

Exercise 6.7: transition from dashboard to story

In Chapter 1 of *SWD*, I drew a distinction between exploratory and explanatory analysis. In a nutshell, exploratory is what you do to understand the data and explanatory is what you do to communicate something about the data to someone else.

I consider dashboards to be a useful tool in the *exploratory* part of the process. There is some data that we need to be looking at on a regular basis (weekly, monthly, or quarterly) to see where things are in line with our expectations as well as where they are not. The dashboard can help us identify where there might be something unexpected or interesting happening. However, once we've found those interesting things and want to communicate them, we should take that data *out* of the dashboard and apply the various lessons that we've covered.

Let's look at an example dashboard and practice how we can move from exploratory dashboard to explanatory story. Refer to Figure 6.7a, which shows the Project Dashboard. You'll see demand and capacity breakdowns by a variety of categories (by region and department). The metric being graphed across the dashboard is project hours.

This may feel familiar, as we've looked at some of this data already in Exercises 2.3 and 2.4. Spend some time studying Figure 6.7a, then complete the following steps.

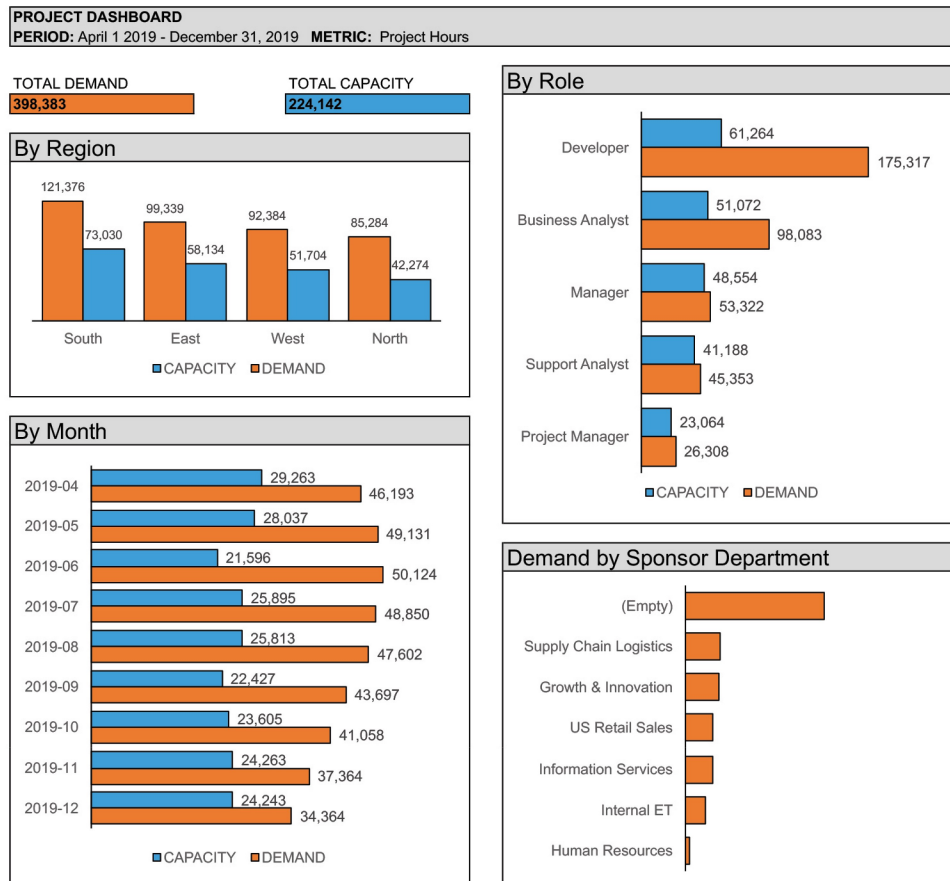


FIGURE 6.7a Project dashboard

STEP 1: Let's start by practicing putting it into words. Write a sentence describing a takeaway from each component of the dashboard in Figure 6.7a.

STEP 2: Do we need all of this data? It may be important to look at project hours cut by each of these dimensions as part of our exploration of the data, but not all of the data is equally interesting when it comes to communicating it to our audience. Imagine you need to tell a story with this data: which parts of the dashboard would you focus on and which would you omit?

STEP 3: Create a visual story with the elements you selected to include in Step 2. Make assumptions as needed for purposes of the exercise. How would you show the data? How will you incorporate words? Decide whether you'll present live or send the information off to be consumed on its own. Optimize your approach for the scenario you've chosen.