

Dashboard Implementation Checklist & Readiness Kit

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Keyword: free dashboard implementation checklist

Visible value before checkout: filled example, before/after worksheet, dashboard preview, workbook screenshot, calculator results, and usage scenario.

Use the scorecard, shortlist, pricing matrix, ROI calculator, RFP questions, and dashboard together.

Sample dashboard: review shortlist quality, risk flags, best ROI case, and missing evidence before demos.

Before/after: move from scattered notes to comparable vendor evidence and a written decision trail.

Current pain: Microsoft Power BI - Collect baseline cost, owner, and workflow friction before demos.

Budget-safe option: Tableau - Prefer clear plan limits, lower setup work, and exportable data.

Best-fit option: Looker Studio - Prefer workflow depth, reporting quality, and role permissions.

Implementation-safe option: Looker - Prefer migration help, onboarding clarity, and low admin burden.

Renewal-risk check: Metabase - Review cancellation, price increase, data export, and support terms.

Security check: Databox - Confirm SSO, audit logs, permissions, backups, and user offboarding.

Reporting check: Klipfolio - Ask for dashboard exports that prove value after 30, 60, and 90 days.

Integration check: Spreadsheet dashboard - Verify native integrations, paid add-ons, and middleware dependency.

Stakeholder review: Microsoft Power BI - Record who approved cost, risk, data migration, and final vendor fit.

Final decision: Tableau - Document why the selected route won and which tradeoff was accepted.

Post-purchase checkpoint: Looker Studio - Schedule adoption, usage, support, and renewal review dates.

Fallback route: Looker - Keep a lower-cost alternative if implementation risk becomes too high.

Client-ready note: Metabase - Summarize decision evidence for a client, partner, or finance reviewer.

Risk exception: Databox - Name any unverified claim and require written vendor confirmation.

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Operating record: Klipfolio - Store the completed kit beside the contract or renewal file.

Conservative: monthly \$259.33 annual \$3112.0

Low budget: monthly \$155.17 annual \$1862.0

Agency operator: monthly \$986.0 annual \$11832.0

SMB operations: monthly \$531.0 annual \$6372.0

Expansion case: monthly \$1661.0 annual \$19932.0