info System (WIT) : Technical System Program Basic		
Kernel Systems	Kernel Comm Suite	SPI.Blu : Technical System Program	SPI.Blu : Technical System Program Advanced		
Kernel Systems	Kernel Comm Suite	SPI.Blu Core System Plan	SPI.Blu Core System Plan Basic		
Kernel Systems	Kernel Comm Suite	Connector Bot Application	Connector Bot Application Advanced		
Kernel Systems	Kernel .KNL	Connector PopulateB	Connector PopulateB and Connector Kernel BopSop Basic		
Builder	Builder	Connector Builder Applications			
Builder	Builder	Connector Carry Testing			
Builder	Builder	App Test Labs			
Builder	Builder	Connector Lab Applications			
Builder	Builder	Connector DevOps Server			
Builder	Builder	Team Basic Server			

- **Merge cells** to make the organization more apparent.

Unit	Technology	Technical Category	Build Plans	Basic System	Advanced System
Op Systems	System Applications	System Applications Foundation	SA Foundation Basic		
		System Applications_Dev	SA DoIT Augmented Basic		
		System Applications_Detail	SA Detail Augmented Basic		
		System Applications_Quick	SA Quick Augmented Advanced		
		System Applications_App	SA App Augmented Basic		
Connector Developer	ConnDev_Developer	ConnDev Router			
		ConnDev EPM			
		ConnDev Compute Connector Applications			
		ConnDev Batch Applications			
	ConnDev Application	ConnDev Application Sheet			
		ConnDev Application Sheet Containers	Connector Developer Application Sheet Foundation Basic		
	ConnDev Application Sheet	ConnDev Application Conn			
		ConnDev Application Conn Connector Search			
		ConnDev Application Conn Signal Hub			
		ConnDev Application Conn Occur Hub			
		ConnDev Application Conn Occur Grid	Connector Developer Application Conn Foundation Advanced		
		ConnDev Depot			
		ConnDev Depot Spread Cache	Connector Developer Depot Foundation Basic		
Quant Systems	Quant Applications	Quant Systems Consumption	Quant Systems Standard Foundation Basic		
		Quant Systems Standard			
Kernel Systems	Kernel Alpha	InterBlu Information Applications (IIS)	Kernel Info System (WIT) : Technical System Program Basic		
	Kernel Comm Suite	SPI.Blu : Technical System Program	SPI.Blu : Technical System Program Advanced		
		SPI.Blu Core System Plan	SPI.Blu Core System Plan Basic		
		Connector Bot Application	Connector Bot Application Advanced		
	Kernel .KNL	Connector PopulateB	Connector PopulateB and Connector Kernel BopSop Basic		
Builder	Builder	Connector Builder Applications			
		Connector Carry Testing			
		App Test Labs			
		Connector Lab Applications			
		Connector DevOps Server			

- **Add stakeholders** so the team knows who the decision makers are

Unit	Unit Leads	Technology	Teach Leads	Technical Category	Build Plans
Op Systems	Marty Poppins	System Applications		System Applications Foundation	SA Foundation Basic
				System Applications_Dev	SA DoIT Augmented Basic
				System Applications_Detail	SA Detail Augmented Basic
				System Applications_Quick	SA Quick Augmented Advanced
				System Applications_App	SA App Augmented Basic
Connector Developer	Bertha Sweeper	ConnDev_Developer	Te Ka	ConnDev Router	
				ConnDev EPM	
				ConnDev Compute Connector Applications	
				ConnDev Batch Applications	
		ConnDev Application	Michael Mose	ConnDev Application Sheet	
				ConnDev Application Sheet Containers	Connector Developer Application Sheet Foundation Basic
		ConnDev Application Sheet	Bud Lighter	ConnDev Application Conn	
				ConnDev Application Conn Connector Search	
				ConnDev Application Conn Signal Hub	
				ConnDev Application Conn Occur Hub	
				ConnDev Application Conn Occur Grid	Connector Developer Application Conn Foundation Advanced
				ConnDev Depot	
				ConnDev Depot Spread Cache	Connector Developer Depot Foundation Basic
Quant Systems	Drizella Tremaine	Quant Applications	Barry Beast	Quant Systems Consumption	Quant Systems Standard Foundation Basic
				Quant Systems Standard	
Kernel Systems	Fa Li	Kernel Alpha	Dwayne Rock	InterBlu Information Applications (IIS)	Kernel Info System (WIT) : Technical System Program Basic
		Kernel Comm Suite	Pan Tinker	SPI.Blu : Technical System Program	SPI.Blu : Technical System Program Advanced
				SPI.Blu Core System Plan	SPI.Blu Core System Plan Basic
				Connector Bot Application	Connector Bot Application Advanced
		Kernel .KNL	Peter Bell	Connector PopulateB	Connector PopulateB and Connector Kernel BopSop Basic
Builder	Shivani Hildegard	Builder	Buffy Slayer	Connector Builder Applications	
				Connector Carry Testing	
				App Test Labs	
				Connector Lab Applications	
				Connector DevOps Server	
				Team Basic Server	

- Add a column to show where the build specs are housed since the build plans will need to reference those. And give them a **color code** to show which are on nonstandard platforms.

Unit	Unit Leads	Technology	Teach Leads	Technical Category	Build Specs Hosted	Build Plans
Op Systems	Marty Poppins	System Applications		System Applications Foundation	SA_Foundation	SA_Foundation Basic
				System Applications_Dev	SA_DoIT Augmented	SA_DoIT Augmented Basic
				System Applications_Detail	SA_Detail Augmented	SA_Detail Augmented Basic
				System Applications_Quick	SA_Quick Augmented	SA_Quick Augmented Advanced
				System Applications_App	SA_App Augmented	SA_App Augmented Basic
Connector Developer	Bertha Sweeper	ConnDev_Developer	Te Ka	ConnDev Router		
				ConnDev EPM		
				ConnDev Compute Connector Applications		
				ConnDev Batch Applications		
		ConnDev Application	Michael Mose	ConnDev Application Sheet		
				ConnDev Application Sheet Containers	ConnDev ASF	Connector Developer Application Sheet Foundation Basic
		ConnDev Application Sheet	Bud Lighter	ConnDev Application Conn		
				ConnDev Application Conn Connector Search		
				ConnDev Application Conn Signal Hub		
				ConnDev Application Conn Occur Hub		
				ConnDev Application Conn Occur Grid	ConnDev ACF	Connector Developer Application Conn Foundation Advanced
				ConnDev Depot		
				ConnDev Depot Spread Cache	ConnDev Depot Cache	Connector Developer Depot Foundation Basic
Quant Systems	Drizella Tremaine	Quant Applications	Barry Beast	Quant Systems Consumption	Quant Systems SF	Quant Systems Standard Foundation Basic
				Quant Systems Standard		
Kernel Systems	Fa Li	Kernel Alpha	Dwayne Rock	InterBlu Information Applications (IIS)	KIS : Technical System Program	Kernel Info System (WIT) : Technical System Program Basic
		Kernel Comm Suite	Pan Tinker	SPI.Blu : Technical System Program	SPI.Blu : Technical System Program	SPI.Blu : Technical System Program Advanced
				SPI.Blu Core System Plan	SPI.Blu Core System Plan	SPI.Blu Core System Plan Basic
				Connector Bot Application	Connector Bot Application	Connector Bot Application Advanced
		Kernel .KNL	Peter Bell	Connector PopulateB	.KNL Connector PopulateB	Connector PopulateB and Connector Kernel BopSop Basic
Builder	Shivani Hildegard	Builder	Buffy Slayer	Connector Builder Applications		
				Connector Carry Testing		
				App Test Labs		
				Connector Lab Applications		
				Connector DevOps Server		
				Team Basic Server		

- Color code the column for the main deliverable to show risk.

Unit	Unit Leads	Technology	Teach Leads	Technical Category	Build Specs Hosted	Build Plans
Op Systems	Marty Poppins	System Applications		System Applications Foundation	SA_Foundation	SA_Foundation Basic
				System Applications_Dev	SA_DoIT Augmented	SA_DoIT Augmented Basic
				System Applications_Detail	SA_Detail Augmented	SA_Detail Augmented Basic
				System Applications_Quick	SA_Quick Augmented	SA_Quick Augmented Advanced
				System Applications_App	SA_App Augmented	SA_App Augmented Basic
Connector Developer	Bertha Sweeper	ConnDev_Developer	Te Ka	ConnDev Router		
				ConnDev EPM		
				ConnDev Compute Connector Applications		
				ConnDev Batch Applications		
		ConnDev Application	Michael Mose	ConnDev Application Sheet		
				ConnDev Application Sheet Containers	ConnDev ASF	Connector Developer Application Sheet Foundation Basic
		ConnDev Application Sheet	Bud Lighter	ConnDev Application Conn		
				ConnDev Application Conn Connector Search		
				ConnDev Application Conn Signal Hub		
				ConnDev Application Conn Occur Hub		
				ConnDev Application Conn Occur Grid	ConnDev ACF	Connector Developer Application Conn Foundation Advanced
				ConnDev Depot		
				ConnDev Depot Spread Cache	ConnDev Depot Cache	Connector Developer Depot Foundation Basic
Quant Systems	Drizella Tremaine	Quant Applications	Barry Beast	Quant Systems Consumption	Quant Systems SF	Quant Systems Standard Foundation Basic
				Quant Systems Standard		
Kernel Systems	Fa Li	Kernel Alpha	Dwayne Rock	InterBlu Information Applications (IIS)	KIS : Technical System Program	Kernel Info System (WIT) : Technical System Program Basic
		Kernel Comm Suite	Pan Tinker	SPI.Blu : Technical System Program	SPI.Blu : Technical System Program	SPI.Blu : Technical System Program Advanced
				SPI.Blu Core System Plan	SPI.Blu Core System Plan	SPI.Blu Core System Plan Basic
				Connector Bot Application	Connector Bot Application	Connector Bot Application Advanced
		Kernel .KNL	Peter Bell	Connector PopulateB	.KNL Connector PopulateB	Connector PopulateB and Connector Kernel BopSop Basic
Builder	Shivani Hildegard	Builder	Buffy Slayer	Connector Builder Applications		
				Connector Carry Testing		
				App Test Labs		
				Connector Lab Applications		
				Connector DevOps Server		
				Team Basic Server		

- Add **color and spacing** to make the whole dashboard easier to read.

Unit	Unit Leads	Technology	Teach Leads	Technical Category	Build Specs Hosted	Build Plans	Ba
Op Systems	Marty Poppins	System Applications		System Applications Foundation	SA_Foundation	SA_Foundation Basic	
				System Applications_Dev	SA_DoIT Augmented	SA_DoIT Augmented Basic	
				System Applications_Detail	SA_Detail Augmented	SA_Detail Augmented Basic	
				System Applications_Quick	SA_Quick Augmented	SA_Quick Augmented Advanced	
				System Applications_App	SA_App Augmented	SA_App Augmented Basic	
Connector Develope	Bertha Sweeper	ConnDev_Developer	Te Ka	ConnDev Router			
				ConnDev EPM			
				ConnDev Compute Connector Applications			
				ConnDev Batch Applications			
		ConnDev Application	Michael Mose	ConnDev Application Sheet			
				ConnDev Application Sheet Containers	ConnDev ASF	Connector Developer Application Sheet Foundation Basic	
		ConnDev Application She	Bud Lighter	ConnDev Application Conn			
				ConnDev Application Conn Connector Search			
				ConnDev Application Conn Signal Hub			
				ConnDev Application Conn Occur Hub			
				ConnDev Application Conn Occur Grid	ConnDev ACF	Connector Developer Application Conn Foundation Advanced	
				ConnDev Depot			
				ConnDev Depot Spread Cache	ConnDev Depot Cache	Connector Developer Depot Foundation Basic	
Quant Systems	Drizella Tremaine	Quant Applications	Barry Beast	Quant Systems Consumption	Quant Systems SF	Quant Systems Standard Foundation Basic	
				Quant Systems Standard			
Kernel Systems	Fa Li	Kernel Alpha	Dwayne Rock	InterBlu Information Applications (IIS)	KIS : Technical System Program	Kernel Info System (WIT) : Technical System Program Basic	
		Kernel Comm Suite	Pan Tinker	SPI.Blu : Technical System Program	SPI.Blu : Technical System Progra	SPI.Blu : Technical System Program Advanced	
				SPI.Blu Core System Plan	SPI.Blu Core System Plan	SPI.Blu Core System Plan Basic	

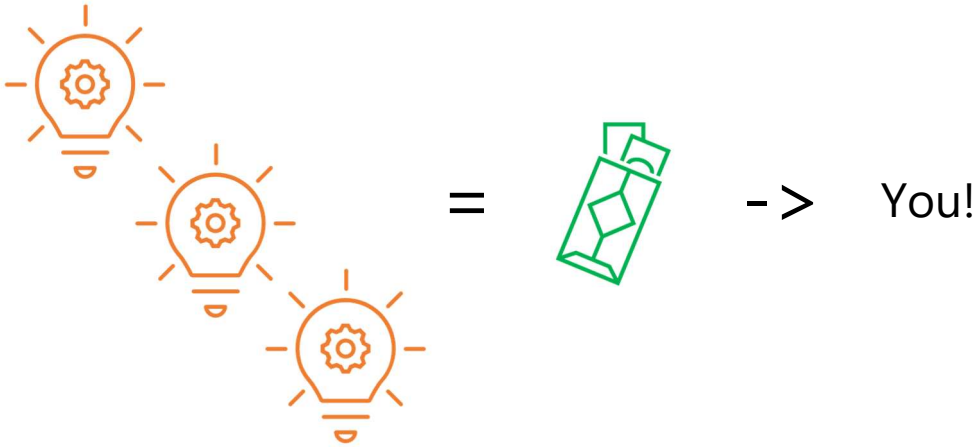
Compare this to the original tracking sheet.

Unit	Technology	Technical Category	Build Plans	Basic System	Advance
Op Systems	System Applications	System Applications Foundation	SA_Foundation Basic		
Op Systems	System Applications	System Applications_Dev	SA_DoIT Augmented Basic		
Op Systems	System Applications	System Applications_Detail	SA_Detail Augmented Basic		
Op Systems	System Applications	System Applications_Quick	SA_Quick Augmented Advanced		
Op Systems	System Applications	System Applications_App	SA_App Augmented Basic		
Connector Developer	ConnDev_Developer	ConnDev Router			
Connector Developer	ConnDev_Developer	ConnDev EPM			
Connector Developer	ConnDev_Developer	ConnDev Compute Connector Applications			
Connector Developer	ConnDev_Developer	ConnDev Batch Applications			
Connector Developer	ConnDev Application	ConnDev Application Sheet			
Connector Developer	ConnDev Application	ConnDev Application Sheet Containers	Connector Developer Application Sheet Foundation Basic		
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Connector Search			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Signal Hub			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Occur Hub			
Connector Developer	ConnDev Application Sheet	ConnDev Application Conn Occur Grid	Connector Developer Application Conn Foundation Advanced		
Connector Developer	ConnDev Application Sheet	ConnDev Depot			
Connector Developer	ConnDev Application Sheet	ConnDev Depot Spread Cache	Connector Developer Depot Foundation Basic		
Quant Systems	Quant Applications	Quant Systems Consumption	Quant Systems Standard Foundation Basic		
Quant Systems	Quant Applications	Quant Systems Standard			
Kernel Systems	Kernel Alpha	InterBlu Information Applications (IIS)	Kernel Info System (WIT) : Technical System Program Basic		
Kernel Systems	Kernel Comm Suite	SPI.Blu : Technical System Program	SPI.Blu : Technical System Program Advanced		
Kernel Systems	Kernel Comm Suite	SPI.Blu Core System Plan	SPI.Blu Core System Plan Basic		
Kernel Systems	Kernel Comm Suite	Connector Bot Application	Connector Bot Application Advanced		
Kernel Systems	Kernel .KNL	Connector PopulateB	Connector PopulateB and Connector Kernel BopSop Basic		

Sure, the new dashboard is much easier to parse. But if you look beyond that, it also brings more insights:

- You can see a **fair amount of risk** (the yellow highlighted areas) **in Build Plans**. But the Kernel Systems Unit is all green – on time, on track, no risk. It prompts the question, what's working there that might be transferrable?
- You can see there's a **non-standard storage facility** that hosts a noticeable portion of Build Specs. It might be worth looking at **a change plan** to move specs between sites.
- You can see that one Unit is housing their Build Specs on **two different platforms**, neither of which is the standard platform. It might be worth looking into a **standardization plan** with them.
- Looking at the entire chart, there might be reason to do some **high level communication** showing teams the value of bringing specs and plans onto the standard platforms.
- And It's easy to identify the Unit Leads and Tech Leads you'd contact to follow up questions and insights.

And those **insights** will add up to **value** that you bring, **that will be attributed to you**.



Congratulations!

You got this! You transformed your tracking sheet into a dashboard that is not only visually appealing but also highly informative.

You've created a great base for:

- Communicating complex information clearly and effectively.
- Providing stakeholders with the insights they need to make informed decisions.
- Demonstrating your understanding of the project and its challenges.
- Enhancing your professional credibility and reputation.

What's Next for You?

Of course, this is just the beginning of the journey.

Next on your road to transforming yourself into a project leader, you'll want to:

- **Negotiate** with stakeholders so you can keep them engaged in the project
- **Define** their wins and friction, so you can deliver what they'll see as real value.
- **Manage** conflict on your points of risk, so losses don't get dumped on you.

Want expert advice for doing that?

- **Drop me an email** at info@swaysmarts.com
- Let me know **what you need most** or **what would amaze you**.
- I'll put your on my list for **75% off** the Master Class!