KPI / Dashboard Readiness Checklist

Use this before building a dashboard, refreshing a KPI pack, or asking stakeholders to make decisions from a metric. The goal is simple: define the decision, trust the data, and make the handoff repeatable.

1. Decision and owner

[ ] What decision should this dashboard or KPI support?

[ ] Who owns the decision, and who only needs visibility?

[ ] What action should change when the metric moves?

2. KPI definition

[ ] Does every KPI have a plain-language definition?

[ ] Are numerator, denominator, filters, grain, and time window documented?

[ ] Do stakeholders agree which metric is primary vs. supporting?

3. Data readiness

[ ] Where does each source come from, and how often is it refreshed?

[ ] Are missing values, duplicates, late data, and manual edits understood?

[ ] Can the source be reproduced without a person rebuilding it by hand?

4. QA and trust

[ ] Have totals been reconciled against a known source?

[ ] Are edge cases and segment filters tested?

[ ] Is there a clear note for data limitations or assumptions?

5. Dashboard design

[ ] Can a stakeholder answer the main question in under one minute?

[ ] Are charts grouped by decision path instead of tool output?

[ ] Are definitions and refresh timing visible near the report?

6. Handoff and next cycle

[ ] Who updates the dashboard, and what breaks the process?

[ ] What should be reviewed monthly, weekly, or after each experiment?

[ ] What is the next analysis if the dashboard raises a new question?

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