

# Data Visualization Planning Tool - Conceptualization

Version 2.8, March 2017

What is the primary purpose of the visualization? Secondary purposes?

- |   |  |
|---|--|
| <input type="checkbox"/> Educate stakeholders               | <input type="checkbox"/> Attract attention |
| <input type="checkbox"/> Explore the data                   | <input type="checkbox"/> Entertain         |
| <input type="checkbox"/> Emphasize/clarify information      | <input type="checkbox"/> Celebrate         |
| <input type="checkbox"/> Engage and encourage participation | <input type="checkbox"/> Sell              |
| <input type="checkbox"/> Demonstrate transparency           | <input type="checkbox"/> Other _____       |

Who is the primary audience? Other audiences?

- |  |  |
|--|--|
| <input type="checkbox"/> Internal stakeholders | <input type="checkbox"/> External stakeholders |
| <input type="checkbox"/> Board?                | <input type="checkbox"/> Funders?              |
| <input type="checkbox"/> Staff?                | <input type="checkbox"/> Clients?              |
| <input type="checkbox"/> The researcher        | <input type="checkbox"/> The public            |

What attributes of the audiences need to be taken into consideration?

- |   |   |
|---|---|
| <input type="checkbox"/> Literacy           | <input type="checkbox"/> Vision (and color-blindness) |
| <input type="checkbox"/> Numeracy           | <input type="checkbox"/> Ability                      |
| <input type="checkbox"/> Language – native  | <input type="checkbox"/> Time                         |
| <input type="checkbox"/> Language – insider | <input type="checkbox"/> Other _____                  |

What contextual attributes need to be taken into consideration?

- Stakeholder expectations
  - Reporting obligations
  - Positive or negative slant
- Previous evaluations/reports (both findings and format)
- Political, historical, or social pressures

What is the container for the visualization? Other likely uses for it?

- |  |   |
|--|---|
| <input type="checkbox"/> Written report                    | <input type="checkbox"/> Other poster or infographic        |
| <input type="checkbox"/> Newsletter or newspaper           | <input type="checkbox"/> Website                            |
| <input type="checkbox"/> Presentation slides               | <input type="checkbox"/> Social Media                       |
| <input type="checkbox"/> Printed collateral communications | <input type="checkbox"/> Chocolate (or pin or sticker etc.) |
| <input type="checkbox"/> Academic poster                   | <input type="checkbox"/> Other _____                        |

What design skills and technical capacity are available for creating the final visualization?

What is the budget?

What is the timeline?

What is the key message?



# Data Visualization Planning Tool - Execution

Version 2.5, April 2016

*This tool assumes that you have already completed work reflected in the Conceptualization tool and thus are aware of, and will take into consideration, things such as the tools and expertise available for designing the dataviz, contextual issues, and the container in which your dataviz will be displayed.*

## Step 1: Select the data

Are you visualizing all of your data?

If no, why are you selecting the data you have chosen?

- To confirm or contradict hypotheses?
- To illustrate unexpected findings?
- To illustrate required content?
- Other?

## Step 2: Select the data visualization type

Use the chart selection tool or Juice analytics online chart chooser  
(appropriate for most widely-used data visualizations)

OR

Work collaboratively with a data artist to design the visualization  
(appropriate for more complex visualizations and/or those beyond your expertise)

## Step 3: Determine the [default] order of your data as it will be displayed (if needed)

## Step 4: Select the emphasis process and approach (if any)

Do you want to emphasize a particular aspect/message in your data?

If yes, how are you going to emphasize?

- Using color? What is your emphasis color?
- Using layout? (think Gestalt – like things grouped, patterns and variance, etc.)
- Using size? (larger = more important)
- Other?

## Step 4: Create and examine rough draft

## Step 5: Fiddle, draft, fiddle, fiddle some more, draft, until satisfied