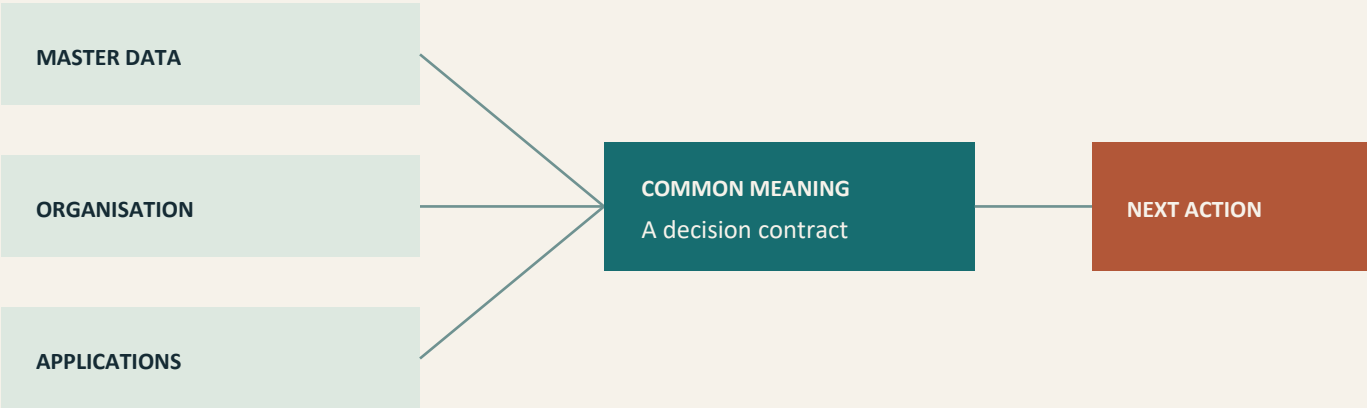


The Decision-Ready Dashboard

Plan the data, organisation and application contracts before you build.



Atul Rai

Introducing Arjun, the internal BI analyst

FIRST EDITION / 2026

AI-assisted drafting and design

PUBLICATION NOTE / FIRST EDITION

A workbook with an output

Build a decision specification, then test it with a real reader. The companion pack includes ten editable text templates and fictional case inputs. It does not include a Power BI file, a course, a certificate or consulting.

Names, evidence and authorship

Written by Atul Rai with AI-assisted drafting and editorial support. Arjun is the fictionalised internal BI analyst used to present the anonymised practitioner cases; he is not the author or an independent source. The underlying practitioner accounts were supplied by Atul Rai. City, customer and organisation names are fictional substitutes. New worked examples and role-play dialogues are fictional teaching material, not transcripts or additional reported outcomes. Cedar Retail and numerical examples are fictional. Reported outcomes are qualitative and have not been independently verified. The 30-second test is an author-proposed design heuristic.

Meet Arjun

Arjun is the internal BI analyst you will follow through the cases and fictional practice conversations. He asks the questions that connect business meaning, data evidence and decisions. The character helps us examine a situation without disclosing the people or organisations involved in the underlying practitioner experience.

About the author

Atul Rai works in business intelligence, leadership analytics and enterprise BI/AI system design, with experience in retail. This book develops his planning-first approach: agree the decision, business meaning and evidence before implementing the solution.

Terminology

Gross sales is the label used for the organisational allocation driver. Apply one documented definition consistently to actuals and targets. It is distinct from the net-revenue measure in the fictional Cedar exercise.

Copyright and edition

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CHAPTER

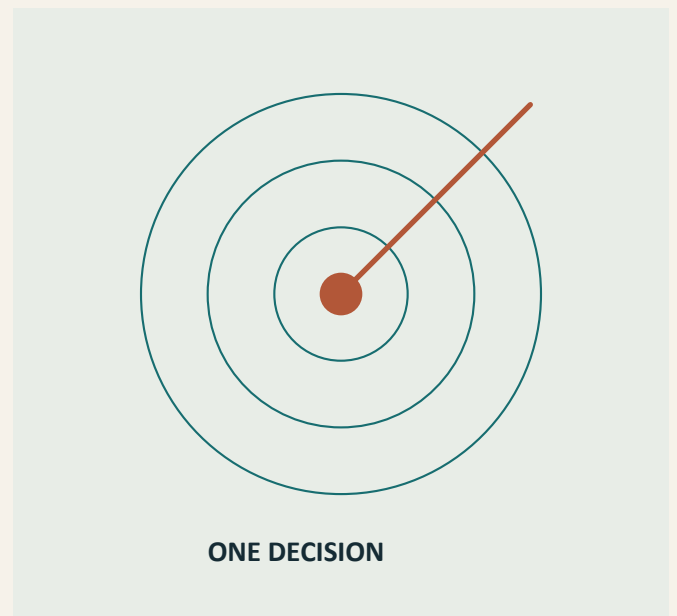
01

Use the workbook on one decision

A decision has a centre.

THE IDEA

Begin with one recurring decision. Follow Arjun as he connects the owner, choices and evidence before deciding what belongs on the dashboard. The first output is a shared brief, not a collection of charts.



ORIGINAL CONCEPT ILLUSTRATION

Use the workbook on one decision

Who this is for

This workbook serves BI analysts becoming business partners. Its central task is to plan the decision, data ownership and change contracts before implementing a dashboard. A manager can use the same brief to challenge delivery assumptions. You do not need Power BI to complete the exercises; a document or a sketch is enough.

The deliverable

By the end, assemble six core outputs: a decision brief, a metric contract, a data-quality gate, a dashboard sketch, an action log and a release checklist. The editable text templates in the companion pack follow the same order. Work on a recurring decision that you can observe again. Do not attempt to redesign every report at once.

Suggested use

Session one: name the owner, choices and constraints. Session two: agree measures and validate the case arithmetic. Session three: sketch the screen and rehearse a meeting. Session four: collect feedback, revise and decide whether the design is ready for a limited pilot. These are suggested sessions, not measured completion-time claims.

A useful stopping rule

Stop building if the owner cannot name an action, the required evidence cannot arrive before the decision, or a material definition is disputed. Record the obstacle and its owner. A documented reason to pause is a better outcome than releasing a persuasive screen that nobody can safely use.

Choose a decision small enough to observe

The situation

Arjun joins a retail organisation where every review begins with requests for more reports. The commercial team wants a sales dashboard, the supply team wants an inventory dashboard, and finance wants a margin dashboard. All three requests are reasonable, but none says what somebody will do after reading the screen. For this fictional exercise, Arjun selects one recurring question: which store needs a replenishment investigation before Monday's ordering deadline? This does not solve the whole organisation. It provides a bounded decision on which the analyst can learn.

Walk through the reasoning

He writes down the decision owner, the deadline, the available actions and the evidence that could distinguish those actions. The owner may confirm inbound stock, transfer inventory, request additional supply or make no commitment. Arjun asks what authority the owner actually has. A report recommending a purchase is incomplete if the reader can only recommend a transfer. He also records what happens outside the meeting: who verifies the unknowns and where the chosen action will be recorded. This links the screen to an operating process rather than leaving it as an isolated artefact.

What to carry into your work

The smallest useful scope is not necessarily the smallest dataset. It is the smallest decision for which the owner, choices and feedback can be made explicit. Arjun may need several data sources to answer that narrow question. Conversely, a hundred measures may still fail to support it. Judge the first deliverable by whether another person can explain the decision and the boundaries without asking the analyst to translate every chart. Record unresolved questions as work items instead of hiding them in an impressive-looking specification.

01 / ROLE PLAY / FICTIONAL DIALOGUE

Practise the conversation

These conversations are instructional examples, not transcripts of the practitioner cases.

Manager

I need visibility across every store, product and region.

Arjun

Which decision in the next review would that visibility change?

Manager

I need to know where we should investigate stock before committing more money.

Arjun

Then let us begin with the replenishment decision, its owner and its spending limit. We can record the wider reporting requests separately.

Your turn

Choose one dashboard request from your work. Rewrite it as a decision that recurs at a known interval. List three possible actions, including no change, and identify the person who can authorise each one. If you cannot name that person, make the ownership question your first deliverable rather than proceeding directly to a visual design.

Review your reasoning

A strong response contains an observable decision, a time boundary and an owner with appropriate authority. A weak response contains only a topic such as sales performance or customer visibility. Ask a colleague to read your brief and describe the next meeting in ordinary language. If their account differs from yours, clarify the brief before adding more requirements.

The question I would ask first**The evidence or agreement I would request**