How to Build a Value-Based Dashboard for Your Product
My top things

The UI Audit (book)
UI Breakfast Podcast
Tiny Reminder (SaaS)
Userlist.io (SaaS)
Step #1

Do You Really Need One?
You can only have one welcome mat

Dashboard
Homepage
Primary workspace
Perfect with a dashboard

Status is critical (e.g. web hosting)
Strong analytical component (e.g. project management, marketing)
Ongoing activity is overwhelming (e.g. stock trading)
Perfect without a dashboard

Hands-on work needs to be done!

Gmail, Google Docs, Intercom, InVision, Slack, Trello…
<table>
<thead>
<tr>
<th>Client / Form</th>
<th>Status</th>
<th>Attorney</th>
<th>Cons. Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claire Wild</td>
<td>Completed</td>
<td>Marissa Jardin</td>
<td>Today, 2:00pm</td>
</tr>
<tr>
<td>General Intake</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jonathan Smith</td>
<td>Awaiting</td>
<td>Joe Davidson</td>
<td>Today, 3:00pm</td>
</tr>
<tr>
<td>General Intake</td>
<td>Late</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maria Whitehouse</td>
<td>80%</td>
<td>Joe Davidson</td>
<td>May 15, 10:00am</td>
</tr>
<tr>
<td>Estate Planning Intake Sheet</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dave Johansson</td>
<td>40%</td>
<td>Marissa Jardin</td>
<td>Jun 23, 11:30am</td>
</tr>
<tr>
<td>General Intake</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

View Intake
Edit Details
Reschedule
Close Intake
Delete

Page 1 of 3
Displaying 10 of 27 entries
Your dashboard is not a workspace
Welcome to Your Dashboard

Click on the 'Get Started' button to add or import a list of employer groups. For each employer group, you can add the plan information and then generate the Wrap SPD and Wrap Plan Document.

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**Wrap Documents and PCP Documents Usage**

<table>
<thead>
<tr>
<th>Wrap Docs Used</th>
<th>PCP Docs Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>1203 Used</td>
<td>1030 Used</td>
</tr>
<tr>
<td>97 Remaining</td>
<td>270 Remaining</td>
</tr>
</tbody>
</table>

**Completed vs. Pending Wraps**

<table>
<thead>
<tr>
<th>Completed Wraps</th>
<th>Pending Wraps</th>
</tr>
</thead>
<tbody>
<tr>
<td>59% Completed</td>
<td>5% Pending</td>
</tr>
<tr>
<td>1084 Completed</td>
<td>58 Pending</td>
</tr>
</tbody>
</table>

---

**Completed Wraps**

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maryland Tourism Company</td>
<td>4/27/2017 11:10:59 AM</td>
</tr>
<tr>
<td>Hoover Basketball Company</td>
<td>4/25/2017 11:26:08 AM</td>
</tr>
<tr>
<td>Charlotte Hornets</td>
<td>4/24/2017 3:51:29 PM</td>
</tr>
<tr>
<td>The Bills Company</td>
<td>4/24/2017 3:08:35 PM</td>
</tr>
<tr>
<td>The Ravens Company</td>
<td>4/21/2017 1:13:15 PM</td>
</tr>
<tr>
<td>Phillies Company</td>
<td>4/21/2017 10:49:21 AM</td>
</tr>
<tr>
<td>Ranger Company</td>
<td>4/20/2017 3:13:59 PM</td>
</tr>
<tr>
<td>Rainy Day LLC</td>
<td>4/20/2017 11:46:41 AM</td>
</tr>
<tr>
<td>Big Sky Company</td>
<td>4/19/2017 3:33:40 PM</td>
</tr>
<tr>
<td>Stanley Cup Playoffs Company</td>
<td>4/19/2017 3:05:01 AM</td>
</tr>
<tr>
<td>The Broken iPhone Company</td>
<td>4/19/2017 10:48:03 AM</td>
</tr>
<tr>
<td>Sophires of CT LLC</td>
<td>4/18/2017 8:08:09 PM</td>
</tr>
<tr>
<td>History Company</td>
<td>4/18/2017 11:41:12 AM</td>
</tr>
<tr>
<td>Updates 125 Company</td>
<td>4/18/2017 10:09:25 AM</td>
</tr>
</tbody>
</table>

**Pending Wraps**

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample POP Plan Company</td>
<td>4/24/2017 1:42:27 PM</td>
</tr>
<tr>
<td>The Bob Company</td>
<td>3/15/2017 2:31:32 PM</td>
</tr>
<tr>
<td>TEST</td>
<td>2/10/2017 2:02:03 PM</td>
</tr>
<tr>
<td>Los Angeles Lakers</td>
<td>1/31/2017 11:51:46 AM</td>
</tr>
<tr>
<td>Los Angeles Chargers</td>
<td>1/31/2017 11:51:08 AM</td>
</tr>
<tr>
<td>The IT Company</td>
<td>1/24/2017 11:42:51 AM</td>
</tr>
<tr>
<td>Florida Gators Football Club</td>
<td>1/17/2017 4:51:09 PM</td>
</tr>
<tr>
<td>Windows Cleaning Company</td>
<td>1/17/2017 2:37:12 PM</td>
</tr>
<tr>
<td>The Michael Company - Copy</td>
<td>1/3/2017 11:12:21 AM</td>
</tr>
<tr>
<td>Southern California Environmental Protection Service</td>
<td>12/8/2016 12:53:40 PM</td>
</tr>
</tbody>
</table>
Dashboard

Overview

- 213 Completed Wraps
- 15 Pending Wraps
- 176/200 Wrap Docs Used
- 200/200 PCP Docs Used

Completed Wraps

- East Florida Hurricane Trackers
- Maryland Tourism Company
- Hoosier Basketball Company
- New Venture LLC
- Software Ventures Inc.

Pending Wraps

- Hoosier Basketball Company
- Charlotte Hornets
- May 7
- Completed: 60%
- Rainy Day LLC
- May 7
- Completed: 30%
- Big Sky Company
- May 7
- Completed: 30%

View All Wraps
Step #2

Crafting Your Dashboard
1. What does the user need most?

Key performance indicators?
Status for the peace of mind?
Activity feed?
2. Show value

A lifetime value-based metric

Get close to the money
Your Dashboard

Showing stats for: Last 7 days

Sep 10, 2017
Total sales: $1,089.08
From offers: $154.92

Total revenue: $6,542.38
From upsell pages: $2,450.09
Average conversion rate: 67.4%

Total lifetime revenue from upsell pages via CartHook: $45,220.08

skinny-bald.myshopify.com
Integrated successfully
8 Shopify funnels running
3. Add knowledge

Hints & tips
Promotions
Good Afternoon, Evgeniya!
Welcome back to your account dashboard. Check out these performance statistics and personalized tips from MailChimp.

Explore MailChimp

Campaigns
Define your Facebook ad strategy
Set clear goals for your ad campaign to increase brand awareness, ROI, and even subscribers.
Tips For Facebook Ads

Campaigns
Free marketing automation for all
Send the right message to the right people at exactly the right time—for free.
Read The Blog

Campaigns
Create campaigns on the go
Now you can create campaigns whenever and wherever you need to with our mobile app.
Find Out How
Improve the visual design

Be careful with color coding
Be careful with gradients
Pick a simple layout
April at a glance...

- **Total Revenue**: $4100.00
- **Total Expenses**: $50.00
- **Profit**: $4050.00
- **Total Trip Miles**: 2050
- **Total Paid Miles**: 2000
- **Total Fuel Cost**: $0.00
- **Total Fuel Miles**: 0
- **Fuel Cost Per Mile**: N/A
- **Total Cost Per Mile**: $0.02
- **Total Profit Per Mile**: $1.98
- **Fuel Mileage**: N/A
Dashboard

Total Revenue $7500 +2.5%
Total Expenses $5302 -34.1%
Total Profit $2500 -1.3%
Revenue per Mile $2.28 +2.5%
Expenses per Mile $1.31 +2.5%
Profit per Mile $0.98 +2.5%

Miles 1203 -12%
Miles Paid 1000
Miles Unpaid 203

Save on Loading Costs
Your expenses are a little high this month. You can probably cut back on loading costs, which are above the industry norm. Lorem ipsum dolor sit amet.

Don't Forget to Budget for Taxes
Lorem ipsum dolor sit amet, commodo appellantur cu eam. In vitae eripuit ponderum pro, quo ut vocibus vivendo, vero dicit clita ius cu. Ne per rerum referentur.
Scorpion Shipyard

**TOTAL RECOVERED REVENUE**
$90,787.47

**This Month**

**RECURRING REVENUE AT RISK**
$300.00

**RECOVERED RECURRING REVENUE**
$1,000.00
Empty state matters

Be careful with sample data

Placeholder illustration

Tips & hints

Onboarding steps
Dashboard

0 Transactions

15855 🟢 Successful
979 🔴 Fully refunded
1613 🔴 Partially refunded
755 🔴 Cancelled

NO CHARGES

Unfortunately we don't have any charges to be able to show you a graph. We suggest creating charges on Sandbox to discover what it will look like.
Pretty doesn't mean valuable. But strive for both.