

# STORY TELLING WITH TABLEAU

Marketing is the study and management of exchange relationships. Marketing is the business process of creating relationships with and satisfying customers.



## Analytics

To get your company's name out there, you need to make sure.



## METRIC & KPI

To get your company's name out there, you need to make sure.



## LAG & LEAD METRIC

To get your company's name out there, you need to make sure.



## 4 Components

To get your company's name out there, you need to make sure.



## 4.1/ Business Context

To get your company's name out there, you need to make sure.



## 4.2/ Stakeholders

To get your company's name out there, you need to make sure.



## 4.3/ Reporting Period

To get your company's name out there, you need to make sure.



## 4.4/ Story with Data

To get your company's name out there, you need to make sure.



## Data Manipulation

To get your company's name out there, you need to make sure.

# METRIC & KPI

Metric and KPI's are the language of Business

## METRIC

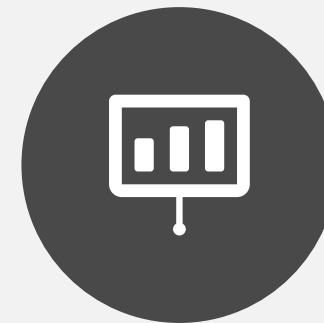
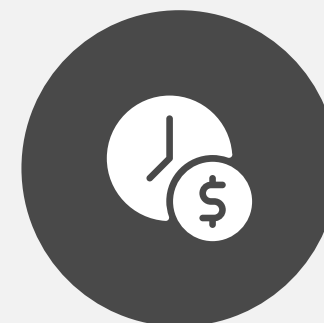
# VS

## KPI

Measure the performance of different functions of a business

Usually have an industry benchmark

Driven by a tactic, an individual, and/or a small group in a team



Measure the progress of the most important objectives of the business

Usually set by the company based on the objectives(s)

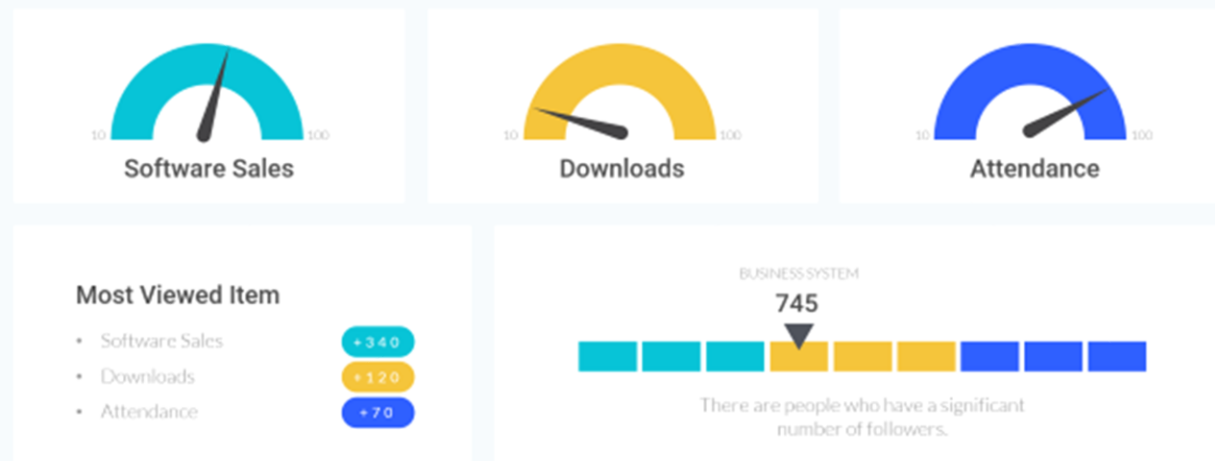
Driven by multiple strategies and metrics (sometimes cross-team) in a company

# 4.4/ Story with Data

Placing your charts can make the difference in getting your story right or getting your stake holders to take action

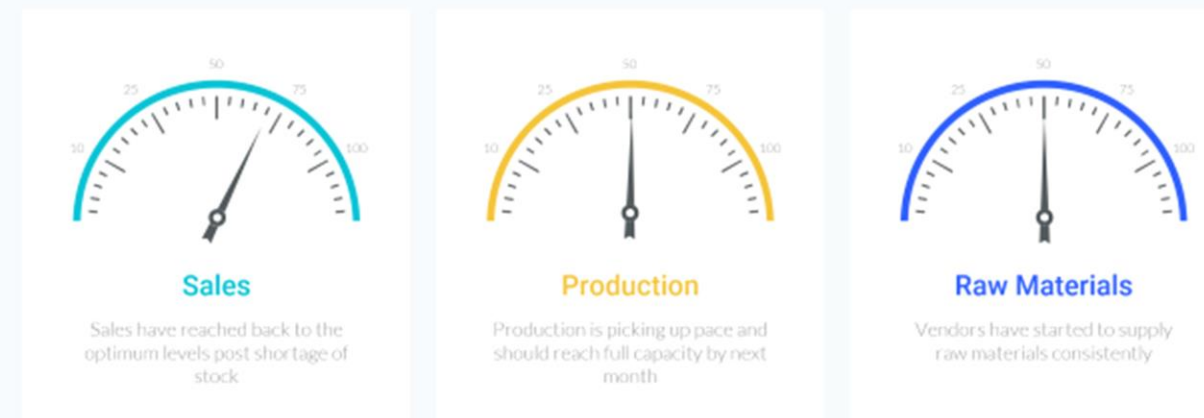
## Z Format

Z format is the most common guide to help you place charts in a way that tells a story



## LEFT TO RIGHT

Use this templates when you want to inform about the metrics



## TOP DOWN

Used when you want some action to be taken by the stakeholder

**3 Steps Approach**  
1/ Show Problem with a compelling outcome you plan to achieve  
2/ Back with evidence or solution you propose to achieve the same  
3/ Call to action or Budget request

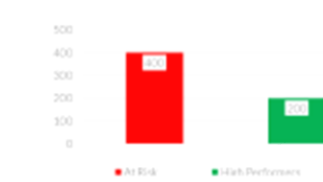
### 1/ Attrition has doubled



### Assumptions

Write the assumptions used to create this view

### 2/ Prioritized Candidates



### Solution

Show evidence of the solution working or steps on how you plan to achieve the same

### 3/ Budget for Retention

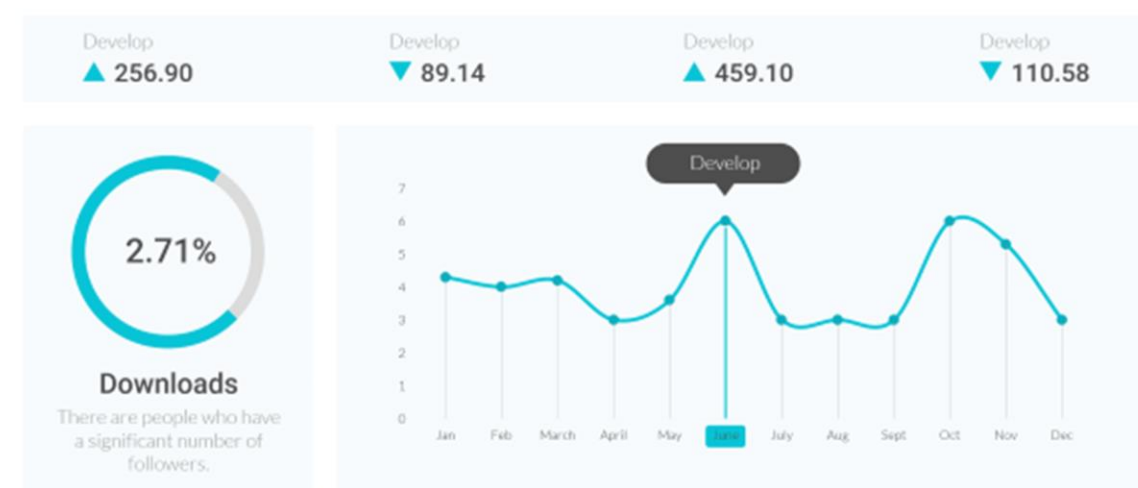
**\$200,000**

### Call to Action

Points on what you will require by when. If not done, then let them know the impact

## Z with KPI Example

When you want to put emphasis on a certain metrics, a KPI card is the best



## LEFT TO RIGHT

BAR Charts are easiest to read and always work the magic to communicate the story



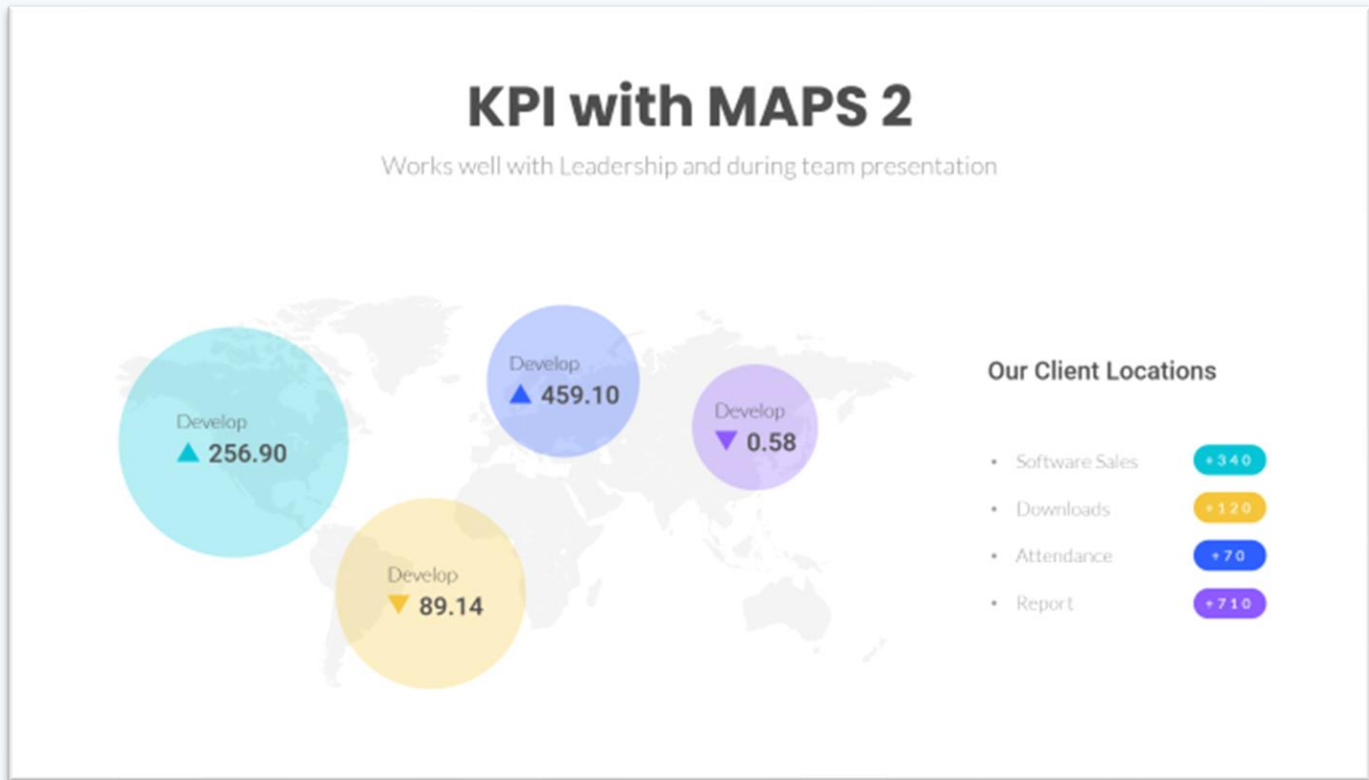
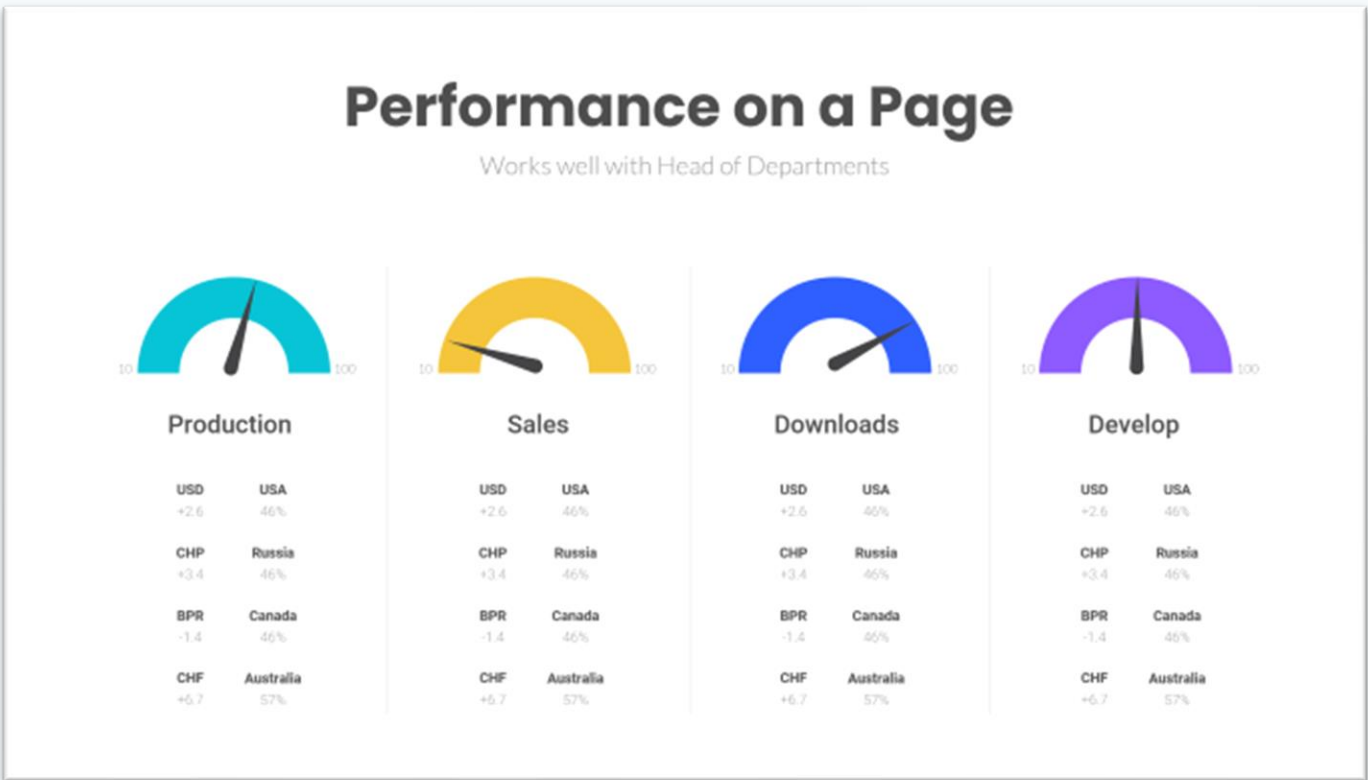
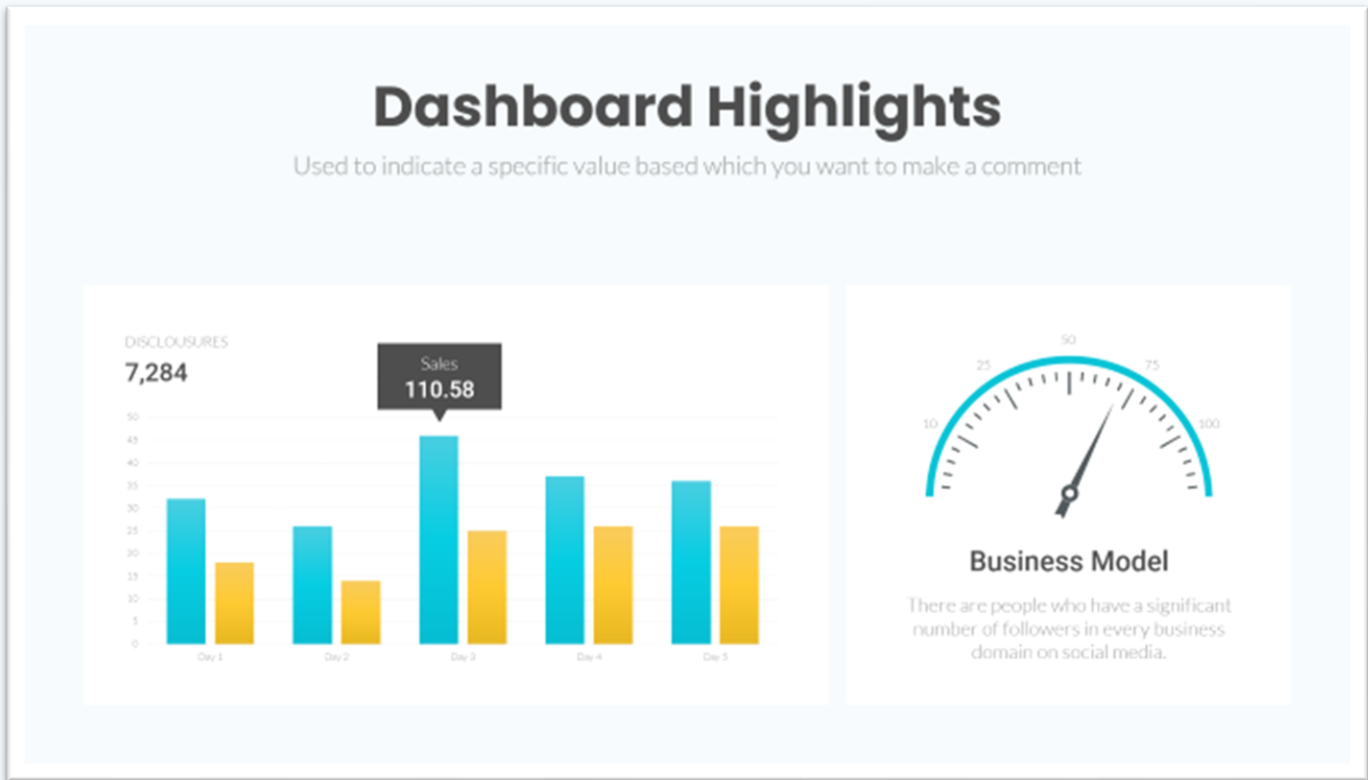
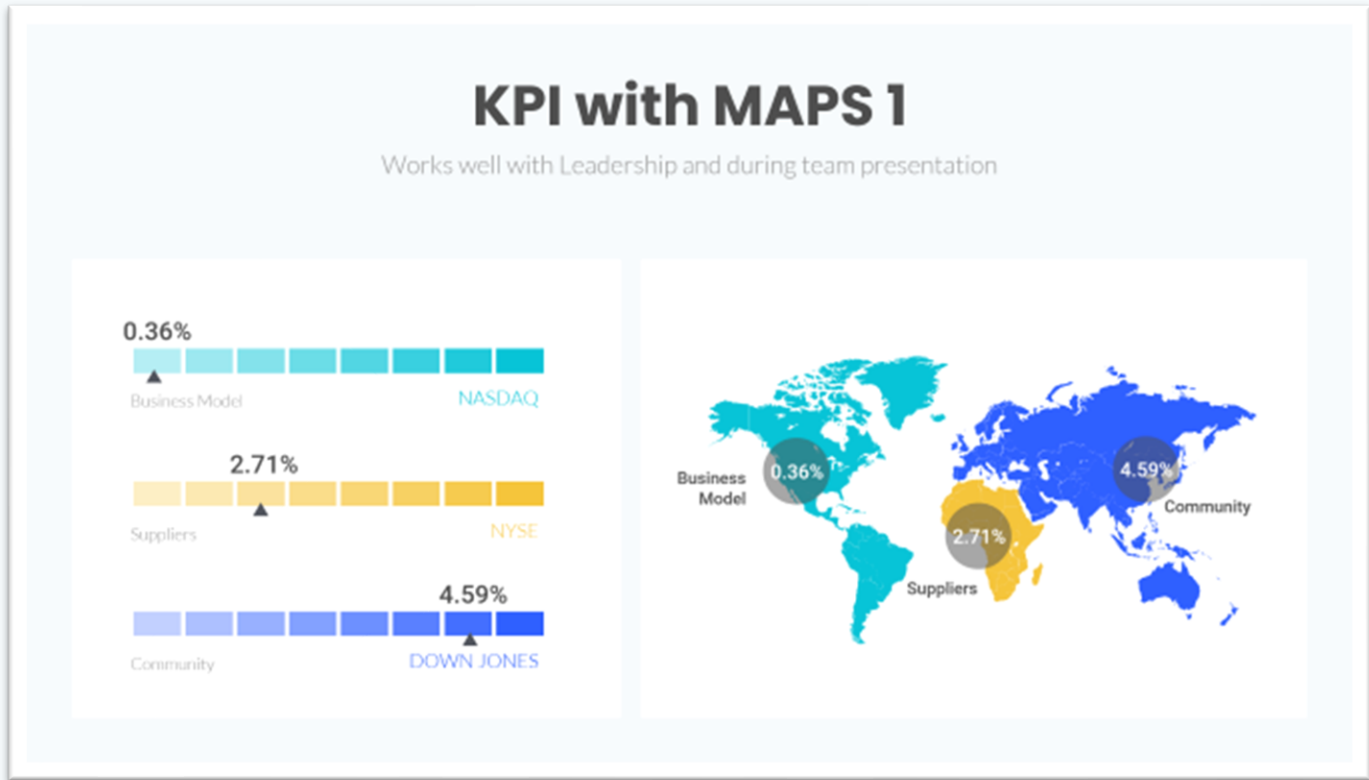
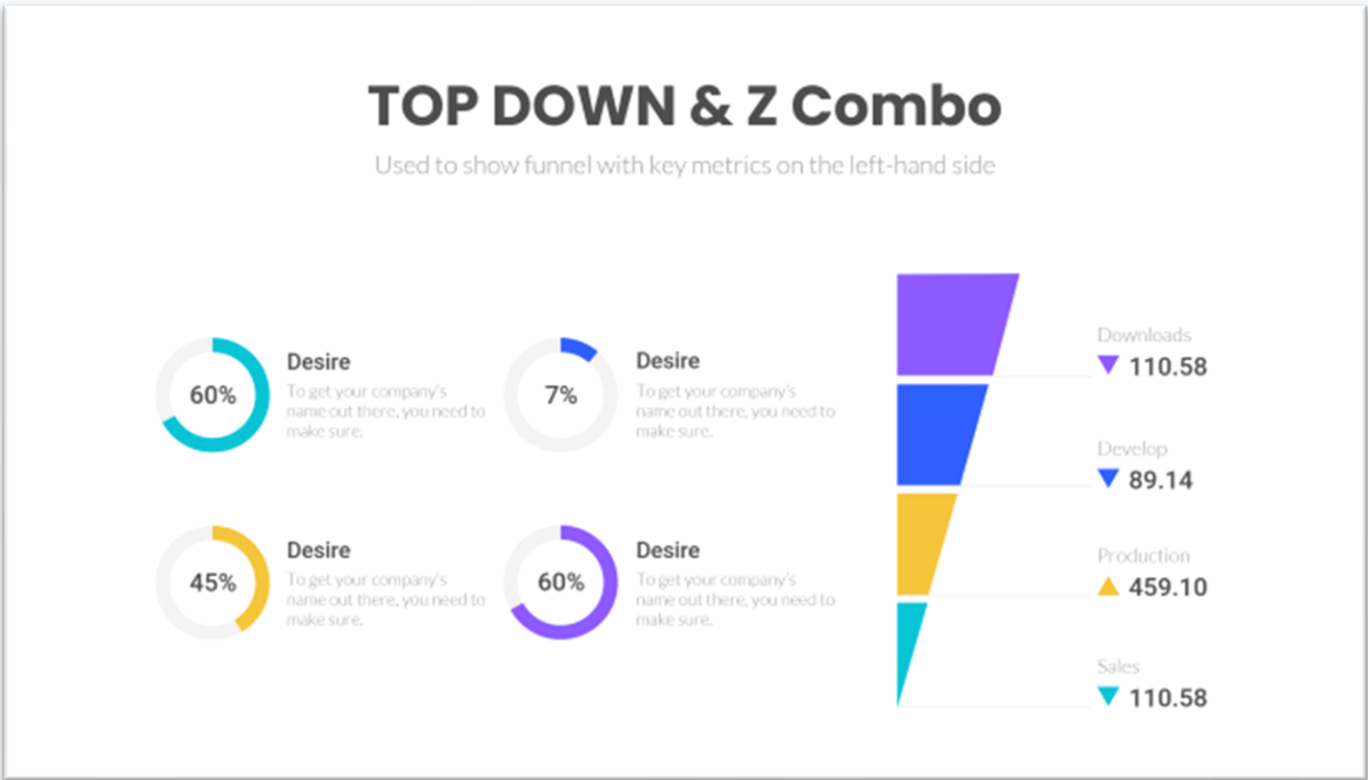
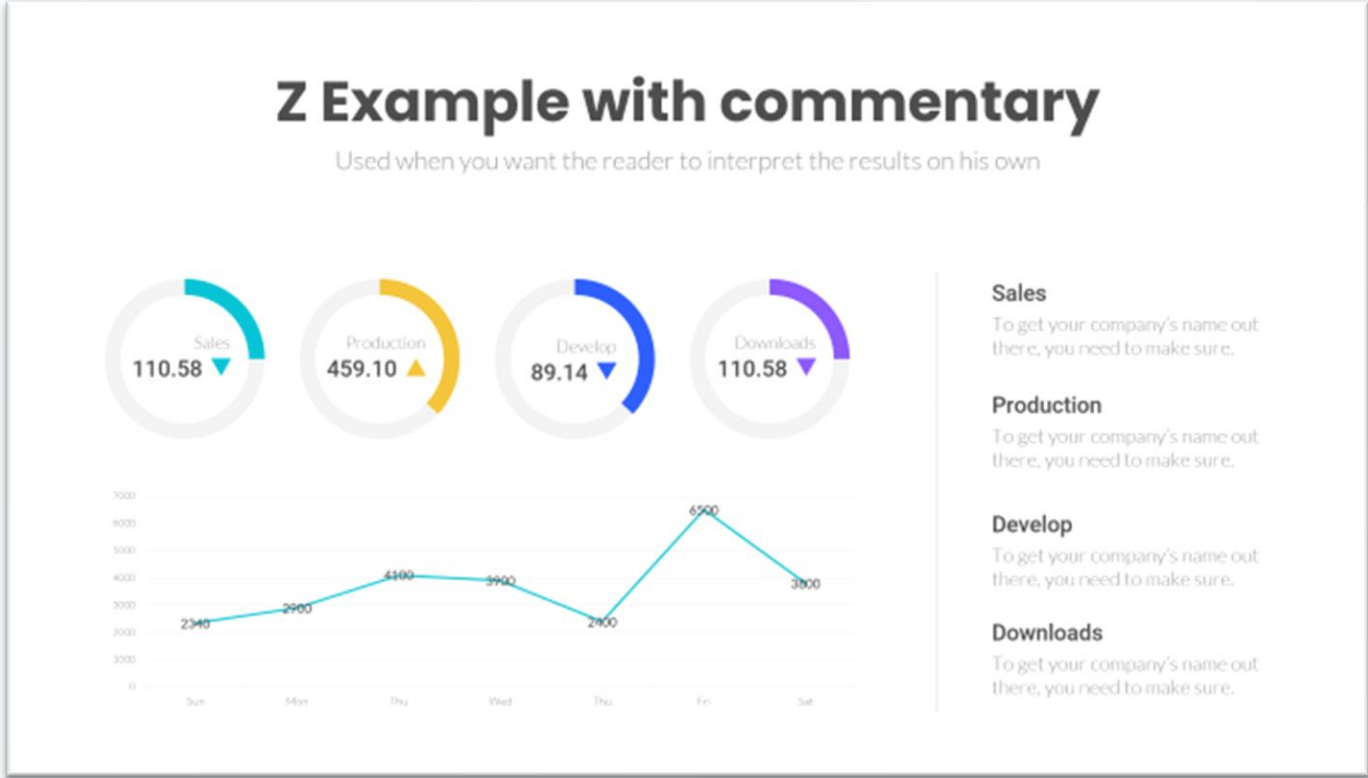
## TOP DOWN & Z Combo

Used to show funnel with key metrics on the left-hand side



# 4.4/ Others

These formats also work best with a certain audience



# Z Format

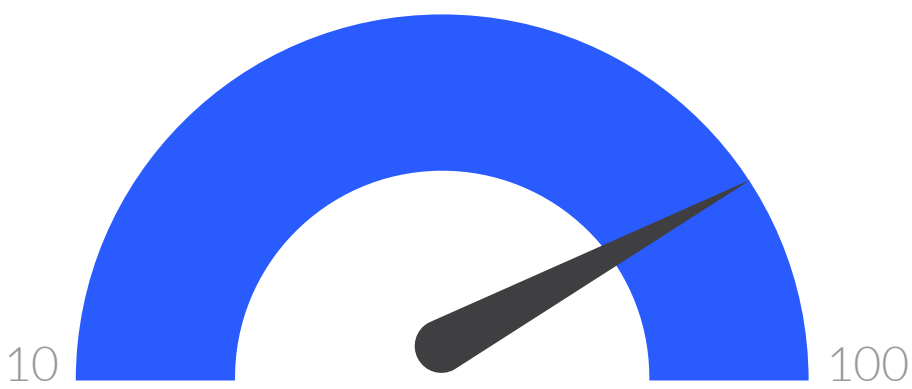
Z format is the most common guide to help you place charts in a way that tells a story



Software Sales



Downloads



Attendance

## Most Viewed Item

- Software Sales
- Downloads
- Attendance

+ 3 4 0

+ 1 2 0

+ 7 0

BUSINESS SYSTEM

745



There are people who have a significant number of followers.



# Z with KPI Example

When you want to put emphasis on a certain metrics, a KPI card is the best

Develop

▲ 256.90

Develop

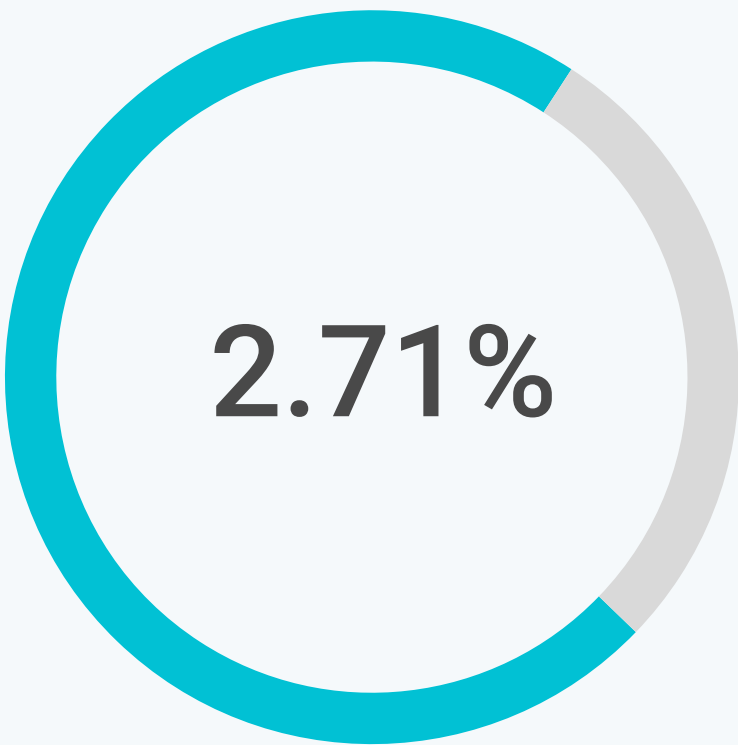
▼ 89.14

Develop

▲ 459.10

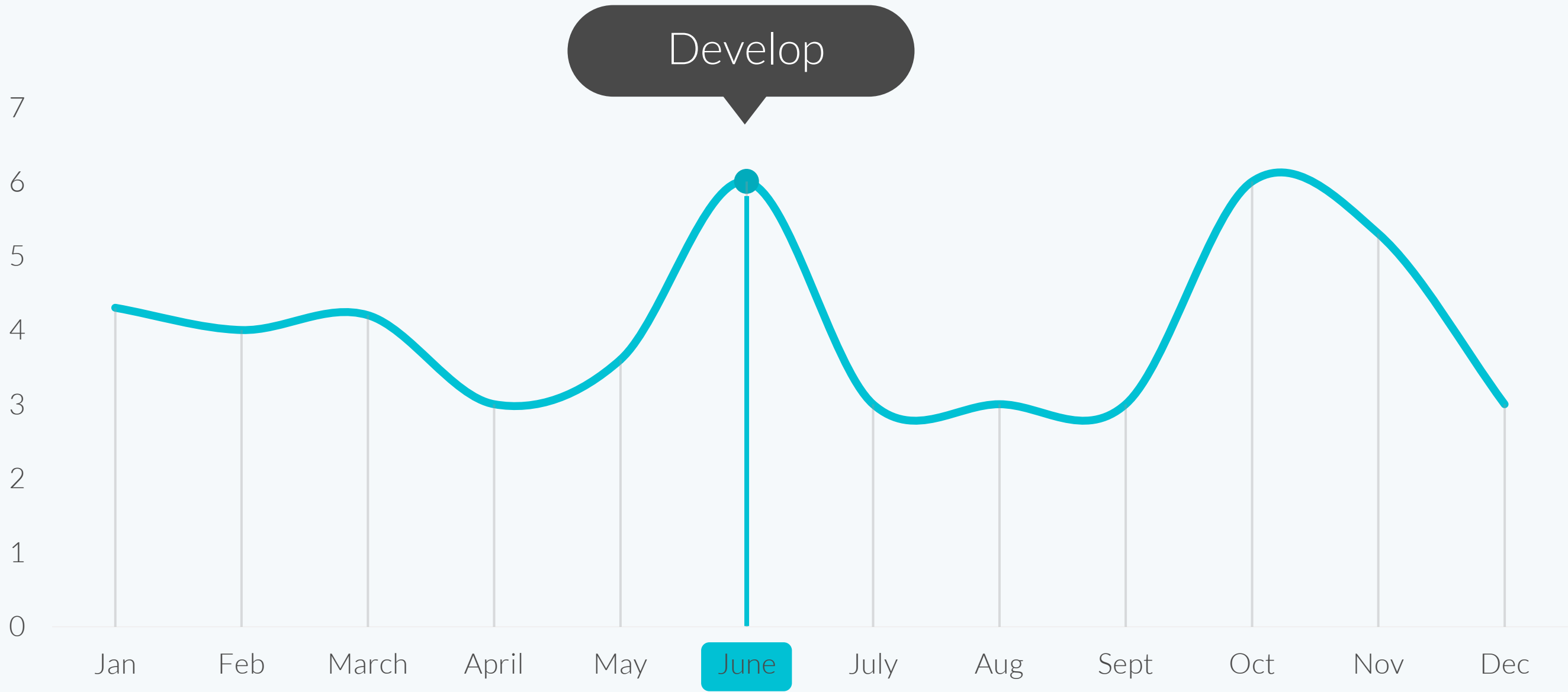
Develop

▼ 110.58



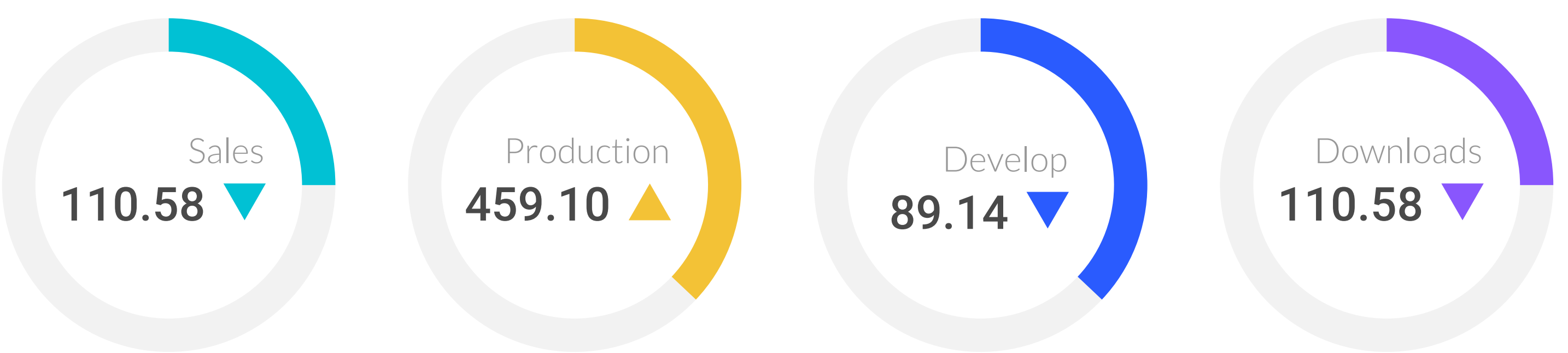
Downloads

There are people who have a significant number of followers.



# Z Example with commentary

Used when you want the reader to interpret the results on his own



## Sales

To get your company's name out there, you need to make sure.

## Production

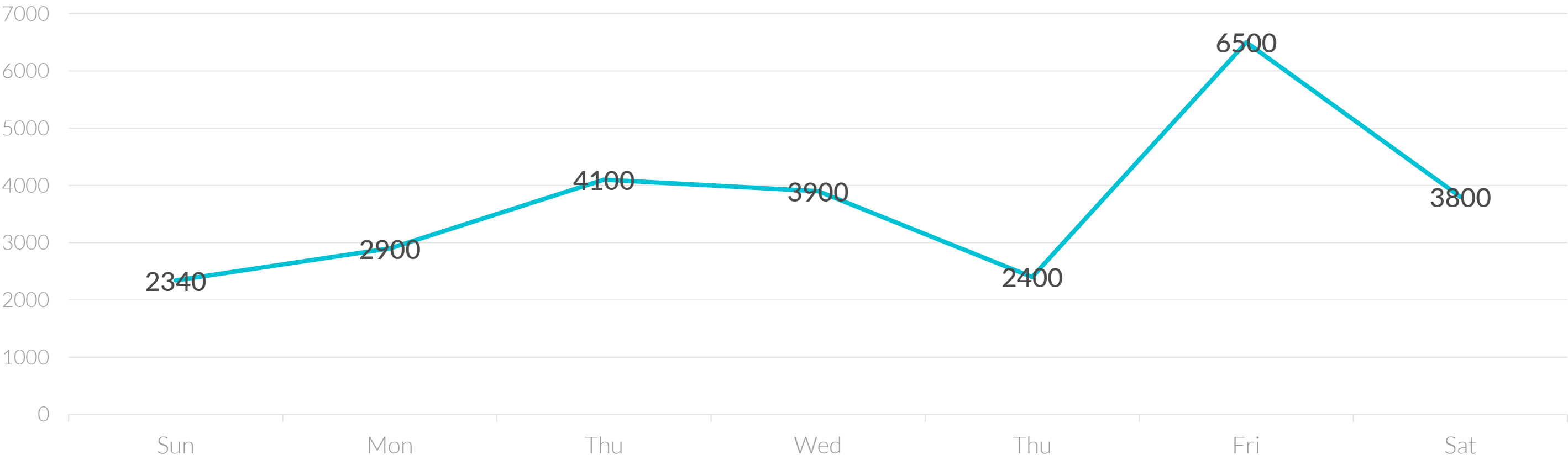
To get your company's name out there, you need to make sure.

## Develop

To get your company's name out there, you need to make sure.

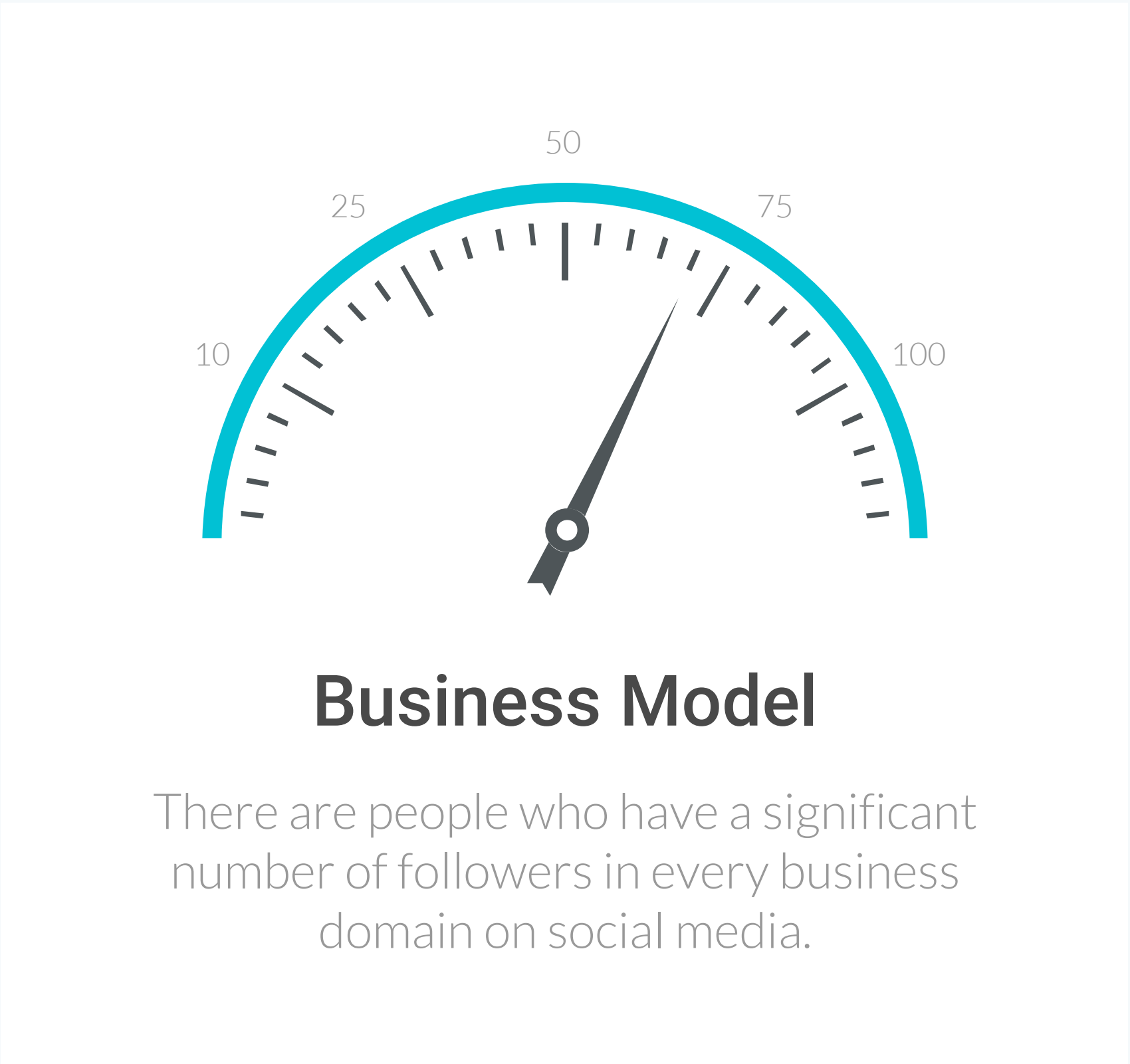
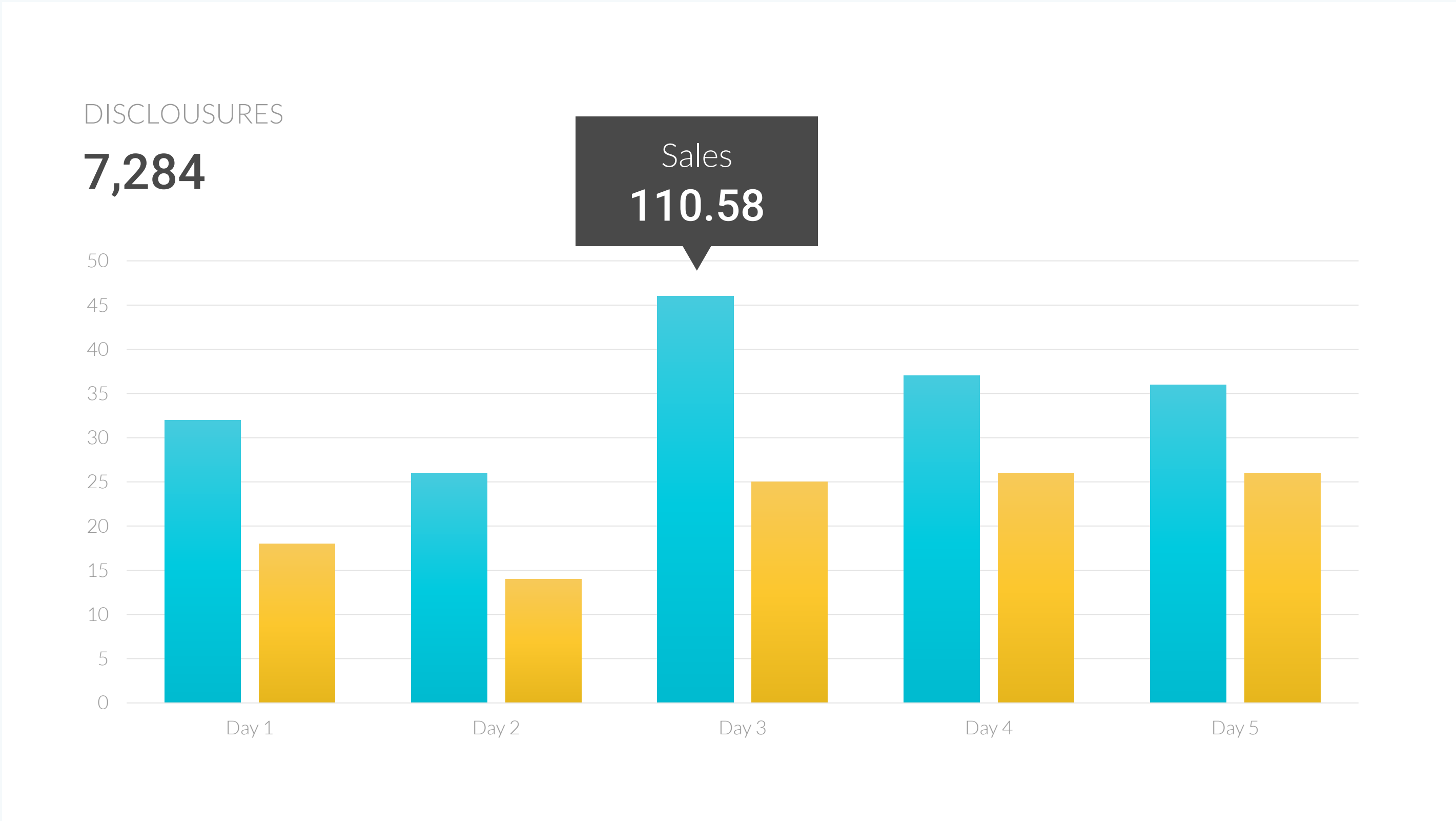
## Downloads

To get your company's name out there, you need to make sure.



# Dashboard Highlights

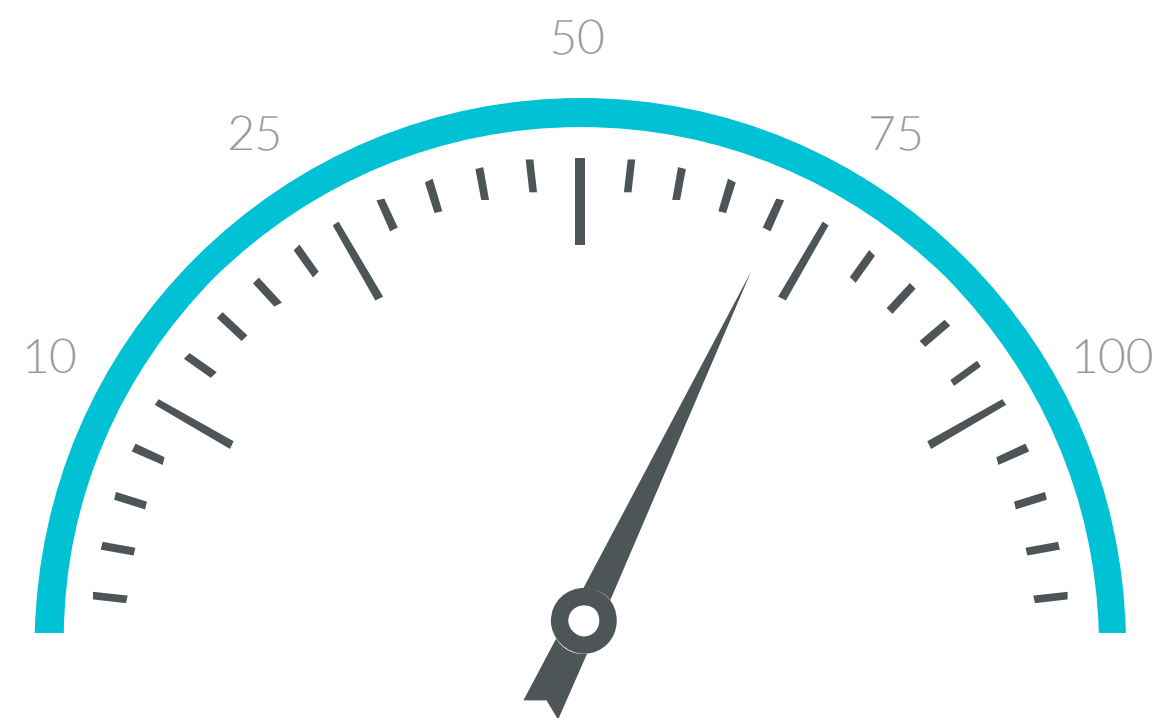
Used to indicate a specific value based which you want to make a comment





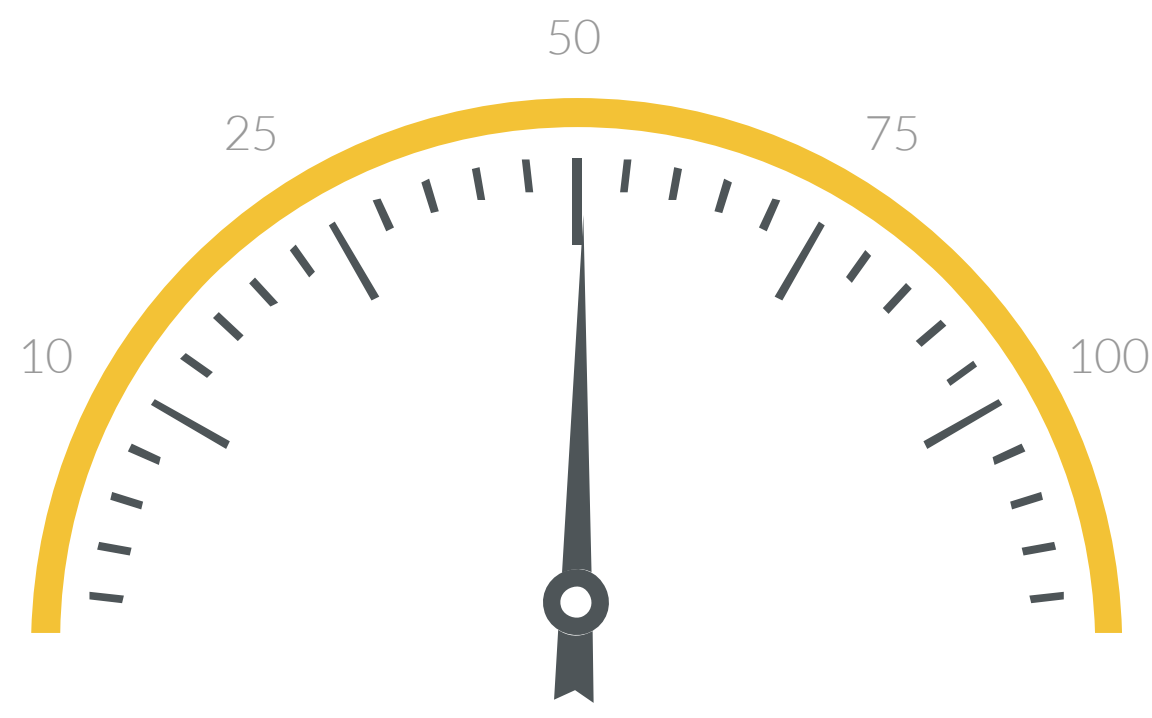
# LEFT TO RIGHT

Use this templates when you want to inform about the metrics



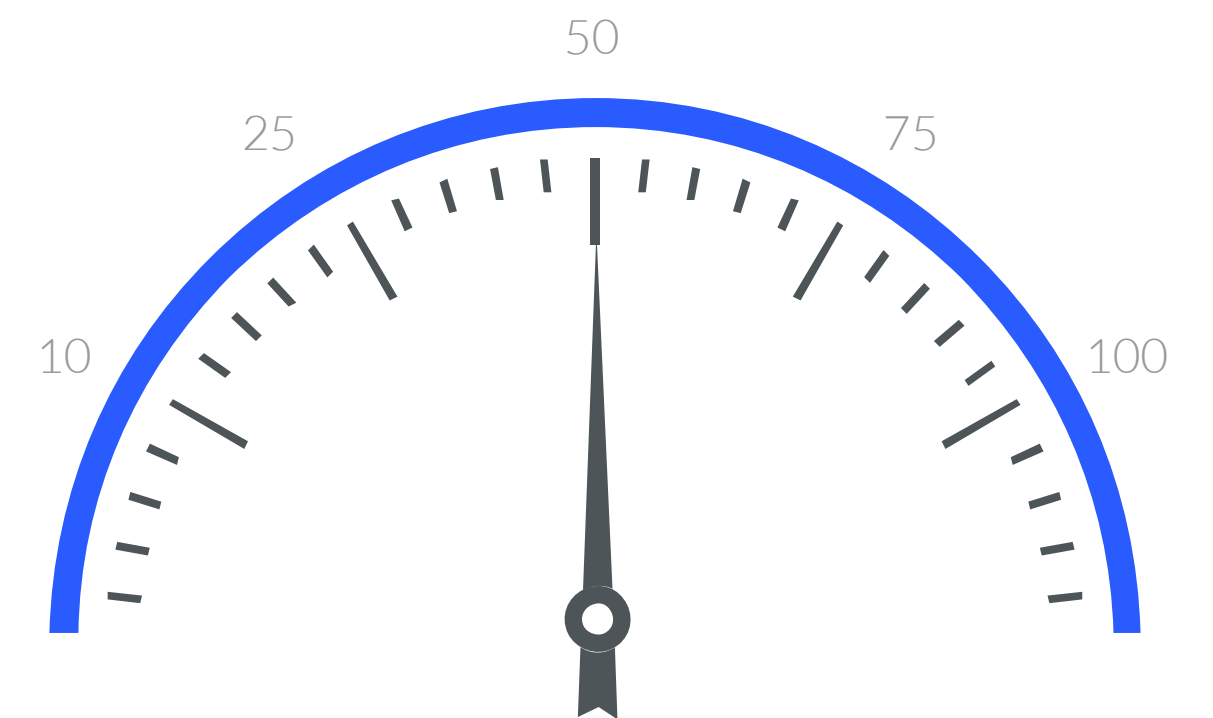
## Sales

Sales have reached back to the optimum levels post shortage of stock



## Production

Production is picking up pace and should reach full capacity by next month

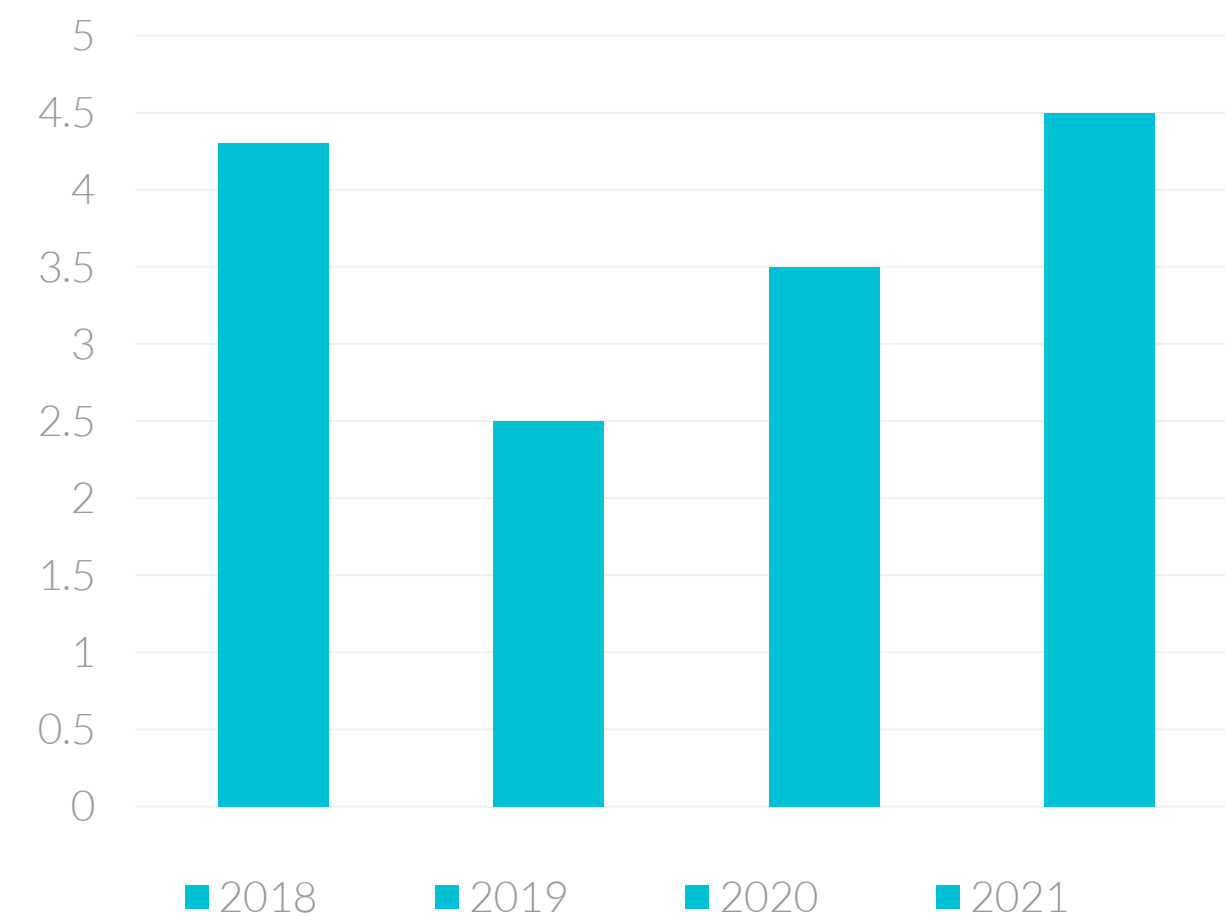


## Raw Materials

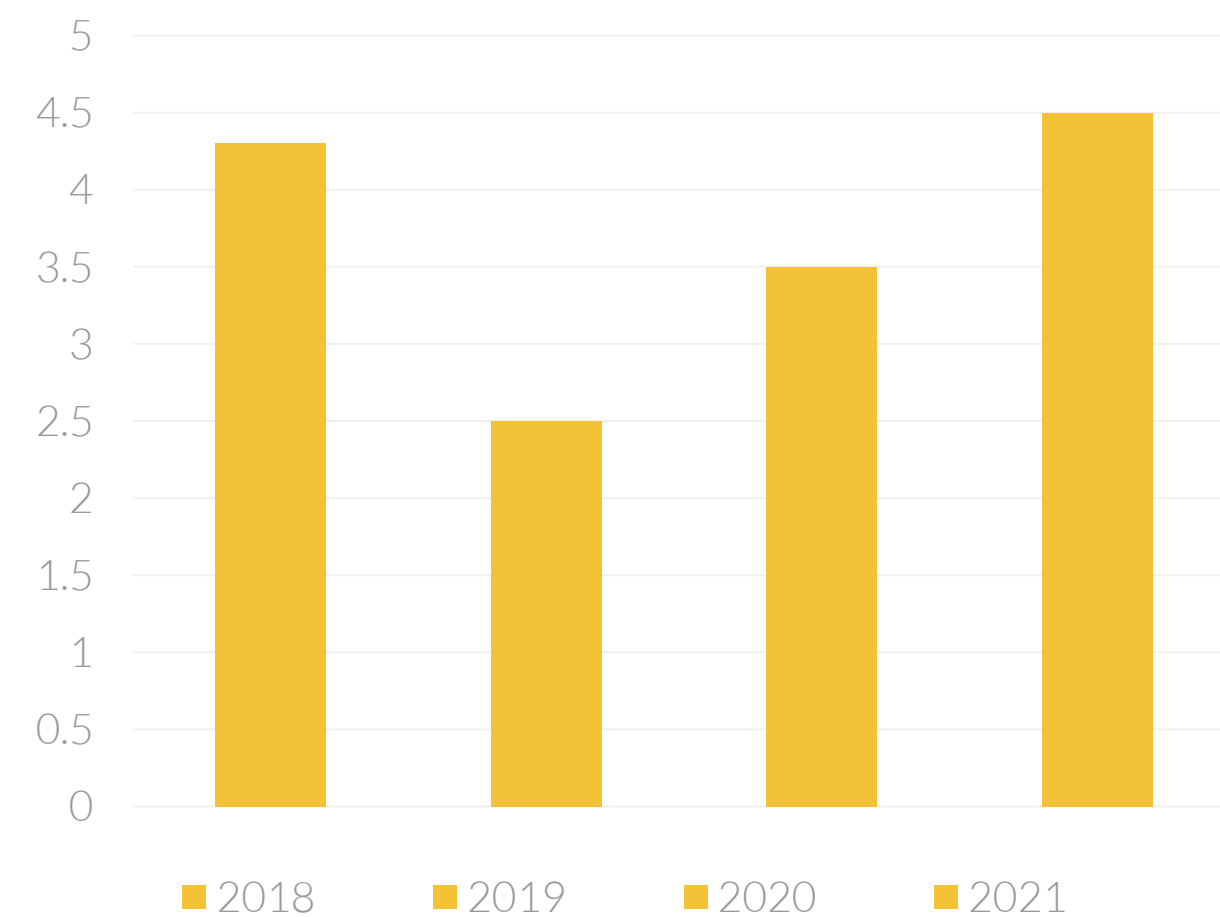
Vendors have started to supply raw materials consistently

# LEFT TO RIGHT

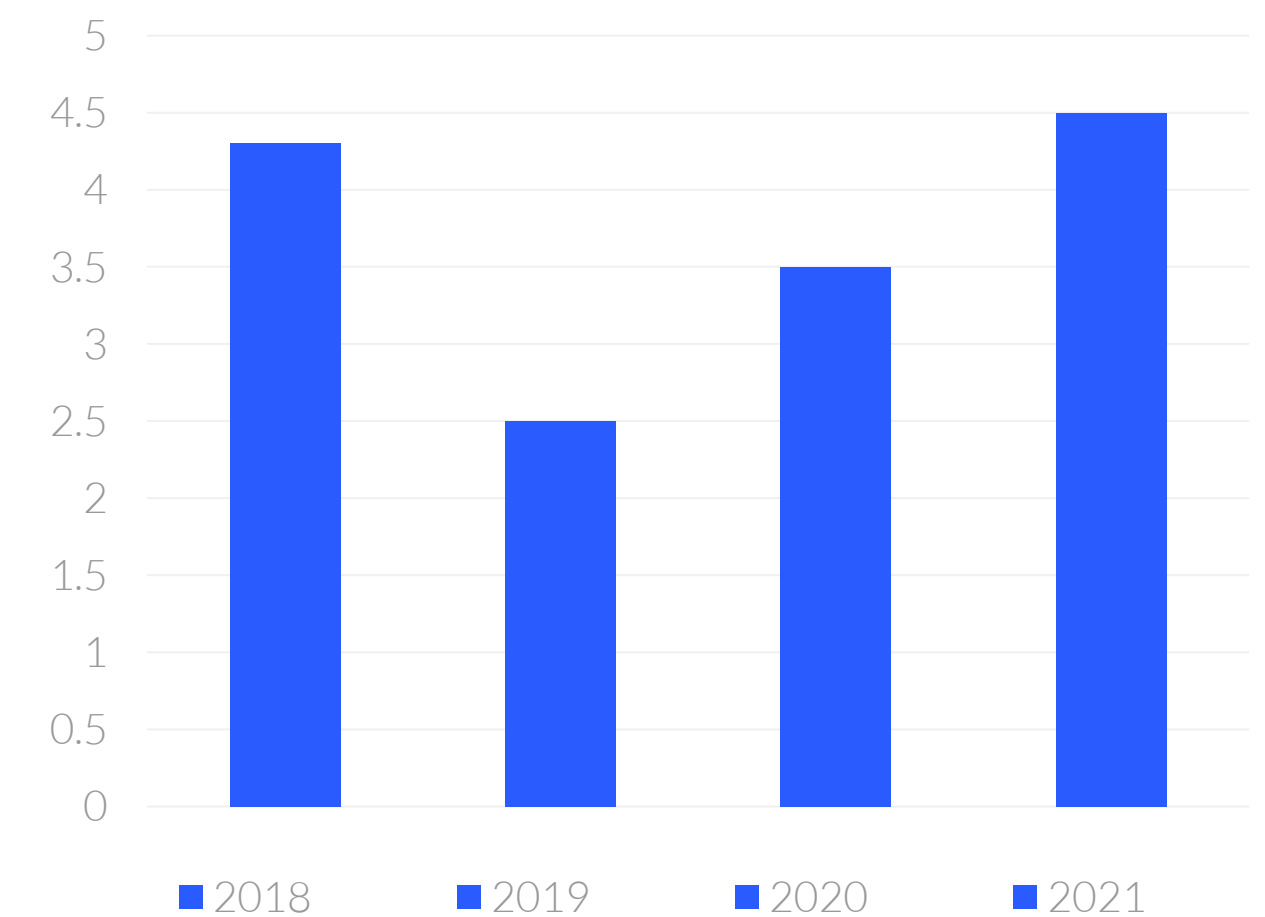
BAR Charts are easiest to read and always work the magic to communicate the story



**2.45%**  
NASDAQ



**1.28%**  
NYSE



**2.04%**  
DOW JONES



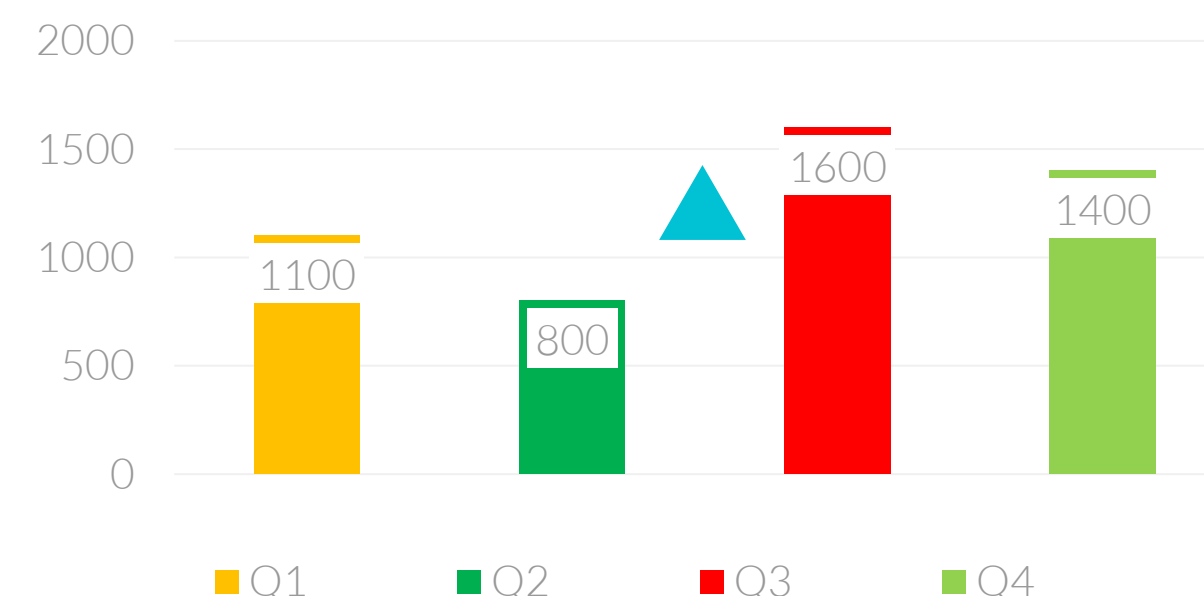
# TOP DOWN

Used when you want some action to be taken by the stakeholder

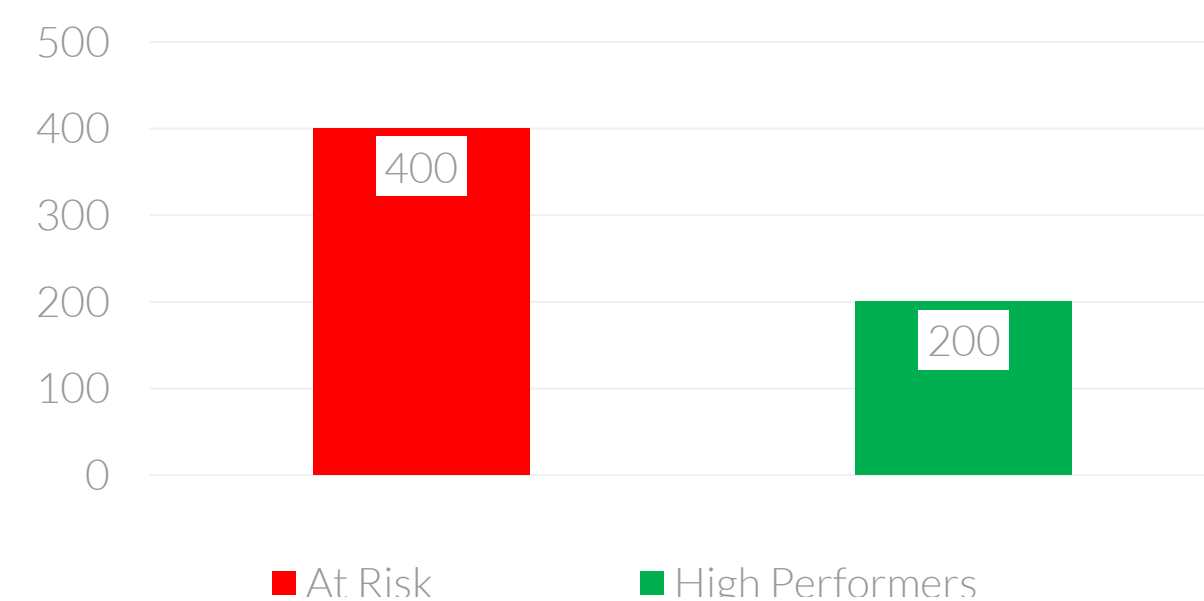
## 3 Steps Approach

- 1/ Show Problem with a compelling outcome you plan to achieve
- 2/ Back with evidence or solution you propose to achieve the same
- 3/ Call to action or Budget request

## 1/ Attrition has doubled



## 2/ Prioritized Candidates



## 3/ Budget for Retention

**\$200,000**

## Assumptions

Write the assumptions used to create this view

## Solution

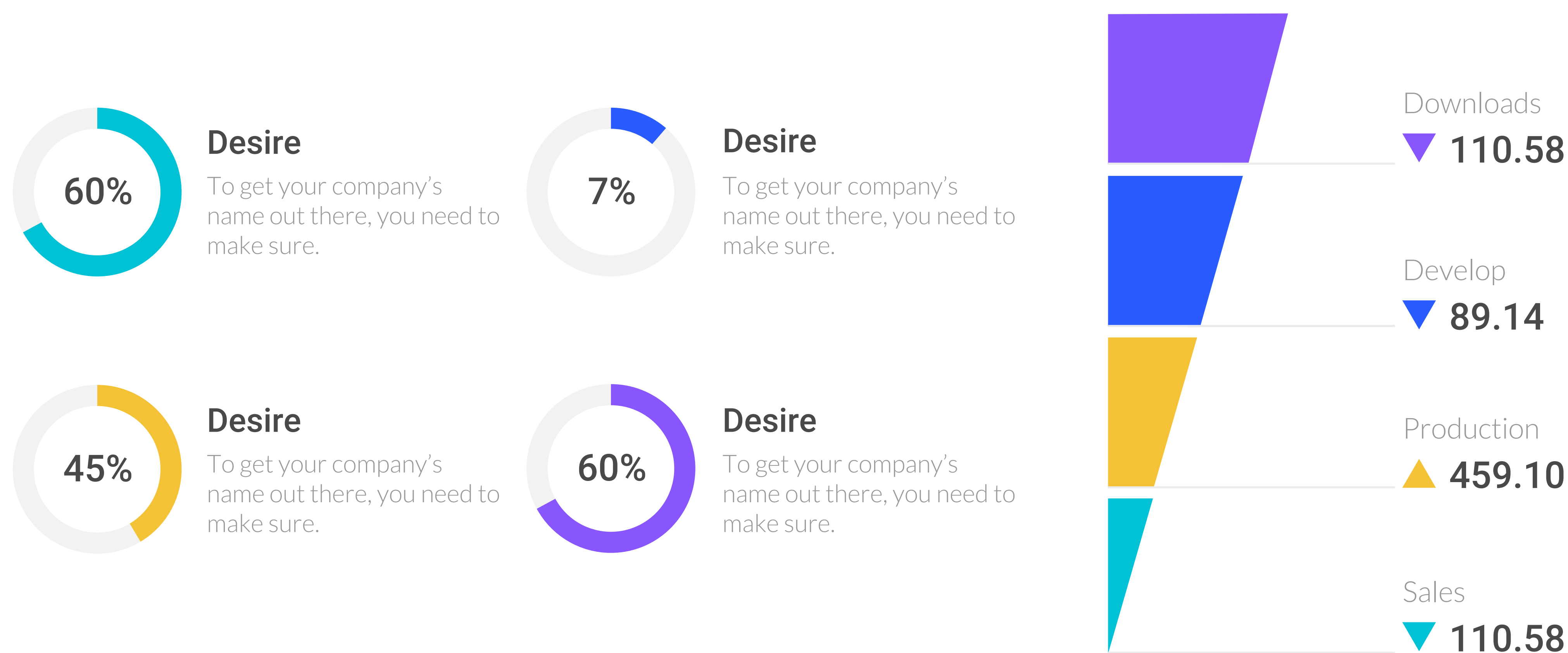
Show evidence of the solution working or steps on how you plan to achieve the same

## Call to Action

Points on what you will require by when. If not done, then let them know the impact

# TOP DOWN & Z Combo

Used to show funnel with key metrics on the left-hand side



# Performance on a Page

Works well with Head of Departments



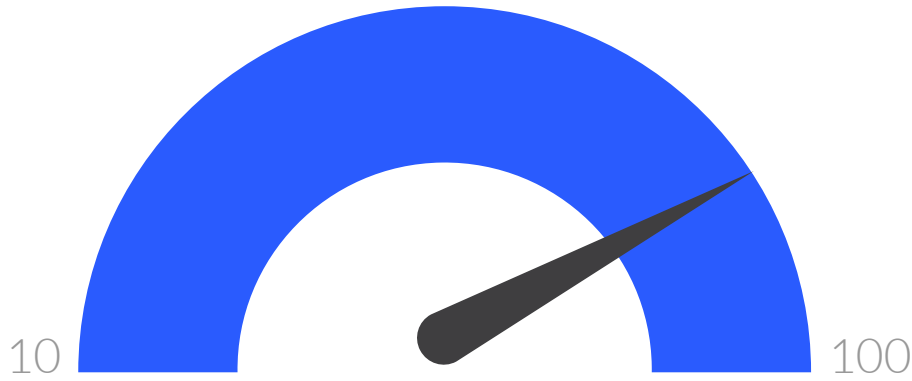
## Production

<b>USD</b> +2.6	<b>USA</b> 46%
<b>CHP</b> +3.4	<b>Russia</b> 46%
<b>BPR</b> -1.4	<b>Canada</b> 46%
<b>CHF</b> +6.7	<b>Australia</b> 57%



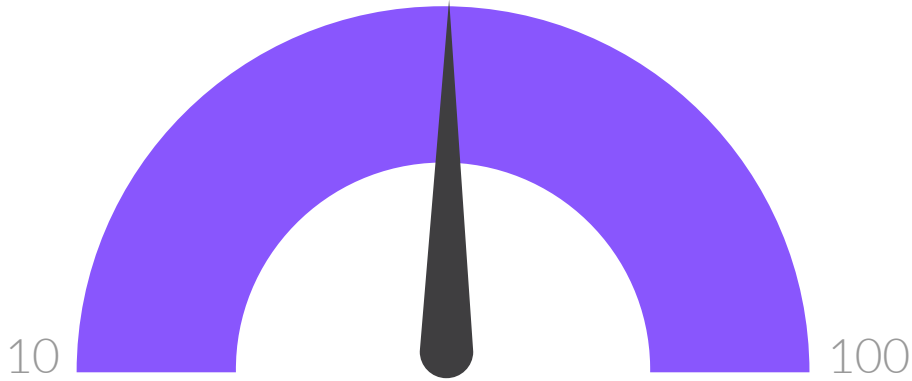
## Sales

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## Downloads

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<b>CHF</b> +6.7	<b>Australia</b> 57%



## Develop

<b>USD</b> +2.6	<b>USA</b> 46%
<b>CHP</b> +3.4	<b>Russia</b> 46%
<b>BPR</b> -1.4	<b>Canada</b> 46%
<b>CHF</b> +6.7	<b>Australia</b> 57%

# KPI with MAPS 1

Works well with Leadership and during team presentation

0.36%



Business Model

NASDAQ

2.71%



Suppliers

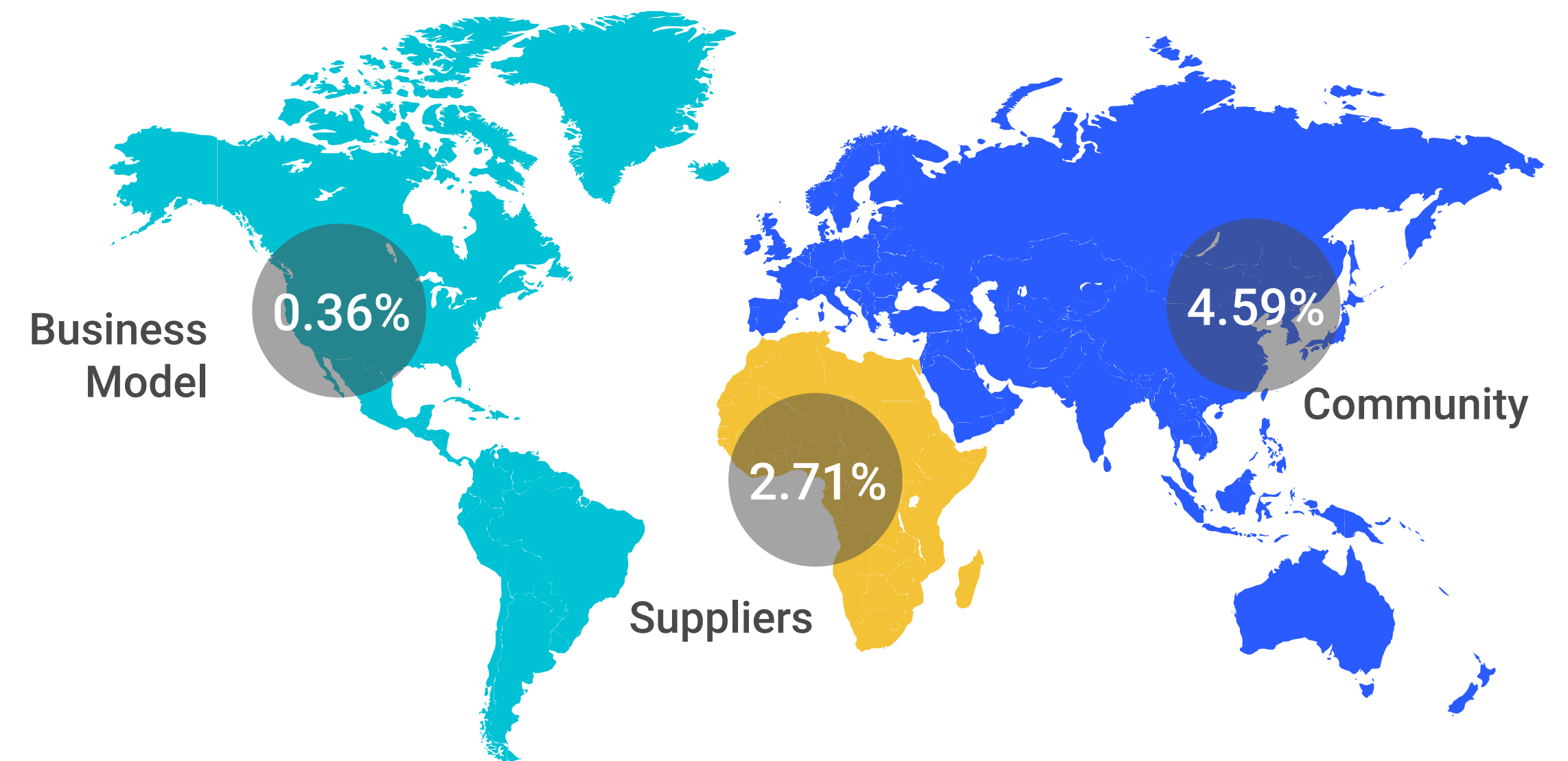
NYSE

4.59%



Community

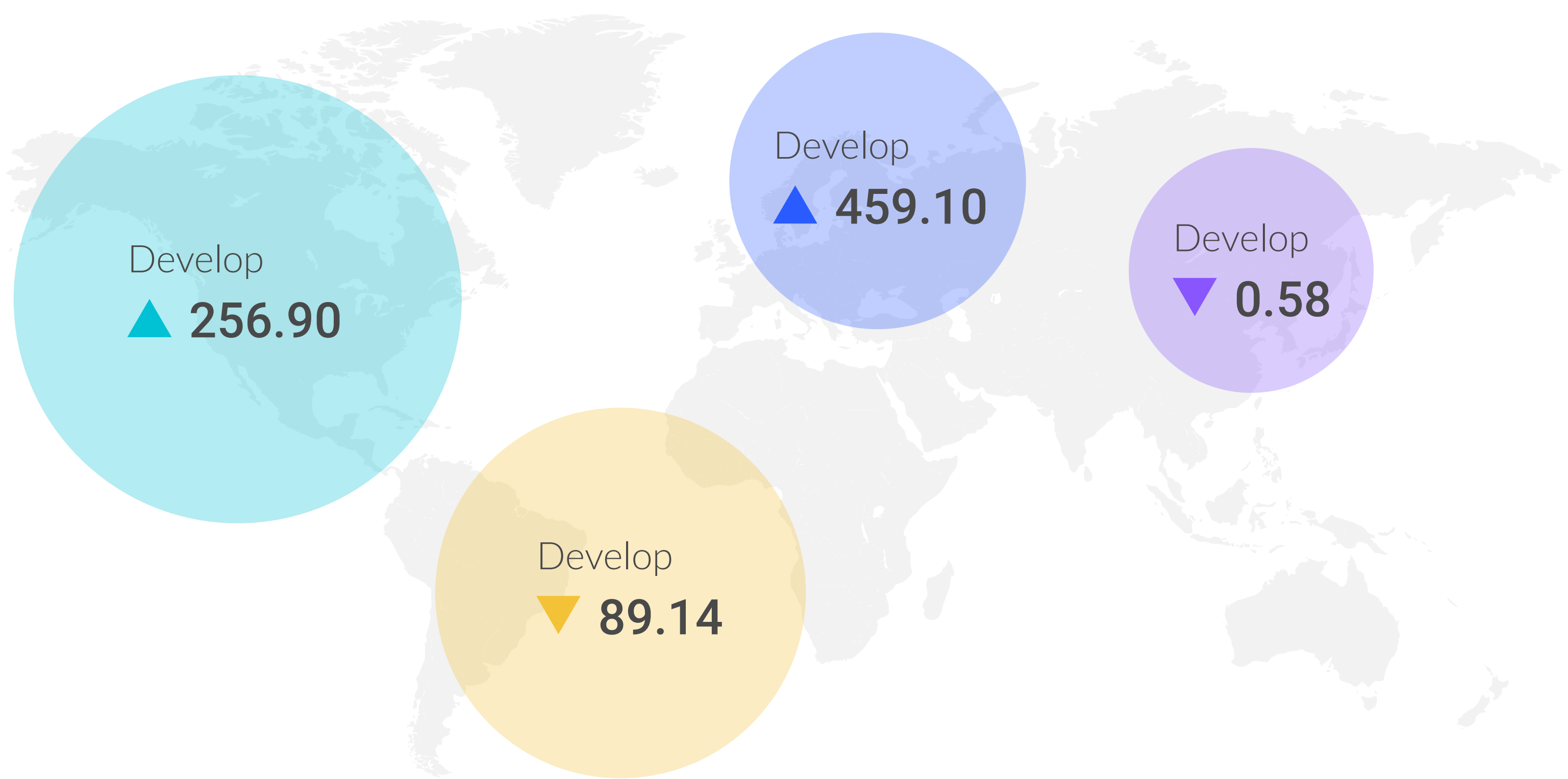
DOWN JONES





# KPI with MAPS 2

Works well with Leadership and during team presentation



## Our Client Locations

- Software Sales + 3 4 0
- Downloads + 1 2 0
- Attendance + 7 0
- Report + 7 1 0