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D601 – Task 1

1. Create step-by-step instructions to send to a nontechnical executive leader to provide guidance for opening the dashboard and navigating the dashboard using *both* filters.

From your file explorer, open the file named "D601-Task1(P.Bailey).twbx". This will automatically open the Tableau Public application previously installed on your device. When the file opens, you'll see multiple tabs at the bottom. Click on the "Churn Dashboard" tab at the far right. This interactive dashboard contains four visualizations: Geography, Contract Type, Streaming Devices, and Tenure in Months. The "Geography" visualization shows a map of the United States that is color coordinated by the number of churned customers. The darker colors represent a higher number of those customers. When you click on an individual state, for example, Virginia, the remaining visualizations also update to reflect the statistics for customers in Virginia. This is what is called a filter. The geographic filter is one component, and there is also a filter on the pie graph labeled "Contract Type". Each contract type can be clicked on, and the remaining visualizations will update to reflect customers who purchased that selected contract type.

2. Explain how the purpose of your dashboard aligns with the needs outlined in the scenario associated with your chosen dataset.

This dashboard is designed to help executive leaders make data-driven decisions to reduce customer churn and improve retention. Each visualization and filter address key business challenges by identifying at-risk customers, understanding regional trends, and pinpointing service issues. The "Contract Type" pie graph shows that the most heavily churned customers purchased month-to-month contracts across all states. That key detail is further supported by the

"Tenure in Months" bar graph, which depicts most churned customers with less than 12 months tenure. Furthermore, the "Streaming Devices" tree map shows us that customers who have purchased streaming movie and TV features on their device also have a high churn rate; however, they are less likely to churn if they have purchased a tablet with these features.

3. Explain three **different ways you would change your data storytelling approach when presenting to a technical versus nontechnical audience.**

When presenting to a nontechnical audience, I would provide context and frame the data to resonate with the audience's interests and concerns (WGU, 2020). Then I would frame the data as a narrative by asking and answering questions such as "who", "when", "where", and "why?" While presenting, I would use plain language, avoid jargon, focus on the visualizations, and highlight actionable insights. On the other hand, I would be more detailed for a technical audience by explaining the data sources, cleaning steps, and analytical models. I would also use more complex charts, like scatter plots with trendlines. Finally, I would discuss limitations such as data quality, assumptions, and potential biases.

4. Identify two elements of effective storytelling you could use to present this dashboard, and explain how *each* element would engage the audience.

One element of compelling storytelling is narrative structure. I would present this data as a story with a beginning that details the problem, a middle that visualizes and analyzes the data, and an end that gives key stakeholders business recommendations. This keeps the audience interested and makes the presentation memorable. Secondly, visual hierarchy is another element of storytelling. I used size, color, and placement to identify the most critical KPIs and trends. This helps the audience quickly grasp key information and allows the executives to make informed business decisions.

REFERENCES

Western Governors University. (2020). Universal design for storytelling. Retrieved from https://apps.cgp-oex.wgu.edu/learning/course/course-v1:WGUx+OEX0386+v01/block-v1:WGUx+OEX0386+v01+type@sequential+block@916626679c5e4434af042c1b2a571185/block-v1:WGUx+OEX0386+v01+type@vertical+block@935e0c3493c449cf879b4f7a3ea8fd1a