

Dashboard Hygiene Checklist

30 questions you should be able to answer about every dashboard on your wall before the end of week 4 of a fractional CDO engagement.

Use it as: a 5-minute scoring sheet, one pass per dashboard.

Score: 1 if the answer is a clean single sentence. 0 otherwise.

Decide: 25 to 30 keep · 15 to 24 rewrite · below 15 retire or rebuild.

Ship: the one-page memo on the last page. Get the sponsor signature.

DISCOVERY CALL

Have a wall of dashboards and a CFO who only opens two of them?

Book a Dashboard Hygiene Audit. 4 weeks. One diagnostic. The board memo with five numbers per dashboard.

calendly.com/nick-valiotti/discovery-call-nick

Source of truth

Five questions. Score 1 per clean single-sentence answer. Max 5.

Q1 What single source does every chart on this dashboard read from?
0 / 1

.....

Q2 Is that source the warehouse, or is it an extract a human refreshes?
0 / 1

.....

Q3 If an extract, when was it last refreshed and who owns the refresh?
0 / 1

.....

Q4 Does the same metric appear on any other dashboard, and if so, do both dashboards read from the same source?
0 / 1

.....

Q5 Can the dashboard owner produce the SQL behind every chart in under five minutes?
0 / 1

.....

Definitions

Five questions. Score 1 per clean single-sentence answer. Max 5.

Q1 What does each KPI label on this dashboard actually compute, in one sentence per KPI?
0 / 1

Q2 Where is that definition written down, outside of the SQL itself?
0 / 1

Q3 Is the written definition identical to the SQL today?
0 / 1

Q4 When was the definition last changed, and who approved the change?
0 / 1

Q5 Does the executive who opens this dashboard most often use the same definition as the analyst who built it?
0 / 1

Ownership

Five questions. Score 1 per clean single-sentence answer. Max 5.

Q1 Who is the named human owner of this dashboard today?
0 / 1

Q2 Who is their backup if the owner is unavailable for a week?
0 / 1

Q3 Who is allowed to change a definition on this dashboard?
0 / 1

Q4 When did the owner last review the dashboard end to end?
0 / 1

Q5 If the dashboard breaks, who is the first human to find out, and how?
0 / 1

Cadence

Five questions. Score 1 per clean single-sentence answer. Max 5.

Q1 How often does the underlying data refresh?
..... 0 / 1

Q2 How often is the dashboard actually opened, by whom, based on the BI tool audit log?
..... 0 / 1

Q3 What is the decision cadence the dashboard supports?
..... 0 / 1

Q4 Are the refresh cadence and the decision cadence aligned?
..... 0 / 1

Q5 If the dashboard is open more than twice a week but no decision is made from it, what is the operational purpose of those opens?
..... 0 / 1

Decision linkage

Five questions. Score 1 per clean single-sentence answer. Max 5.

Q1 What is the single decision this dashboard supports?
..... 0 / 1

Q2 Who makes that decision?
..... 0 / 1

Q3 When, on what cadence, is that decision made?
..... 0 / 1

Q4 What threshold on the dashboard would change the decision?
..... 0 / 1

Q5 If the dashboard were removed tomorrow, which decision would degrade and within how long?
..... 0 / 1

Failure modes

Five questions. Score 1 per clean single-sentence answer. Max 5.

Q1 What happens to the numbers on this dashboard if the source pipeline silently breaks? 0 / 1

Q2 Who notices the break first, and within how long? 0 / 1

Q3 Is there an automated test on the source data, and where is its output routed? 0 / 1

Q4 Is there a sanity check (year-over-year band, expected-range, anomaly alert) on the headline KPI? 0 / 1

Q5 When was the last incident on this dashboard, what was the root cause, and is the fix still in place? 0 / 1

The one-page memo

Signed jointly by the fractional CDO and the executive sponsor.

01 **Three dashboards that survive.**

Named, with owner, and one decision each.

02 **Eight dashboards that get rewritten.**

Named, with the failing scoring section, the owner, and the rewrite-spec deadline.

03 **The rest get retired.**

A count, not a list. Retirement happens in week 6 or 7.

04 **One canonical metric layer.**

Owned by Finance or Data. Stored in a dbt project or a metric repository.

05 **Definition register.**

Every surviving KPI: definition, SQL, owner, last change date.

06 **Refresh cadence map.**

Decision cadence vs refresh cadence. Anything misaligned is flagged.

07 **Test plan and alert routing.**

One automated test per surviving dashboard. Slack alert on failure.

08 **Named executive sponsor.**

The human who is allowed to say no to new dashboard requests for the next twelve months.

