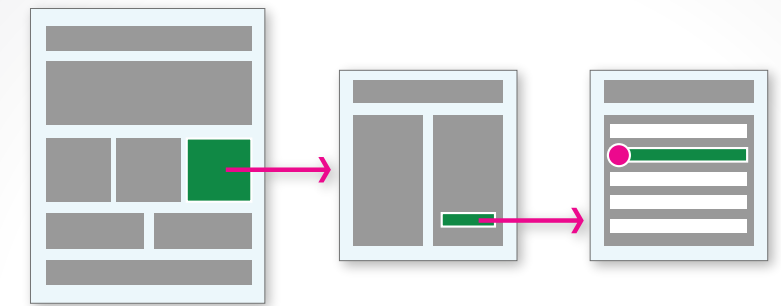


Driving User Adoption & Data Trust Transforming a Business Intelligence Dashboard for Usability & Impact

A Case Study on 4x Adoption Growth, Increased Trust, and
User-Centered Success



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Unlocking the Full Potential of the EBI Pipeline Dashboard

Our team took on the challenge of integrating UX design into the Enterprise Business Intelligence (EBI) team's Pipeline Dashboard project, which had previously lacked UX consideration. The product had a strong vision but fell short in execution. **Our mission:** transform an underutilized dashboard into a critical asset for sales, executives, and technology teams.

Key highlights:

- Driving the initiative from ideation to execution
- Overcoming organizational and technical obstacles
- Applying a user-centered UX process
- Leveraging user research to drive change
- Measuring success and impact

Before we dive in, here's what you need to know:

I spearheaded this initiative, driving the vision, strategy, and execution.

My Hands-On Role:

- UX & Product Leadership
- Cross-Functional Management
- Sketching & Ideation
- UX & Interactive Design
- User Research Framing & Guidance
(Execution handled by research team)

Key Players Involved:

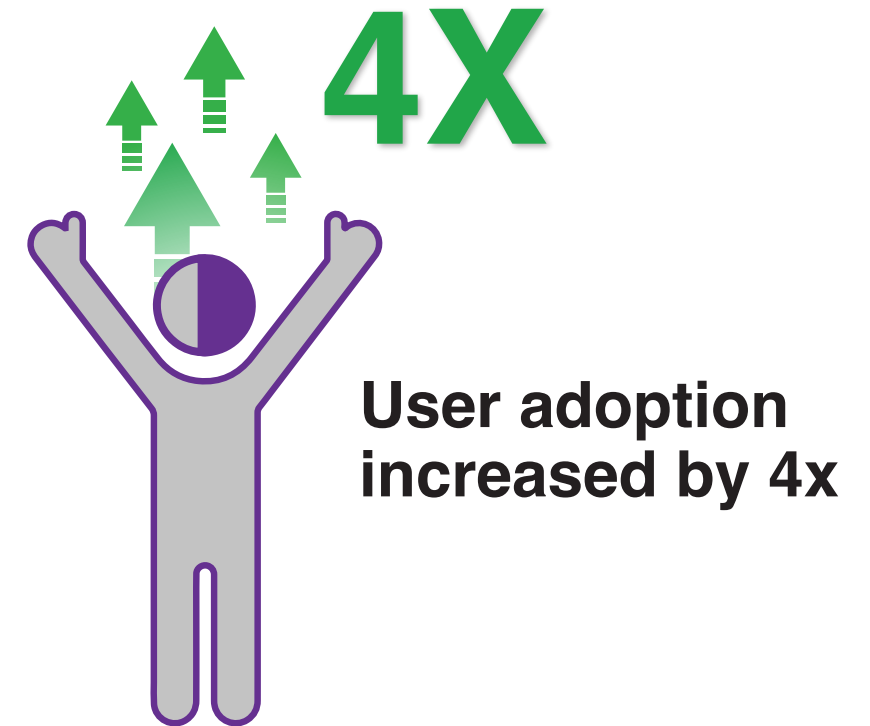
- 12-15 Stakeholders across 4 Business Organizations
- 1 Incredible BI Product Owner + 8 Team Members
- Change Management & Communications Team of 4
- Engineering & Development Team of 18

This was a true cross-functional effort, but my leadership ensured alignment, momentum, and ultimately—impact.

Spoiler Alert!

These were the Outcomes:

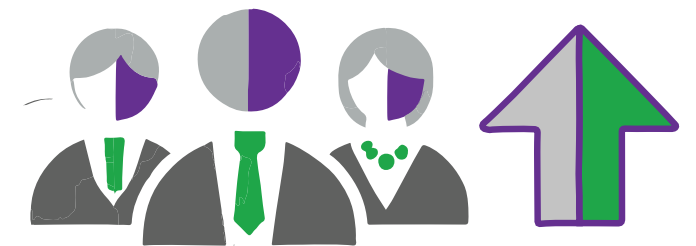
This transformation was not just about design - it was about **strategic execution**, cross-functional alignment, and business impact.



Page load speed improved by 60%



User-reported trust in data increased by 35%



Engagement among executives doubled

What was the **original goal** of the dashboard?

The Enterprise Business Intelligence (EBI) team embarked on an ambitious initiative to centralize metrics and analytics from sales teams, business units, and technology groups into a real-time, single-view Pipeline Dashboard.

The goal was to empower different stakeholders with insights:



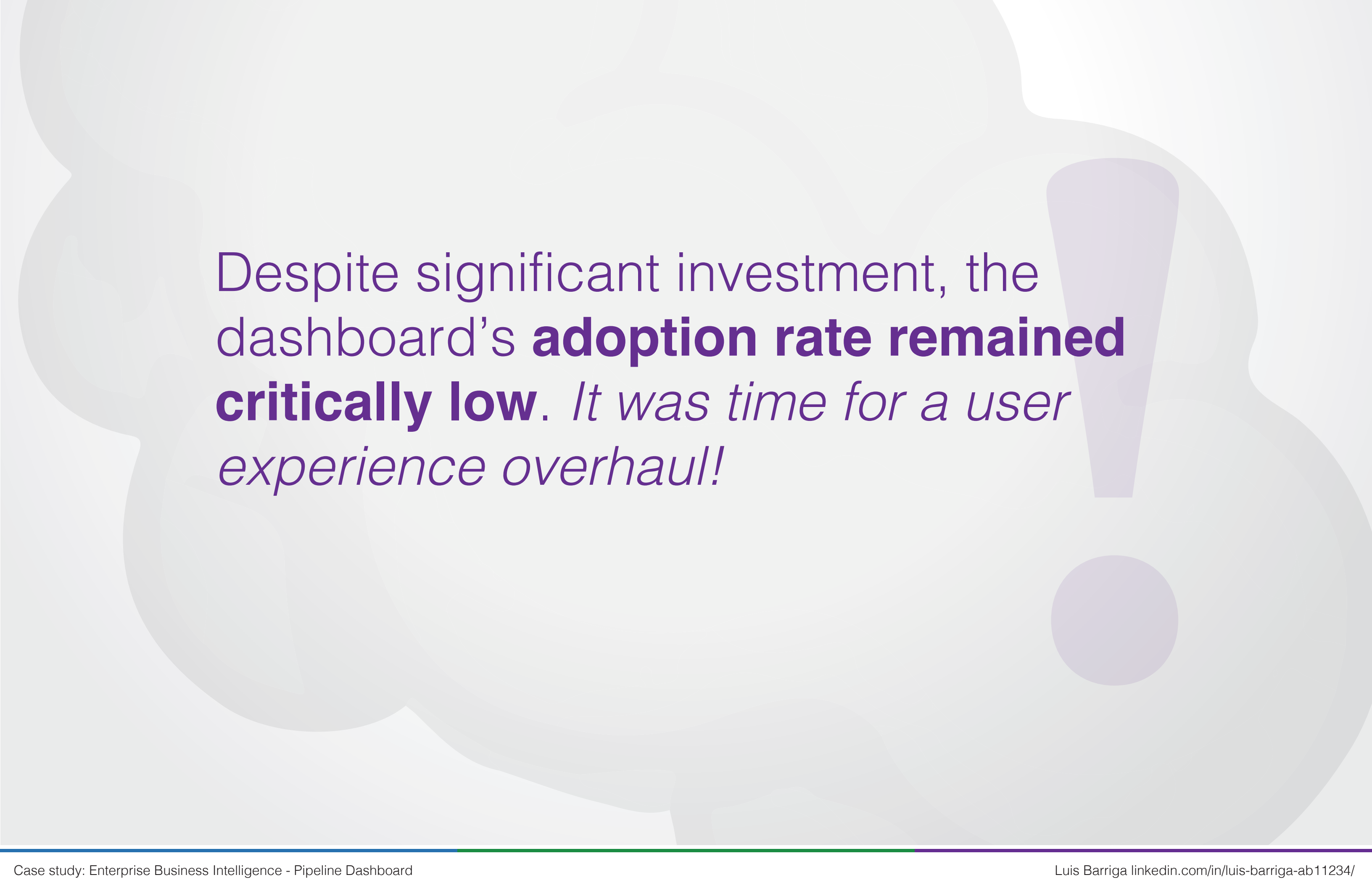
- **Sales teams:** Client data, managed licenses, product consumption, and new opportunities.



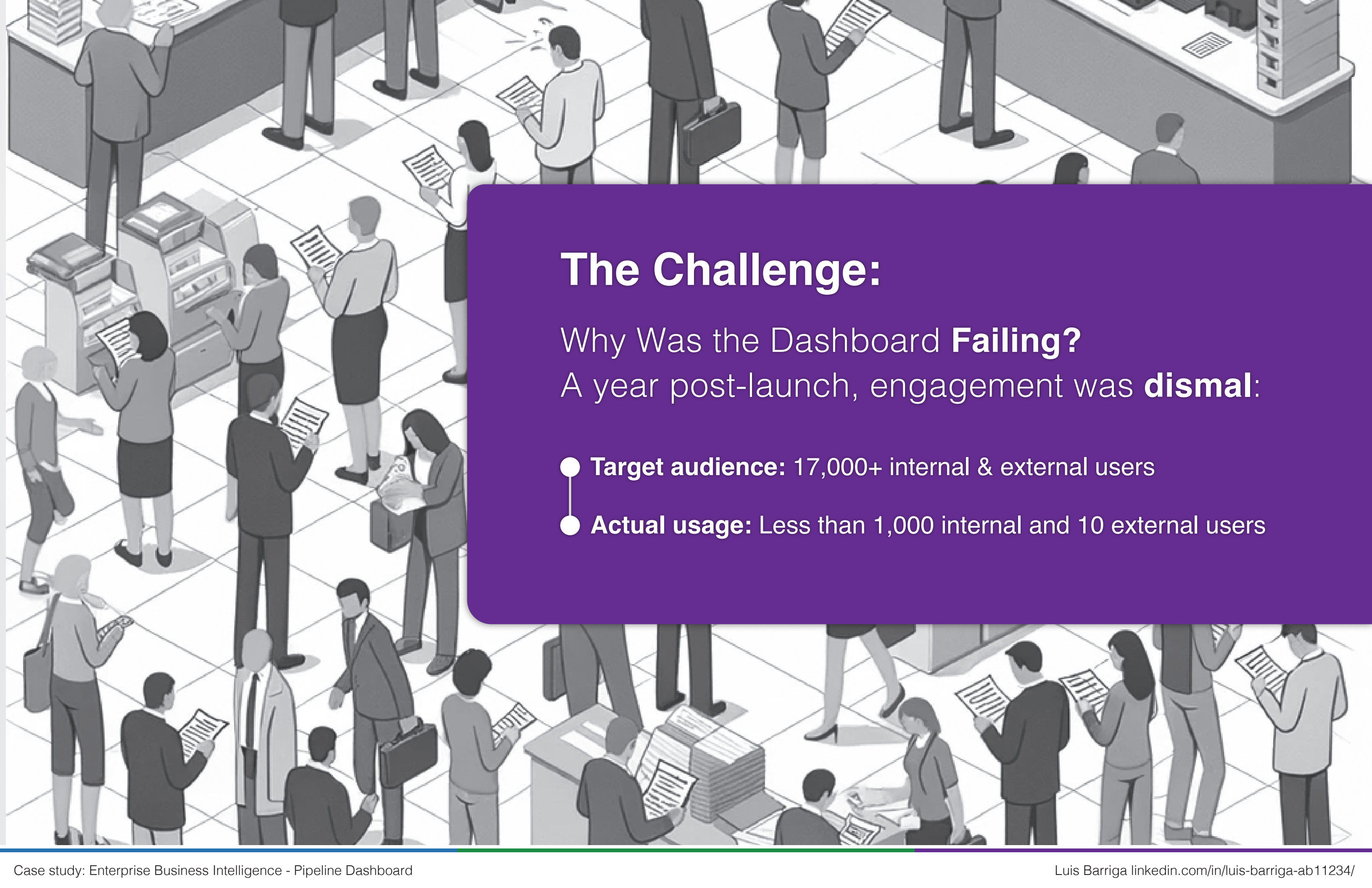
- **Executives:** Business health reports, key metrics, and analytics.



- **Technology teams:** System health ratings, usage trends, and performance insights:



Despite significant investment, the dashboard's **adoption rate remained critically low**. *It was time for a user experience overhaul!*



The Challenge:

Why Was the Dashboard **Failing**?

A year post-launch, engagement was **dismal**:

- **Target audience:** 17,000+ internal & external users
- **Actual usage:** Less than 1,000 internal and 10 external users

The UX Work Begins!

Benchmarking & Research

Understanding the problem to diagnose the root causes, I partnered with cross-functional teams to establish baseline data:

- **Heuristic Evaluation:** Using Jakob Nielsen's 10 Usability Heuristics, we pinpointed critical usability gaps.
- **Service Blueprint:** Mapped user interactions and dependencies
- **User Journey Maps:** Captured real-world workflows
- **Brand & Style Adherence:** Evaluated visual consistency
- **User Communication & Marketing:** Assessed awareness strategies
- **Dashboard Analytics:** Tracked usage and behavior patterns

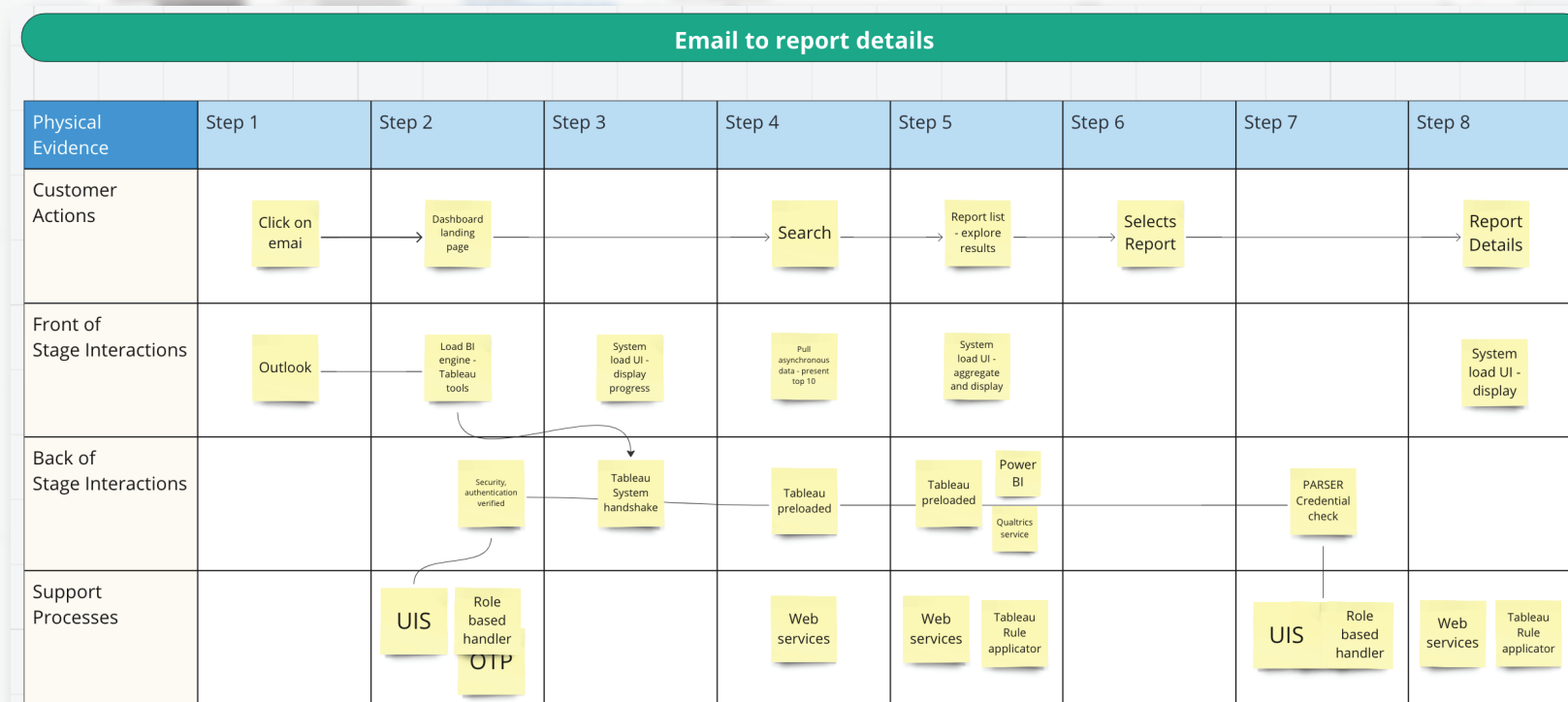
Research breakdown:

- **247 participants**
- **6-week research period**
- **4 dedicated UX researchers**

I encountered resistance from stakeholders reluctant to change existing systems. By demonstrating research-backed insights and framing UX as a business necessity, I secured buy-in and initiated redesign efforts.

Service Blueprint

- **Pain Points Identified:** Poor user flows & siloed processes.
- **Solution Mapped:** Streamlined workflows to align with user goals.
- **Business Impact:** Increased dashboard efficiency & adoption.



User Research & Key Findings:

Overcoming resistance our user research validated hypotheses and uncovered deeper issues:

- **Awareness gap:** Many users were unaware of the dashboard or its purpose.
- **Data trust issues:** Users preferred familiar tools due to discrepancies in data accuracy.
- **Usability challenges:** The interface was unintuitive, making navigation difficult.
- **Accessibility concerns:** Small fonts, low contrast, and poor layout made information hard to digest.
- **Performance bottlenecks:** Slow load times frustrated users.



Solution

A Strategic UX Overhaul!

Armed with insights, I developed a comprehensive four-phase redesign and adoption plan: 

1 Information Architecture Overhaul

- Simplified navigation and improved findability
- Restructured data categorization to align with user mental models
- Enhanced filtering capabilities for precision and speed

2 Visual & Interaction Redesign

- Designed wireframes and interactive prototypes across fidelity levels
- Applied UX best practices for readability, accessibility, and user flow
- Established clear visual hierarchy to reduce cognitive load

3 Data & Trust Enhancements

- Implemented data validation protocols to ensure accuracy
- Improved performance and load speeds
- Integrated real-time user feedback loops for continuous improvement

4 Awareness, Adoption & Change Management

- Crafted targeted messaging to drive visibility
- Aligned with change management for coordinated rollout
- Launched internal marketing to drive adoption
- Introduced workflows and policies to sustain usage



We leveraged **Tableau's capabilities** while pushing its limits to deliver a more intuitive, high-performing dashboard.

Design

The design process was an evolution, and broken up into the following stages:

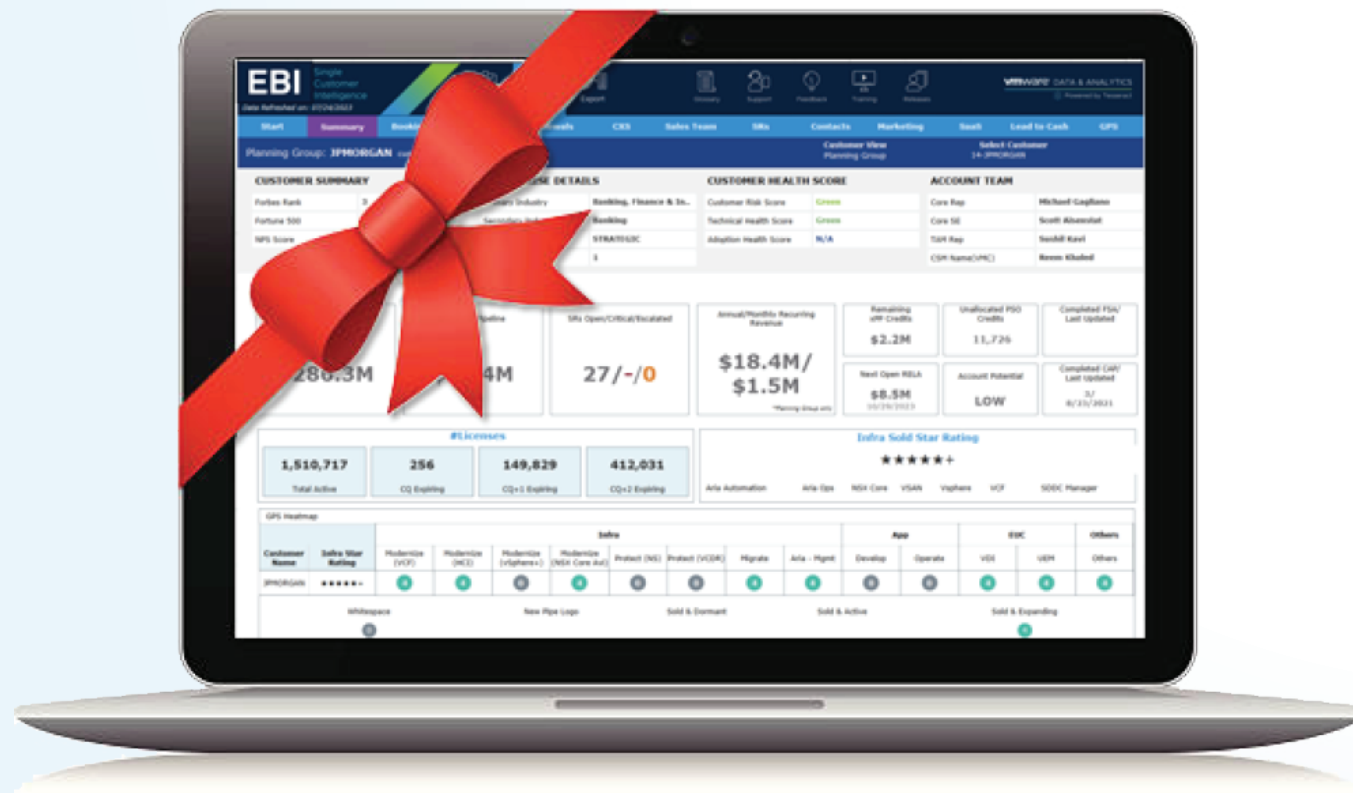
- **Ideation** – Gathered feedback from 247 users.
- **Wireframes** – Developed & tested with stakeholders.
- **Visual Design** – Applied accessibility & UX best practices.
- **Implementation** – Integrated with Tableau’s constraints.

In combination with brand styles and the design systems available we settled on an interactive and visual design that could be implemented with the limitations of Tableau and the Data Visualization systems.



Delivery & Implementation

Driving change beyond delivering designs and UX recommendations, I actively guided implementation:



- **Advocated for continuous UX funding**
- **Conducted training and roadshows to boost adoption**
- **Partnered with Change Management teams for communication strategies**
- **Developed key learning materials for onboarding**
- **Moved the product into ongoing UX support**
- **Established KPIs for success tracking**
- **Empowered executives to champion the dashboard internally**



Results & Impact

The transformation post-implementation, we saw significant improvements:

- **User adoption increased by 4x**
- **Engagement among executives doubled**
- **Page load speed improved by 60%**
- **User-reported trust in data increased by 35%**

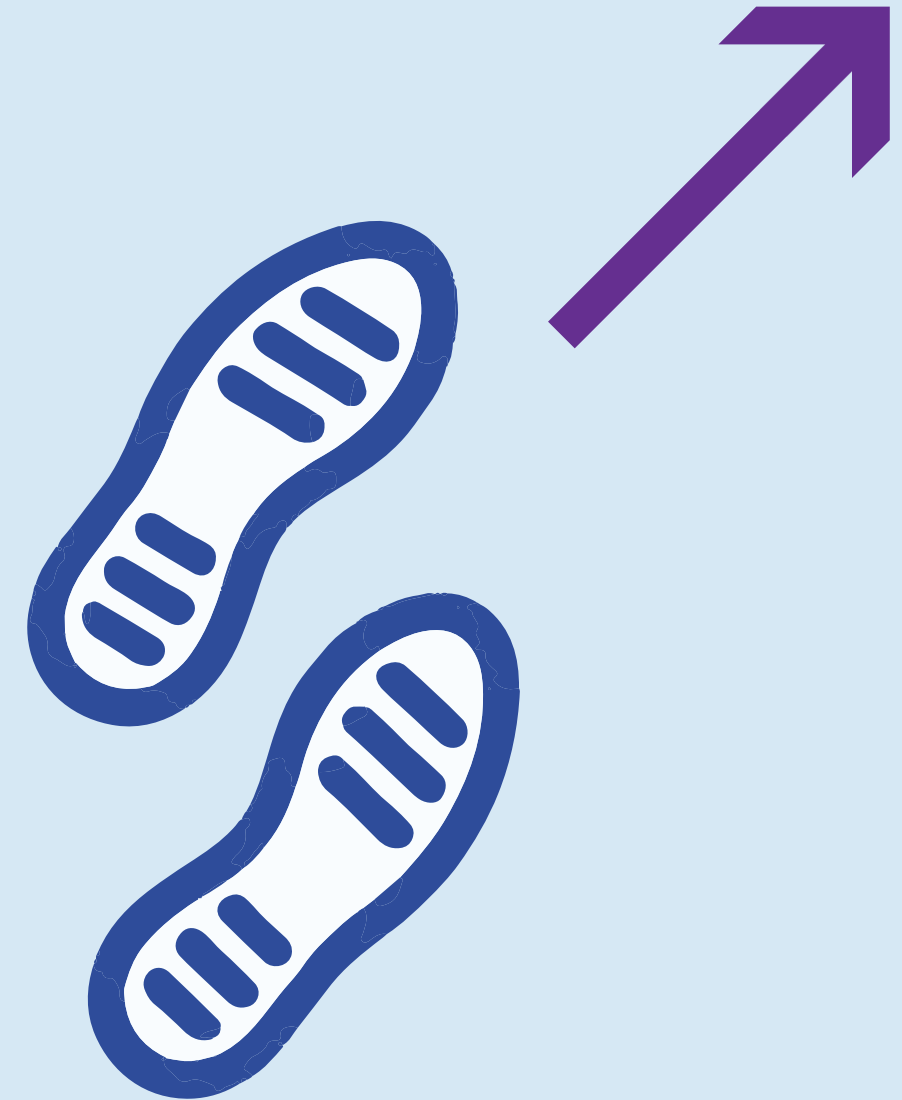
This transformation was not just about design - it was about **strategic execution**, cross-functional alignment, and business impact.

Next Steps:

To sustain success, I recommended:

- **Continuous UX research and iteration**
- **Expanding awareness campaigns**
- **Ongoing performance monitoring**

The EBI Pipeline Dashboard case study demonstrates the power of UX-driven transformation in enterprise environments. A well-designed product isn't enough - strategic execution is key.



How This Relates to You?

This case study is more than a UX success story - it's a blueprint for driving change in digital initiatives. If your organization faces:

- Low adoption of internal tools
- Usability and accessibility challenges
- Stakeholder resistance to change
- Trust issues in data visualization and reporting

**If you're facing similar challenges,
let's discuss how UX can transform
your projects and business!**

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- **LinkedIn:** [linkedin.com/in/luis-barriga-ab11234](https://www.linkedin.com/in/luis-barriga-ab11234/)

Ready to unlock the potential of your
product? Let's connect!