

Dashboard Review Template

Turn dashboard data into executive-ready narrative. A structured framework for interpreting metrics, identifying anomalies, explaining context, and recommending actions — so dashboards drive decisions, not just decoration.

Category:	Reporting & Analytics
Audience:	Analysts, managers, data leads, operations teams
Use When:	Weekly reviews, stakeholder updates, metric deep-dives
Sections:	11 structured sections with interpretation frameworks
Principle:	A dashboard without narrative is noise. Add the story.

SECTION 1

Dashboard Health Check

Before interpreting data, verify the dashboard itself is trustworthy. Stale data, broken filters, or missing sources will poison your analysis.

CHECK	STATUS	NOTES
Data freshness (last updated)	OK / Stale / Unknown	
All data sources connected	OK / Missing / Partial	
Filters applied correctly	OK / Wrong / None	
Time range matches review period	OK / Mismatch	
Known data gaps or outages	None / Listed below	
Metric definitions unchanged	OK / Changed	

Rule: If any check fails, state it upfront in your review. Never present stale or incomplete data as if it were current truth.

SECTION 2

Metric Inventory

List every metric on the dashboard. For each, define what it measures, who owns it, and what "good" looks like. Metrics without context are just numbers.

METRIC	DEFINITION	OWNER	TARGET	CURRENT	STATUS

If you cannot define a metric in one sentence, it should not be on the dashboard. Remove or replace it.

SECTION 3

Anomaly Detection

Scan for anything unexpected. An anomaly is any metric that moved significantly, broke a trend, crossed a threshold, or behaved differently from its peers.

METRIC	EXPECTED RANGE	ACTUAL VALUE	DEVIATION	ANOMALY TYPE	SEVERITY

Anomaly Types

- Spike: Sudden increase beyond normal variance
- Drop: Sudden decrease below expected floor
- Trend break: Direction change after consistent pattern
- Divergence: One metric moves while its pair stays flat
- Flatline: No movement when movement is expected

SECTION 4

Context Layer

Numbers without context mislead. For every significant movement, add the "why" layer. What happened in the business, market, or operations that explains this?

METRIC MOVEMENT	BUSINESS CONTEXT	EXTERNAL FACTORS	ONE-TIME OR RECURRING

Discipline: If you cannot explain a movement, say "cause unknown, investigating" rather than guessing. Speculation presented as fact erodes trust.

SECTION 5

The "So What?" Framework

For each insight, answer three questions: What happened? Why does it matter? What should we do? If you cannot answer all three, the insight is incomplete.

INSIGHT	WHAT HAPPENED	WHY IT MATTERS	RECOMMENDED ACTION	OWNER

SECTION 6

Metric Relationships

Dashboards show metrics in isolation. Strong analysis connects them. When one metric moves, which others should move with it? Which ones did not?

PRIMARY METRIC	EXPECTED CORRELATED METRIC	DID IT MOVE?	IMPLICATION IF NOT

Broken correlations are often more interesting than the metrics themselves. If revenue went up but orders stayed flat, something structural changed.

SECTION 7

Narrative Summary

Write the story the dashboard is telling. This is what you present to leadership. Structure: situation, key changes, risks, and recommended focus.

SECTION	YOUR NARRATIVE (2-3 SENTENCES MAX)

SECTION	YOUR NARRATIVE
Overall situation	
Biggest positive signal	
Biggest concern	
What changed vs last period	
What needs attention now	
Recommended leadership focus	

SECTION 8

Audience-Specific Views

Different stakeholders need different things from the same dashboard. Tailor your narrative to who is reading.

AUDIENCE	THEY CARE ABOUT	DEPTH NEEDED	FORMAT
C-Suite / Exec	Trend direction, risks, decisions	High-level only	3-5 bullets
Director / VP	Root causes, trade-offs, resource nee	Medium depth	Narrative + table
Manager / Lead	Specific actions, timelines, owners	Detailed	Full breakdown
Analyst / IC	Methodology, data quality, edge case: Deep		Technical notes

SECTION 9

Action Items from Dashboard

Every dashboard review should produce actions. If it does not, the review was a viewing, not a decision session.

INSIGHT SOURCE	ACTION	PRIORITY	OWNER	DUE DATE	SUCCESS MEASURE

Test: If your dashboard review produces zero actions for three consecutive weeks, either the dashboard is wrong or the review process is broken.

SECTION 10

Dashboard Improvement Log

Track what is missing, misleading, or broken. Use this to continuously improve the dashboard itself.

ISSUE	TYPE	IMPACT ON DECISIONS	FIX NEEDED	OWNER	STATUS

Issue Types

- Missing metric: Something important is not tracked
- Misleading visual: Chart type or scale distorts reality
- Stale data: Source is delayed or broken
- Wrong granularity: Too aggregated or too detailed
- No owner: Metric exists but nobody acts on it

AI Prompt - Copy and Paste

Use this prompt to generate a dashboard review narrative from your data.

Act as a senior data analytics leader.

Review the dashboard data below and produce an executive-ready narrative that turns numbers into decisions.

Structure:

1. Dashboard Health Check (data freshness, gaps, filters)
2. Metric Inventory (current vs target, status)
3. Anomaly Detection (spikes, drops, trend breaks, divergences)
4. Context Layer (business reasons behind movements)
5. "So What?" Analysis (what happened, why it matters, what to do)
6. Metric Relationships (correlations that held or broke)
7. Narrative Summary (situation, changes, risks, focus)
8. Audience-Specific Takeaways (exec vs manager vs analyst)
9. Action Items (specific, owned, time-bound)
10. Dashboard Improvement Notes (what to fix for next time)

Rules:

- Lead with insight, not description.
- Every metric needs context. Numbers alone are noise.
- Flag anomalies explicitly. Do not bury them.
- Separate facts from interpretation.
- End with actions, not observations.
- If data is missing or stale, say so upfront.

Dashboard data: [PASTE METRICS/SCREENSHOTS HERE]

Time period: [PASTE PERIOD]

Business context: [PASTE CONTEXT]

Known issues: [PASTE KNOWN ISSUES]

How to Use This Template

- Run the health check first. Do not analyze bad data.
- Identify anomalies before writing narrative.
- Always answer "so what?" for every insight.
- Tailor depth to your audience.
- End every review with owned action items.

SECTION

Common Mistakes in Dashboard Reviews

- Describing what the chart shows instead of what it means.
- Presenting all metrics equally when only 3-4 matter this week.
- Ignoring broken correlations between related metrics.
- Using the dashboard as a status update instead of a decision tool.
- Showing green/red without explaining what changed.
- Averaging away important spikes or local problems.
- Presenting stale data without flagging the delay.
- Adding more metrics instead of explaining fewer better.
- Skipping the "so what?" — insight without recommendation.
- Never improving the dashboard based on review feedback.

Best Practices

- Start with anomalies. What is different this period?
- Add context to every movement. Numbers need stories.
- Use the "So What?" framework for every insight you present.
- Show metric relationships, not just individual metrics.
- Write the narrative summary last, after full analysis.
- Tailor the message to your audience level.
- Produce at least one action item per review.
- Track dashboard improvement items like product backlog.
- Kill metrics nobody acts on. Less is more.
- Review the review: did last week's actions happen?

Final principle: A dashboard is a lens, not a conclusion. Your job is to add the interpretation layer that turns data into decisions. Without you, it is just pixels.