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Storytelling & Power BI

Valerie Junk

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Mainzer Datenfabrik

b.telligent smart data. smart decisions.

HMS analytical software

ORAYLIS turn your data into value

TIMEXTENDER

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ITGAIN

SOLISYON www.solisyon.de

GDS BUSINESS INTELLIGENCE GmbH

Dashboard Delivery Disappointment

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

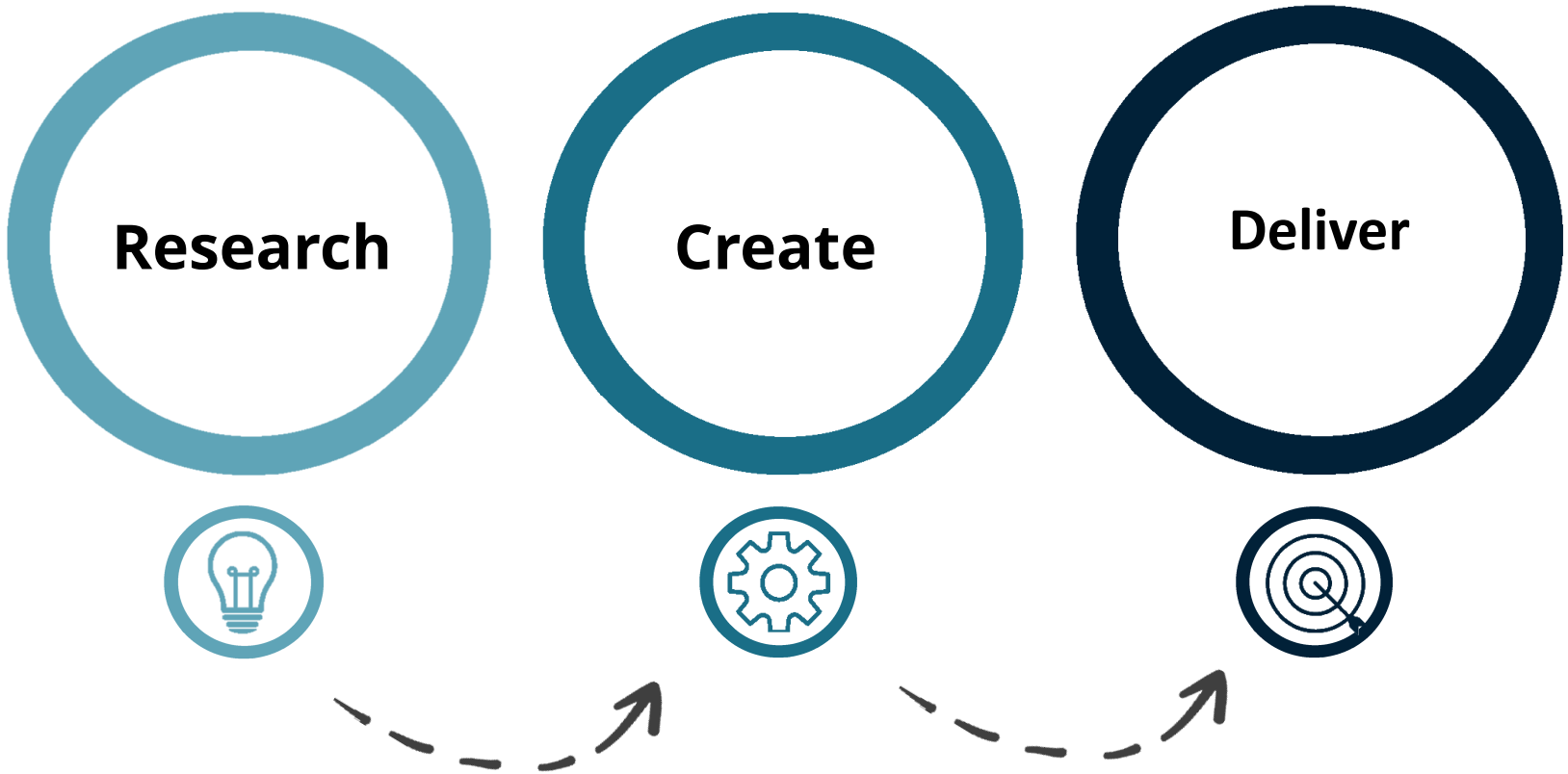
Storytelling Benefits

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 key message

CONTEXT

SALES INSIGHTS

INFORMATION

ALL

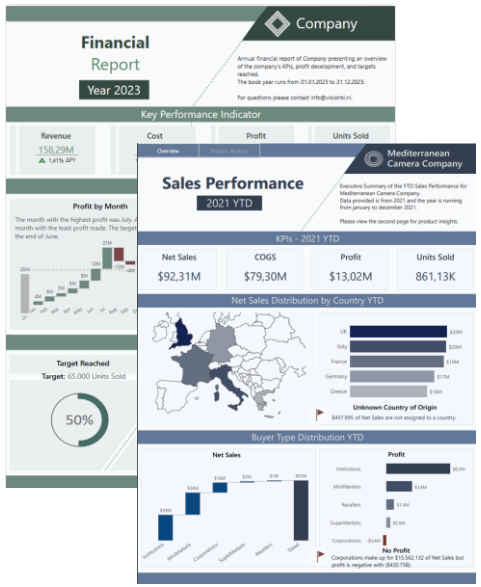
ACTIONS TO TAKE

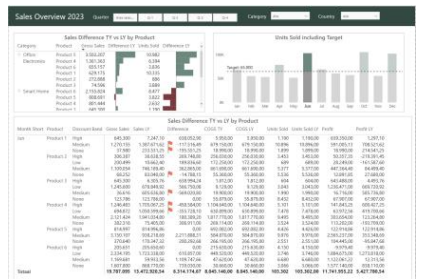
TBD

3 different key messages

- 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?

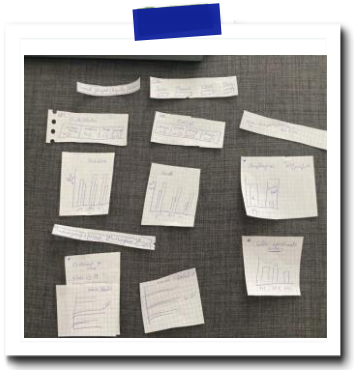
or

- Different reports & different pages?
- What's possible within the budget & the consequences

Create

Storyboard, Templates & Visuals

Storyboard



Gather all the information

- Sticky Notes (easy to rearrange)

Translate pieces to design

- Each piece tells a part of the story
- Keep it simple
- Check your story

As **MT** we **evaluate monthly** the **key** sales results, the **performance** of our account managers and the **best/worst products**.

Templates -> Consistency

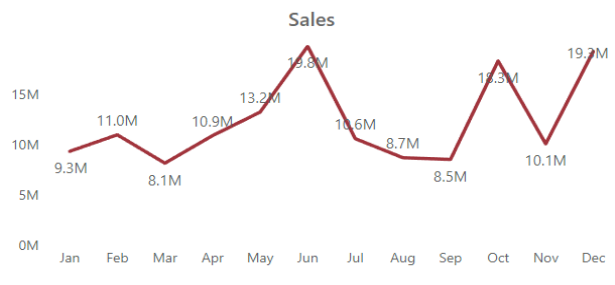
Expectation Management & Ease of use

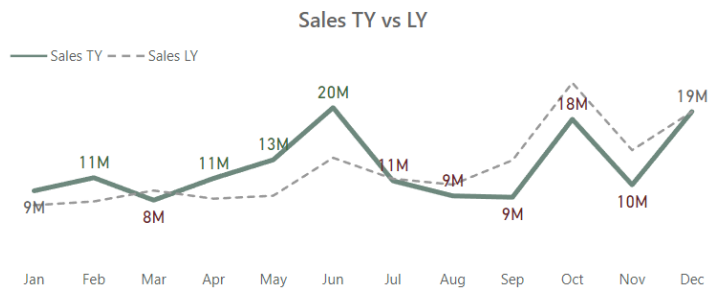
- Templates
- Color Schemes
- Way of Working

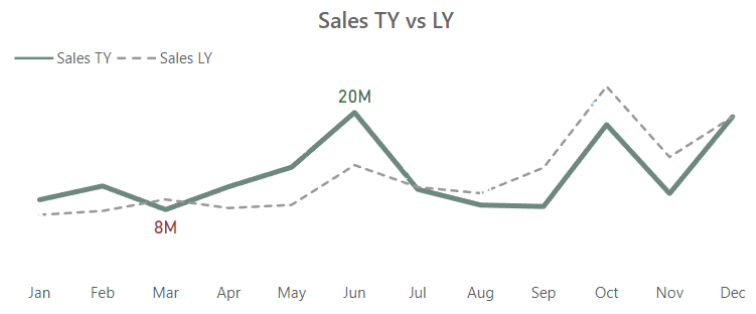
Declutter/Enrich for your audience

Do you really need all the information?

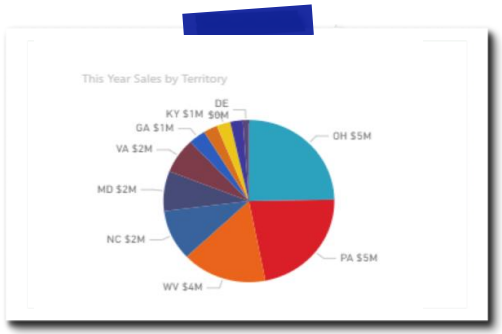
Do you need more information?

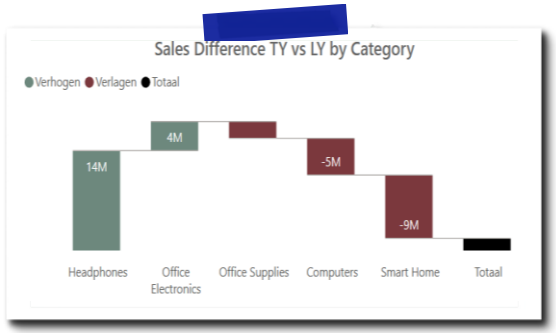


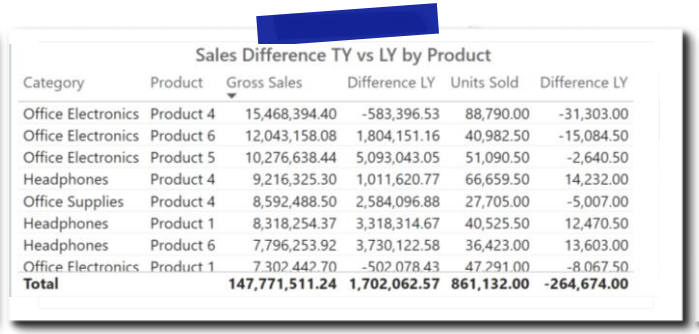




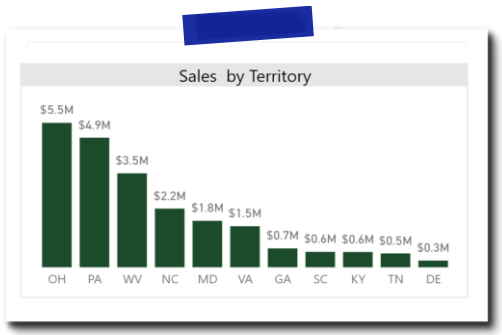
Check the visuals used (with your audience)

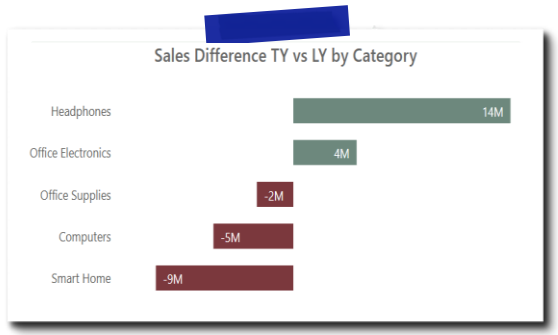


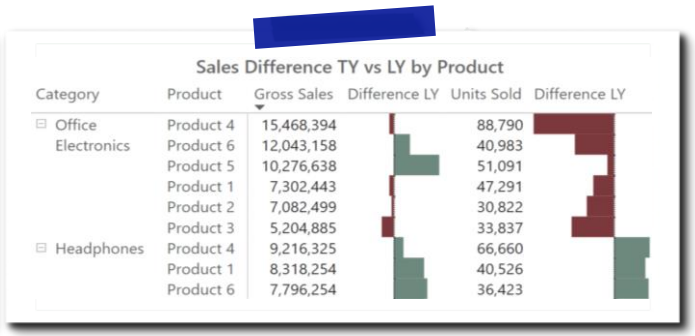




Category	Product	Gross Sales	Difference LY	Units Sold	Difference LY
Office Electronics	Product 4	15,468,394.40	-583,396.53	88,790.00	-31,303.00
Office Electronics	Product 6	12,043,158.08	1,804,151.16	40,982.50	-15,084.50
Office Electronics	Product 5	10,276,638.44	5,093,043.05	51,090.50	-2,640.50
Headphones	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**





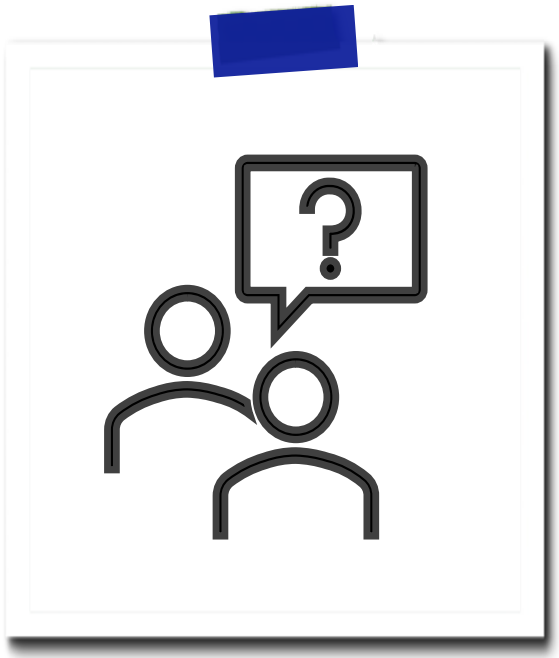


Category	Product	Gross Sales	Difference LY	Units Sold	Difference LY
Office Electronics	Product 4	15,468,394		88,790	
	Product 6	12,043,158		40,983	
	Product 5	10,276,638		51,091	
	Product 1	7,302,443		47,291	
	Product 2	7,082,499		30,822	
	Product 3	5,204,885		33,837	
Headphones	Product 4	9,216,325	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

Deliver

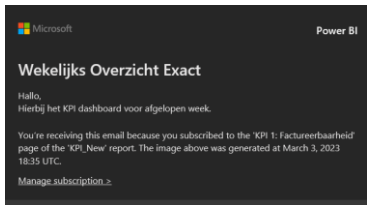
Evaluate & Test

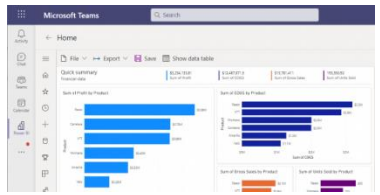
Evaluate

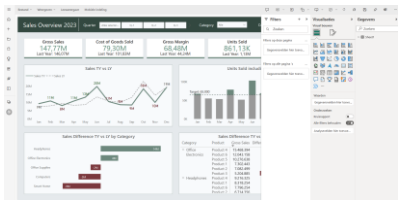


- Test run
- Evaluate with users
- Reflect & Feedback
- Usage Report

Deliver







Delivery is key!

- Mail
- Teams
- App
- Workspace
- Handout

Best practices

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

Feedback

Thank you very much for your attention.

Vielen Dank für Eure Aufmerksamkeit.