Power BI Dashboard Design Guide

Best practices for building executive dashboards that drive decisions. Based on AnswerPoint deployments across healthcare, retail, manufacturing, and government.

1. Start with the Decision, Not the Data

- Before opening Power BI, ask: what decisions will this dashboard inform?
- Interview stakeholders for their top 3-5 questions
- Design for the 80% use case — don't answer every question on one page
- Each dashboard needs a purpose statement: 'This helps [role] make [decision] by showing [metrics]'

2. Data Modeling Best Practices

- Use a star schema: fact tables surrounded by dimension tables
- Create a dedicated date dimension table (never rely on auto date/time)
- Establish clear relationships; avoid bidirectional filtering unless necessary
- Calculated columns for row context, measures for aggregations
- Implement row-level security (RLS) from the start

3. Visual Design Principles

- Limit to 6-8 visuals per page — whitespace is your friend
- Use consistent color palette aligned with your brand (3-4 colors max)
- Put the most important KPI top-left (where eyes go first)
- Bar charts for comparison, line charts for trends, cards for KPIs
- Avoid pie charts for 4+ categories — use horizontal bars instead
- All text 10pt minimum for readability

4. Interactivity and Navigation

- Limit slicers to 2-3 per page maximum
- Use drill-through pages for detail; keep summary pages clean
- Bookmarks for guided navigation and storytelling
- Tooltips for context rather than cluttering the main view
- Test on actual devices users will use (mobile, projected, desktop)

5. Performance Optimization

- Aggregations and summary tables for datasets over 100M rows
- Limit visuals that query the entire dataset on page load
- Import mode is faster than DirectQuery — use DQ only when real-time is essential
- Remove unused columns and tables from the model
- Monitor with Performance Analyzer and DAX Studio

6. Deployment and Governance

- Organize workspaces by department or function

- Use deployment pipelines: Dev > Test > Production

- Schedule refresh based on actual freshness requirements

- Document data sources, refresh schedules, and ownership

- Review usage metrics monthly — retire unused dashboards

Need expert help? Contact AnswerPoint for a free consultation.

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