Data Visualization Planning Tool - Conceptualization
Version 2.8, March 2017

What is the primary purpose of the visualization? Secondary purposes?
- Educate stakeholders
- Explore the data
- Emphasize/clarify information
- Engage and encourage participation
- Demonstrate transparency

- Attract attention
- Entertain
- Celebrate
- Sell
- Other

Who is the primary audience? Other audiences?
- Internal stakeholders
  - Board?
  - Staff?
- The researcher

- External stakeholders
  - Funders?
  - Clients?
- The public

What attributes of the audiences need to be taken into consideration?
- Literacy
- Numeracy
- Language - native
- Language - insider

- Vision (and color-blindness)
- Ability
- Time
- 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?
- Written report
- Newsletter or newspaper
- Presentation slides
- Printed collateral communications
- Academic poster

- Other poster or infographic
- Website
- Social Media
- Chocolate (or pin or sticker etc.)
- 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?

Developed by Susan Kistler, send recommendations for revisions to sjkonthego@gmail.com
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

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