Dashboard Maps with Mindjet MindManager® and Power Markers™

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What is a "dashboard map"?

Can any map be a dashboard map?

How do we design and create dashboard maps?

How does Power Markers turn ordinary maps into dashboard maps?

So many questions, so little time.

What exactly is a "dashboard map"?

If you have been using MindManager for a while, you will almost certainly have encountered the term "dashboard map". Many different types of map are called dashboard maps, but what actually distinguishes dashboard maps from other maps? What makes a map a dashboard map?

It is commonplace today for words with specific meaning to become diluted through liberal use. Pictures became "visualisations", open-ended chats became "debates", and everyone is a "consultant". You will often find the term "dashboard" applied to many kinds of image or map, whether or not they are dynamic or actionable.

The dashboard in a car has the specific task of displaying essential information in a way that is quick to read and respond to. Driving would be so much harder if you had to choose from a menu and press a button to get a printout of your current speed. Dashboards need *design*.

The fundamental properties of a dashboard map are:

- **Scope**: the map relates to a clearly defined situation or subject
- **Frequency of use**: it is a map which you regularly access and update
- **Dynamic**: the map is always a snapshot of something that is changing over time, either through manual or automatic updates
- **Process**: there is some kind of process associated with the contents, and the information displayed measures this process
- **Prioritisation**: it visually summarises and prioritises key information so that current status can be visually assessed
- **Response**: it is designed to help you to respond to a current situation and take appropriate action
- **Usability**: it is efficient to maintain and update for the typical events that occur during the lifecycle of the situation or process

The above definition helps us to filter out things that are not dashboard maps, including presentation maps, "brainstorm" maps, navigation maps and stale maps that are not up to date. Many maps have a few of the above properties, but not many have them all. But what is clear is that mind mapping software has great potential for realising all of the above.

Where do dashboards come from?

Databases are a great way to generate dashboards. A report from a database ticks all the boxes. For example, a report of customers who made enquiries but did not place an order is nicely focused, has a clear process and action associated with it, and gives you a useful insight into the situation. If the report returned three names, you could feel comfortable about your sales process. If it returned three thousand, not only would it be a great list of people to contact, but it might be telling you there is a problem with the sales process too.

The list-type output from databases is perfect, but the input side sorely lacks the "big picture". It is usually difficult or even impossible to do a bit of creative thinking, sketch out some alternative strategies, or store some interesting but only vaguely related information in a database. The value of a database is proportional to the amount of time invested in keeping it clean and tidy, which is painstaking work. The upkeep of databases is their biggest weakness. There is also a minimum level above which a database pays dividends; for small or short projects, the set-up cost can be more than the value returned.

From the other end of the scale, software mind maps are perfect for free thinking, collecting and organising diverse information and ideas, and making sense of it all by evolving structures. The usual fate of software maps is to grow, and grow, and keep growing, like magic beanstalks. This is not a problem for the author while the project is active, but it can be a problem under other circumstances. The threshold at which someone else has trouble following your map is probably far lower than you hope, and it can be tough to return to a big map a year later, even if you wrote it yourself. The fundamental issue with software mind maps is that while they make it fantastically easy to create, collect, organise and focus, it is often hard to find specific items again. The "context" that adds so much value to the topics is also the key to finding them again; if you can't remember it, or can't follow the signposts to a context in your map, it can become tedious to locate a specific piece of information. Knowing it is in there somewhere just adds to the frustration. Creating a map is a journey full of anticipation; you are looking forwards, and not backwards to see where you have come from. Most of us have had the experience of parking our car somewhere, looking forward to the play, film or restaurant meal, and being unsure where you actually parked afterwards. You were too busy focusing on the destination to note landmarks for the return journey. Maps can be like that too, unless you are really careful about how you signpost things, and take the time to label things that are completely obvious while they are still completely obvious - because you won't remember them forever.

What do dashboard maps need to tell us?

When faced with a comprehensive map that reflects an ongoing situation, the same kinds of question come up every time:

1. What requires my attention right now?
2. How up to date is this map?
3. Where did I leave that web page link / attachment / login name / great idea / read-me-first document?
4. Where is the right place to add a new issue or idea?

One solution to dashboard maps is to make a map of *lists* to begin with; things to do this week, things organised by who is doing them, things organised by priority and so on. It will probably take you less than five minutes to discover that trees do this pretty badly, because most things need to be in more than one place at the same time. Duplicating the same item on the "tomorrow" list and the "critical issues" list is not only tiresome, but is a recipe for eventually losing control.

Fortunately, maps offer plenty of other options - icons, fill colours, text labels and so on, which can be used to "code" the contents of a map and create groupings *across* the branches. While images and colour in mind maps were originally intended to assist recognition and recall, it is natural to regard topics marked with the same image or colour as having something in common. For example, we can visually mark all Priority 1 items with the same icon, and easily spot them in the map. MindManager also has the ability to filter the map, so that only topics containing certain markers are visible. But filtering the map itself to get at a certain type of item destroys the big picture and/or the context around a topic at the same time, and if the results are spread over a large map and cannot all be seen at once, it is becomes laborious to work with them as a group.

Extracting sorted lists from visual structures

Power Markers™ for Mindjet MindManager® effectively takes the filtering of map markers out of the map and puts it in a "Hot Lists" task pane, always in view alongside the map. Instead of modifying the view of the map itself, it constantly updates lists of topics that match certain criteria. These can be more sophisticated than just a single marker, such as "unfinished actions due this week".

While it is very handy to have an instant list of "things to do tomorrow", the implications of separating out the list-making function subtly extend beyond the value of the lists themselves. What it does is free up the map to be organised for navigation of the subject, without making any compromises for list-making in the map itself. So you don't need to have a tree in your map for "Important stuff" - these topics will be visible in the Hot Lists, wherever they are in the map. This means that you can focus on organising your map for navigation and summarisation, and ignore all other criteria.

The dashboard map can be organised by subject, not by status
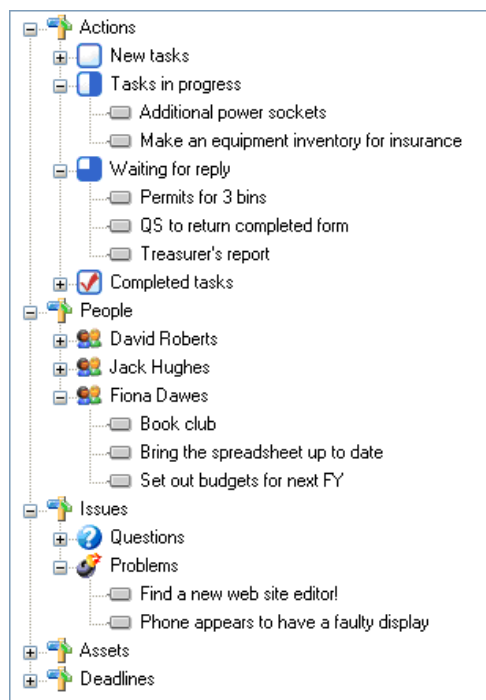
The **Hot Lists** extract and organise dynamic status information from the map

Questions 1, 2 and 3 above are answered immediately by looking in the Hot Lists. Question 4 is answered by navigating the map. The lists and the map are optimised to make both easy. When designing your lists, your focus is "What will l need to know to take quick decisions and identify next actions?" When designing your map, the only thing you need to focus on is "How will I find this particular material again?", and make sure that the path to it is clear and unambiguous. This will save a lot of time later when you want to add more information.

A "dashboard map" has the potential to combine the free-form capture and organisational aspects of a visual map with the practicality of filtered lists produced by a database report. It does the following:

- It answers the question "What requires my attention?" by visual mark-up near the centre of the map, or by looking in lists
- It answers the "Where is... ?" questions by looking in a list of assets organised by type
- It answers the "How up to date... ?" question by looking in lists of items organised by status
- It answers the "Where do I add... ?" questions by presenting a highly navigable big-picture view of the subject

What are the steps in designing a dashboard map?

The beauty of mind mapping software is that you don't need to have a perfect scheme before you can start work. You can start anywhere and gradually add refinements to both content and structure - as Michael Gerber puts it in the E-Myth model, working both in your business and on your business. But if you wanted to plan out your dashboard in advance, then you will be off to a better start.

1. Identify the **scope** - what project, subject area, activity or issue the dashboard reflects. If it is something that will be finished in a few hours, you won't need a dashboard. If it is going to take weeks or months of periodic updates, issues and changes, then you definitely need a dashboard.
2. Think about the **process** that your project will entail. What kinds of update are likely to be needed? What would be a typical interaction with the map? For example, if you are keeping track of actions, then you will need to add an action to the map, check its status from time to time, add extra information around it and mark it as complete when done, and keep track of what actions remain open. Action-based dashboards are the most common type.
3. Think about what kind of information you need back from the dashboard in order to keep on top of the subject. You will need to create markers that allow you to assess status and determine the need for action. It will also be helpful to be able to quickly find frequently used information; for example, if your dashboard was about developing a web site, then a list of login links for back-end administration pages and services would be useful to have only one click away. You can then define the markers you will need in your map, and how the lists in the Hot List will enable you to assess status quickly and take action.
4. In some cases, you might benefit from a high-level visual alerting system that shows you vital status information at a glance. A common example is to use highlighting that rolls up to the centre of the map to indicate overdue actions. You can then see at a glance whether immediate intervention is required, without even looking in the Hot List or drilling down into the map.
5. You can then design the map itself to capture and organise all the detail within the scope of the dashboard. One technique for doing this is to imagine that you need to explain it to someone else, using a map. This is obviously useful if you are sharing the map with others, but no less useful if you are working alone. How would you introduce someone to the subject? Which are the big ideas to grasp first, before they can be broken down into detail? Make sure that you could have a conversation about your map with only the main topics in view. If you could not give someone else a coherent explanation using the main topics alone, then this is a sure sign

that you will have trouble navigating the map yourself later on. Go back through the map and review the signposts that you have created to each section. Are they ambiguous? Is there something still missing from the whole picture? Does it seem that some things should be in more than one place? These are indicators that your map might be usable today, but hard work in a few weeks time.

Fortunately, Power Markers does not mind at all if your map is a complete mess - it can still pick out unfinished actions, or topics with hyperlinks, for example. The only area where you will have difficulties is when you want to add something new to the map, and cannot find the right place, or cannot choose between two "right places". Or you may have difficulty locating something that is not labelled so that Power Markers sees it and can show it in a list. When you get more deeply into this, you may find that it is useful to use a marker for things that you suspect are in the wrong place and need more thought, but not right now. Power Markers can then help you to improve the structure of your map over time.

Power Markers version 2 is available at

www.olympic-limited.co.uk/mindmanager-add-ins/power-markers/

For more information, please contact

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