

# Creating a cohesive story

CASE STUDY: ANALYZING CUSTOMER CHURN IN TABLEAU



**Carl Rosseel**  
Curriculum Manager

# Data analysis flow in Tableau

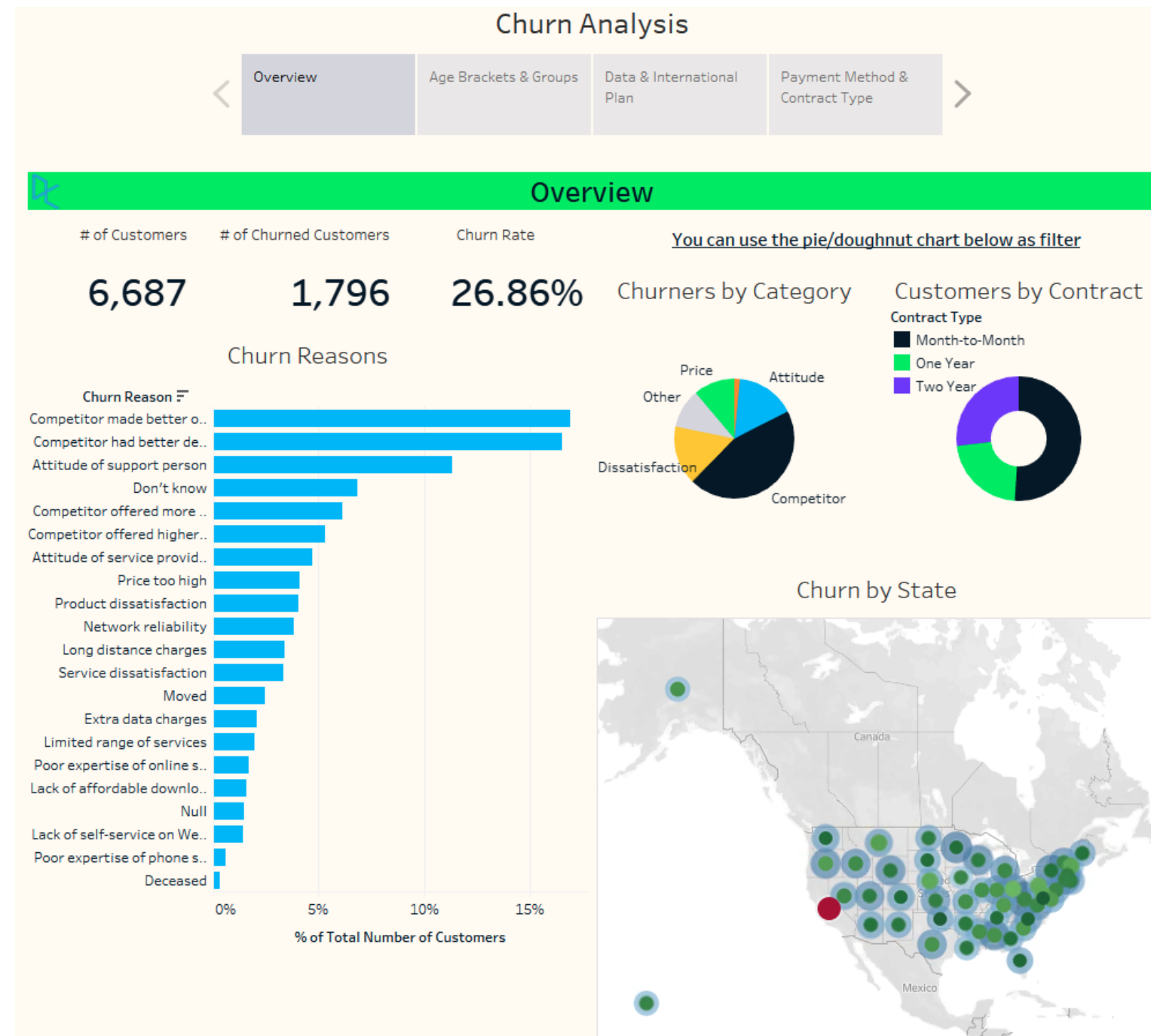


# Structuring your analysis is not easy

- Not informative to publish 10+ different worksheets.
- Need to combine information which fits well together.



# It's time to tell a story

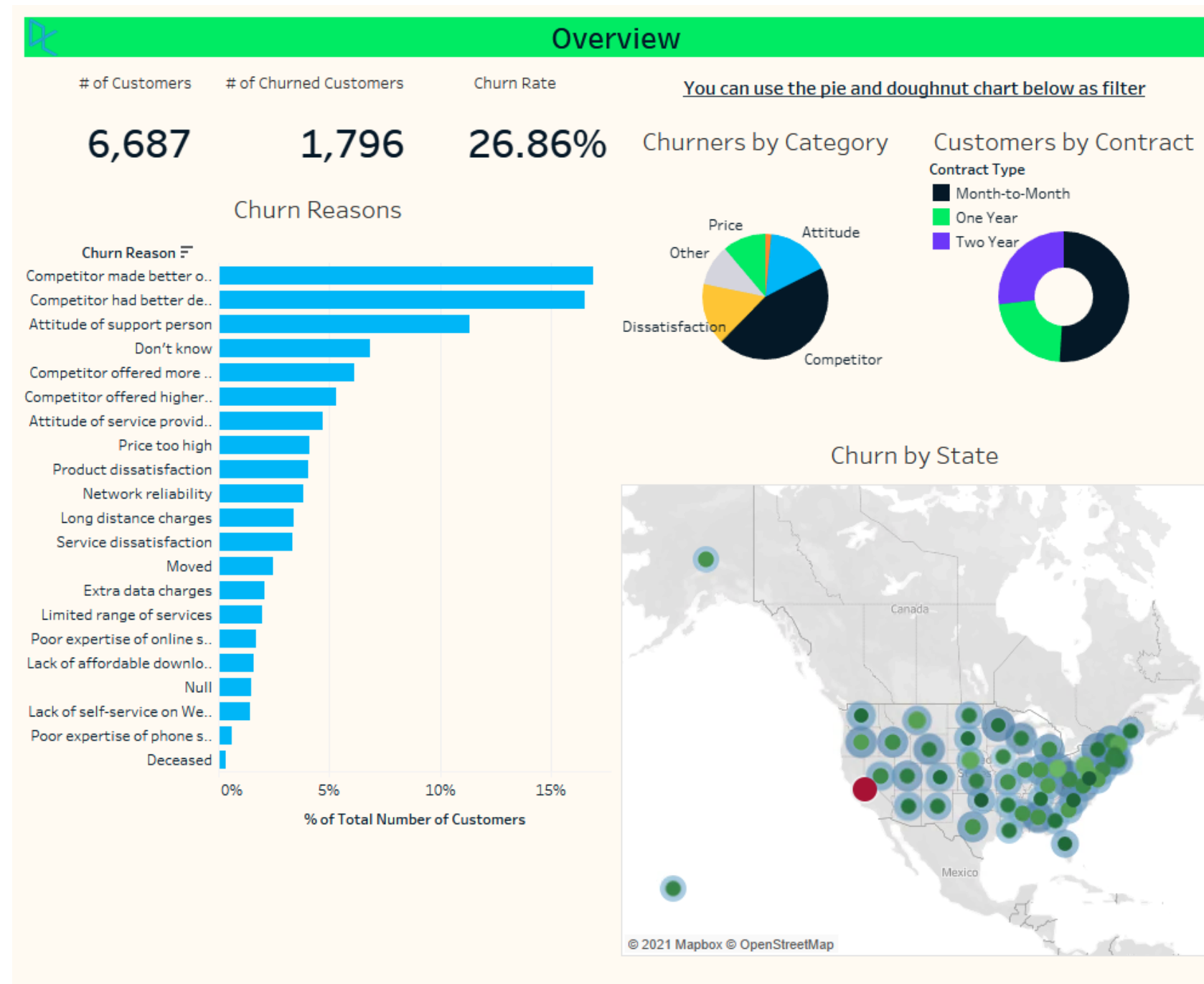


# Each story point investigates a different topic

## Churn Analysis



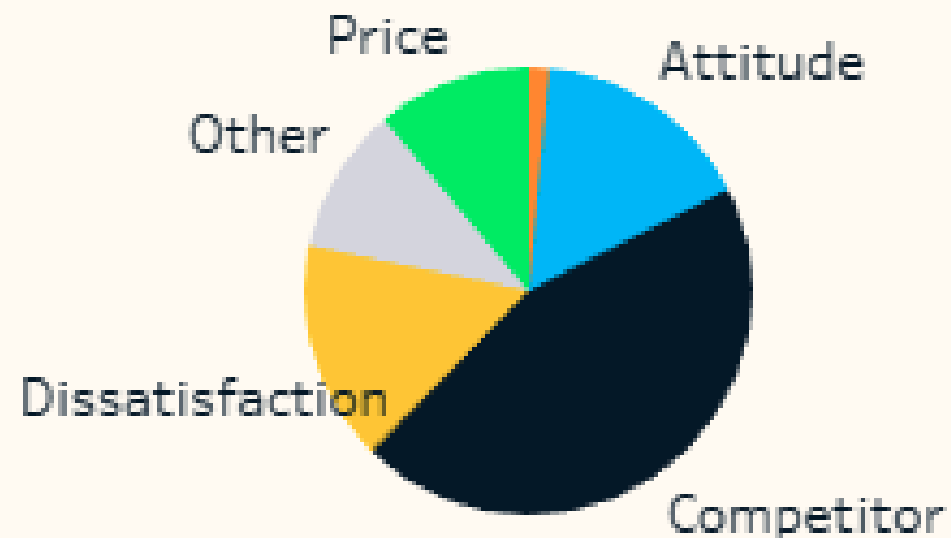
# Overview page



# Adding instructions can be extremely useful

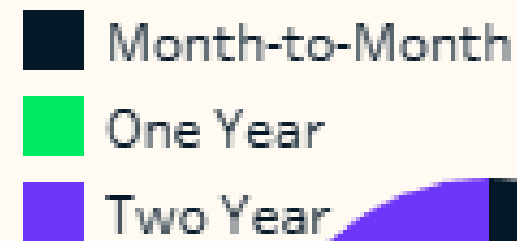
You can use the pie and doughnut chart below as filter

Churners by Category

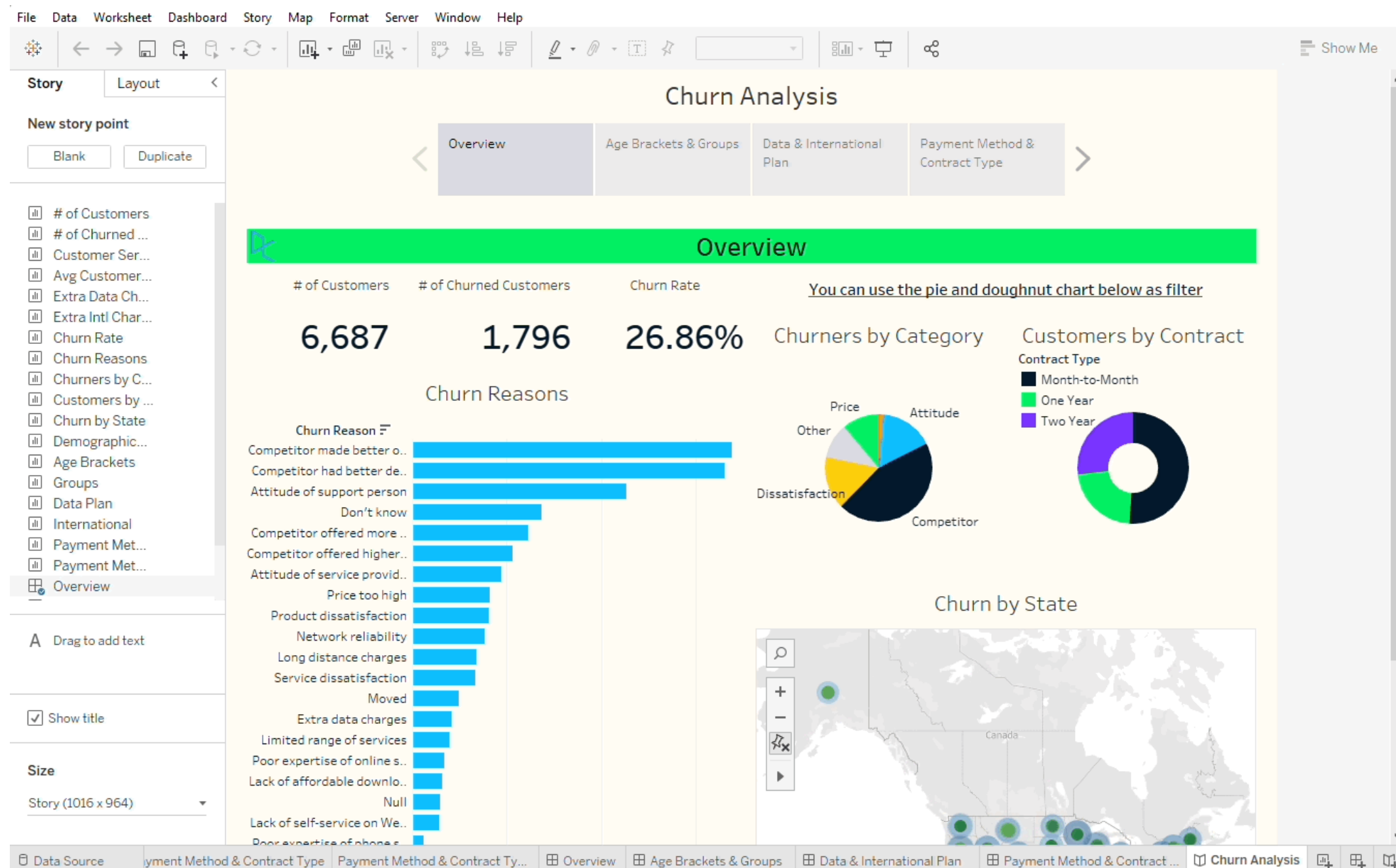


Customers by Contract

Contract Type

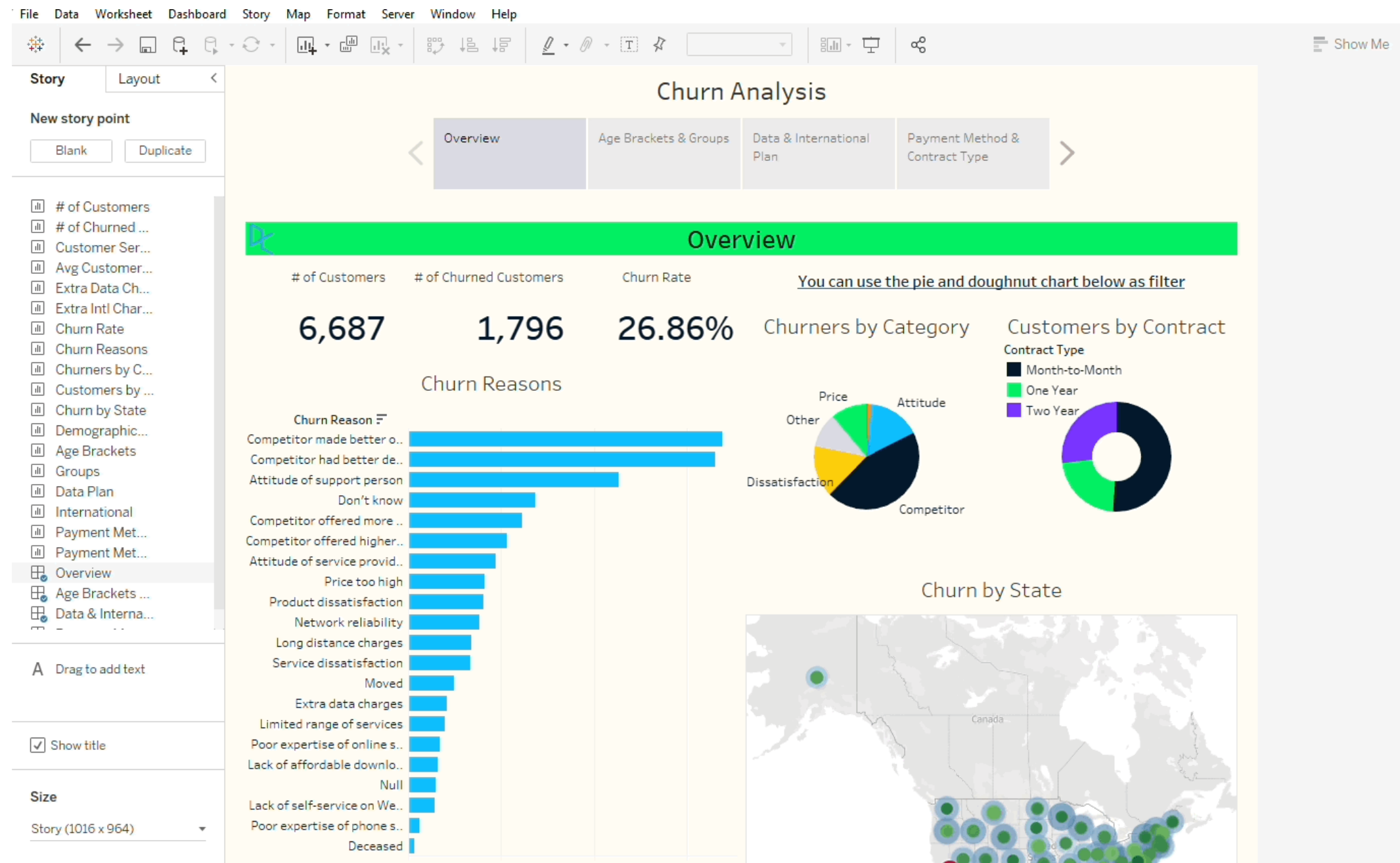


# Interactivity makes a dashboard powerful

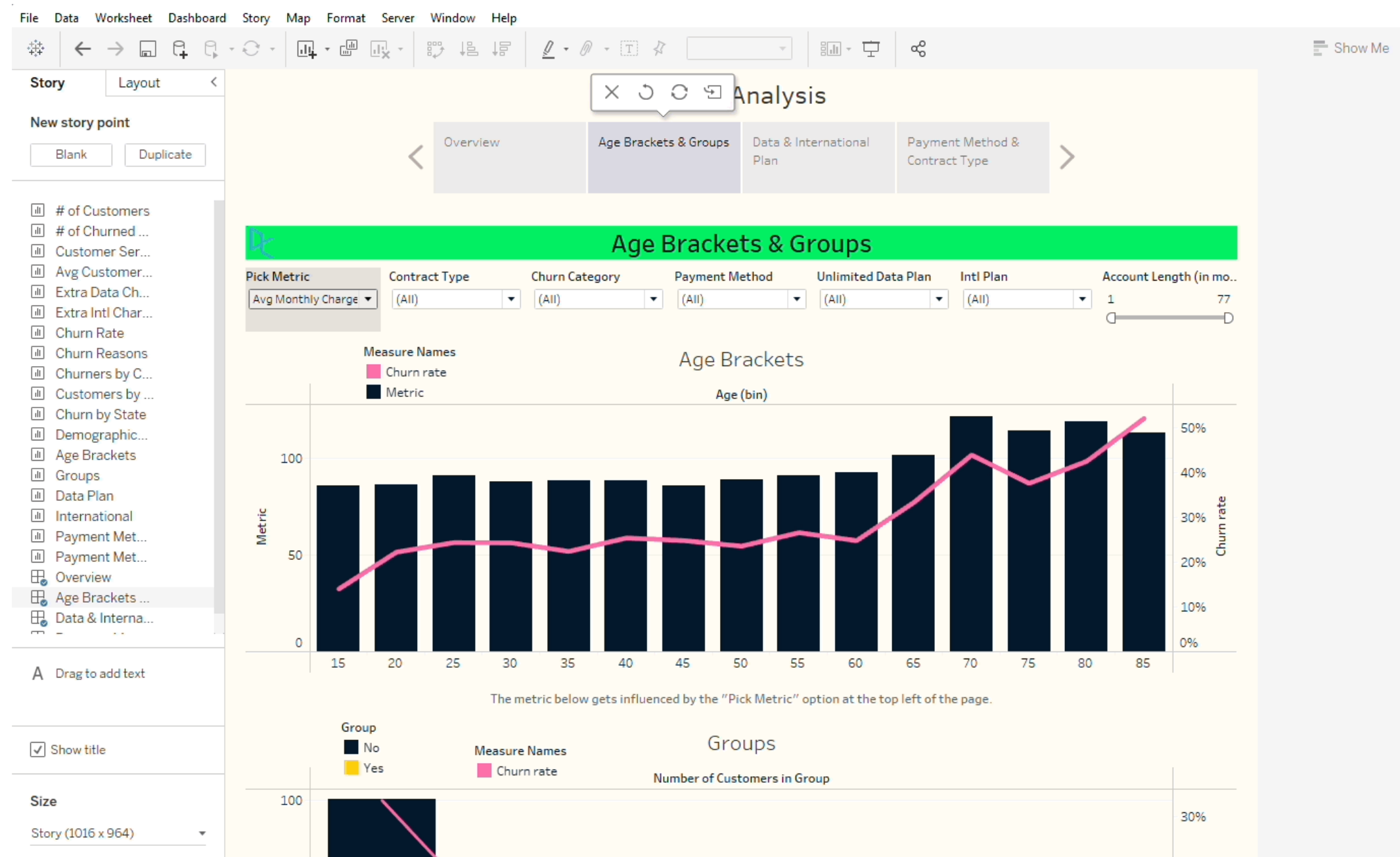




# Interactivity makes a dashboard powerful



# Interactivity makes a dashboard powerful

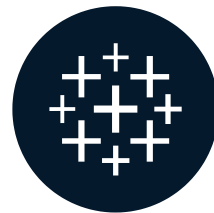


# Let's visualize!

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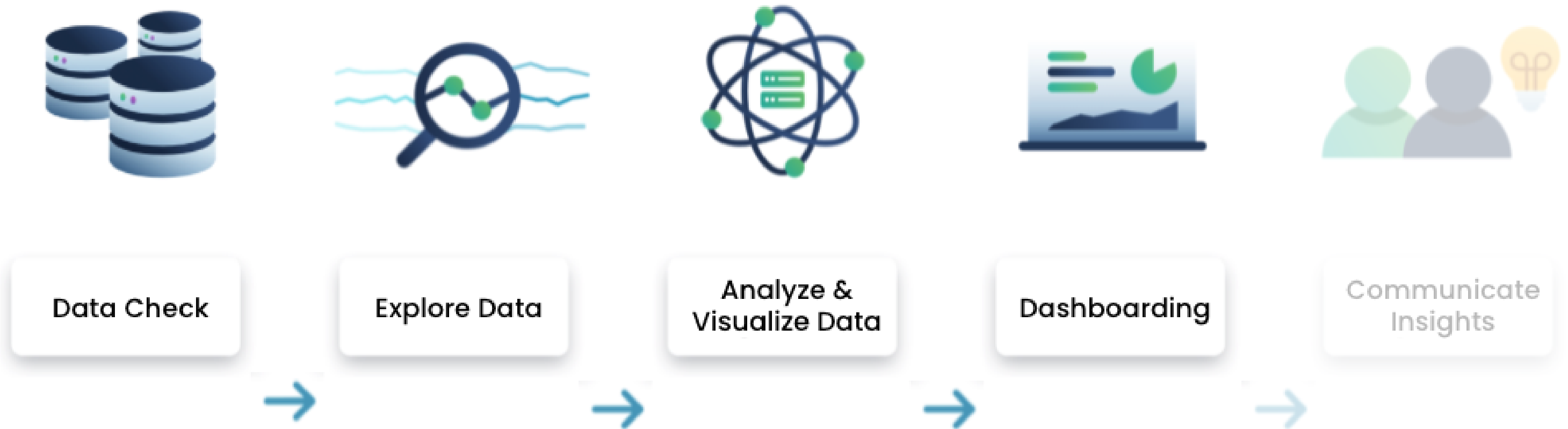
# Wrap-up

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# Data analysis flow

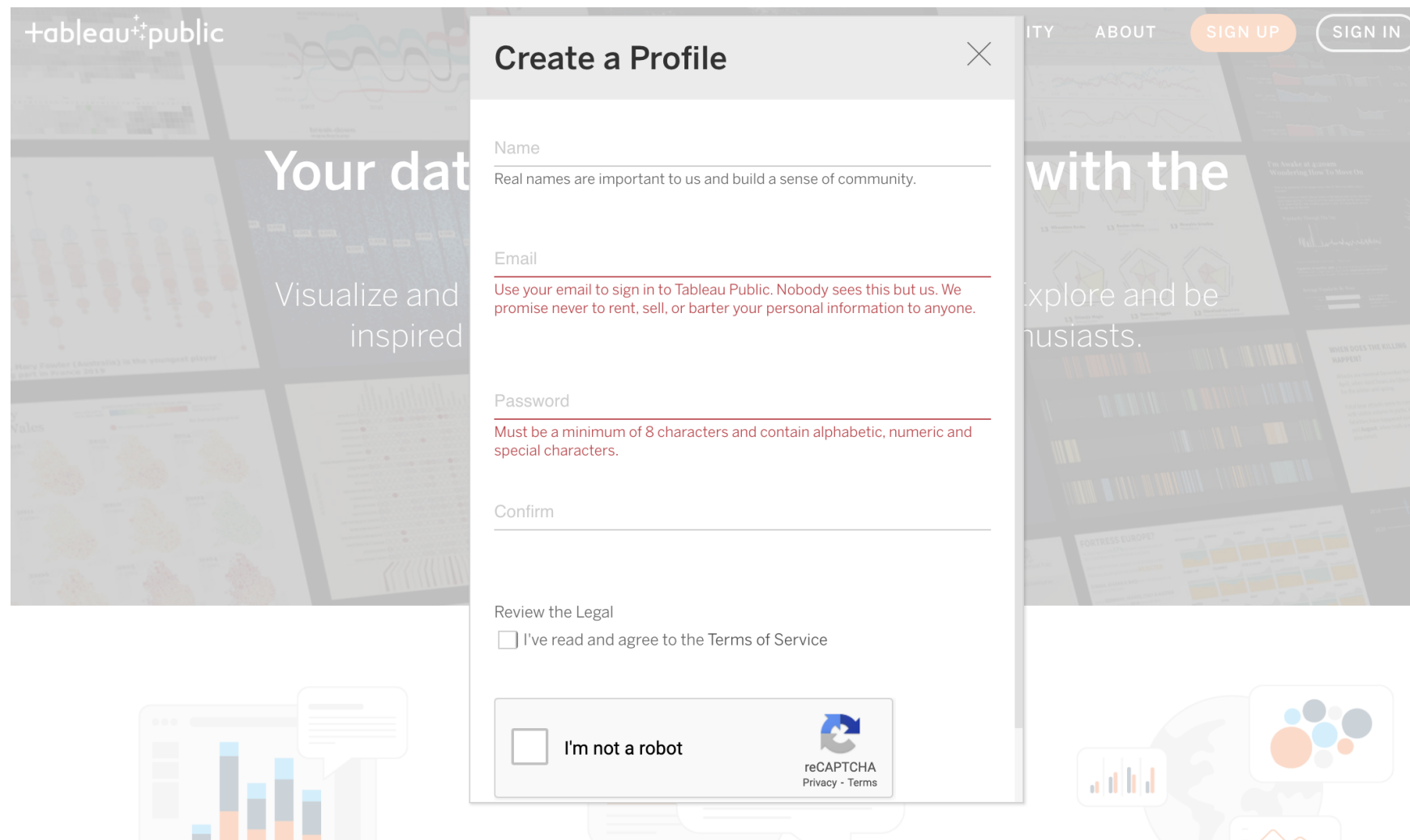


# Tableau Public

- Free
- Limitations
  - Only CSV, Excel and text files
  - Save online
  - 15 millions rows of data
  - Public reports
- **Allows you to save your work**

# A Tableau Public account is required

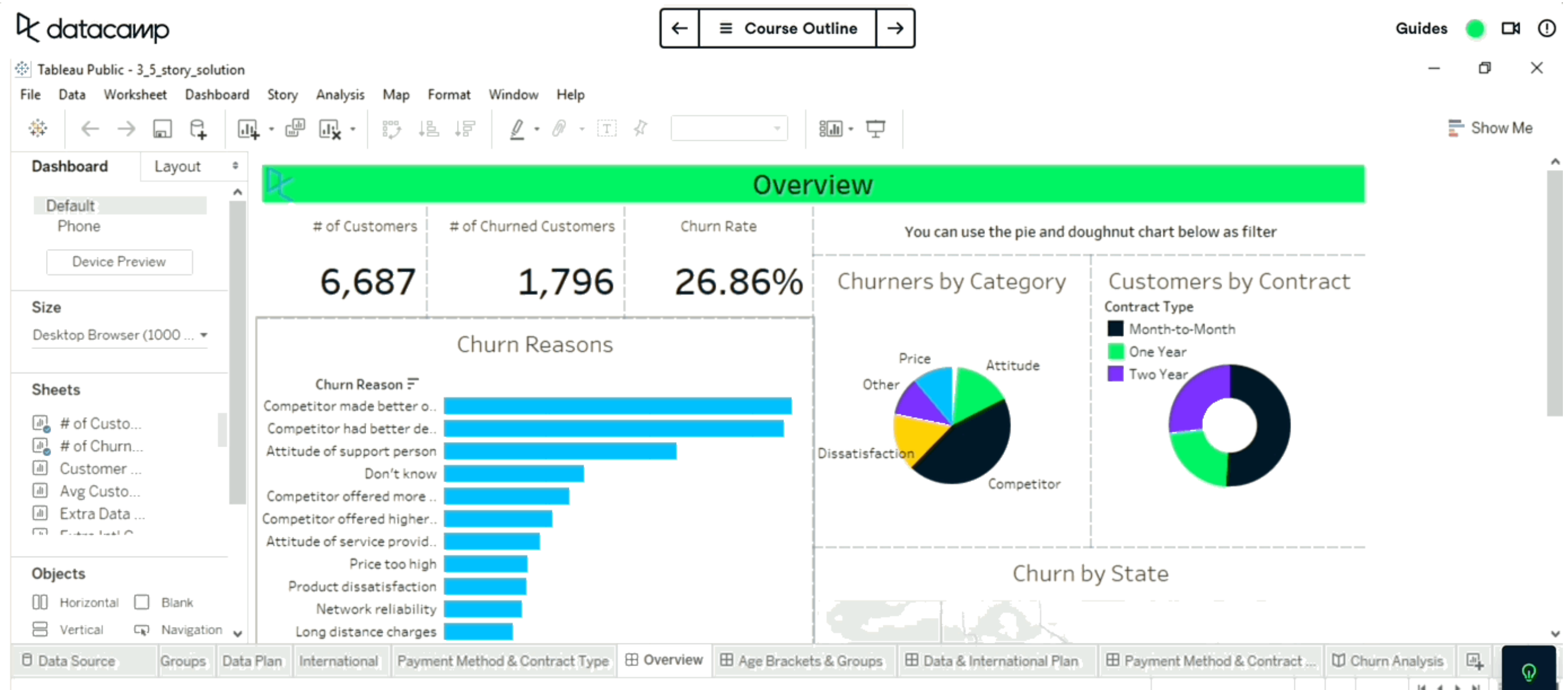
- You can't publish without an account
- You can create an account on <https://public.tableau.com/>
  - Click the sign up button and complete the details:



The image shows a screenshot of the Tableau Public website's sign-up process. A modal window titled "Create a Profile" is centered over the website's background. The background features the Tableau Public logo, navigation links for "HOME", "ABOUT", "SIGN UP", and "SIGN IN", and promotional text: "Your data with the", "Visualize and inspired", and "Explore and be enthusiasts.". The "Create a Profile" form includes the following fields and instructions:

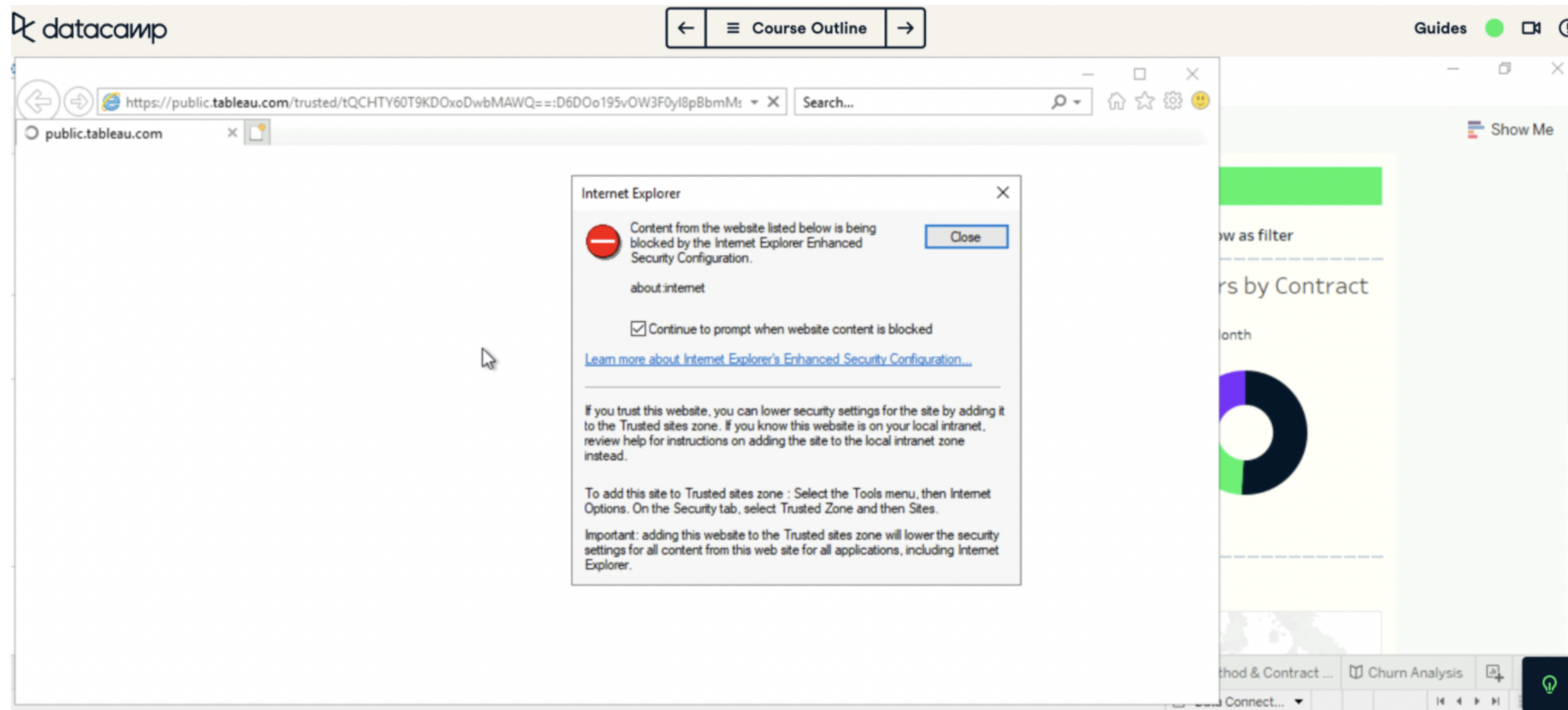
- Name:** A text input field with the instruction: "Real names are important to us and build a sense of community."
- Email:** A text input field with the instruction: "Use your email to sign in to Tableau Public. Nobody sees this but us. We promise never to rent, sell, or barter your personal information to anyone."
- Password:** A text input field with the instruction: "Must be a minimum of 8 characters and contain alphabetic, numeric and special characters."
- Confirm:** A text input field for password confirmation.
- Review the Legal:** A checkbox labeled "I've read and agree to the Terms of Service".
- reCAPTCHA:** A checkbox labeled "I'm not a robot" next to the reCAPTCHA logo and "Privacy - Terms" link.

# Saving your work

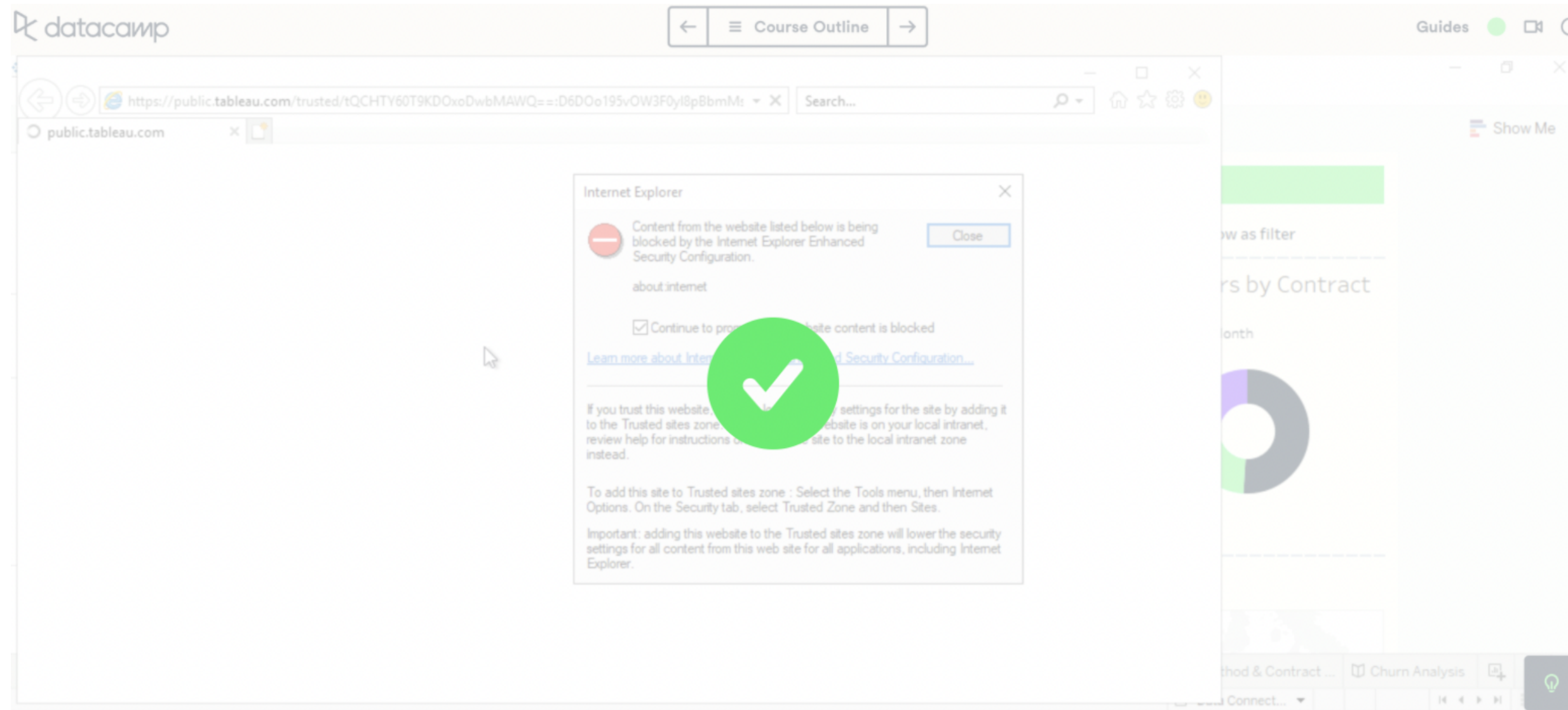




# Internet access is blocked



# Your file will be published

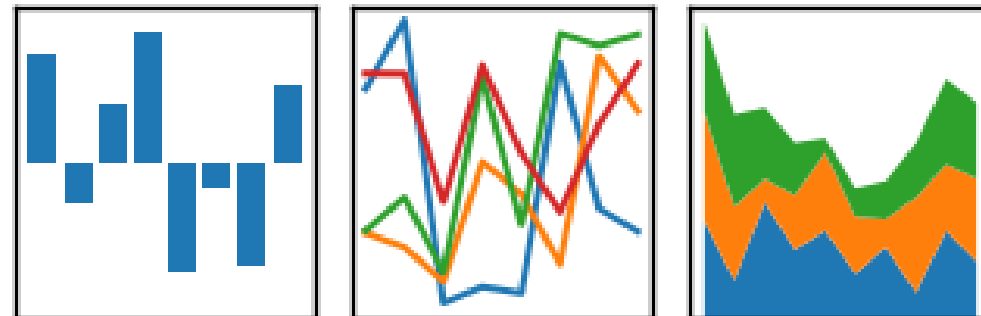


# Optional future work: predicting churn

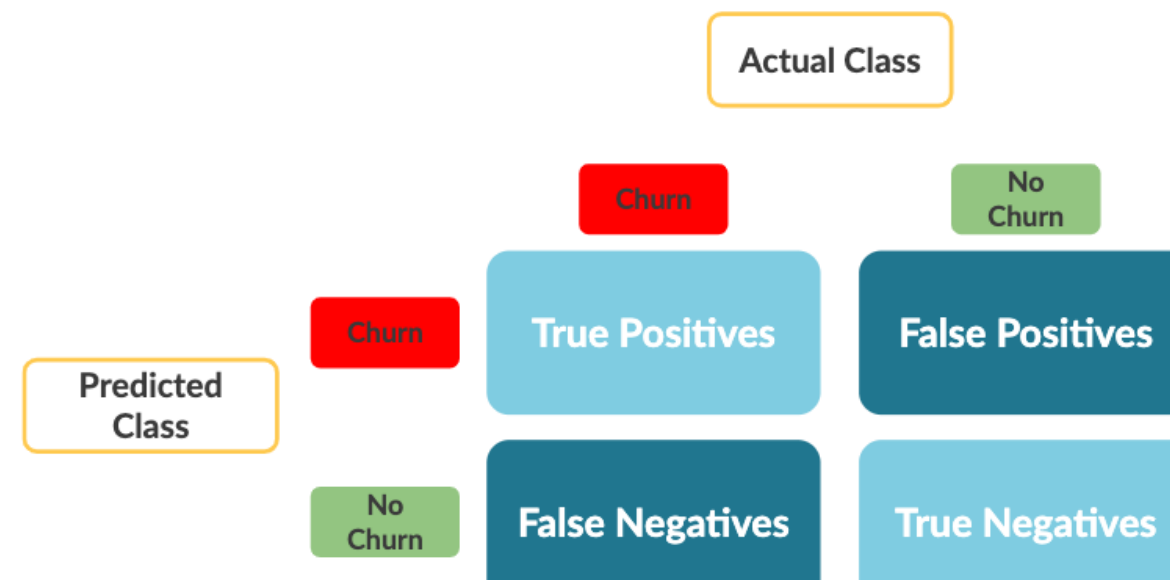
- Course on churn prediction: [Marketing analytics: predicting customer churn in Python](#)
- Intermediate python knowledge required

pandas

$$y_{it} = \beta' x_{it} + \mu_i + \epsilon_{it}$$



- You'll learn how to build and validate your prediction using model metrics



# Tableau is a playground

- You analyzed a new dataset from scratch:
  - Various visualizations: Dual Axis graphs, scatter plots, maps, ...
  - Calculated fields: `COUNTD()` , `IF THEN ELSE` , ..
  - Bins and bin sizes
- You leveraged the power of interactivity through:
  - Filters
  - Visualizations as filters
  - Parameters

# Congratulations!

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