

Mastering Tableau

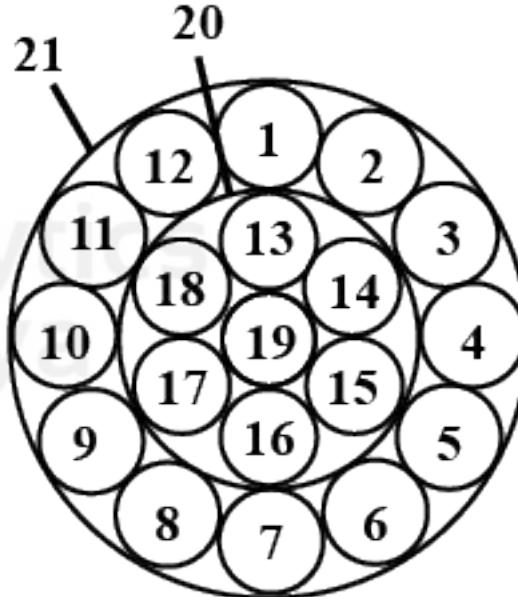
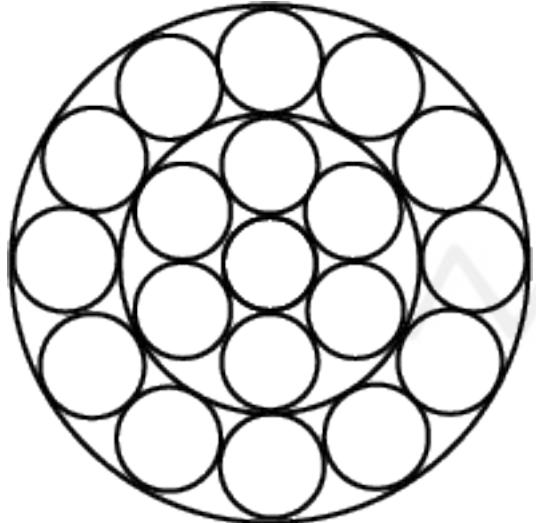
Become a Data Visualization Rockstar



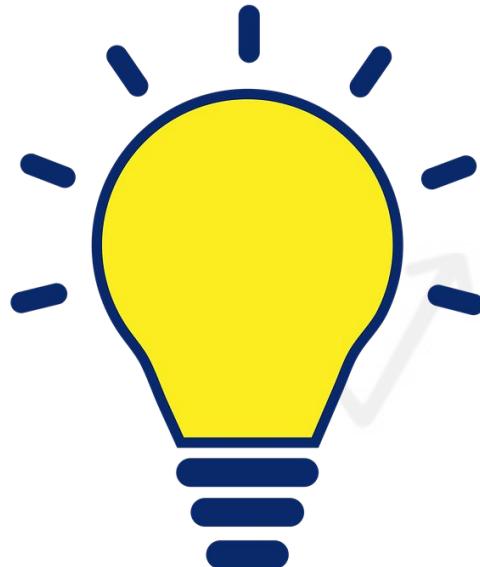


- Pranav Dar
- Senior Content Strategist and Program Lead
- ~10 years of experience in various Visualization and Analytics roles

Can you Count the Number of Circles?

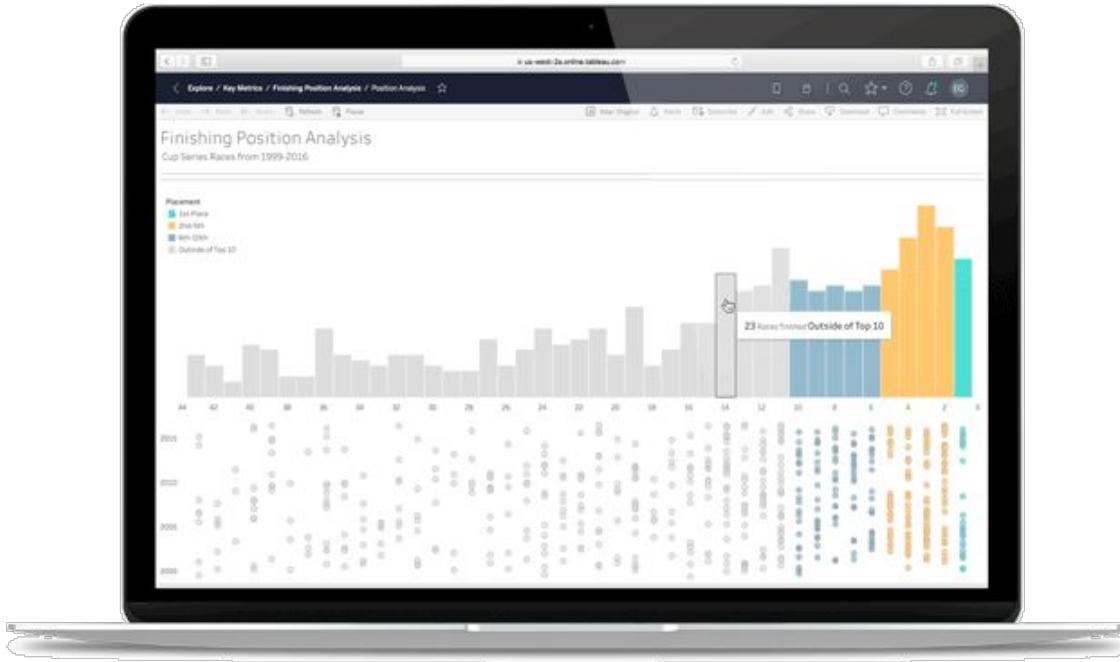


Methodology for this Training



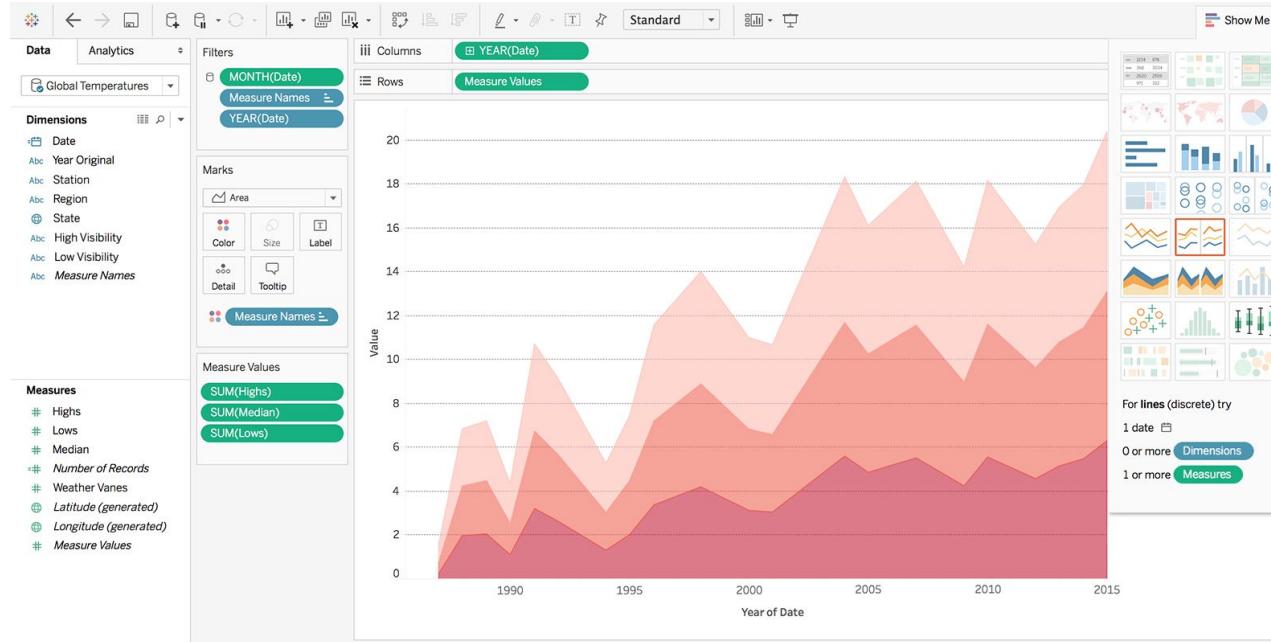
Business Sense + Tableau = Data Visualization Expert

Getting Started with Tableau



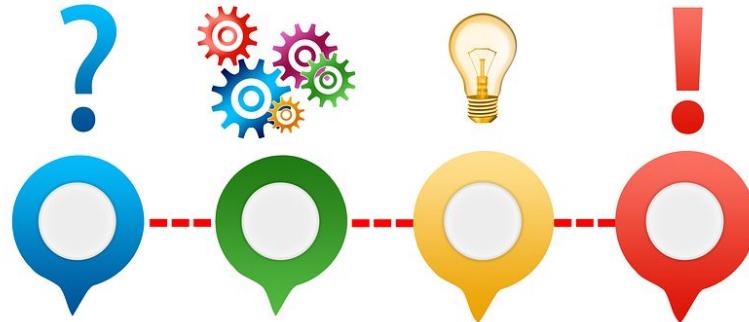
- The Power of Data Visualization
- Understanding the different Tableau products

Understanding the Length and Breadth of Tableau



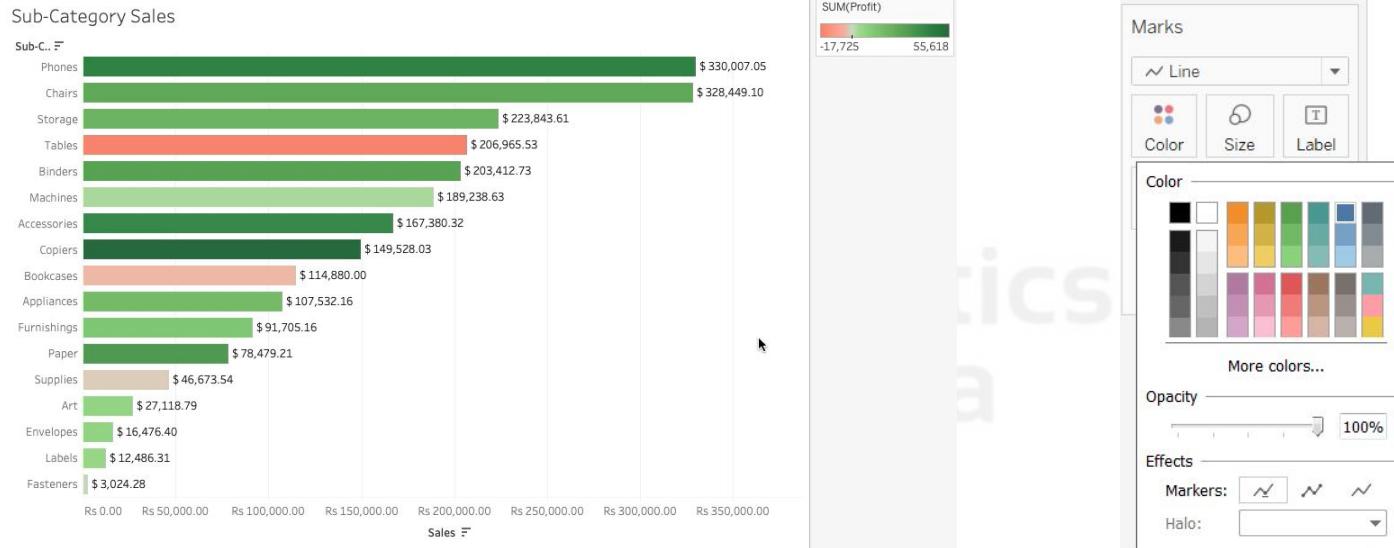
- Navigating the Tableau interface
- Connecting Tableau to different data sources

Setting up the Problem Statement



- Understanding the Problem Statement
- Importing Data into Tableau
- Getting Familiar with the Variables

Getting Hands-On with Tableau



- Create your first visualization in Tableau
- Labels, formatting and colors in Tableau
- Filters and Excel-like Pivot Structures
- Learn how to export your Tableau worksheet

Different Chart Types in Tableau



Bar Charts

Line
Charts

Heat Maps

Scatter
Plots

Histograms

Stacked
Charts

Dual Axis
Charts

Geospatial

Bubble
Charts

Area
Charts

Box Plots

Pie Charts

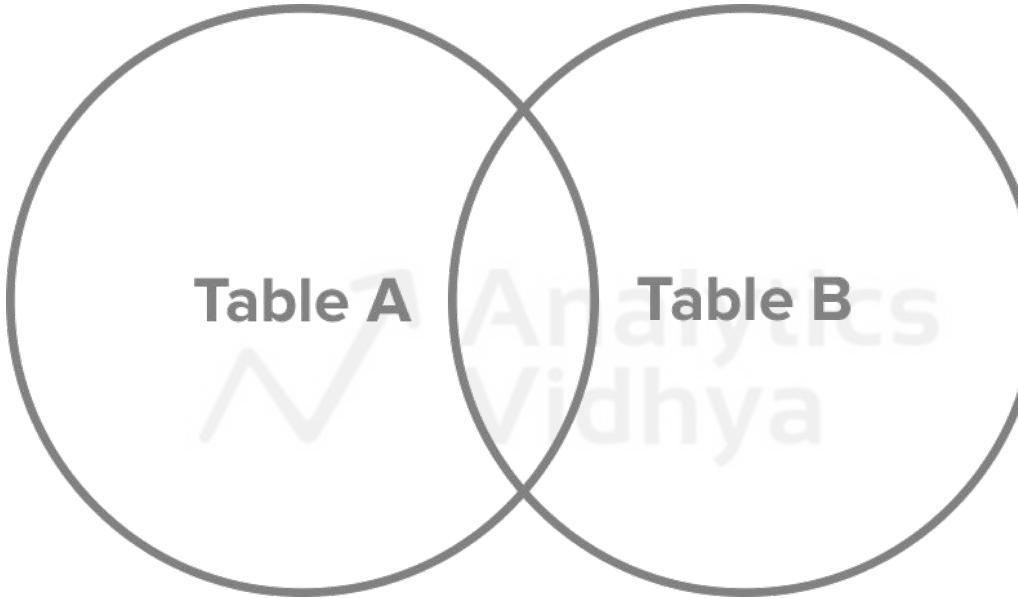
- Learn how to design various charts in Tableau
- Line charts, map visualizations, bubble charts, scatter plots, etc.
- Dual Axis charts in Tableau

Calculated Fields and Parameters



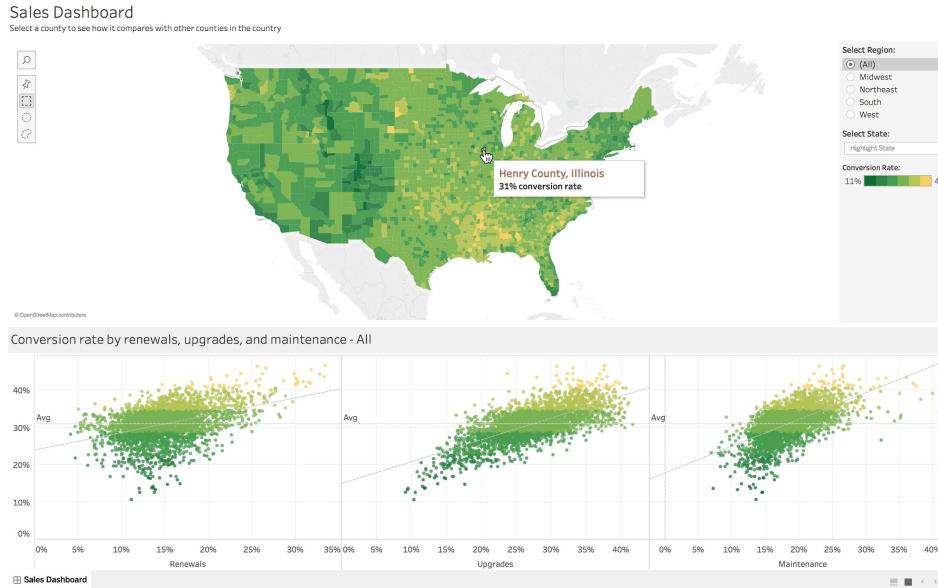
- Feature Engineering in Tableau using Calculated Fields
- Parameter Control in Tableau to Enhance User Experience

Joining and Blending Data in Tableau



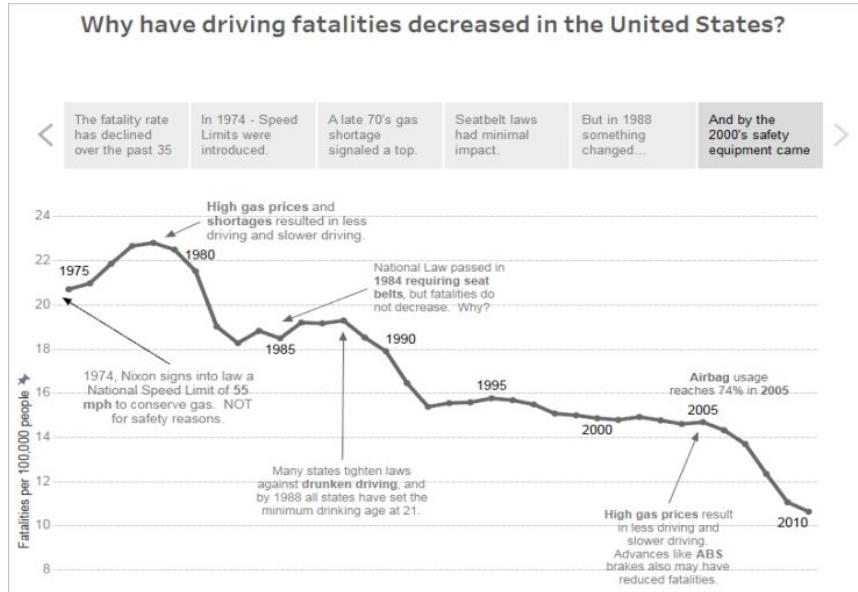
- Joins and their Different Types
- Data blending (advanced topic)
- Data joining v Data blending

Building Powerful Dashboards in Tableau



- Understand Dashboards and their importance
- Putting together the different Dashboard components
- Creating an effective business industry-level Dashboard

The Art of Storyboarding in Tableau



- Understand the importance of storytelling for business
- Storyboarding in Tableau and how it's different from dashboarding
- Build an awesome Storyboard in Tableau

What we will cover in this training

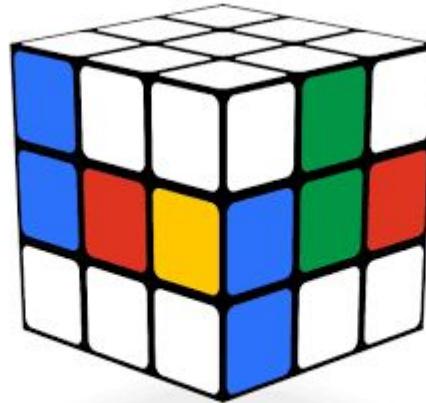
- Getting Started with Tableau
- Understanding the Length and Breadth of Tableau
- Setting up the Problem Statement
- Getting Hands-on with Tableau
- Different Chart Types in Tableau
- Calculated Fields and Parameters
- Joining and Blending
- Building Powerful Dashboards in Tableau
- The Art of Storyboarding in Tableau
- Final Assessment



The Power of Visualization

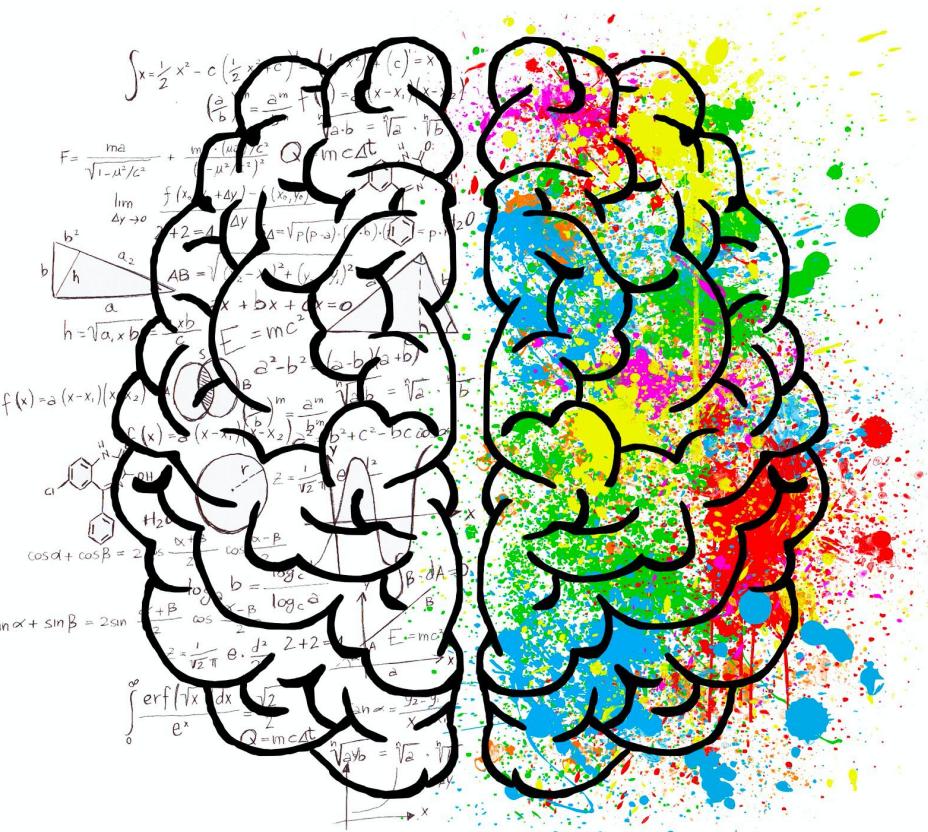


How Many Squares are in a Rubik's Cube?



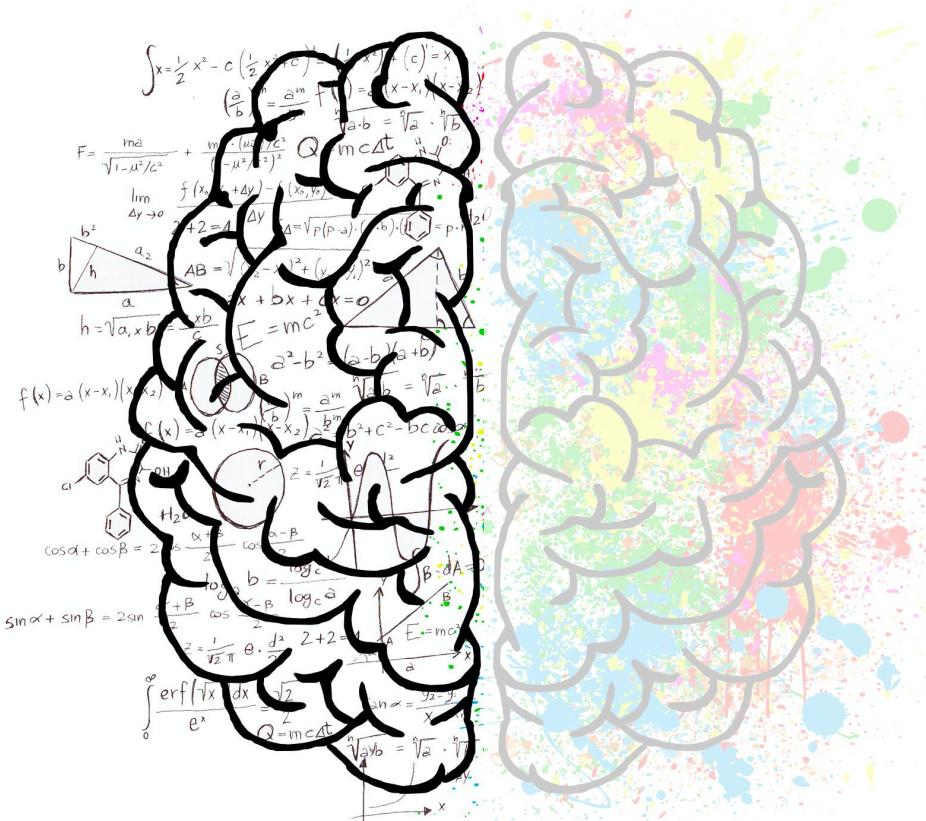
6 Sides, 54 Squares!

The Two Hemispheres of our Brain



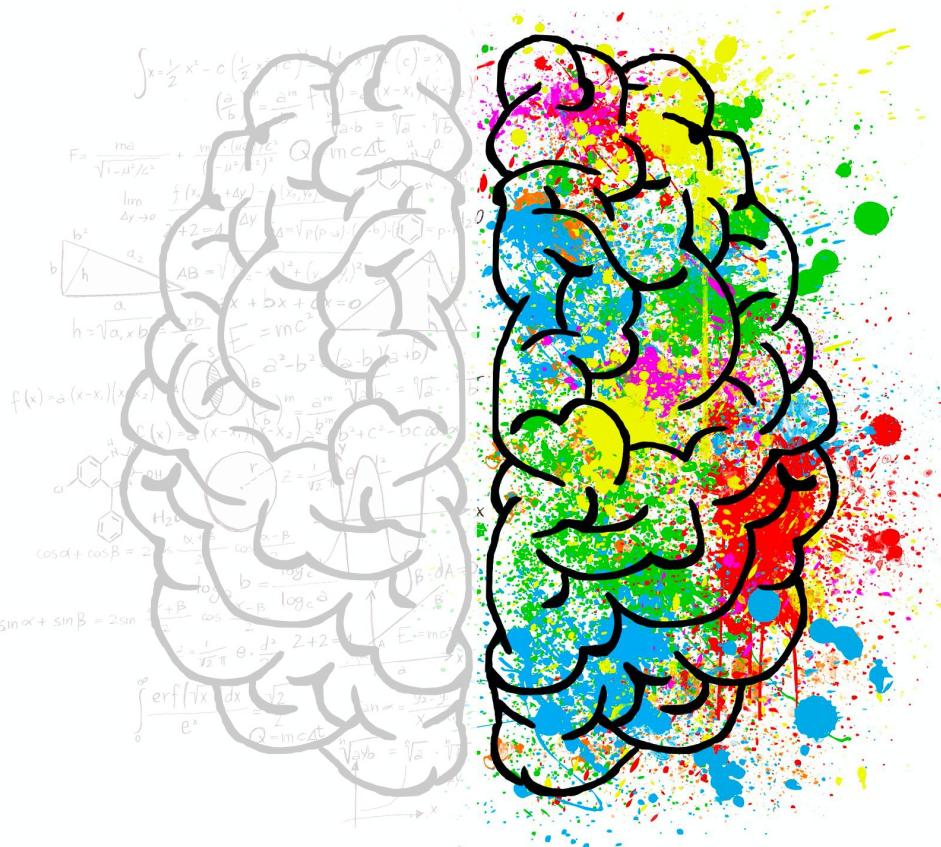
The Two Hemispheres of our Brain

- Reading
- Writing
- Speaking
- Reasoning



The Two Hemispheres of our Brain

- Reading
- Writing
- Speaking
- Reasoning



- Visual Perception
- Patterns
- Music
- Expressions

The 3 Vs of Communication



The 3 Vs of Communication

1. Verbal



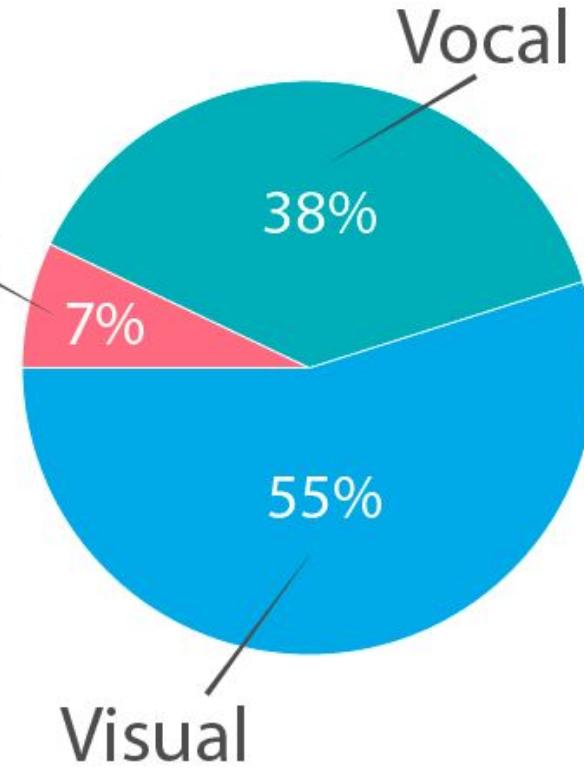
2. Vocal



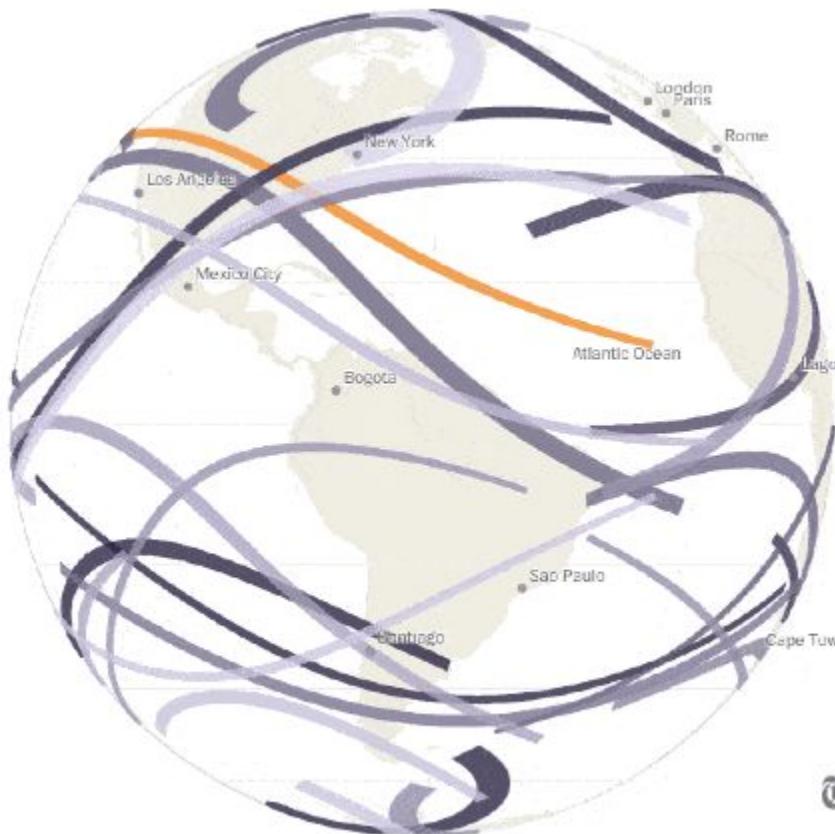
3. Visual



Verbal

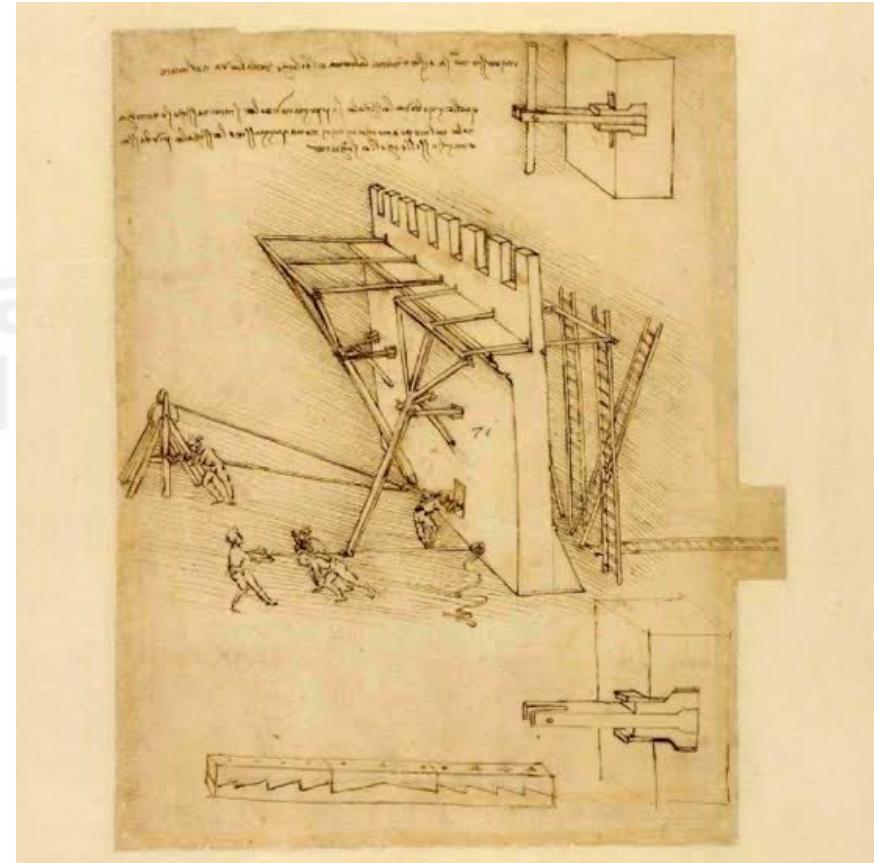


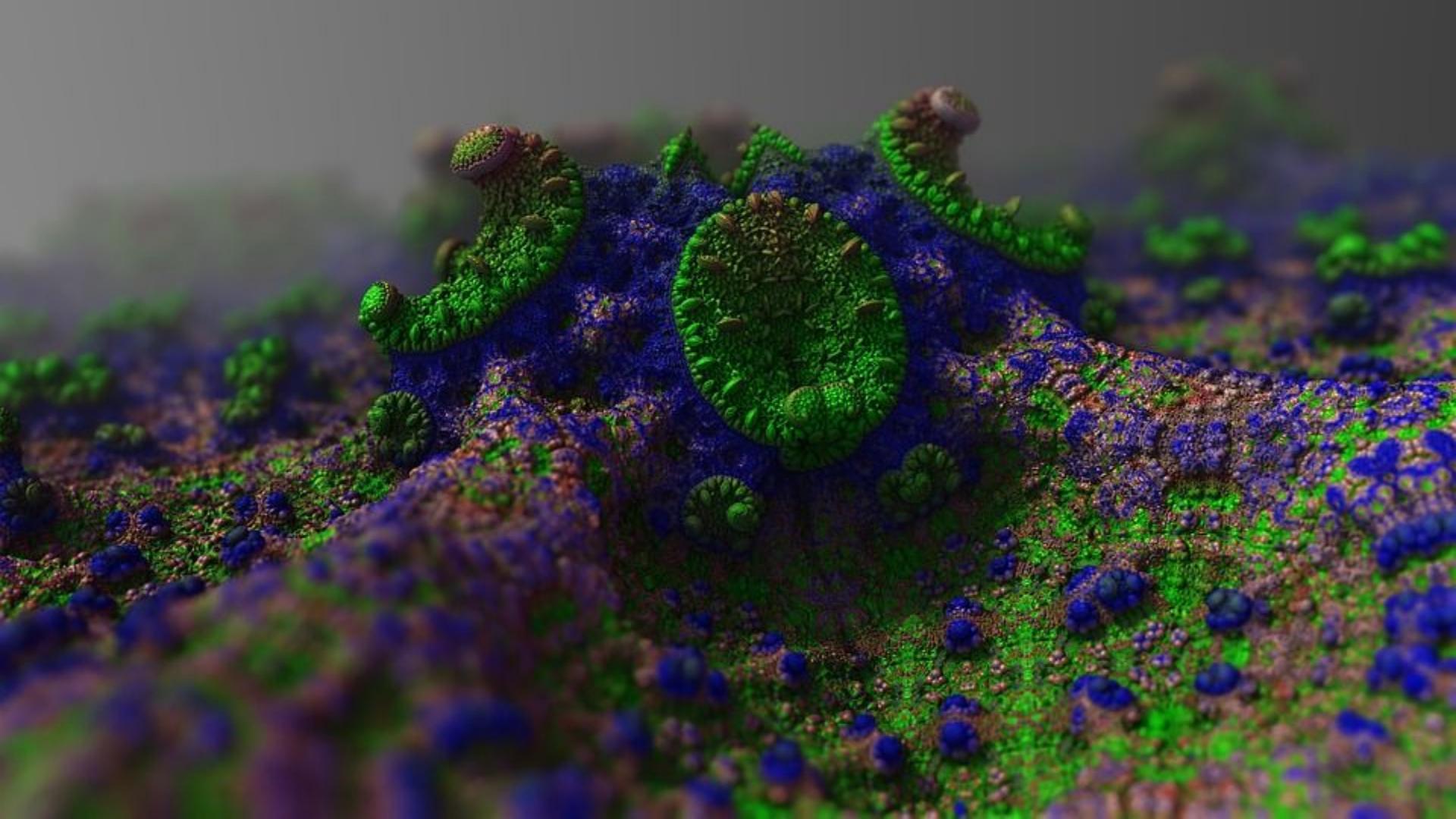
Visualizing the Future!



The Washington Post

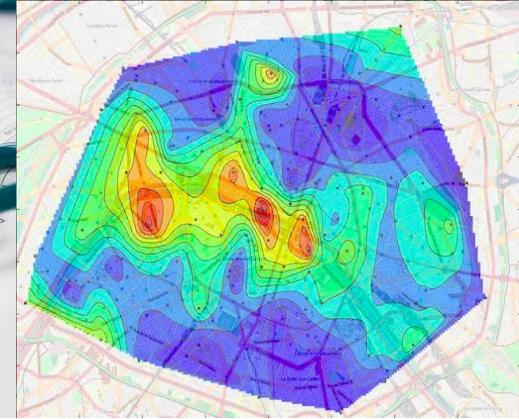
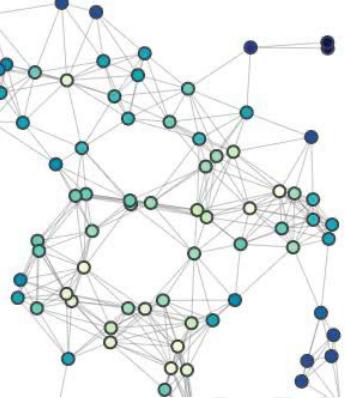
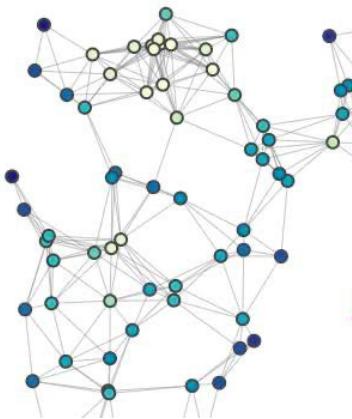
Visualizations have been Around for Centuries



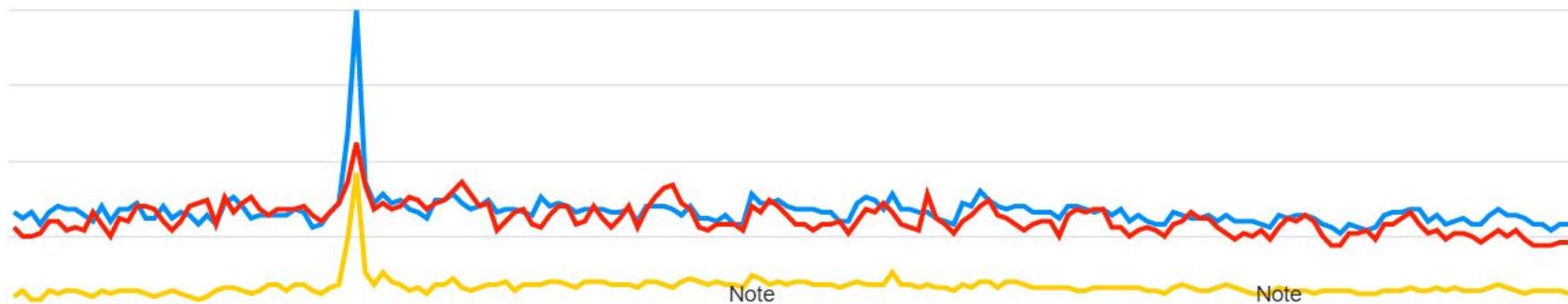


What is Data Visualization and Why We Should use it

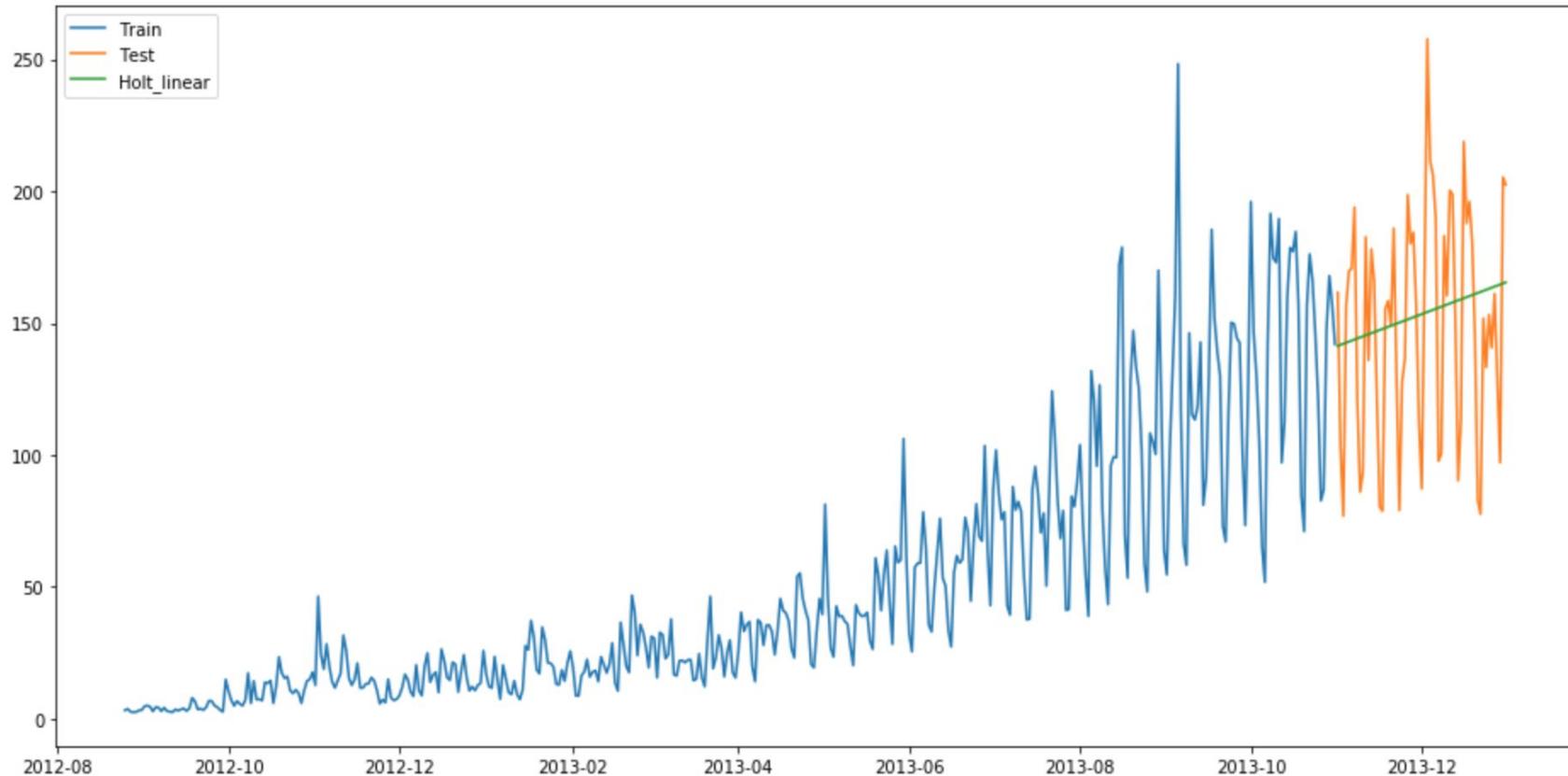
Data is Generated Everywhere & Everyday



We are generating data at an unprecedented pace.



Visualization in a Data Science Scenario



So, What is Data Visualization?

Data Visualization is the ability to turn data into visible and tangible insights that people can intuitively understand.

Why Should We Use Data Visualization?

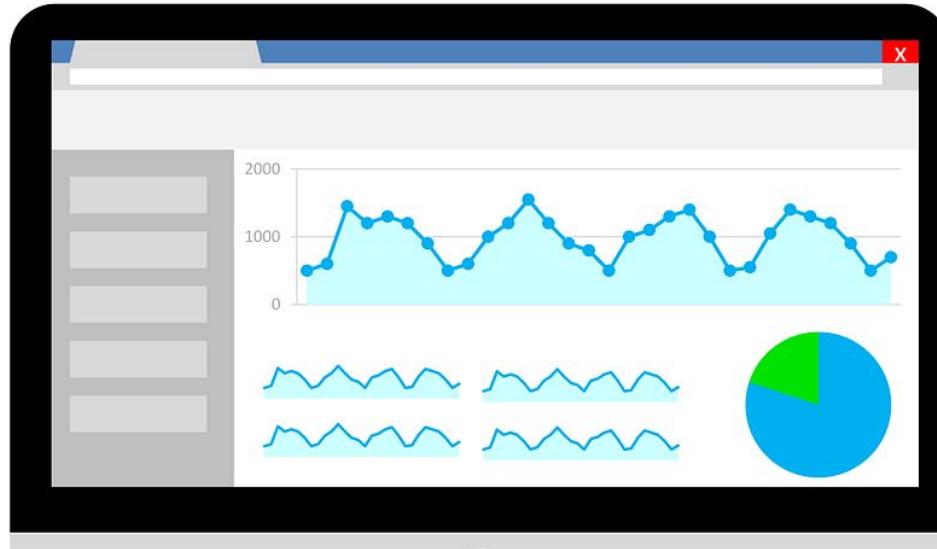
To Explore



Why Should We Use Data Visualization?

To Explore

To Analyze

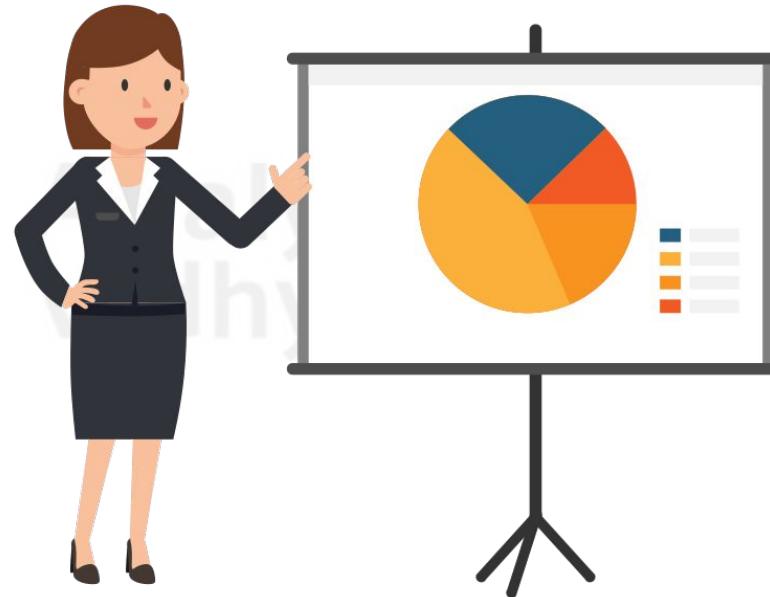


Why Should We Use Data Visualization?

To Explore

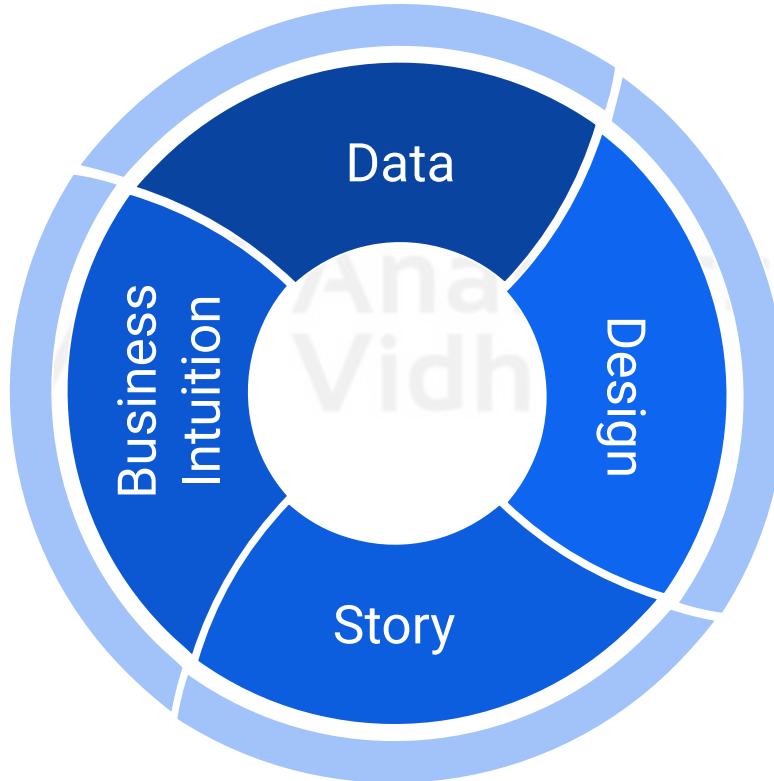
To Analyze

To Present



4 Key Elements of an Effective Data Visualization

The 4 Elements of an Effective Visualization



Element #1: Data

Data



Element #2: Design

Data

Design



Element #3: Story

Data

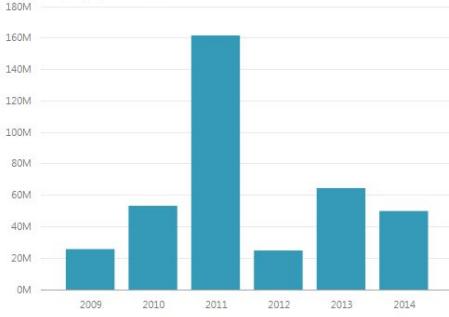
Design

Story

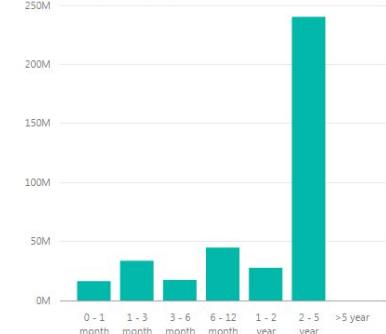
Used Capacity (TB) and Total Capacity (TB)



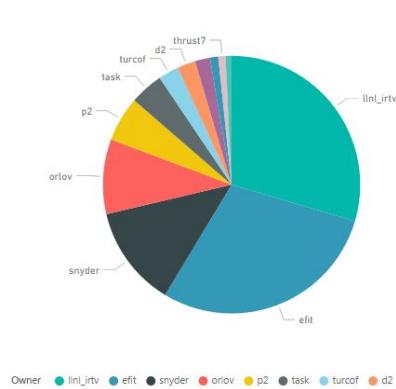
Storage Capacity by Year Created



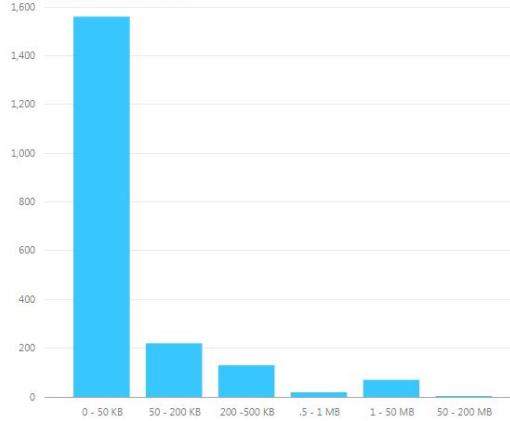
Storage Capacity by Age (Last Access)



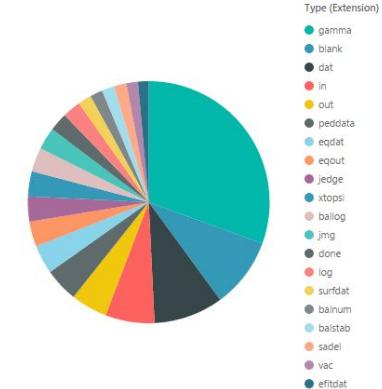
Storage Capacity by Owner



Count of Number of Files by File Size



File Count by Type (Extension)



Element #4: Business Intuition

Data

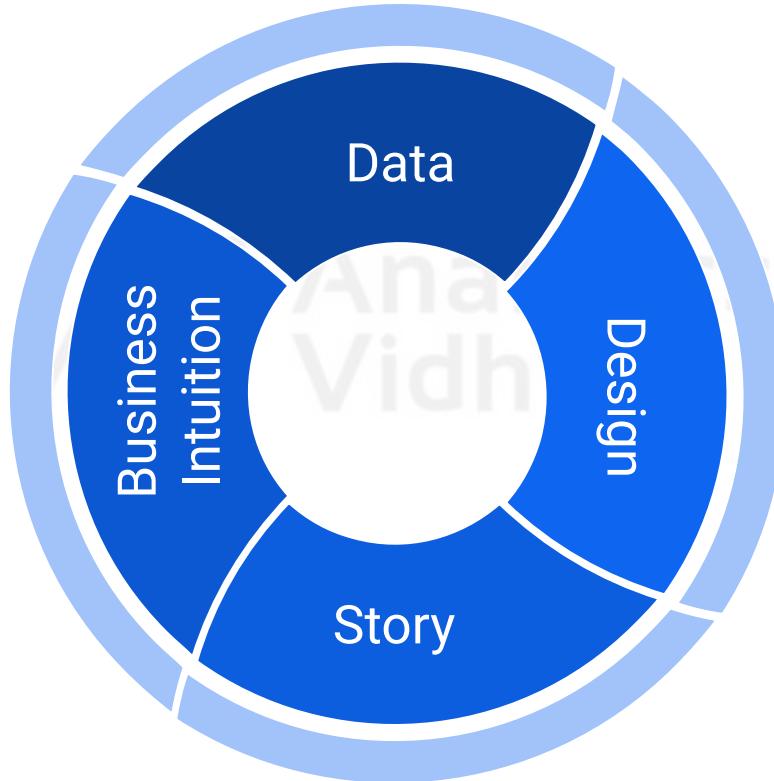
Design

Story

Business
Intuition



The 4 Elements of an Effective Visualization



Getting Familiar with the Tableau Ecosystem

Understanding the Problem Statement

Welcome to the Superstore



Examples of Other Superstores



Amazon Go



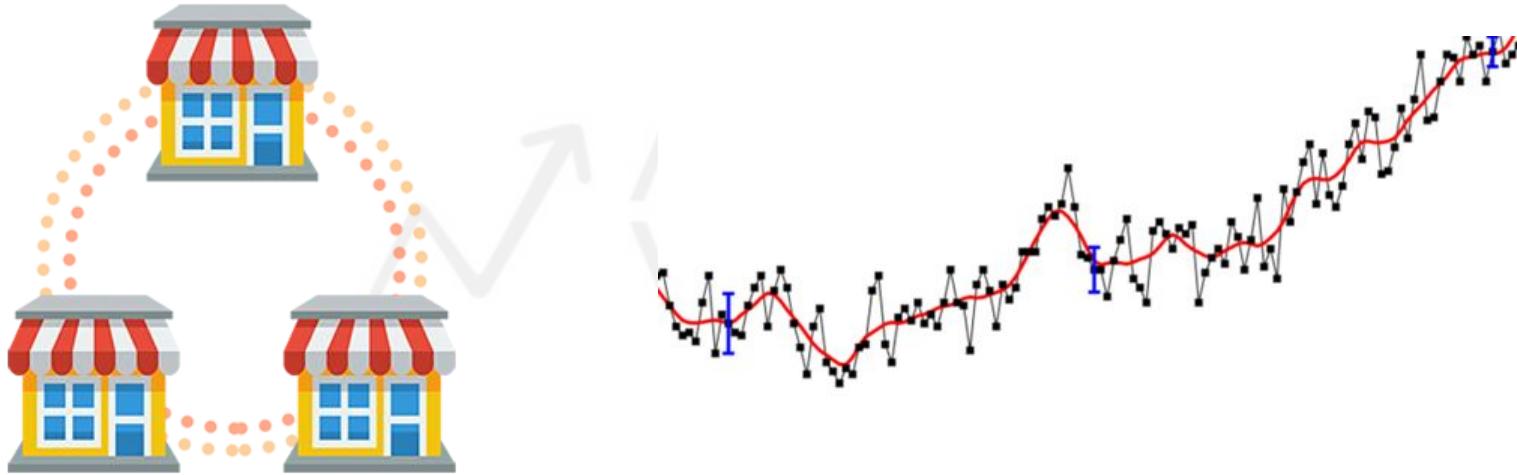
Walmart

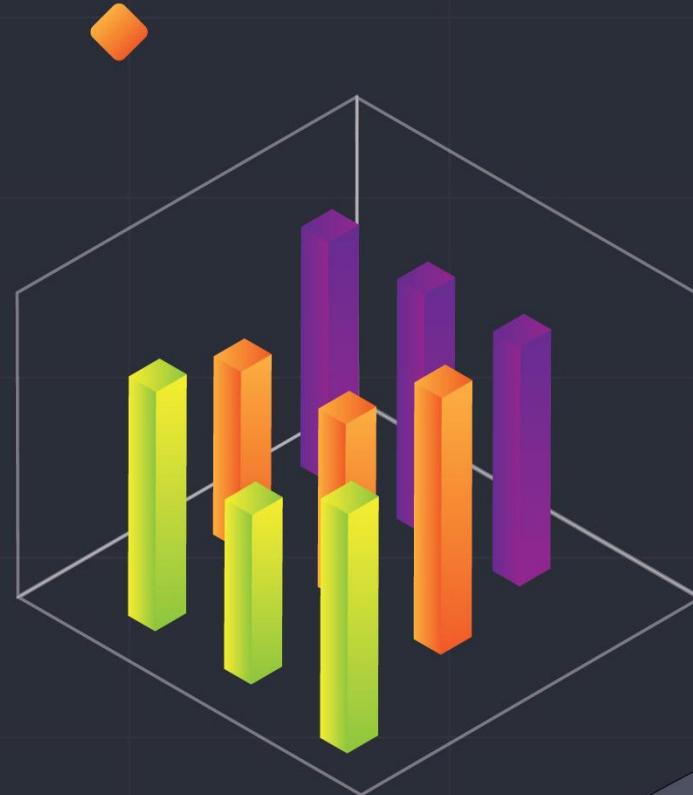
Understanding the Problem Statement



- A Superstore in the United States has recently set up its data science team
- The store has rich data about its products, regions, and much more
- The leadership team wants to know which products, regions, categories, segments and so on are doing well

Understanding the Problem Statement





Mastering Tableau

Become a Data Visualization Rockstar

Insights Time!

Let's quickly check how much of yesterday's session you can remember. 😊

- How do we separate the First Name and the Last Name from a column?
- Measures are blue and Dimensions are Green. True or False?
- Data Extract is a subset of the data that doesn't need to be refreshed regularly. True or False?
- Which is the category with the highest sales?
- Which segment has the lowest sales?

Different Chart Types in Tableau



Bar Charts

Line Charts

Heat Maps

Scatter Plots

Histograms

Stacked Charts

Dual Axis Charts

Geospatial

Bubble Charts

Area Charts

Box Plots

Pie Charts

- Learn how to design various charts in Tableau
- Line charts, map visualizations, bubble charts, scatter plots, etc.
- Dual Axis charts in Tableau

Calculated Fields and Parameters



- Feature Engineering in Tableau using Calculated Fields
- Parameter Control in Tableau to Enhance User Experience

The Different Chart Types



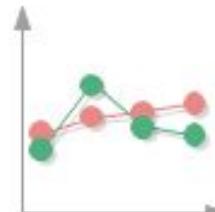
Pie



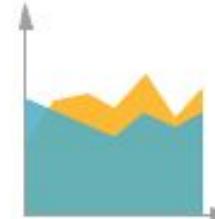
Bar



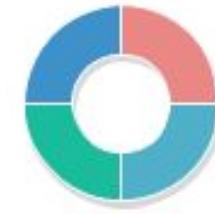
Column



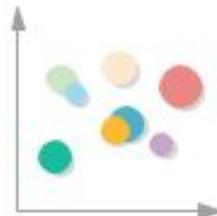
Line



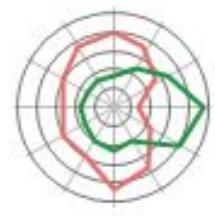
Area



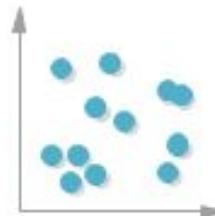
Doughnut



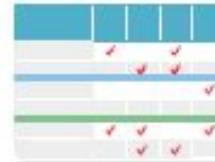
Bubble Chart



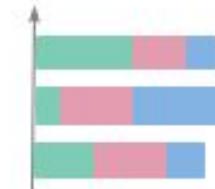
Spider and Radar



Scatter



Comparison Chart



Stacked bar chart



Gauges

The Different Chart Types

“There is magic in graphs. The profile of a curve reveals in a flash a whole situation — the life history of an epidemic, a panic, or an era of prosperity. The curve informs the mind, awakens the imagination, convinces.” - Henry D. Hubbard

“Graphical excellence is that which gives to the viewer the greatest number of ideas in the shortest time with the least ink in the smallest space.” - Edward Tufte

The 'Show Me' Button in Tableau



Bar Charts

Line
Charts

Heat Maps

Scatter
Plots

Histograms

Stacked
Charts

Dual Axis
Charts

Geospatial

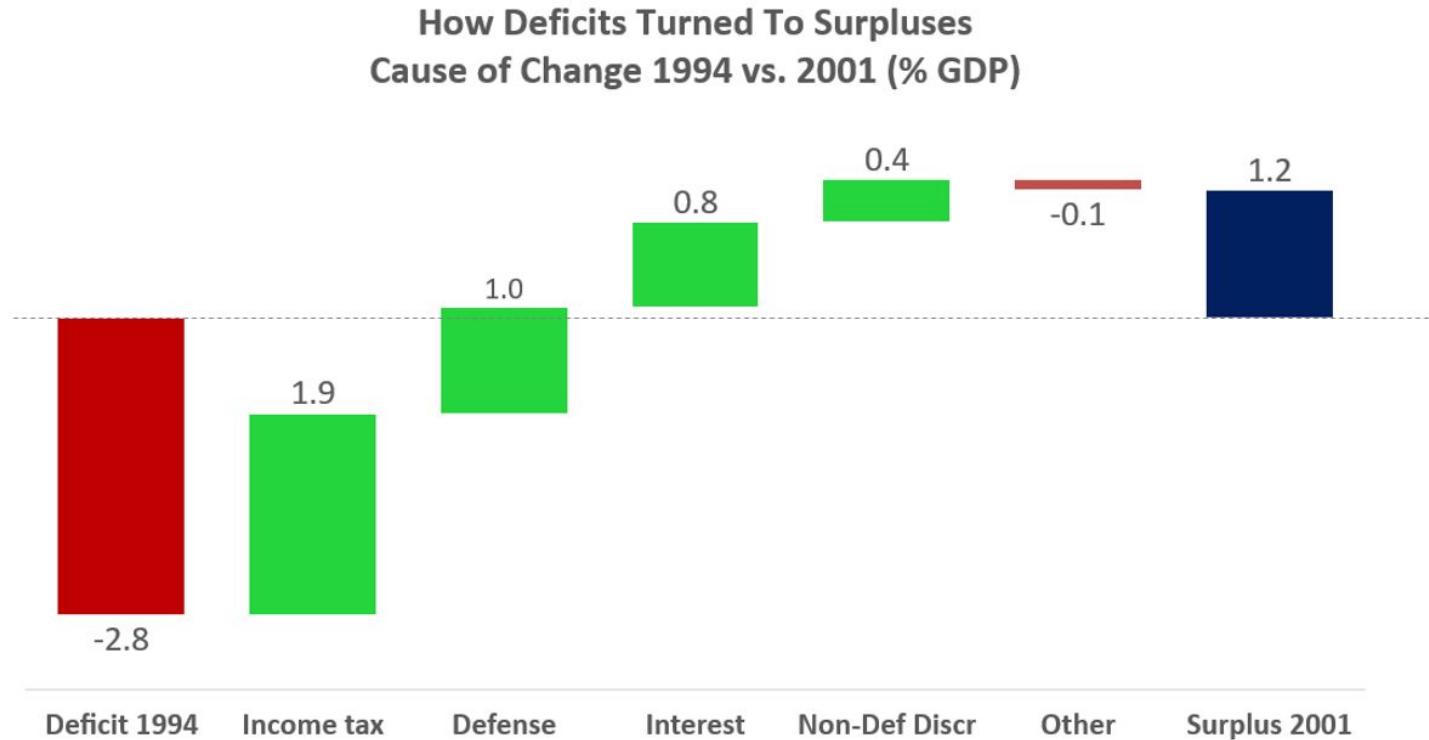
Bubble
Charts

Area
Charts

Box Plots

Pie Charts

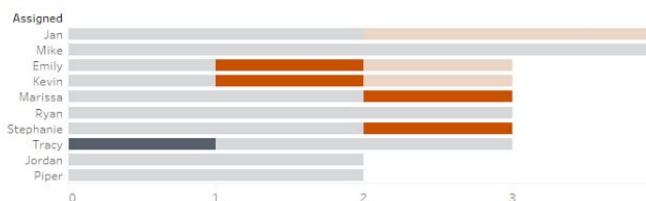
Advanced Charts in Tableau (Waterfall)



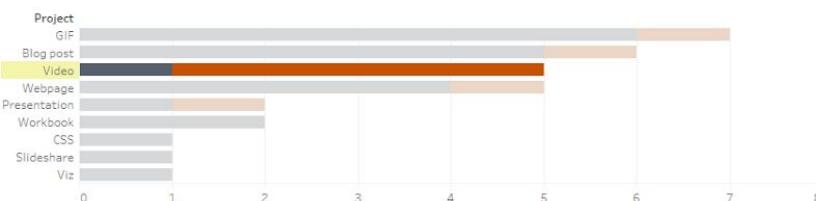
Advanced Charts in Tableau (Gantt)



Projects by Owner



Project Breakdown



Time Series Charts

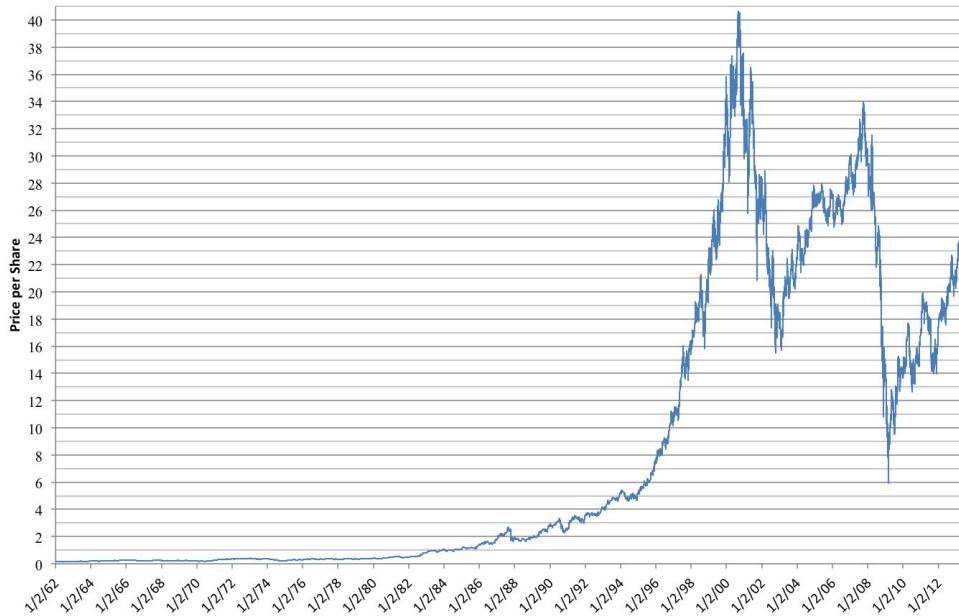
What is a Time Series?



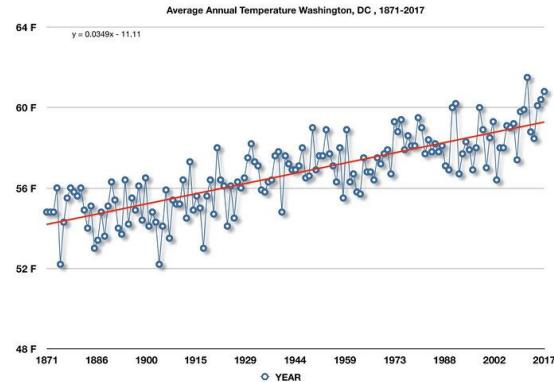
Time Series can be Represented as..

Line charts!

General Electric Company



The Climate is Changing



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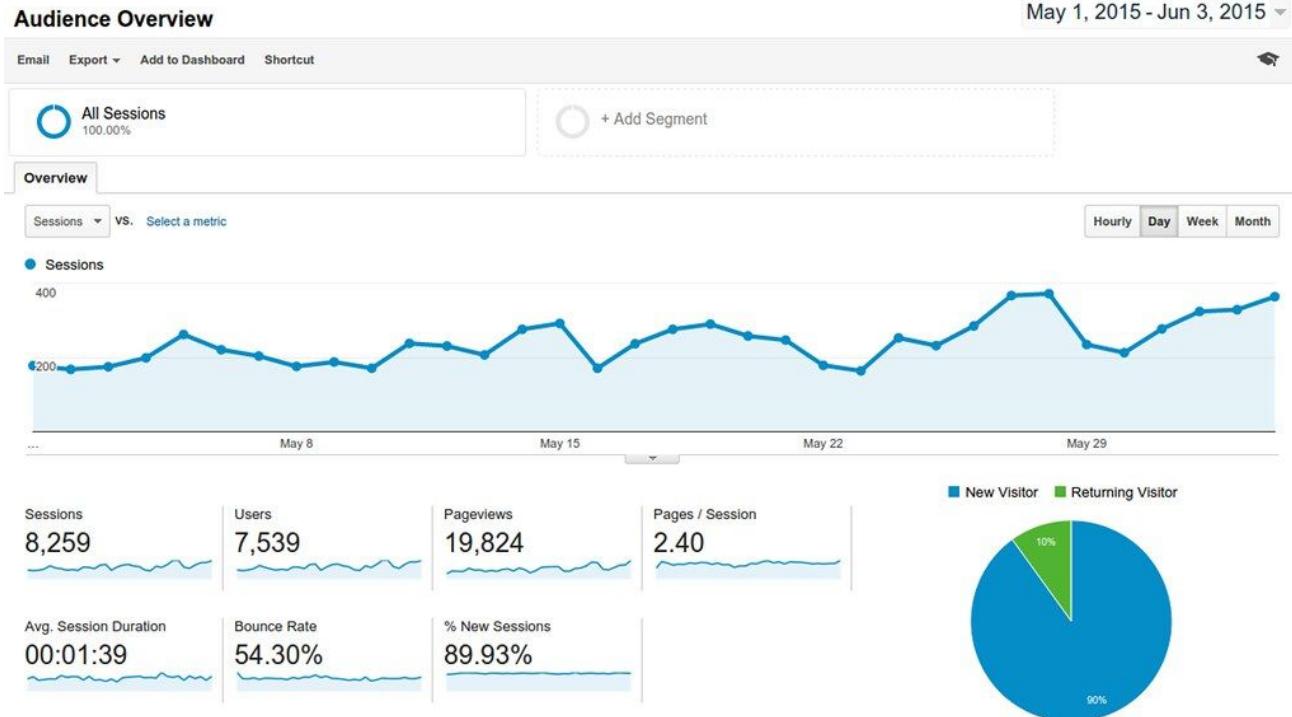


Ted Eytan, MD, MS, MPH
@tedeytan

revised
05.13.18

Why do we Need Line Charts in Business?

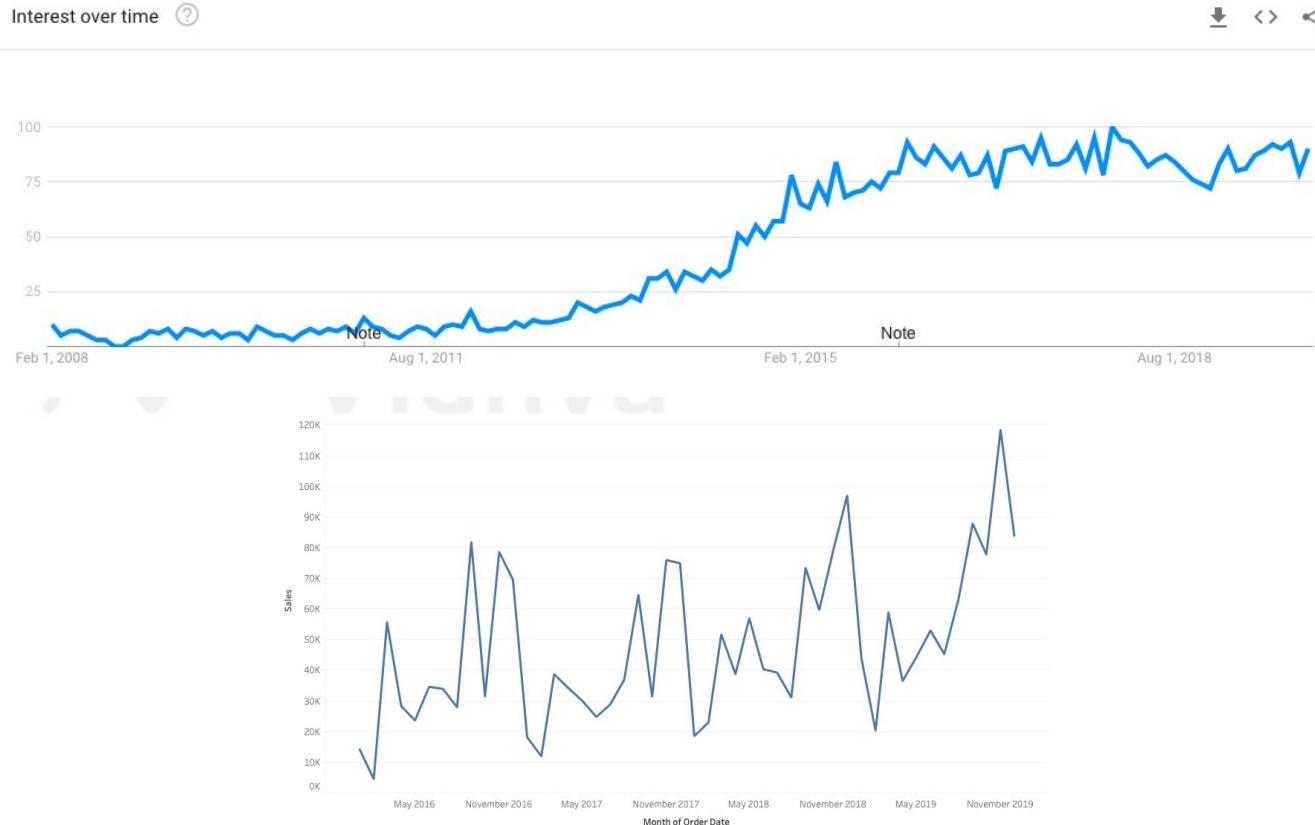
To Monitor
Changes over Time



Why do we Need Line Charts in Business?

To Monitor
Changes over Time

To Analyze Trends



Why do we Need Line Charts in Business?

To Monitor
Changes over Time

To Analyze Trends

To Compare
Patterns

COMPARISON OF SCORES IN WORLD CUP 2019



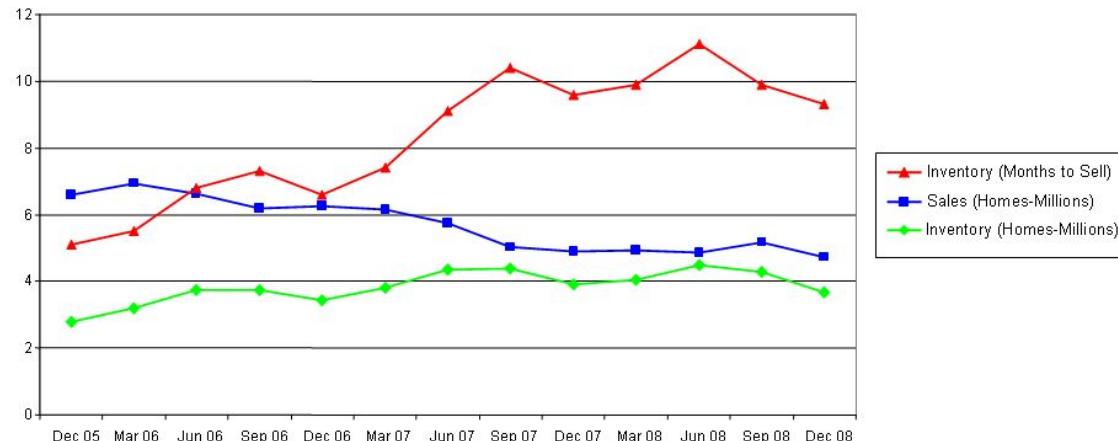
Why do we Need Line Charts in Business?

To Monitor
Changes over Time

To Analyze Trends

To Compare
Patterns

U.S. Existing Home Sales, Inventory, and Months Supply
December 2005 – December 2008



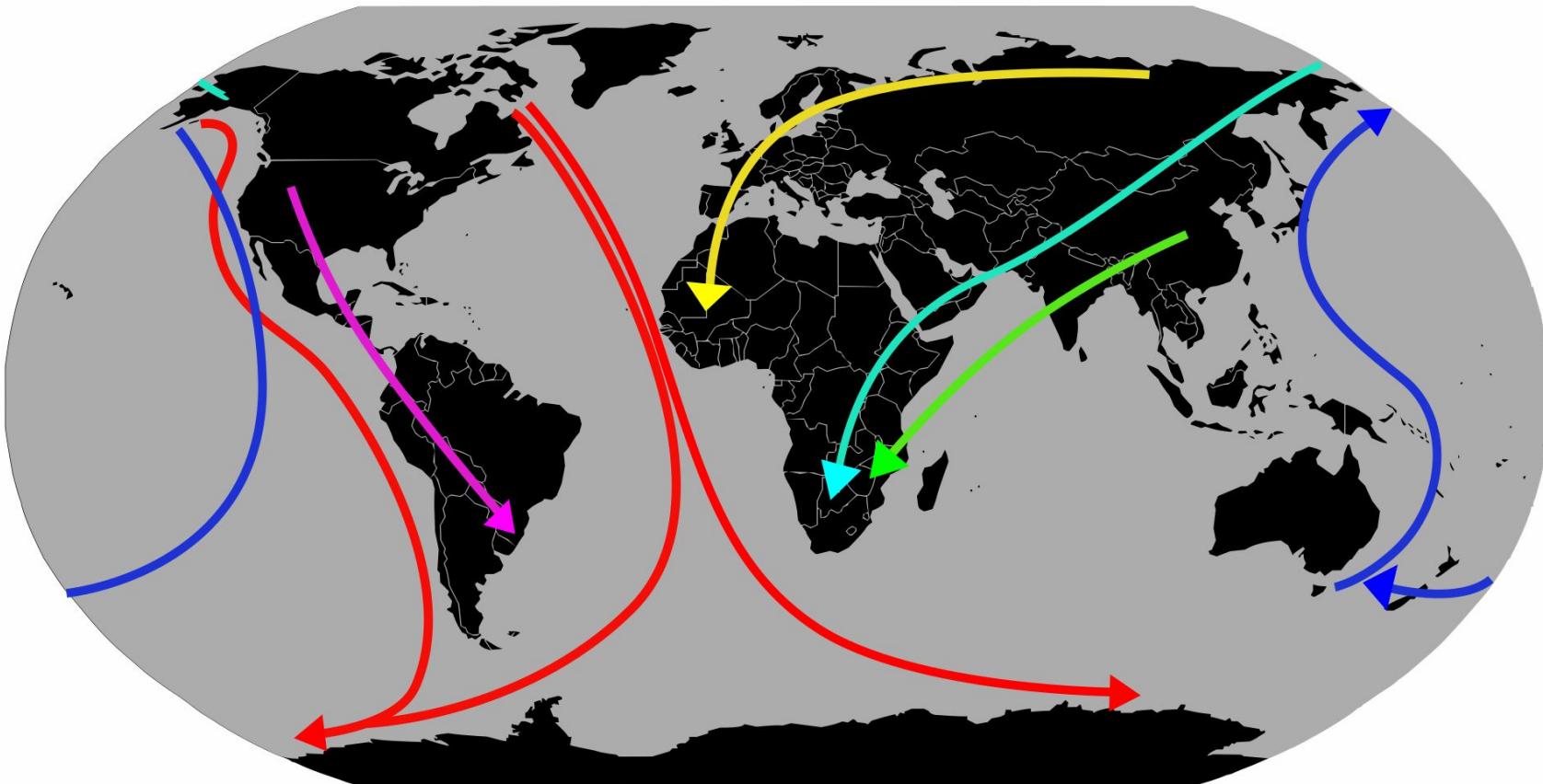
Each sales data point (blue line) is annualized based on the most recent month's rate of sale.
The inventory figure (green line) represents the number of homes for sale at a point in time.
The inventory months to sell (red line) is how many months it would take to sell the existing inventory.

Map Visualizations

The Rise of Location Data



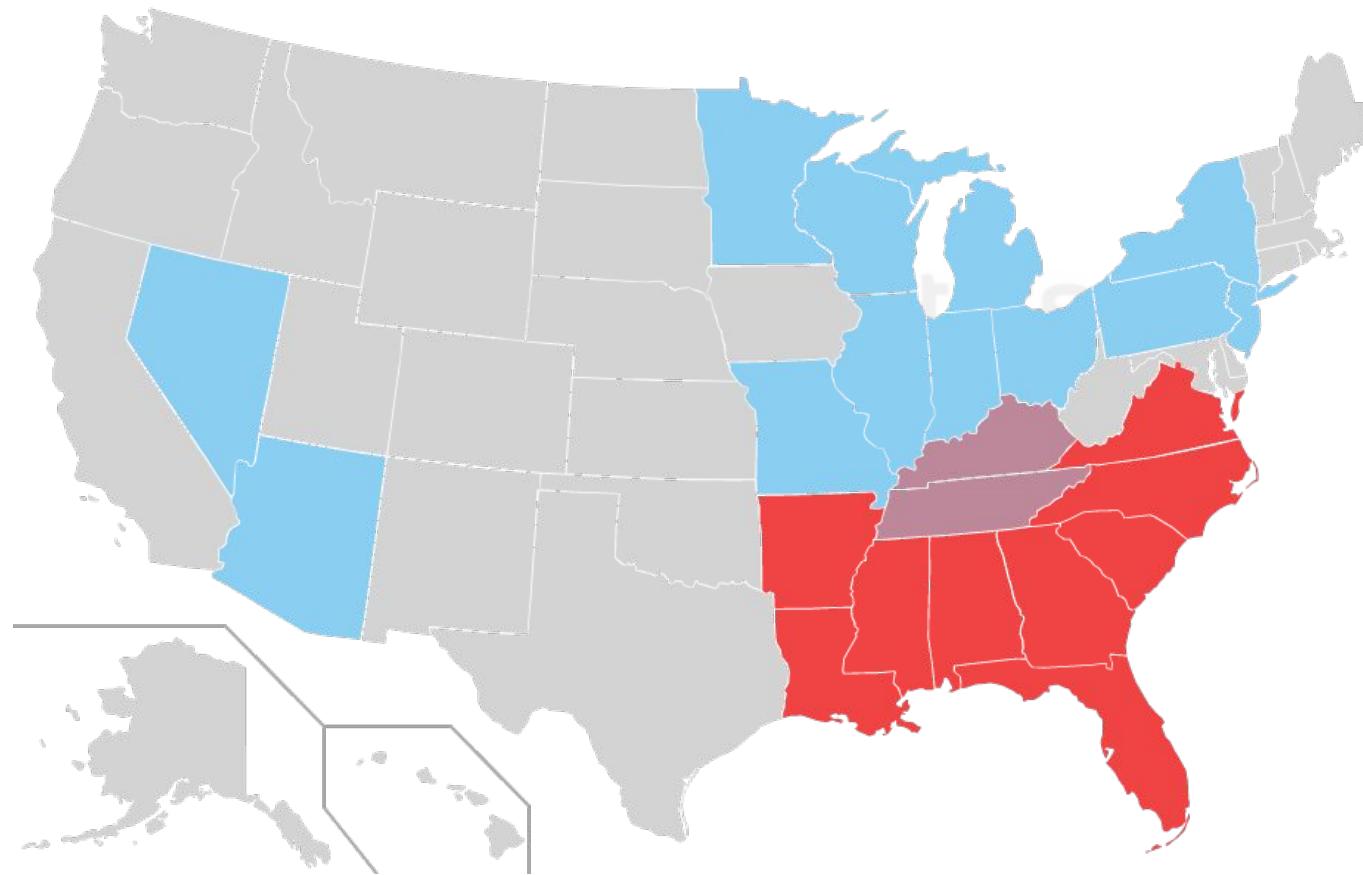
The Rise of Location Data



What is Geospatial Analysis?

Country/Region	City	State	Postal Code	Region	Sales	Quantity	Discount	Profit
United States	Henderson	Kentucky	42420	South	261.96	2	0	41.9136
United States	Henderson	Kentucky	42420	South	731.94	3	0	219.582
United States	Los Angeles	California	90036	West	14.62	2	0	6.8714
United States	Fort Lauderdale	Florida	33311	South	957.5775	5	0.45	-383.031
United States	Fort Lauderdale	Florida	33311	South	22.368	2	0.2	2.5164
United States	Los Angeles	California	90032	West	48.86	7	0	14.1694
United States	Los Angeles	California	90032	West	7.28	4	0	1.9656
United States	Los Angeles	California	90032	West	907.152	6	0.2	90.7152
United States	Los Angeles	California	90032	West	18.504	3	0.2	5.7825
United States	Seattle	Washington	98103	West	407.976	3	0.2	132.5922

What is Geospatial Analysis?



Use Cases of Geospatial Analysis

Sales & Marketing

Transportation &
Logistics

Situational Intelligence

Risk Analysis

Strategic Growth
Optimization

Satellite Imagery

Calculated Fields

Calculated Fields in Tableau



What are Calculated Fields in Tableau?

Calculated fields allow us to create new columns (or data) from our already existing data. Think of it like the power to do feature engineering in Tableau!

What can you do with Calculated Fields?

Segment data

Convert data
type

Aggregate data

Filter results

Calculate ratios

And much, much more!



Basic Calculations

Transform values at:

- Data source
- Visualization

LOD Expressions

Transform values at:

- Data source
- Visualization

Table Calculations

Transform values at:

- Visualization

Data source = Row-level calculation
Visualization = Aggregate-level calculation

Example of a Calculated Field

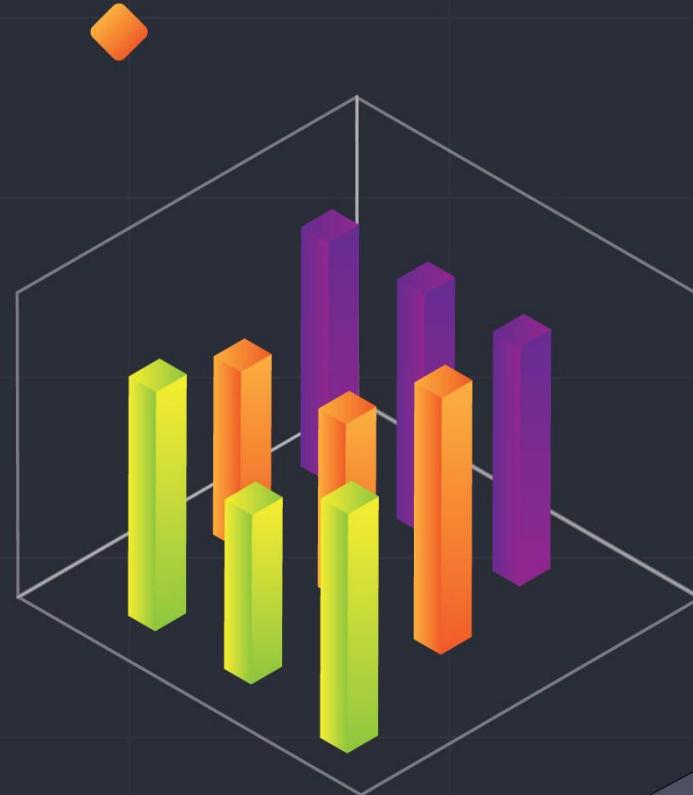
Calculated Field [Last Day]

Name: Last Day

Formula:

```
CASE [Date Level]
WHEN 'Year' THEN
    IF dateadd('day',1,[Order Date])=DATETRUNC('year',dateadd('day',1,[Order Date])) THEN 1
        ELSE 0
    END
WHEN 'Quarter' THEN
    IF dateadd('day',1,[Order Date])=DATETRUNC('quarter',dateadd('day',1,[Order Date])) THEN 1
        ELSE 0
    END
WHEN 'Month' THEN
    IF dateadd('day',1,[Order Date])=DATETRUNC('month',dateadd('day',1,[Order Date])) THEN 1
        ELSE 0
    END
ELSE 1
END
```

 The calculation is valid.



Mastering Tableau

Become a Data Visualization Rockstar

Memory Jogging Time

Let's quickly check how much of yesterday's session you can remember. 😊

- What was the formula we used to count the number of orders?
- How can we reverse the colors in any Tableau visualization?
- Can you recall the steps to correct locations if Tableau cannot automatically detect it?
- Can you spot what's wrong with this formula?



The screenshot shows a Tableau calculation editor window. The title bar says "Furniture Segment" and has a close button "X". The main area contains the following DAX formula:

```
IF [Sub-Category] = "Bookcases"  
OR [Sub-Category] = "ChairS"  
OR [Sub-Category] = "Tables"  
THEN "Furniture Segment"  
ELSE "Other Segment"  
END
```

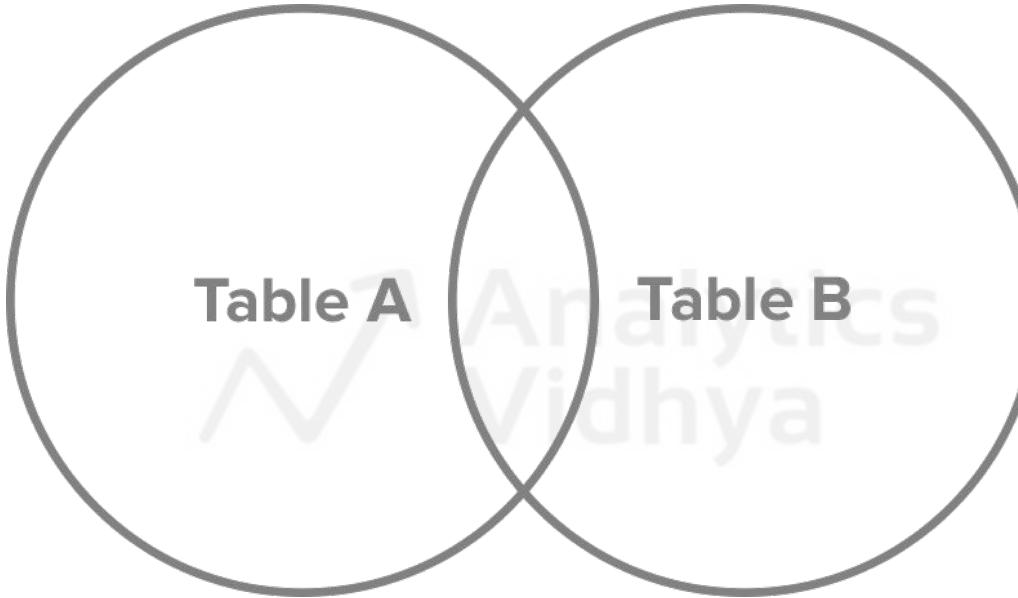
At the bottom of the editor, there is a status message "The calculation is valid.", a dependency indicator "1 Dependency ▾", and two buttons: "Apply" and "OK".

Calculated Fields and Parameters



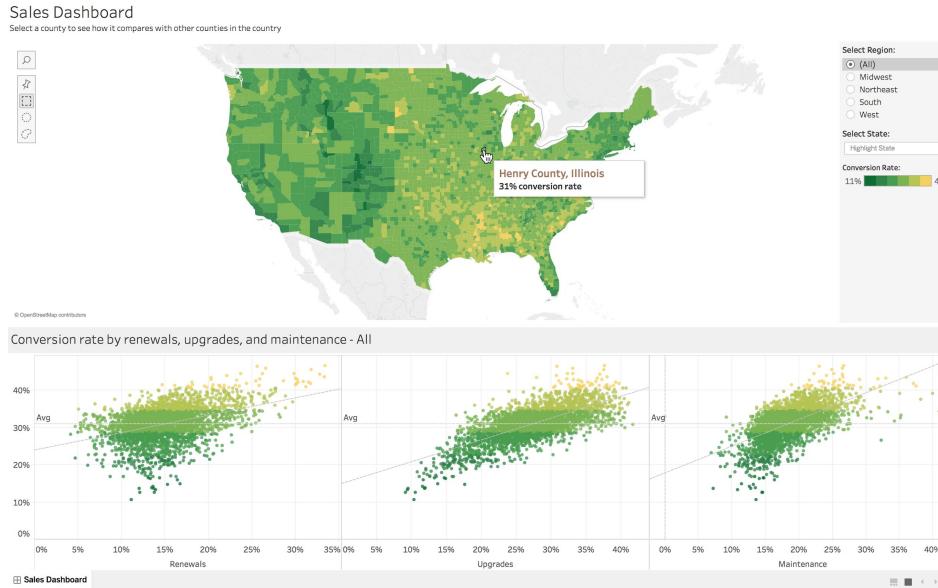
- Feature Engineering in Tableau using Calculated Fields
- Parameter Control in Tableau to Enhance User Experience

Joining and Blending Data in Tableau



- Joins and their Different Types
- Data blending (advanced topic)
- Best Practices

Building Powerful Dashboards in Tableau

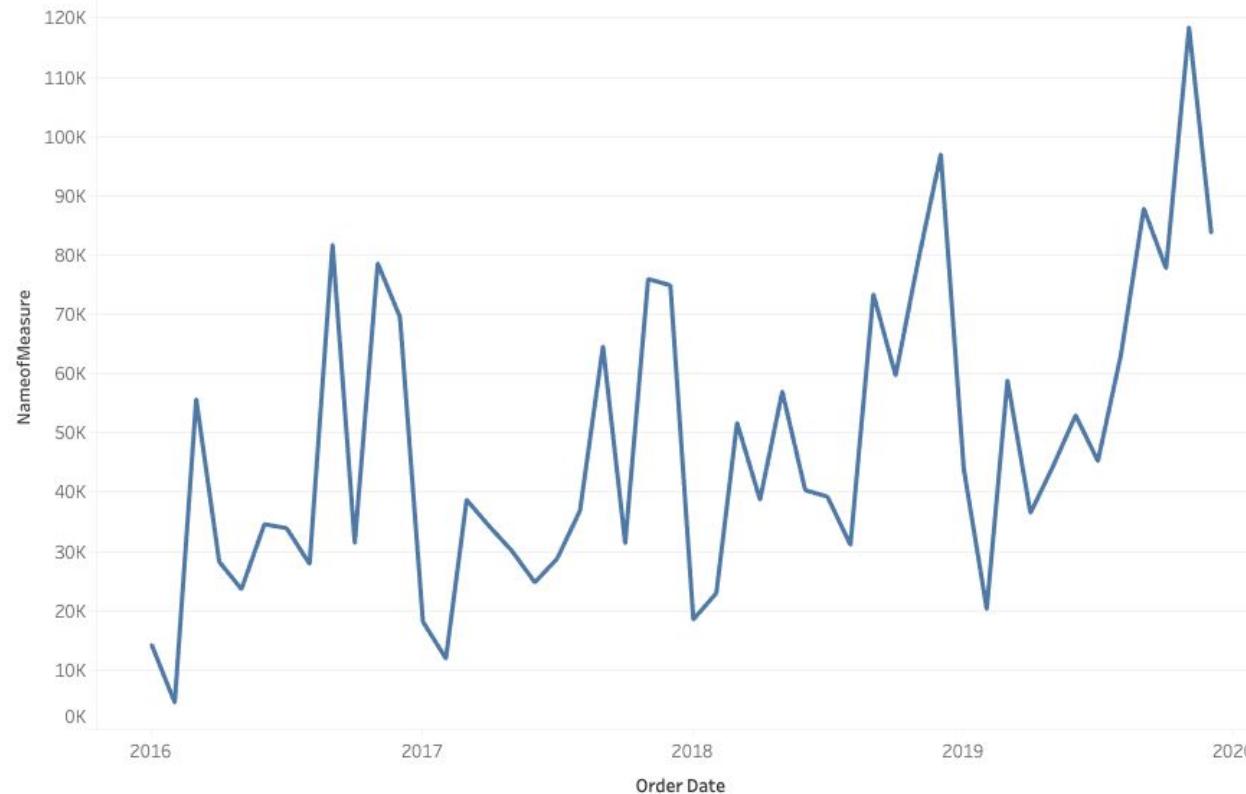


- Understand Dashboards and their importance
- Putting together the different Dashboard components
- Creating dynamic interlinked Dashboards

Parameters in Tableau

Parameters in Tableau

Understanding Parameters



MeasureValues

Sales

Top N Customers

25

Profit

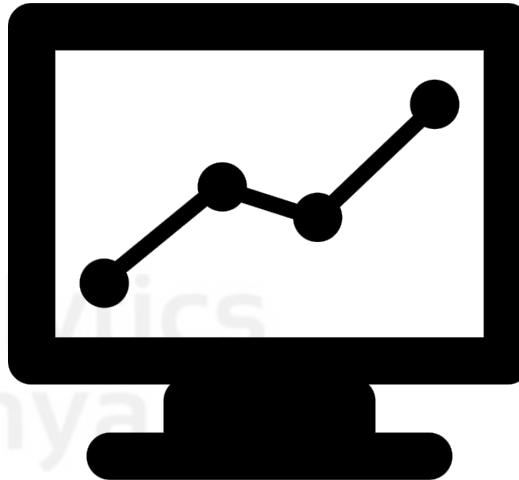
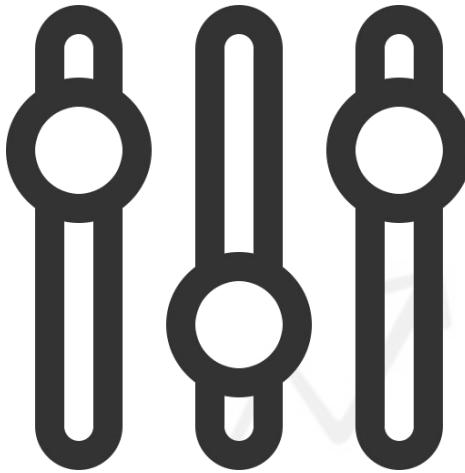
1

0

What are Parameters in Tableau?

Parameters are dynamic values that can replace constant values in calculations, filters, and reference lines.

4 Steps to Create Parameters



- 1) Create a new parameter
- 2) Show parameter
- 3) Create a calculated field using the parameter
- 4) Apply this calculation on your Tableau sheet

A Sales/Profit Parameter

Sales/Profit Parameters

Sub-C.. F

Phones

Chairs

Storage

Tables

Binders

Machines

Accessories

Copiers

Bookcases

Appliances

Furnishings

Paper

Supplies

Art

Envelopes

Labels

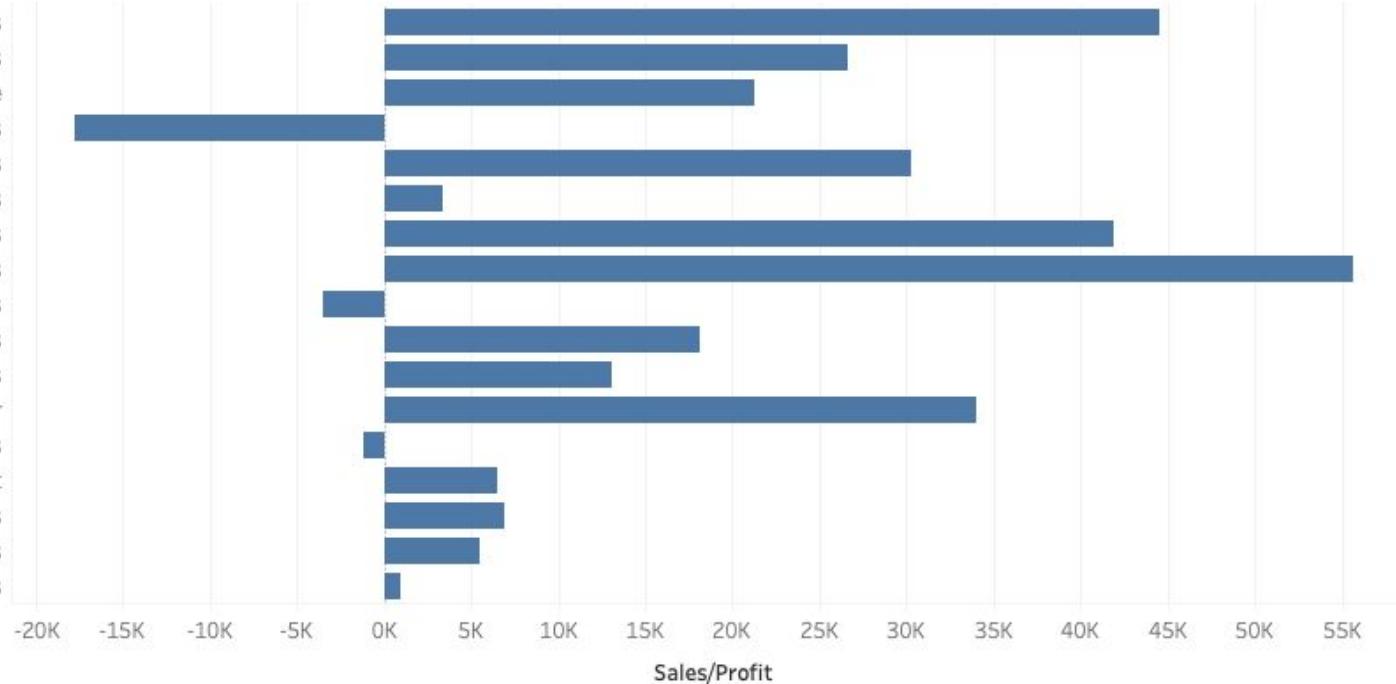
Fasteners

Sales/Profit

Profit

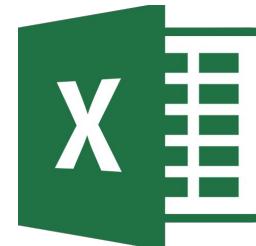
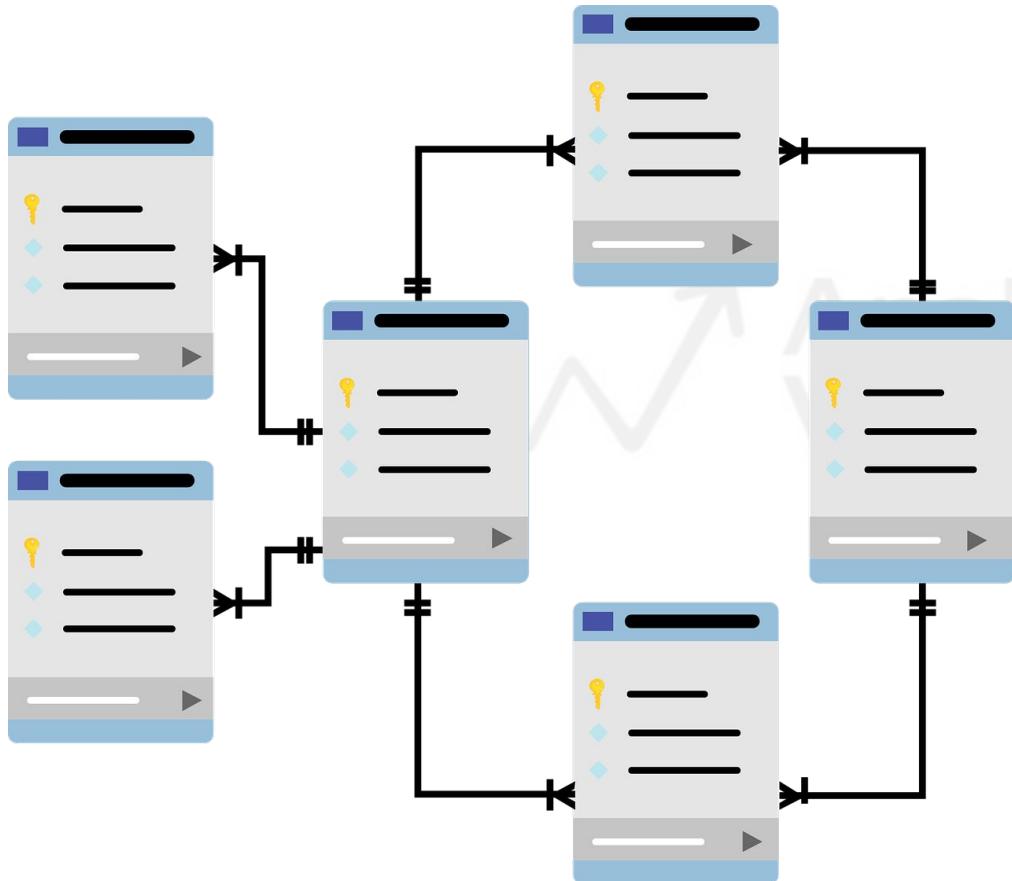
Sales

Profit



Data Joining in Tableau

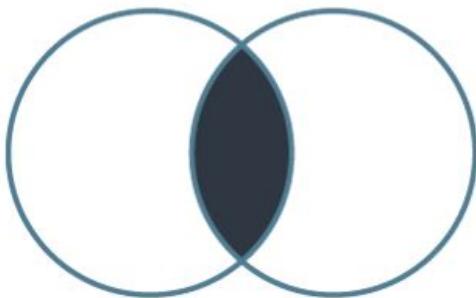
The Concept of Joins



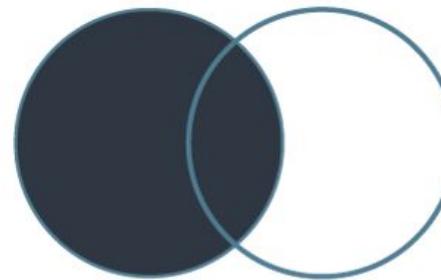
What is a Join?

Joining is a method for combining the related data among common fields in different tables. The result of combining data using a join is a virtual table that is extended horizontally by adding columns of data.

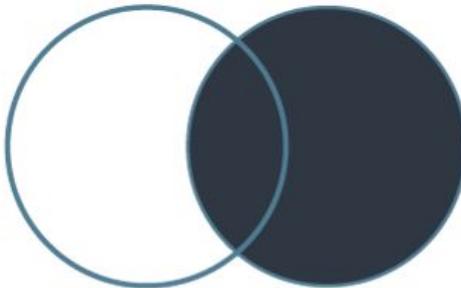
Types of Joins in Tableau



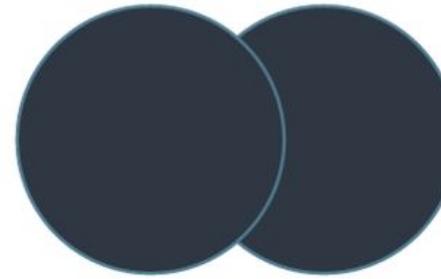
Inner Join



Left Join

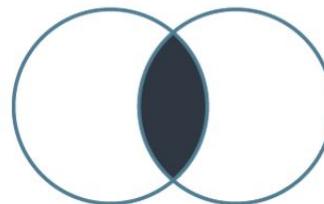


Right Join



Full outer Join

Inner Join



Inner Join

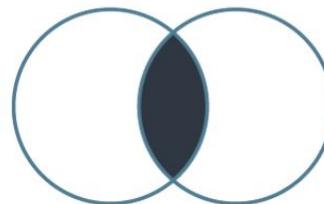
Table 1

Name	State	Quantity
Neha	California	2
Adam	Florida	4
Scott	Illinois	2
Jill	Colorado	1
Rohit	California	3

Table 2

Name	Title	Tenure (in years)
Scott	Data Scientist	2
Jasna	Sales Head	4
John	Marketing Intern	1
Neha	Product Lead	3

Inner Join



Inner Join

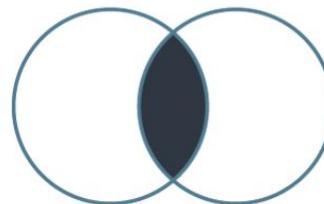
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Inner Join

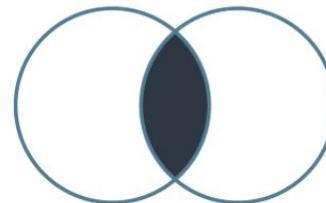
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Name	Title	Tenure (in years)
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John	Marketing Intern	1
Neha	Product Lead	3

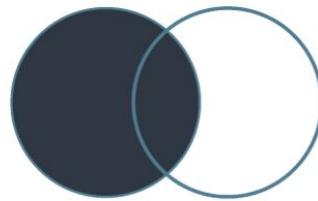
Inner Join



Inner Join

Name	State	Quantity	Name (Table 2)	Title	Tenure (in years)
Neha	California	2	Neha	Product Lead	3
Scott	Illinois	2	Scott	Data Scientist	2

Left Join



Left Join

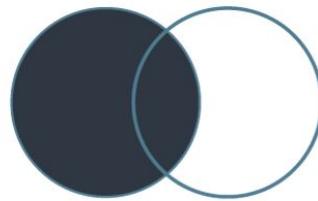
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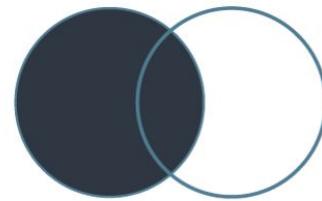
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Name	Title	Tenure (in years)
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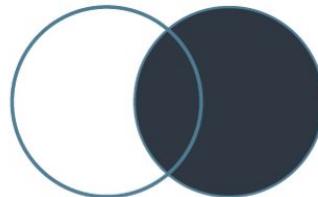
Left Join



Left Join

Name	State	Quantity	Name (Table 2)	Title	Tenure (in years)
Neha	California	2	Neha	Product Lead	3
Adam	Florida	4			
Scott	Illinois	2	Scott	Product Lead	3
Jill	Colorado	1			
Rohit	California	3			

Right Join



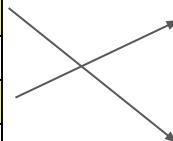
Right Join

Table 1

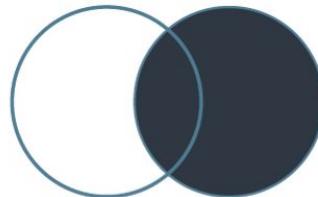
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Neha	Product Lead	3



Right Join



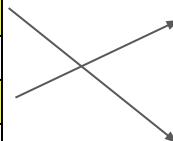
Right Join

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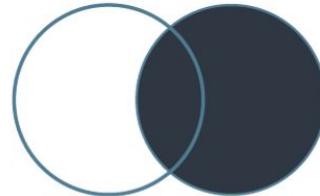
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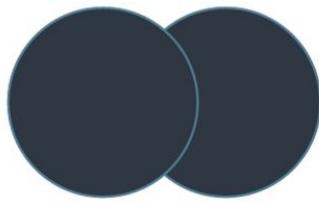
Right Join



Right Join

Name	State	Quantity	Name (Table 2)	Title	Tenure (in years)
Scott	Illinois	2	Scott	Data Scientist	2
			Jasna	Sales Head	4
			John	Marketing Intern	1
Neha	California	2	Neha	Product Lead	3

Full Outer Join



Full outer Join

Table 1

Name	State	Quantity
Neha	California	2
Adam	Florida	4
Scott	Illinois	2
Jill	Colorado	1
Rohit	California	3

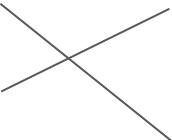
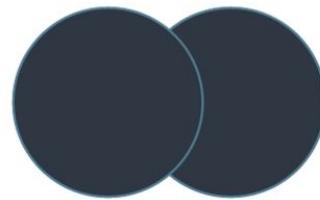


Table 2

Name	Title	Tenure (in years)
Scott	Data Scientist	2
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John	Marketing Intern	1
Neha	Product Lead	3

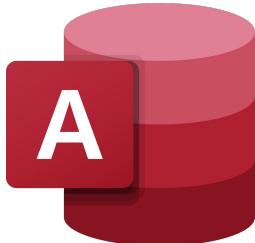
Full Outer Join



Full outer Join

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Neha	California	2	Neha	Product Lead	3
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Scott	Illinois	2	Scott	Data Scientist	2
Jill	Colorado	1			
Rohit	California	3			
			Jasna	Sales Head	4
			John	Marketing Intern	1

Combining Data from Multiple Sources



ORACLE®
DATABASE



What is Data Blending?



Data blending is a method for combining data from multiple sources. We can bring in additional information from a secondary data source and Data blending displays it with data from the primary data source directly in the same view.

Data Joining v Data Blending

Data Joining

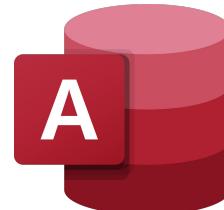
- Data comes from the same source
- Joins the two sheets/tables
- Joins happen at the row-level

Order ID	Customer ID	Order Date	Ship Date	Status
39	CA-2017-117415	12/27/2017	12/31/2017	Standard
40	CA-2017-117415	12/27/2017	12/31/2017	Standard

+ Orders ▾ People ▾ Returns ▾

Data Blending

- Data comes from multiple sources
- Keeps the two data sources separate
- Results are aggregated to the appropriate level



Data Joining v Data Blending

Data Source 1

Order ID	Order Date	Ship Date	State	Sub-Category	Sales
CA-2018-152156	11/8/2018	11/11/2018	Kentucky	Bookcases	261.96
CA-2018-152156	11/8/2018	11/11/2018	Kentucky	Chairs	731.94
CA-2018-138688	6/12/2018	6/16/2018	California	Labels	14.62
US-2017-108966	10/11/2017	10/18/2017	Florida	Tables	957.5775
US-2017-108966	10/11/2017	10/18/2017	Florida	Storage	22.368

Data Source 2

Month	State	Target
1-19	California	12,000
2-19	Florida	8,000
3-19	Arizona	6,000
4-19	Kentucky	9,000

Data Joining v Data Blending

Data Source 1

Order ID	Order Date	Ship Date	State	Sub-Category	Sales
CA-2018-152156	11/8/2018	11/11/2018	Kentucky	Bookcases	261.96
CA-2018-152156	11/8/2018	11/11/2018	Kentucky	Chairs	731.94
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Data Source 2

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Data Joining v Data Blending

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CA-2018-152156	11/8/2018	11/11/2018	Kentucky	Chairs	731.94
CA-2018-138688	6/12/2018	6/16/2018	California	Laptops	14.62
US-2017-108966	10/11/2017	10/12/2017	...	Florida	Tables	957.5775
US-2017-108966	10/11/2017	10/18/2017	Florida	Storage	22.368

Data Source 2

Month	State	Target
1-2017	California	12,000
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3-2017	Arizona	6,000
4-2017	Kentucky	9,000

Welcome to the World of Dashboards!

The Power of Dashboards

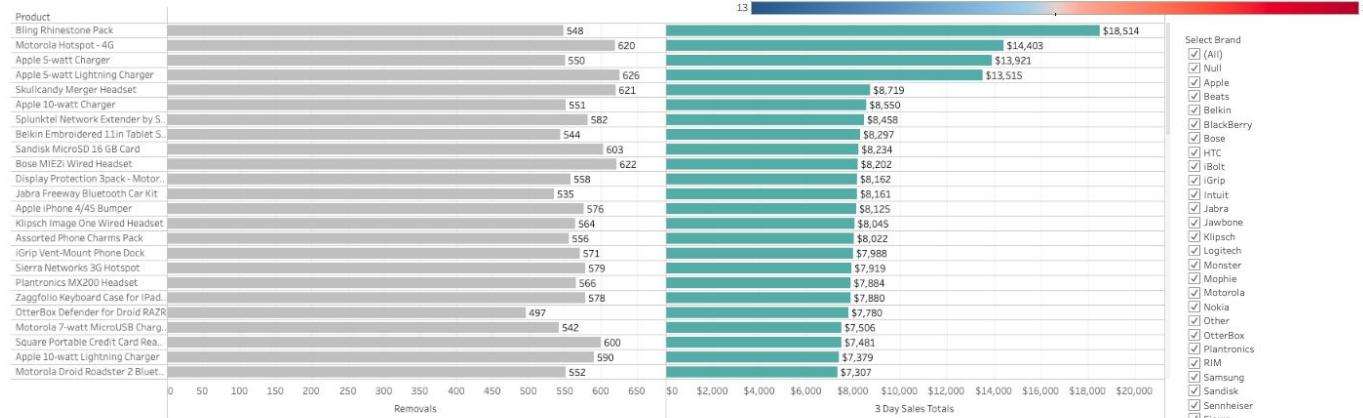
Online Shopping

Frequency of Customers Removing Items from their Carts



Product Removals vs. Product Sales

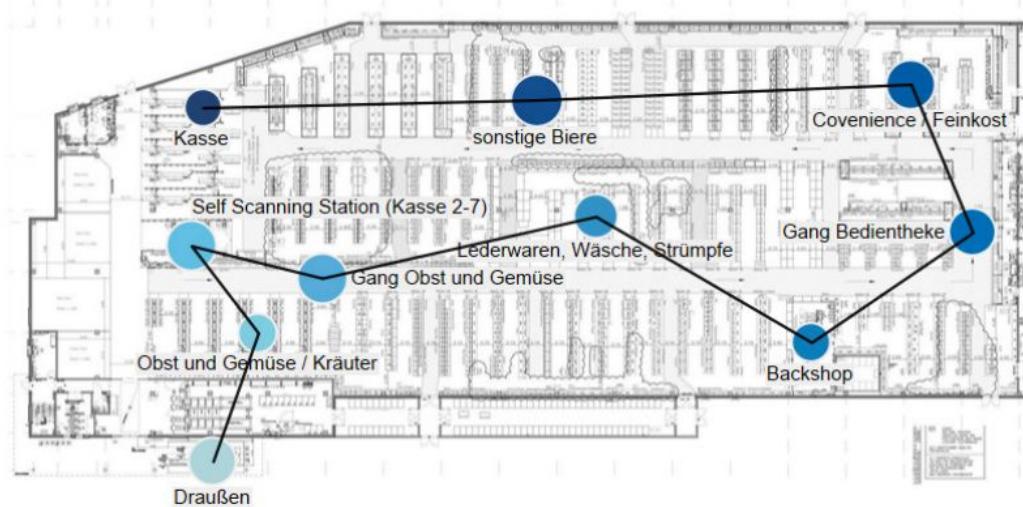
Using Splunk blended with Excel



The Power of Dashboards

Customer Journey

Visit Path



Date Filter

- 24 June 2016
- 1 July 2016
- 8 July 2016
- 13 July 2016
- 26 July 2016
- 30 July 2016
- 4 August 2016
- 5 August 2016
- 2 September 2016
- 8 September 2016**
- 14 September 2016

Rank

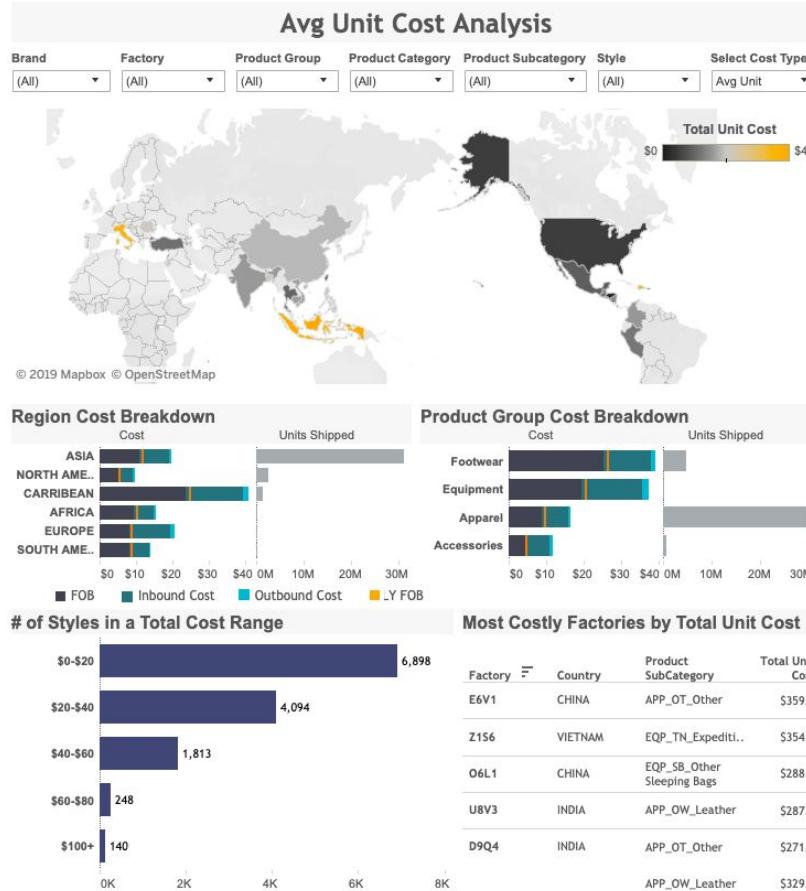
- 1
- 10

Average Dwell Time per Section

- 9.1
- 12.0
- 14.0
- 16.0
- 18.3

MiNODES

The Power of Dashboards



What is a Dashboard?

A **dashboard** is a visual interface that provides multiple views of key performance indicators (KPIs) for a business or a process.



Elements of an Impactful Dashboard



Analytics
Vidhya

Elements of an Impactful Dashboard



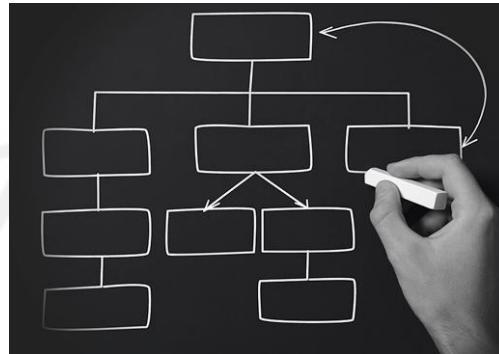
 Analytics
Vidhya

Know your Audience

Elements of an Impactful Dashboard



Know your Audience

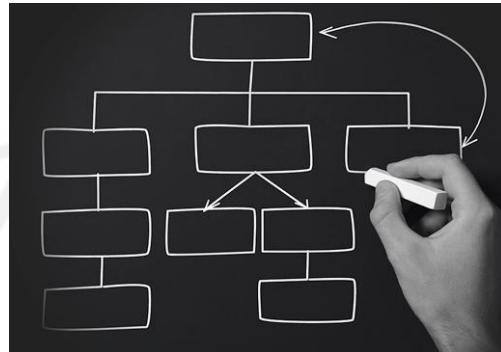


Structured Story

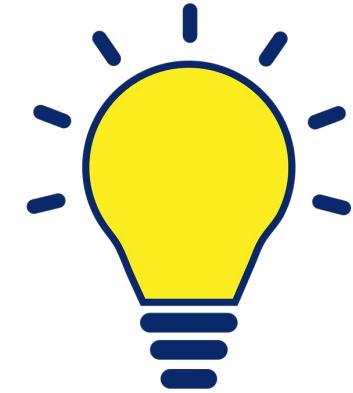
Elements of an Impactful Dashboard



Know your Audience



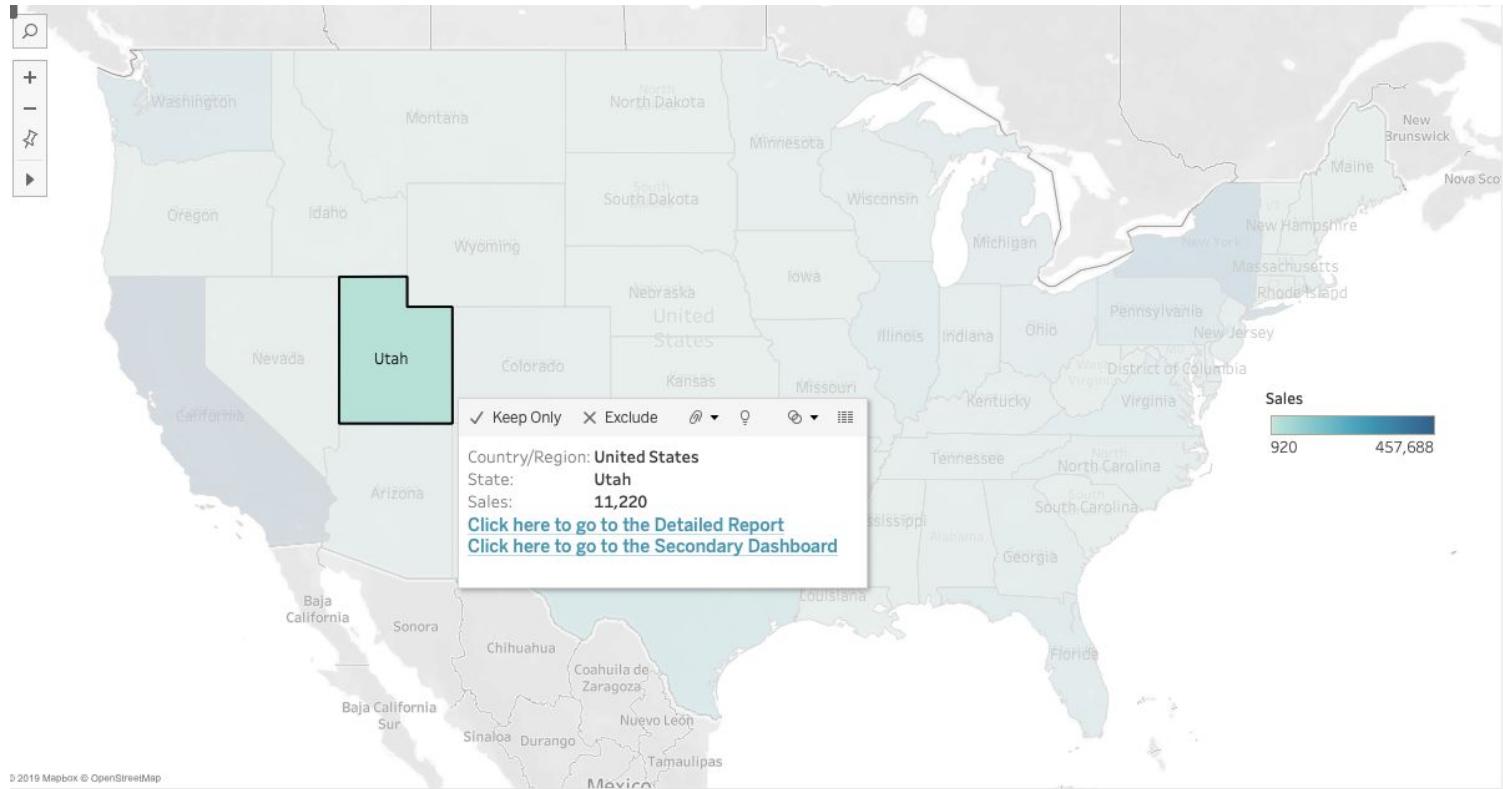
Structured Story



Key Takeaway(s)

Use Cases of Dashboards

Interlinking Reports



Use Cases of Dashboards

Interlinking
Reports

Information
Sharing



Use Cases of Dashboards



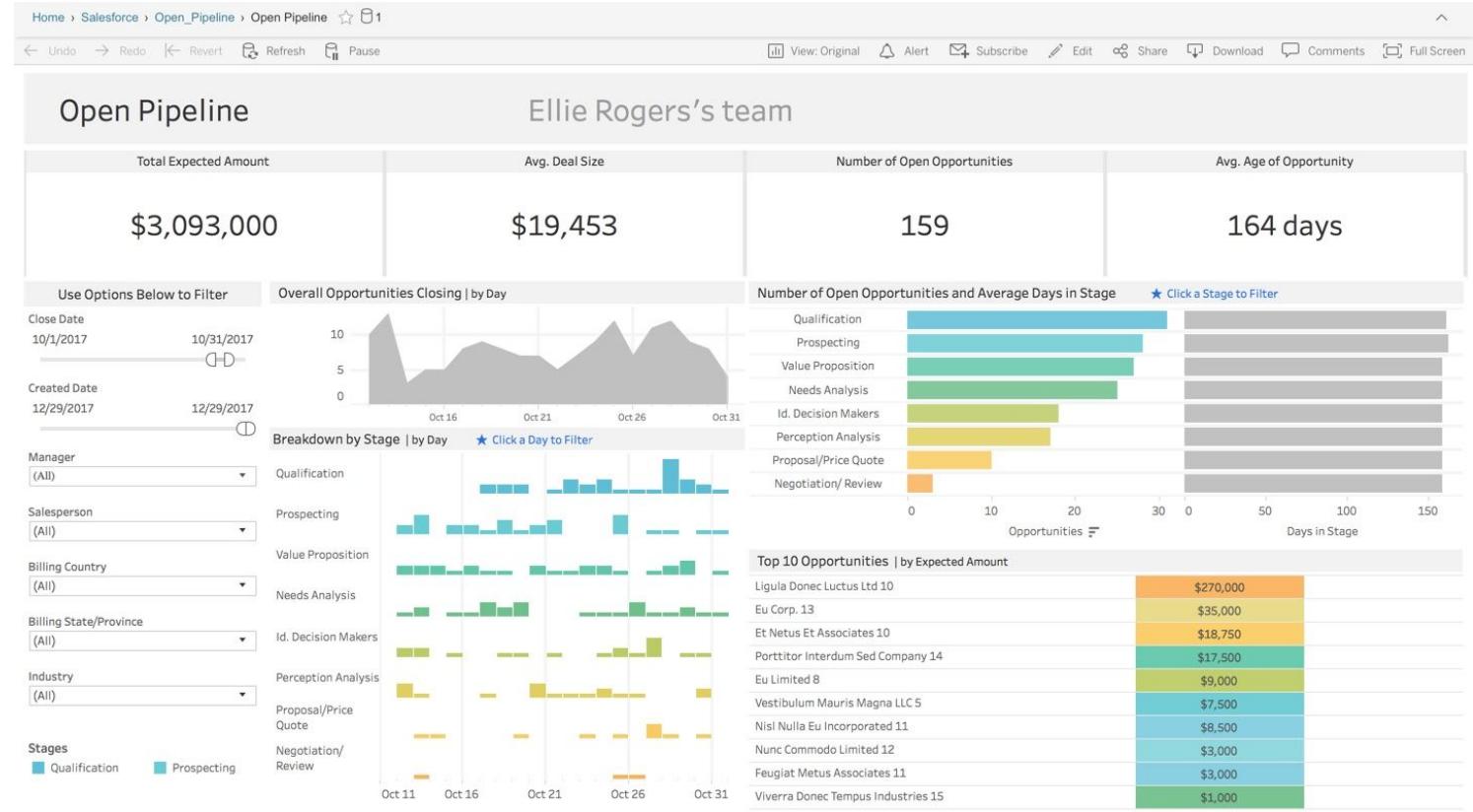
Interlinking
Reports



Information
Sharing



Measuring and
Monitoring
Performance



*Image courtesy Tableau

Use Cases of Dashboards

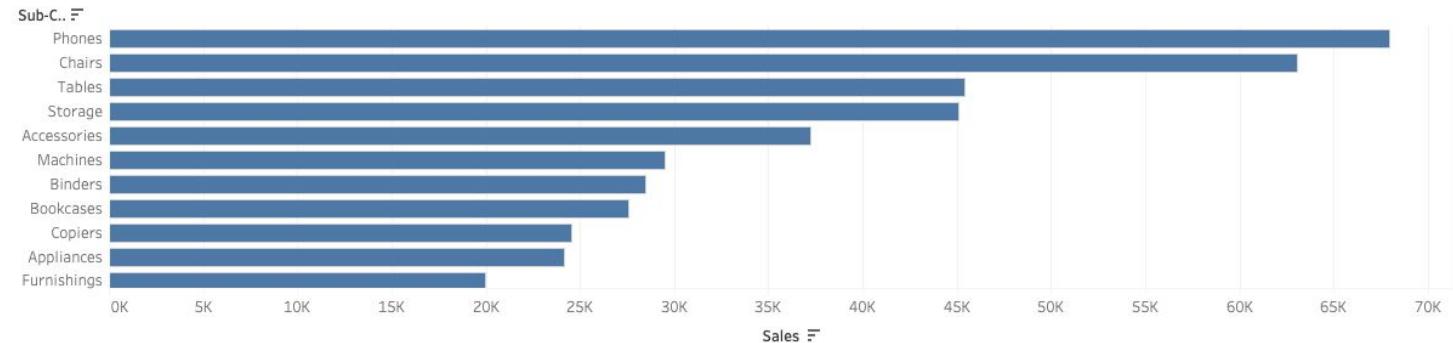
Interlinking Reports

Information Sharing

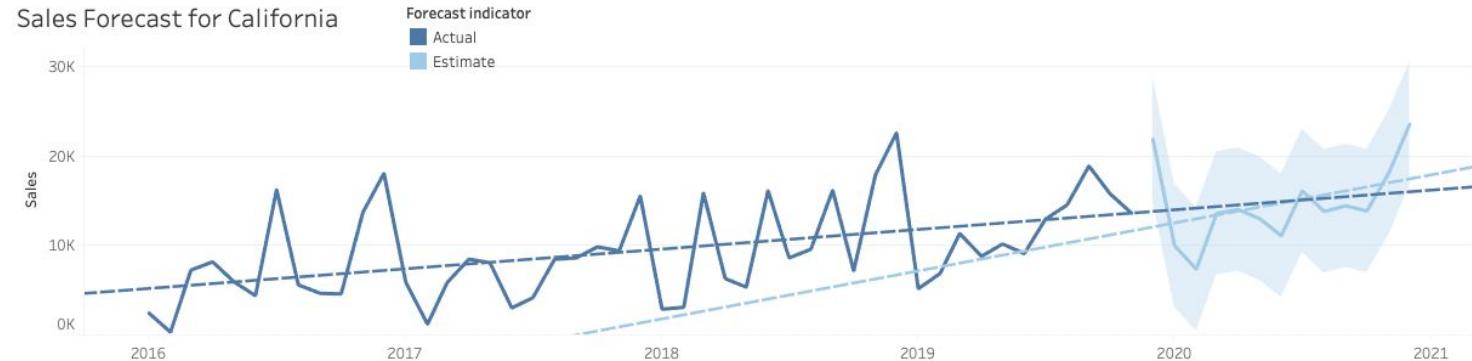
Measuring and Monitoring Performance

Forecasting!

Sub Category Sales for California



Sales Forecast for California



Creating the Blueprint for our Dashboard

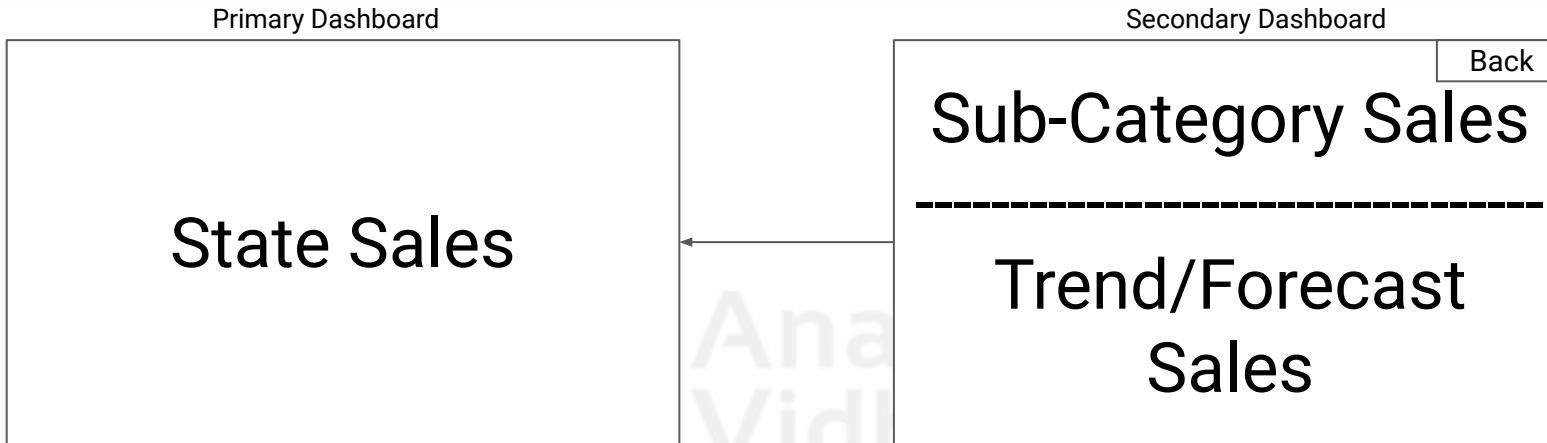


Blueprint for our Dashboards

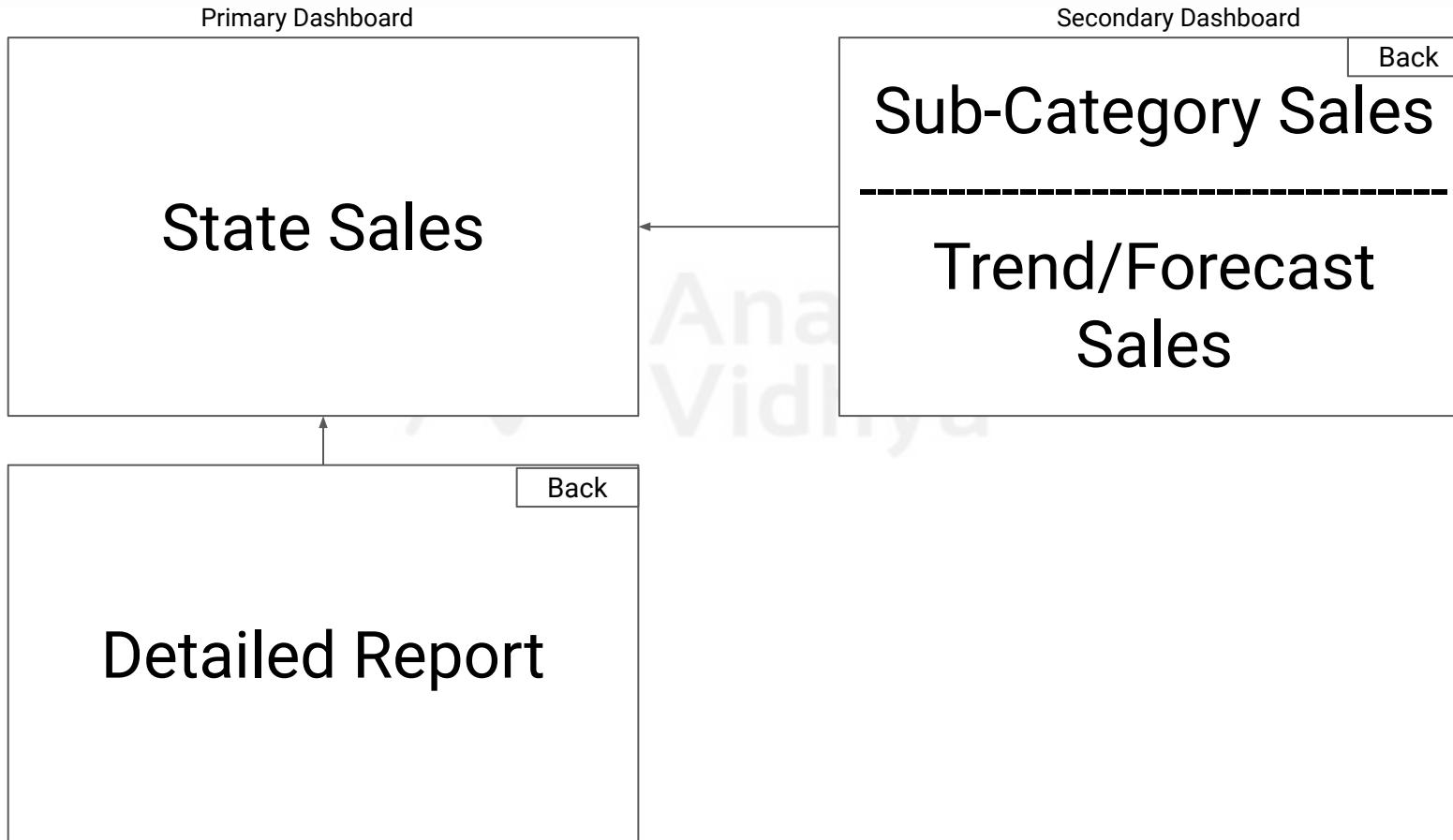
Primary Dashboard

State Sales

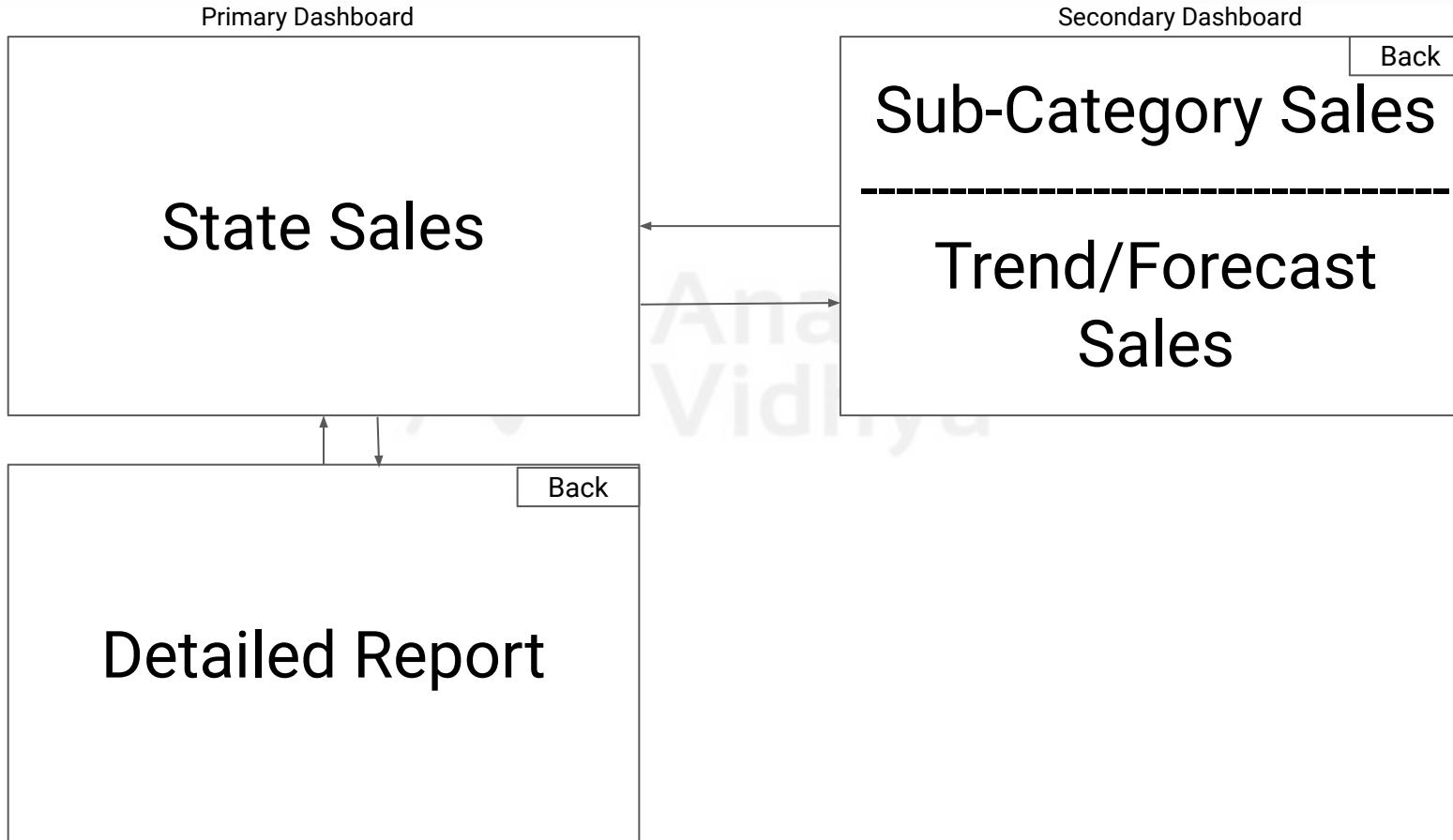
Blueprint for our Dashboards



Blueprint for our Dashboards



Blueprint for our Dashboards





Mastering Tableau

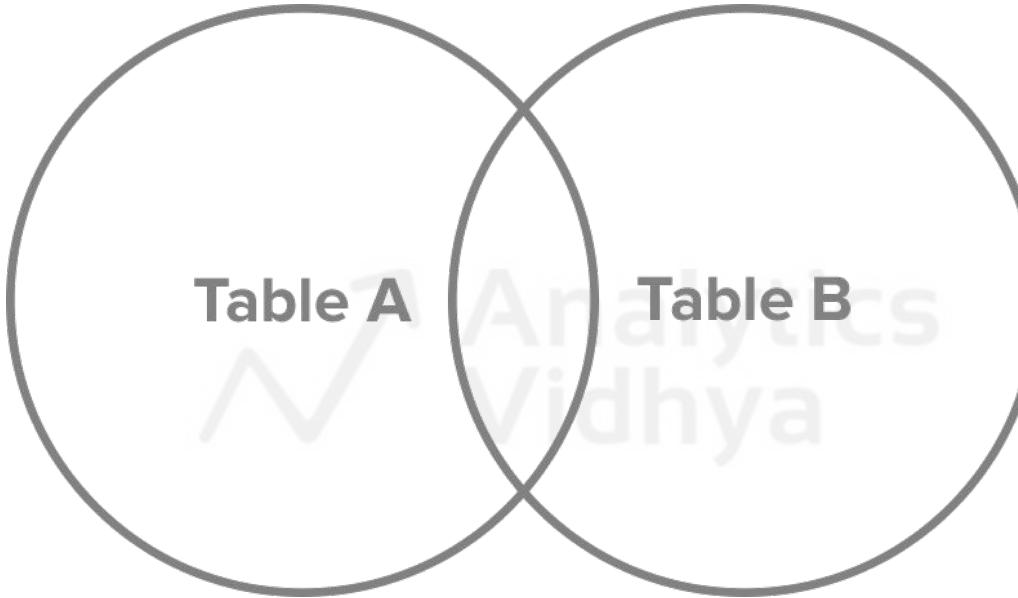
Become a Data Visualization Rockstar

Calculated Fields and Parameters



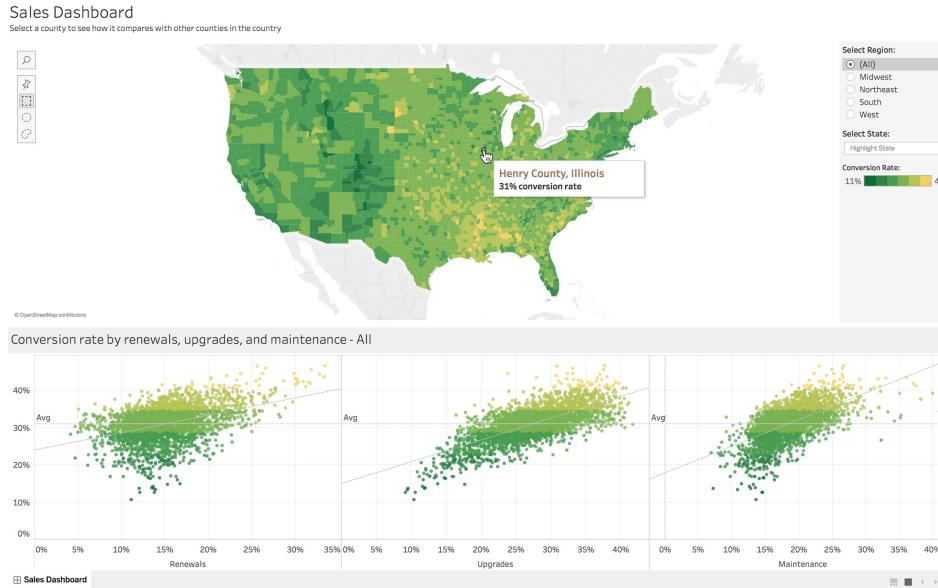
- Feature Engineering in Tableau using Calculated Fields
- Parameter Control in Tableau to Enhance User Experience

Joining and Blending Data in Tableau



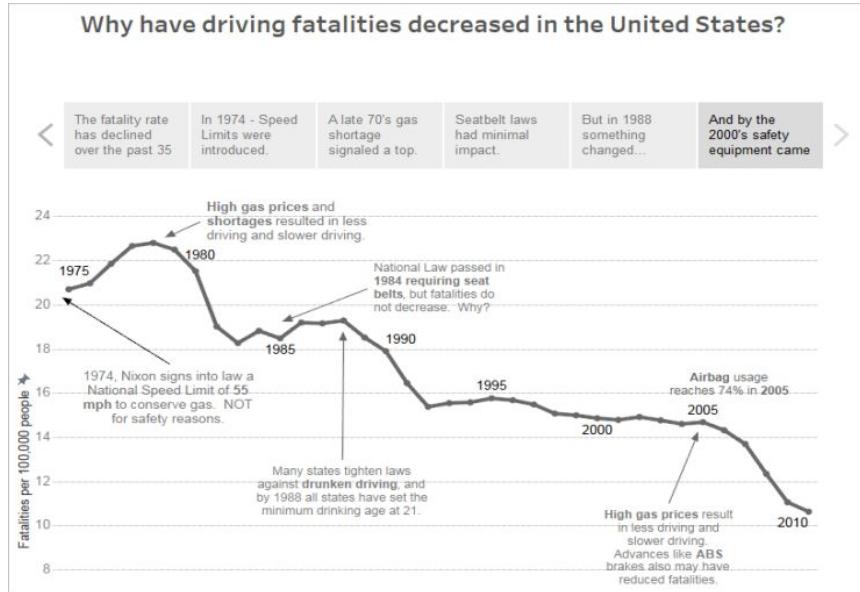
- Joins and their Different Types
- Data blending (advanced topic)
- Best Practices

Building Powerful Dashboards in Tableau



- Understand Dashboards and their importance
- Putting together the different Dashboard components
- Creating dynamic interlinked Dashboards

The Art of Storyboarding in Tableau



- Understand the importance of storytelling for business
- Storyboarding in Tableau and how it's different from dashboarding
- Build an awesome Storyboard in Tableau

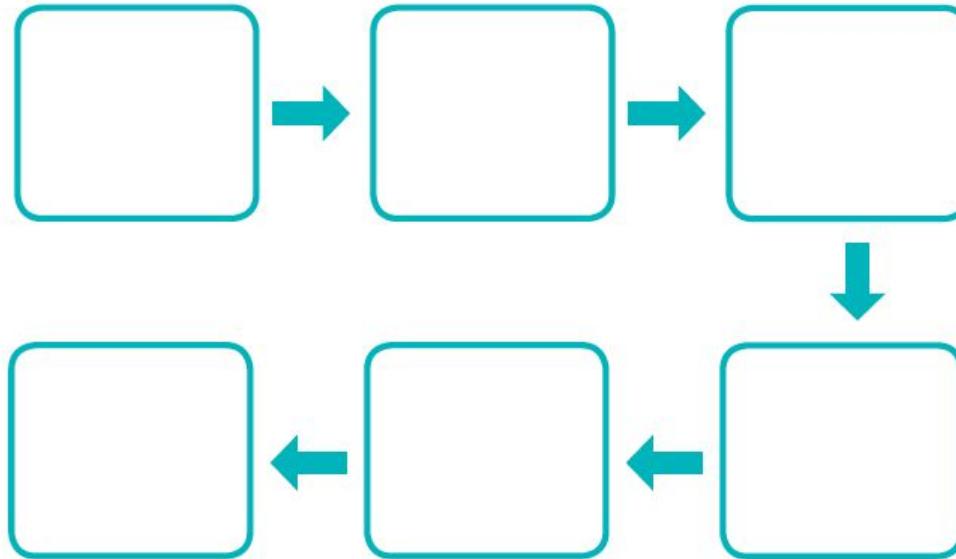
The Art of Storytelling

The Art of Storytelling

<ΨΠΡΦΡΥΧΡΗΙΒΩΣΓΚΥΦ
ΣΤΜΡΑΤΣΩΣΣΩΣ ΗΠΑΠΑΠΛ
*Τ+ΦΨΣΗΨΡΟΔΛ
ΨΣ*ΧΞ⊗ΗΛ↑Ψ↑ΦΛ
ΙΩ*ΗΤΣΤΤ#Τ↓
Λ

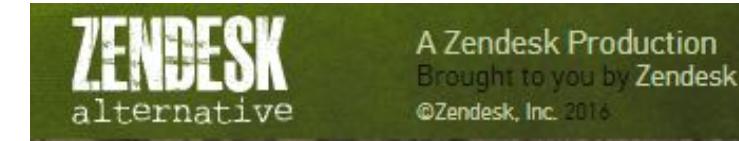
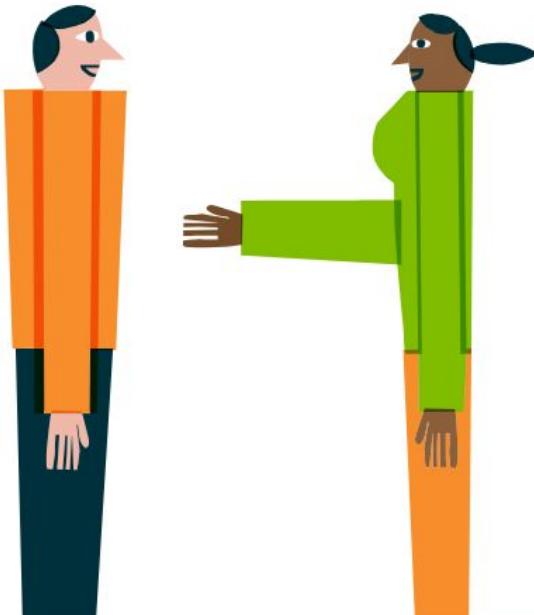


The Art of Storytelling



Here's a Real-world Story

zendesk



Zendesk Alternative is one of the original Seattle alternative rock bands.

They have toured the world, headlining major festivals and sharing the stage with legendary acts like Sweater Head, DynoPlax, and The Banana Nuts.

Now, Zendesk Alternative has begun a new chapter in their storied career. They have joined forces with Zendesk® to record an anthemic concept album of epic proportions. On the surface, it's a collection of songs about customer service. Underneath, it's about so much more.

Finally, Zendesk Alternative and Zendesk® the customer service software company are together at last.

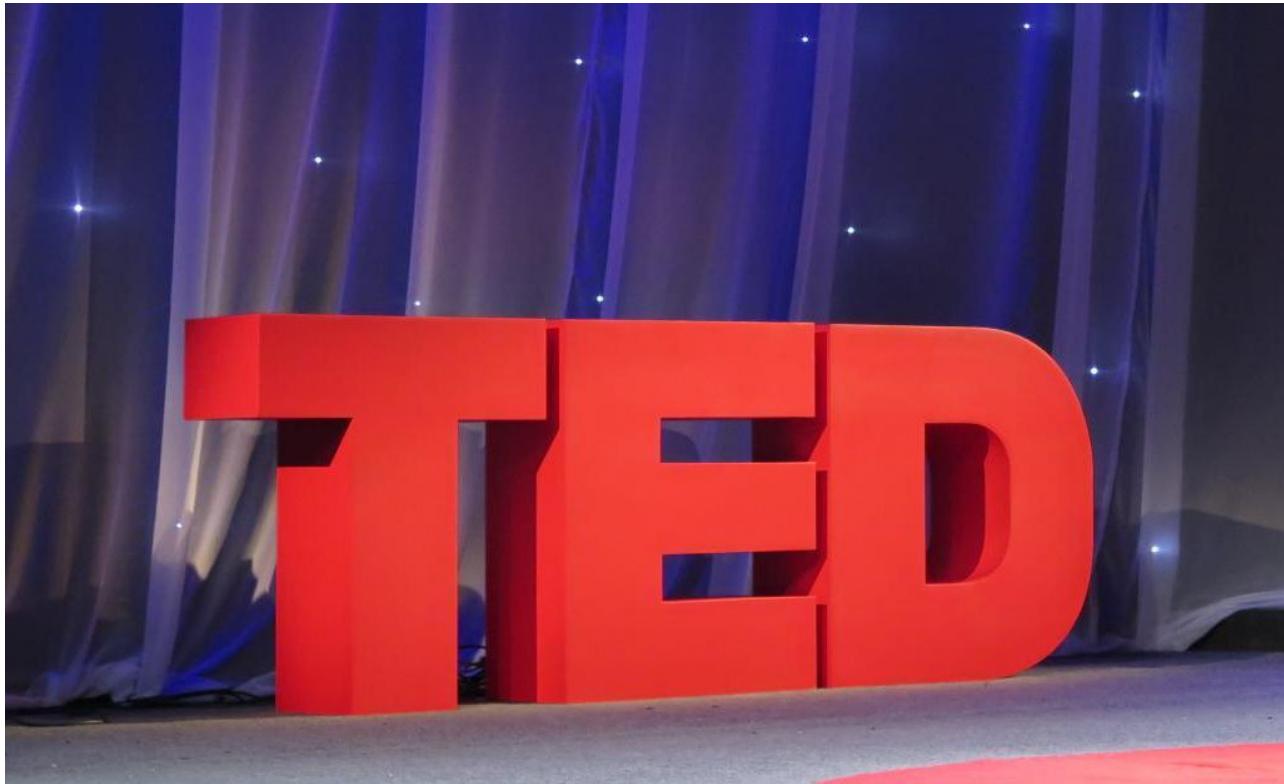
The Art of Storytelling



“Stories are how we remember. We tend to forget lists and bullet points.” - Robert McKee,
Best-Selling Author and Lecturer



Sometimes, our Storytelling Goal is Obvious



Delivering a TED Talk

Sometimes, our Storytelling Goal is Obvious



Addressing your employees about a new strategy

Sometimes, our Storytelling Goal is Obvious



Launching a new product

Wait, What if the Topic is Mundane?

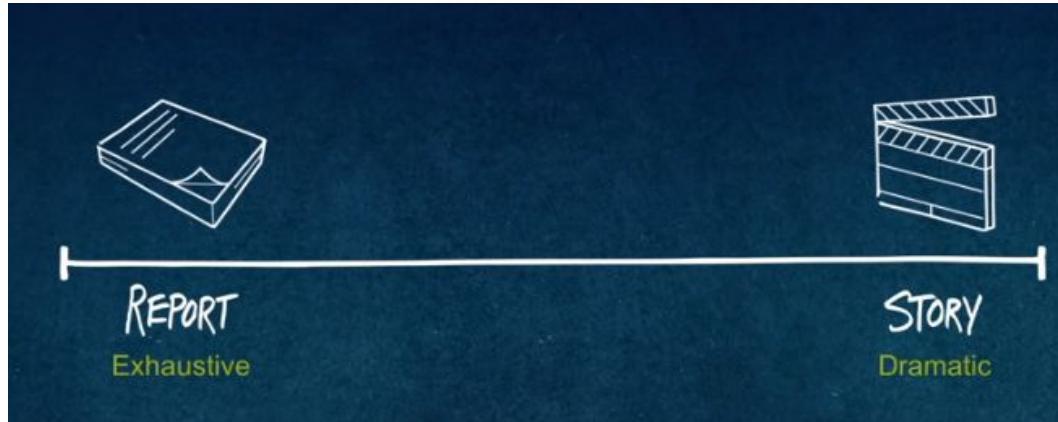


- Delivering a project status to the client
- Talking about budgetary/accounting issues
- Elaborating on financial calculations



Giving a presentation is about persuasion,
not distributing information.

Engage Through Storytelling – Nancy Duarte



3-Step Storytelling Framework

Establishing a Framework for Storytelling



Many People Start with a Vague Theme

We have a new strategy for customer satisfaction.

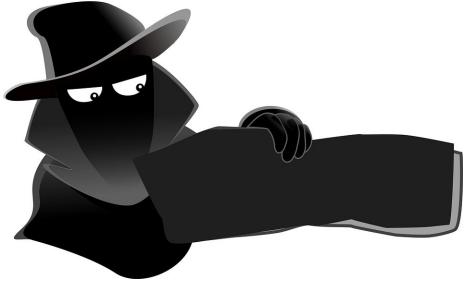
The credit risk model didn't work out as we thought so we changed the way we approached the problem.

We are going to increase focus on product testing.

We plan to revamp the homepage of our site.



3-Step Storytelling Framework



Villain

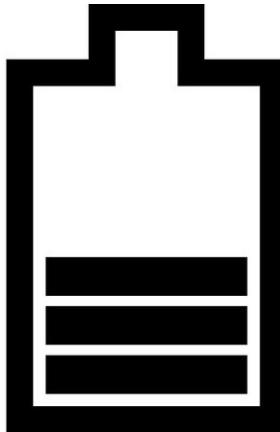


Victim



Hero

A Simple Software Example



An all too familiar situation!

Plug in our Framework

Villain

The software update killing the battery life of the phone.

Victim

People who updated their phone.

Hero

A new update that will either roll back the previous iteration or improve on the current release.

Understanding the Problem Statement

You have recently joined ABC company as a data scientist.

ABC is a nascent e-commerce website with a catalogue of thousands of products across a variety of functions. All the users are currently served a 'Most popular products' section since there is no recommendation engine on the portal.

Use the Villain-Victim-Hero framework to prepare a story which you will then use for your eventual presentation.



Plug in our Framework

Villain

No personalization on the e-commerce portal for customers owing to a lack of a recommendation engine.

Victim

- All customers visiting the portal - both new and loyal ones.
- Our company's bottom line!

Hero

Build and deploy a recommendation engine to personalize recommendations for customers and drive up revenue.

Sketching the Story Blueprint

Problem Statement at Hand

Superstore's leadership team is expanding to ensure each region in the United States has an individual head.

There are 4 regions in the US – Central, East, West, South.

We have been asked by the leadership team to drill down into the numbers and prepare a presentation that showcases how each region is doing in terms of profits.

Note: This isn't just a profits by region breakdown. We need to show more granular analysis to understand which product categories and segments are profitable and which are not.



Plug in our Framework

Villain

Victim

Hero

Plug in our Framework

Villain

No clear insight into how regions are doing in terms of profits.

Victim

Superstore's sales strategy & revenue.

Hero

A structured storyboard that analyzes these numbers to drill down into each region's performance.

Group Exercise: Storytelling in Tableau

The Superstore leadership team was thrilled by our profit story - they appreciated the region-by-region breakdown. They want to dive a level deeper and have asked you to create another storyboard. This should showcase the sales AND profit by segment and category (both features should be included).

Use appropriate captions and annotations to bring out your story and highlight the parts the leadership team should notice.

Hint: You might find the use of parameters useful here (recall the 2 in 1).

How About a Donut?

