

Storytelling & Power BI

Creating reports that connect with
different audiences

**SPENT HOURS
BUILDING AN
AWESOME
REPORT**



**NO ONE
USES IT**



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Valerie Junk

Data Analytics & Visualization

Data Storytelling

BI Standardization

Process Improvement

Storytelling

- A narrative
- Structure
- Know what to expect
- Engaging
- Different stories for different audiences

Storytelling Benefits



Easy to follow and understand

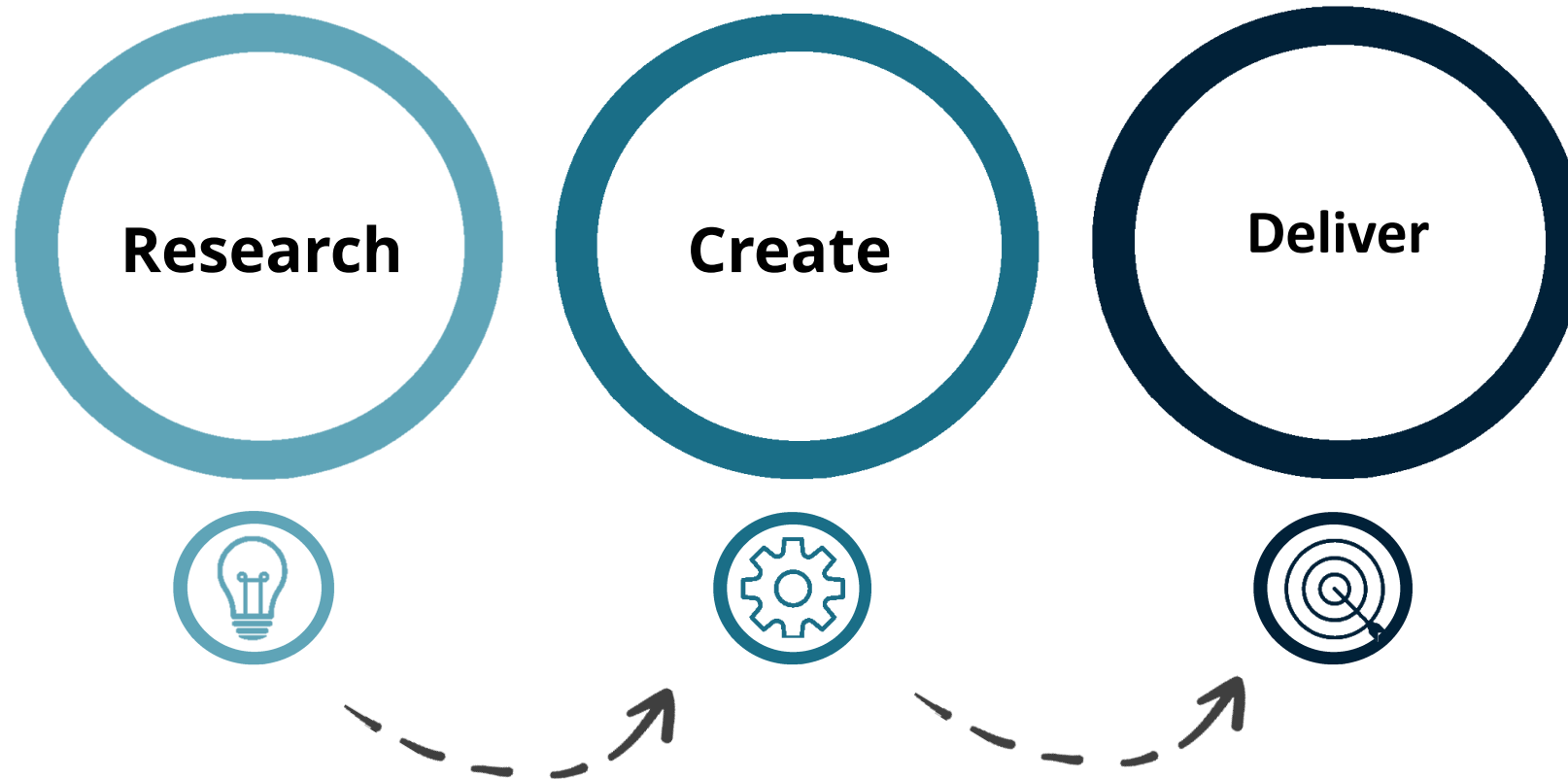


Engaging



Time-saving

3 steps to use Storytelling



Research

Audience, content & key message

The audience



- Who is the audience?
- What motivates (or scares) them? -> Actions
- How much detail do they need?
- How do they access & consume information?

Creating Personas



- Fictional representation of the audience
- Needs & wishes
- Similarities and difference
- Don't make assumptions

What's the message?

1 key message (sentence)

- Context
- Information
- Actions to take

Not a keyy message



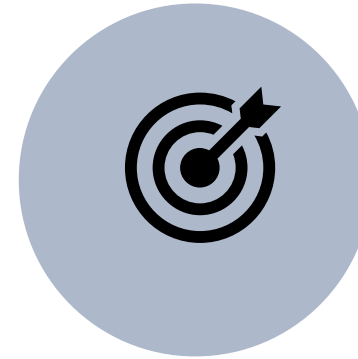
CONTEXT

SALES INSIGHTS



INFORMATION


ALL



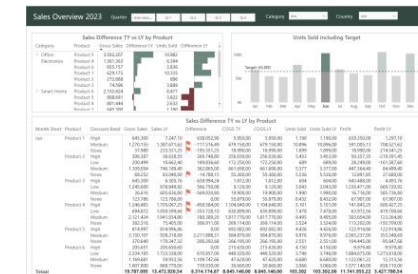
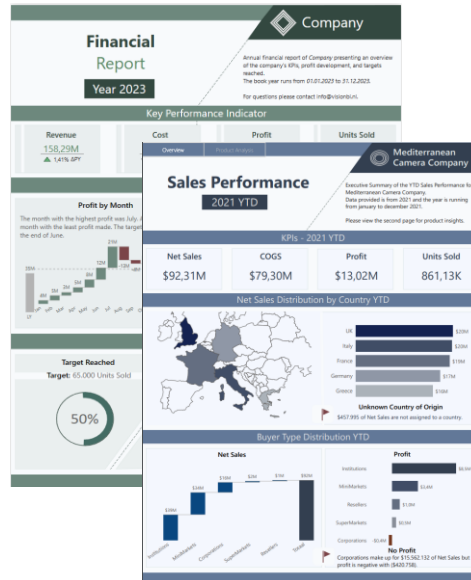
ACTIONS TO TAKE

TBD

3 examples

- 
- Each **year** we share **information** with the **whole company** what our **key** sales results are (profit, costs, margin, difference LY).
 - As **MT** we **evaluate monthly** the **key** sales results, the **performance** of our account managers (€ vs target) and the **best/worst products**.
 - Our **data analysts** daily dig through **all the data** to **investigate** hidden **trends** and **anomaly's**.

Different message = Different Design



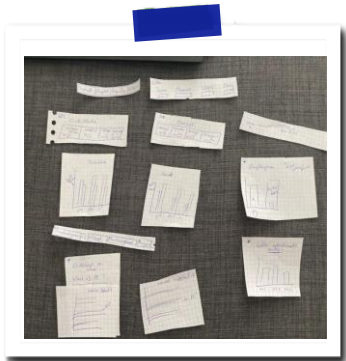
What if the audience is too different?

- One size fits all?
 - or
 - Different reports & different pages?
-
- What's possible within the budget & the consequences

Create

Storyboard, Templates & Visuals

Storytelling



Storyboard - Gather all the information

- Sticky Notes (easy to rearrange)

Translate pieces to design

- Each piece tells a part of the story
- Check your story



Keep it simple

Templates (& Consistency)

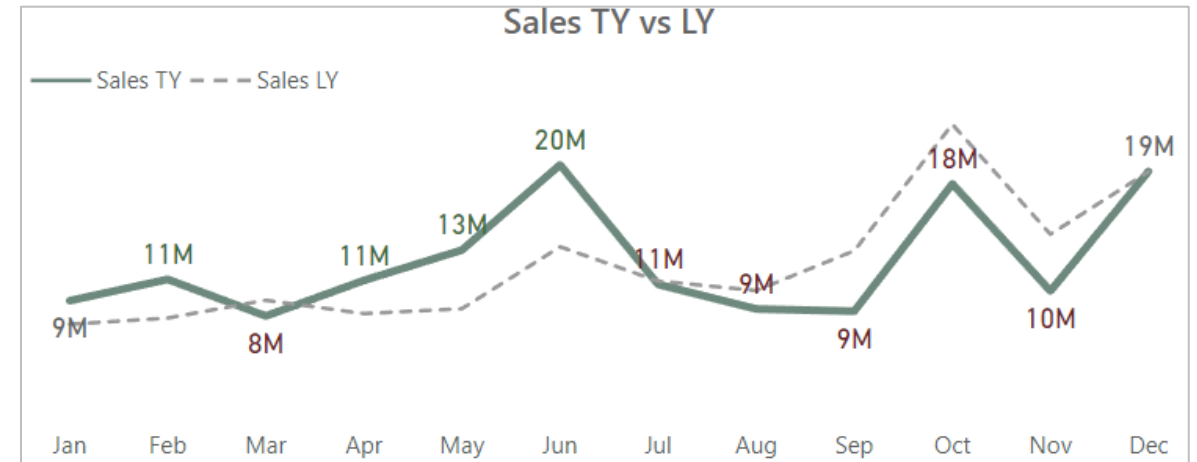
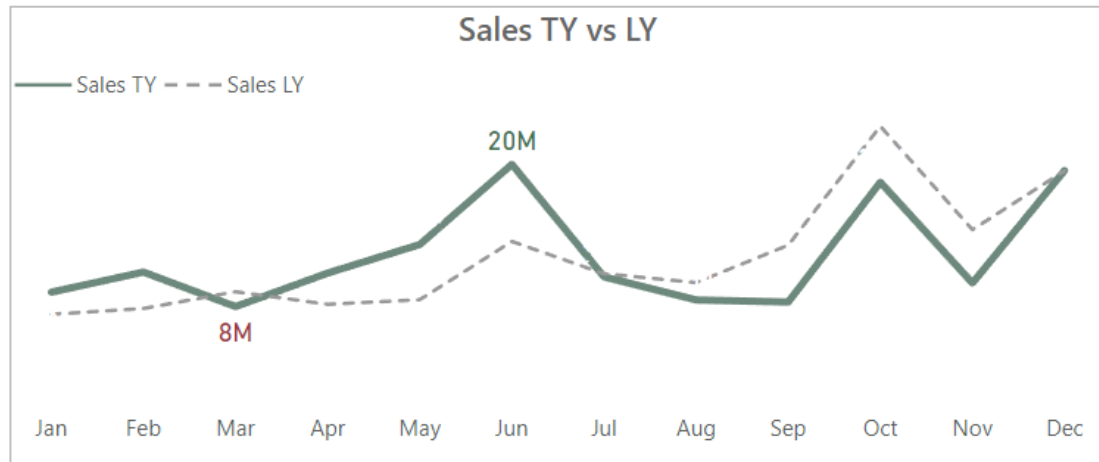
Expectation Management & ease of use

- Templates
- Color Schemes
- Way of Working

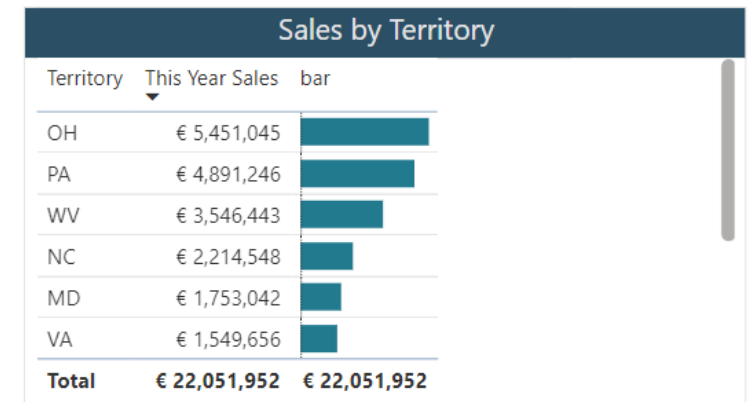
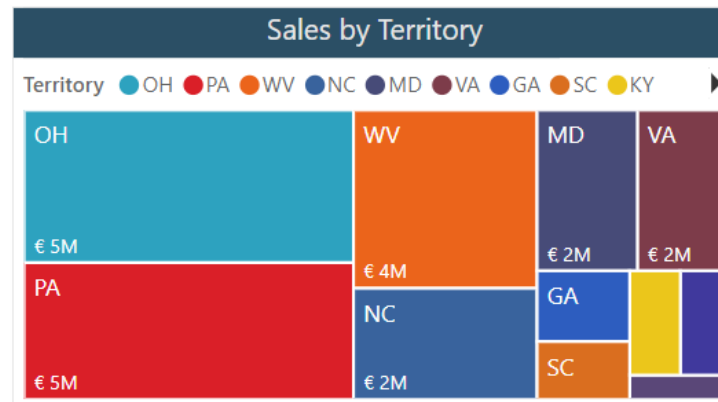
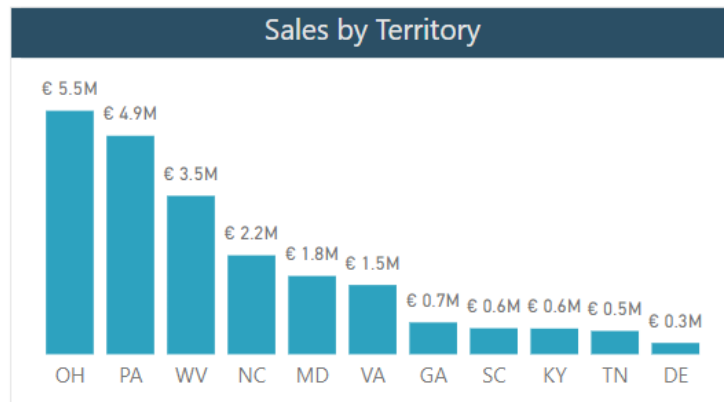
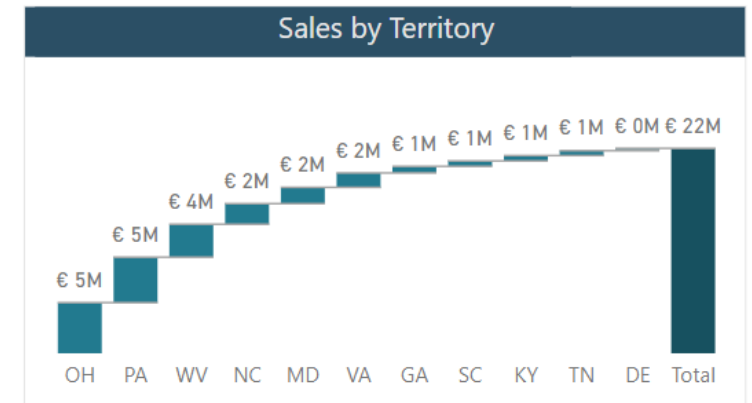
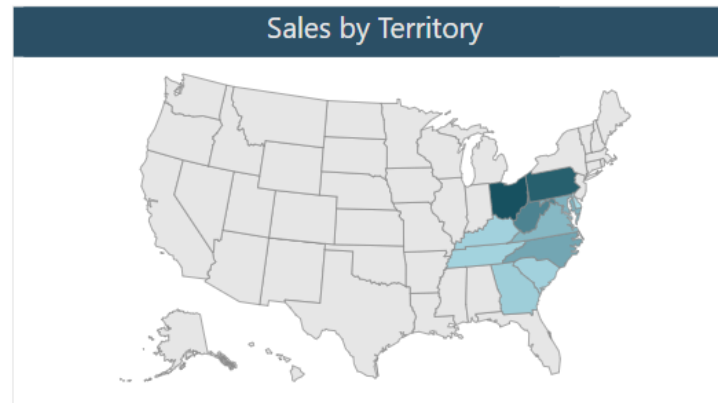
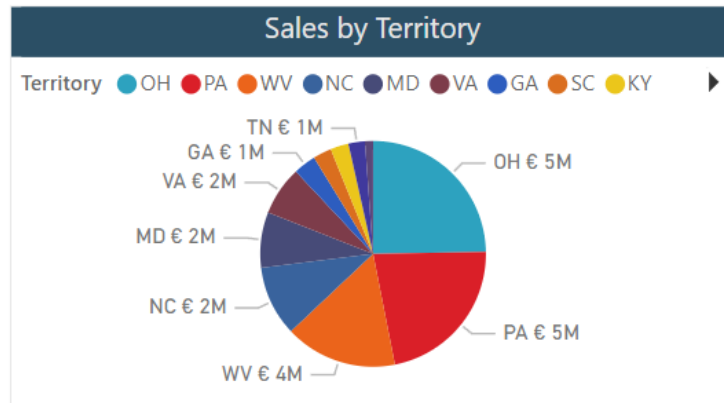


Declutter & Enrich

- What information & how much guidance is needed?



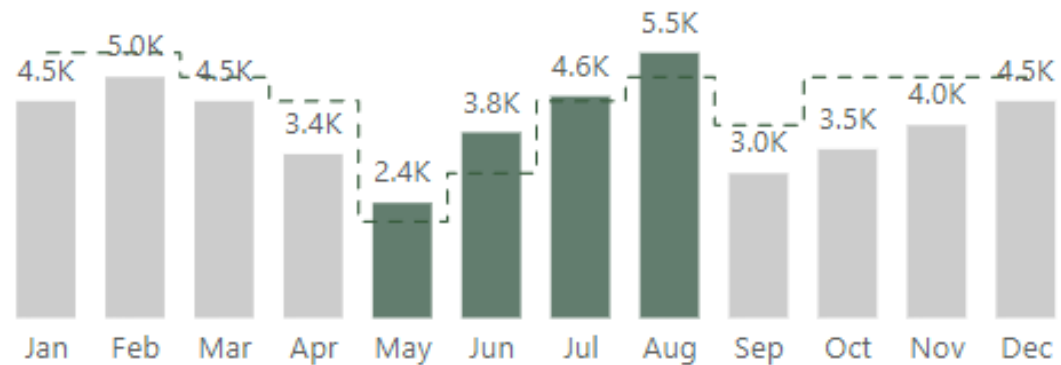
Choosing the visual



Context is key!

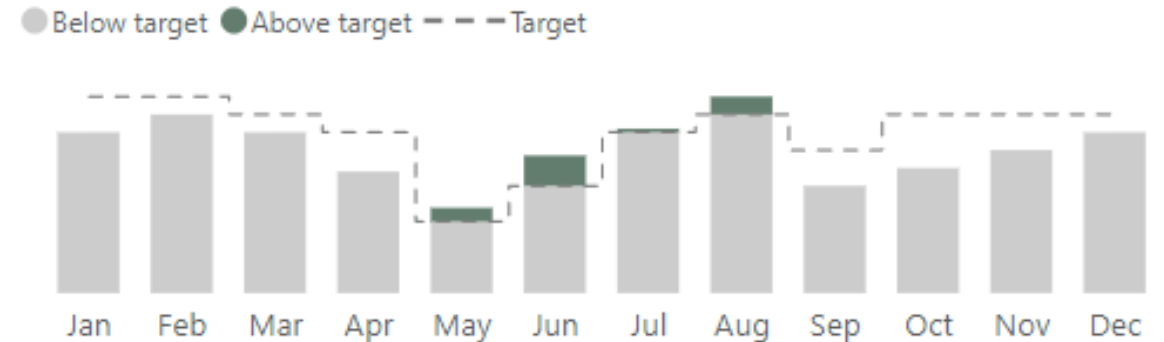
- Title & color coding

Sales quota by month with target



Sales target hit 4 times in 2023

Achieving more than expected in may, june, july and august

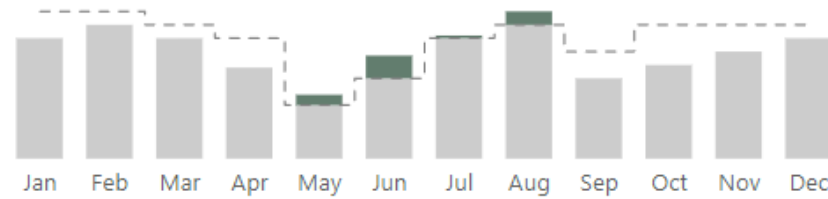


If possible - Simplify

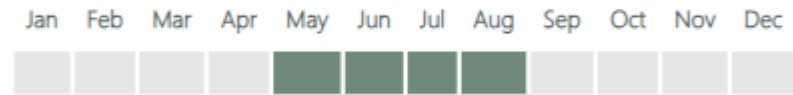
Sales target hit 4 times in 2023

Achieving more than expected in may, june, july and august

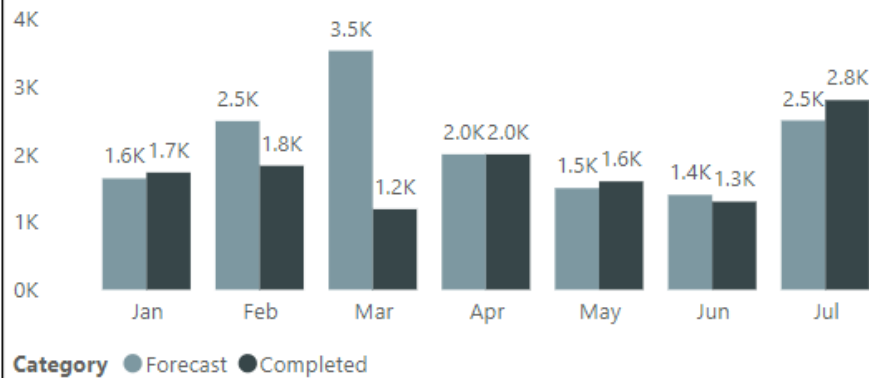
● Below target ● Above target - - Target



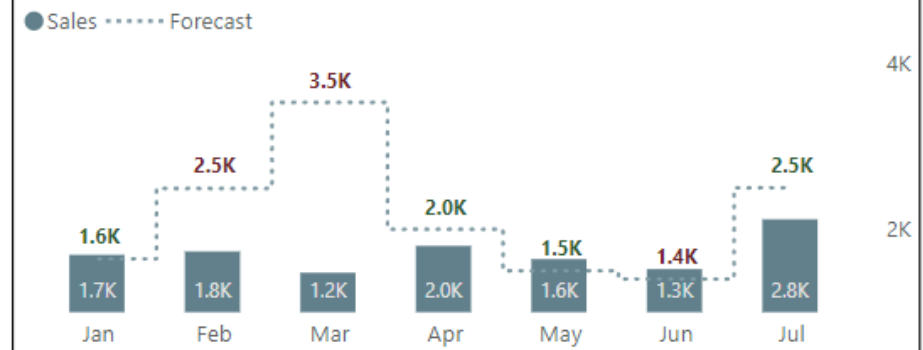
Sales target hit 4 times in 2023



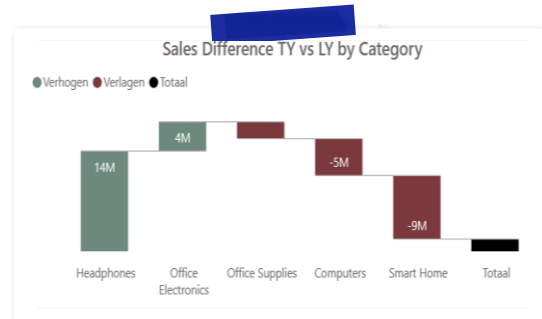
Sales vs Forecast



Sales were below forecast in february, march and june

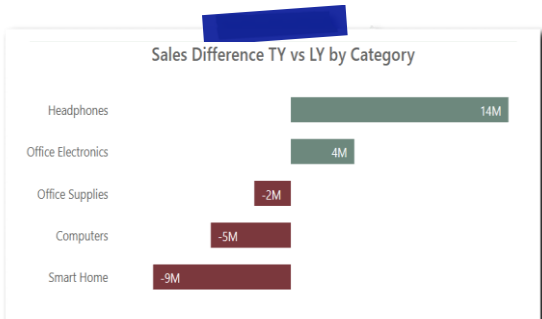
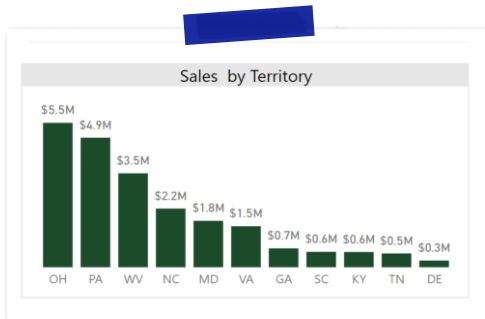
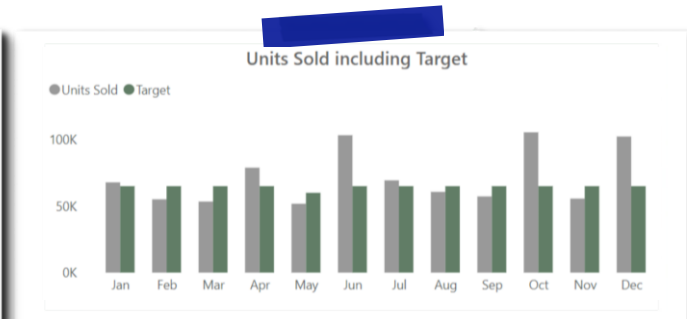


Check your visuals



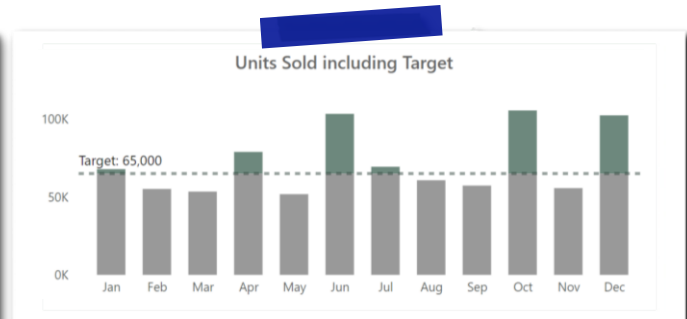
Sales Difference TY vs LY by Product

Category	Product	Gross Sales	Difference LY	Units Sold	Difference LY
Office Electronics	Product 4	15,468,394.40	-583,396.53	88,790.00	-31,303.00
Office Electronics	Product 6	12,043,158.08	1,804,151.16	40,982.50	-15,084.50
Office Electronics	Product 5	10,276,638.44	5,093,043.05	51,090.50	-2,640.50
Headphones	Product 4	9,216,325.30	1,011,620.77	66,659.50	14,232.00
Office Supplies	Product 4	8,592,488.50	2,584,096.88	27,705.00	-5,007.00
Headphones	Product 1	8,318,254.37	3,318,314.67	40,525.50	12,470.50
Headphones	Product 6	7,796,253.92	3,730,122.58	36,423.00	13,603.00
Office Electronics	Product 1	7,302,442.70	-502,078.43	47,291.00	-8,067.50
Total		147,771,511.24	1,702,062.57	861,132.00	-264,674.00



Sales Difference TY vs LY by Product

Category	Product	Gross Sales	Difference LY	Units Sold	Difference LY
Office Electronics	Product 4	15,468,394		88,790	
	Product 6	12,043,158		40,983	
	Product 5	10,276,638		51,091	
Headphones	Product 1	7,302,443		47,291	
	Product 2	7,082,499		30,822	
	Product 3	5,204,885		33,837	
	Product 4	9,216,325		66,660	
	Product 1	8,318,254		40,526	
	Product 6	7,796,254		36,423	



Deliver

Evaluate & Test

Evaluate

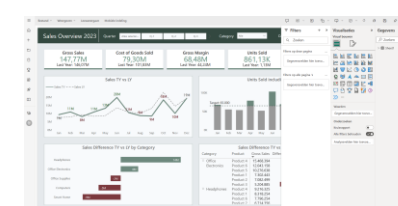
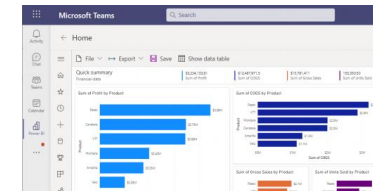
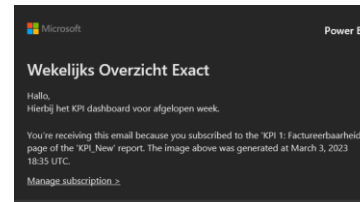


- Test run
- Evaluate with users
- Reflect & Feedback
- Usage Report

Deliver

Delivery is key!

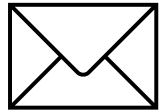
- Mail
- Teams
- App
- Workspace
- Handout



Takeaway

- Consider your audience
- 1 Key message
- Use a storyboard & Templates
- Evaluate
- Keep it simple

Contact



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