MODULE OVERVIEW

Team dashboards people actually use: Seven steps

Adaptive module | ~20 min

Too many dashboards are prepared late at night for a committee meeting and leave the team indifferent: designed for senior management, they don't serve the people who do the work. This module turns the tool from solo reporting into a shared language: five to seven metrics at most (Miller's law), KPIs and OKRs combined, a team review in three zones, and the loop that closes each review, because a dashboard without an action plan is a thermometer without a thermostat.

LEARNING OBJECTIVES

01 Build the dashboard with its readers (the team, internal customers, and senior management) by asking what they need to know about your work.

02 Limit the dashboard to five to seven metrics: KPIs for day-to-day health, OKRs for three- or twelve-month ambitions.

03 Adapt the tool and pace to the team, from a shared spreadsheet to analysis you query in natural language.

04 Run the review in three zones (celebrate, analyze without blame, decide) and close every gap with a dated, tracked action.

WHO IT'S FOR

Managers who want to manage performance with their team, through shared numbers and joint decisions.

- **Prerequisite:** none

HOW THE MODULE WORKS

Self-paced, with practice tailored to each learner.

1 **Self-assessment**: on 9 dimensions, to gauge current habits and guide the practice.

2 **Expert video**: 10 minutes, with 3 pauses for reflection.

3 **Practice scenarios**: the first 2 chosen from the self-assessment, then 16 optional ones. Every answer gets feedback: what it leads to, and one way to improve.

4 **Dated commitment**: one action to try, written by the learner or picked from the suggestions.

5 **Memo to download**: key takeaways, questions, commitment, personal notes and checklists.

ASSESSMENT AND COMPLETION

Pass mark: 80%

The score takes into account your answers to the practice scenarios, your commitment and, where relevant, any additional learning activities. Passing requires a commitment and a score of at least 80%.

METHODS & MODELS

- Miller's law (5 to 7 metrics) – George A. Miller, cognitive psychology
- Team dashboard / stakeholder mapping – Afthonios management method
- Three-zone review (green/orange/red) – Afthonios method
- KPIs / OKRs – standard performance management tools

SOURCES & REFERENCES

- Amy Edmondson (Harvard Business School) – psychological safety: teams that dare to admit they don't understand learn faster
- George A. Miller, "The Magical Number Seven, Plus or Minus Two," 1956 – working memory handles only about seven items at a time
- KPIs and OKRs – performance management frameworks widely documented in the management literature
- Sarikaya et al., IEEE Transactions on Visualization and Computer Graphics (2019) – designing dashboards suited to decisions and users

- Module created by Afthonios.com.
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