

Storytelling and Power BI

Creating reports that connect with your audience

Valerie Junk

De Power BI Gebruikersdagen worden mede mogelijk gemaakt door:



PLATINUM

delaware



ilionx



GOUD



Voorblijven. Niet bijblijven.

KASPAROV
FINANCE & BI

macaw



GET
RESPONSIVE

ZILVER

VICTA
BUSINESS INTELLIGENCE



Motion10
AN HSO COMPANY



VALID
STAY AHEAD



valcon

iqb

Quanto
collective analytics

COMMUNITY



DashData.

volda;
INFORMATIESPECIALISTEN

Power BI
Connector by DAVISTA

AZURROFINANCE

Storytelling & Power BI

Creating reports that connect with your audience



Speaker

Valerie Junk

Lead Microsoft @ VisionBI

My Focus

Data Visualization

Process Improvement

Innovation & Strategy

Goal of today's session

Understand which steps you can take to tailor a report to your audience

Once upon a time..



Agenda

Storytelling

What?
Why?



Research

Audience
Content



Create

Storyboard
Templates
Visuals

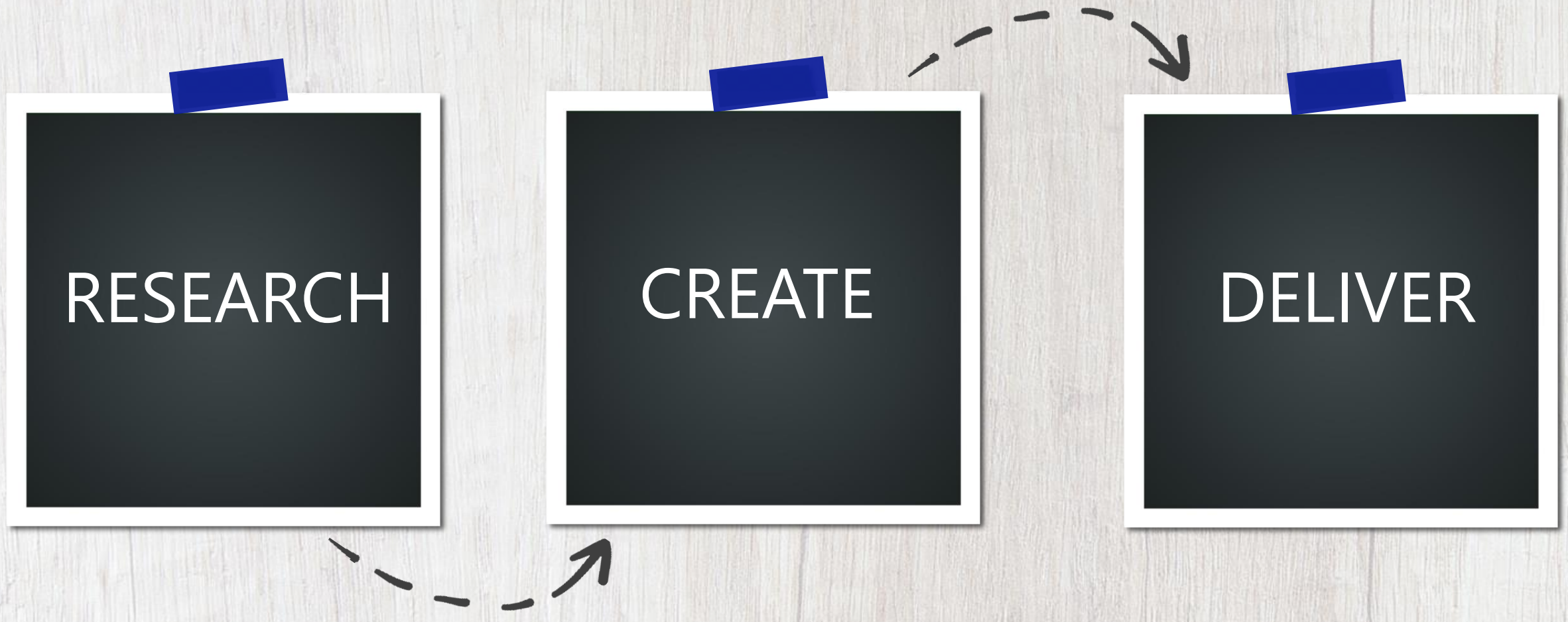


Deliver

Check
Best Practices



STORYTELLING



WHY STORYTELLING?



Save time



Engage



Easy to follow and understand



Create reports that matter



RESEARCH

Storytelling

What?
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KNOW YOUR AUDIENCE



Who?

Single or Group?

Motivation

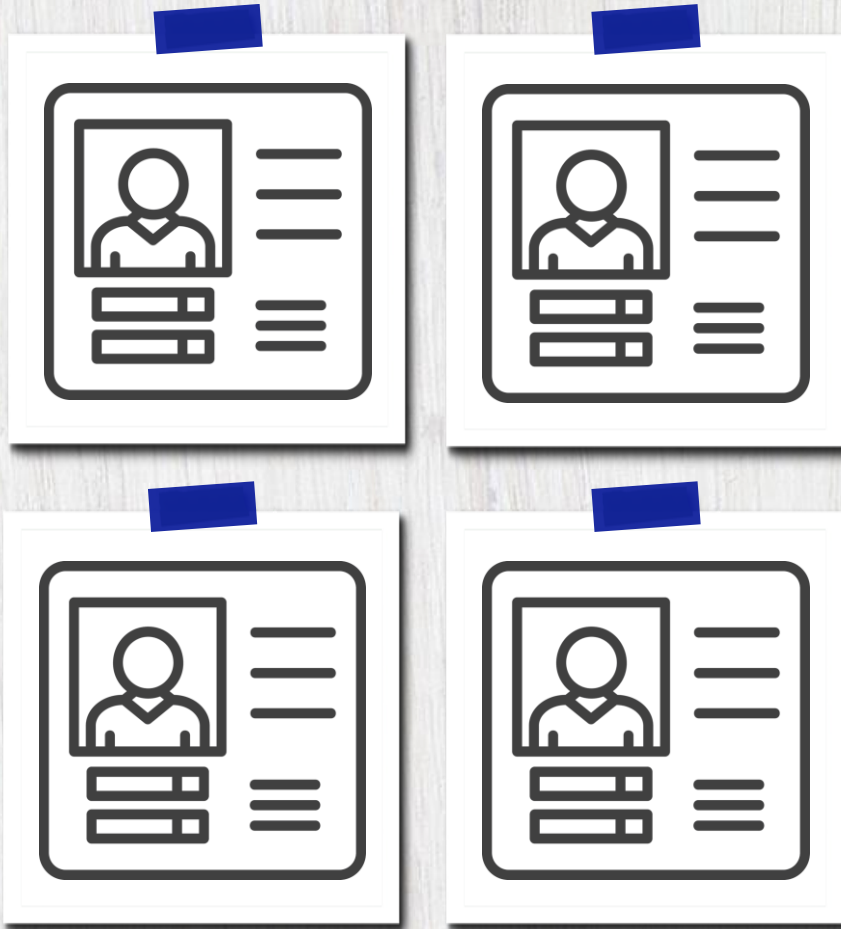
Scare

Preferred communication



Act

PERSONAS



Big audience ➤ create personas

- Subgroups
- Understand them
- What do they have in common?

Don't make assumptions

- Talk to them
- Talk to someone that knows them
- Similar groups



WHATS THE MESSAGE?

If you don't know the message – how will you get it across?



1 key message (sentence)

- Context
- Information
- Actions to take

(NOT A) KEY MESSAGE



Seeds & Co.



INITIAL QUESTION

SALES INSIGHTS



AUDIENCE

EVERYONE IN THE COMPANY



LEVEL OF GRANULARITY


ALL AVAILABLE INFORMATION



KEY MESSAGE



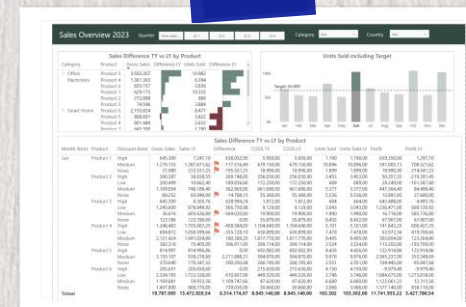
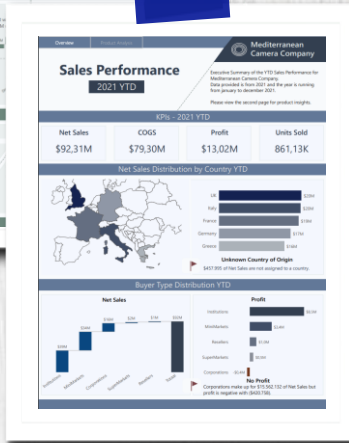
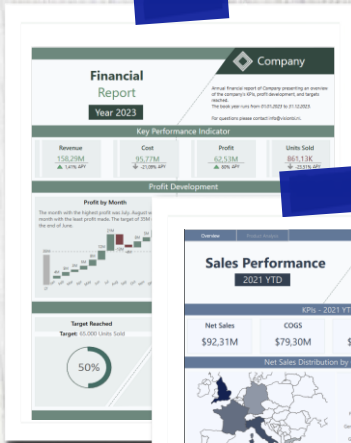
Seeds & Co.

- 
- A large, thick, black arrow pointing downwards, positioned to the left of the list items.
- 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 and the **best/worst products**.
 - Our **data analysts** daily dig through **all the data** to **investigate** hidden **trends** and **anomaly's**.

KEY MESSAGE



Seeds & Co.



CREATE

Storytelling

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Why?



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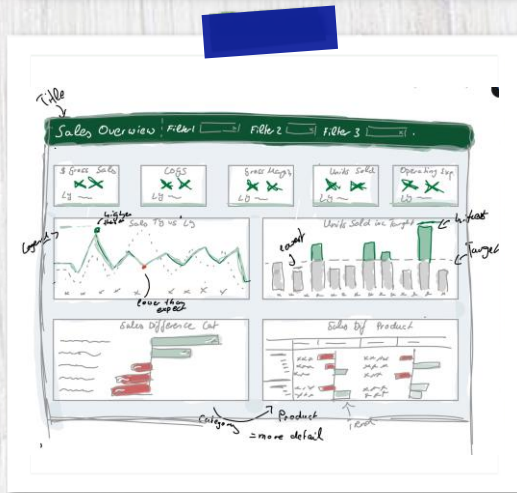
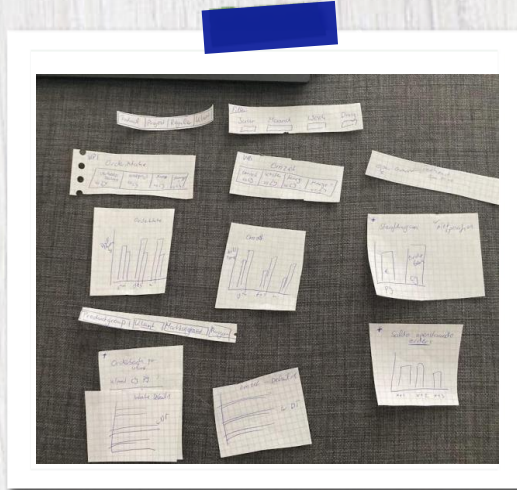


Deliver

Check
Best Practices



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**.

CONSISTENCY

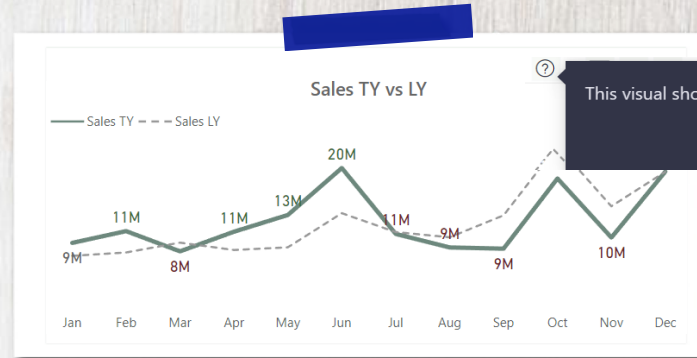
Know what to expect

- Templates
- Color Schemes
- Way of Working



DECLUTTER/ENRICH

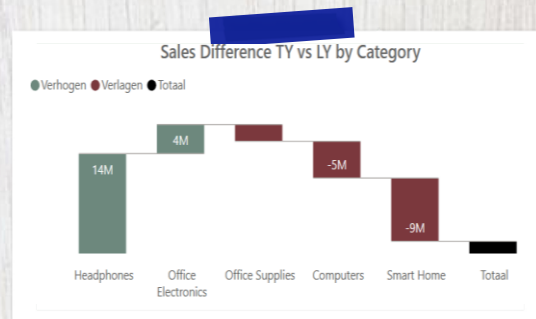
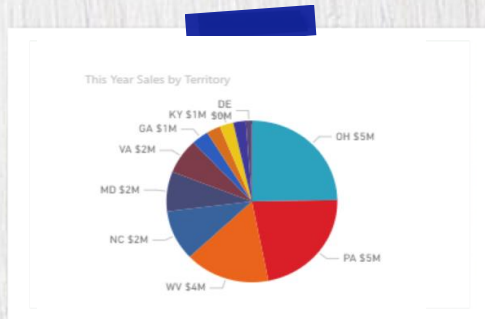
Do you really need all the information?
Do you need more information?



This visual shows you the Sales TY vs LY.
Sales is defined as: ABC
More information...

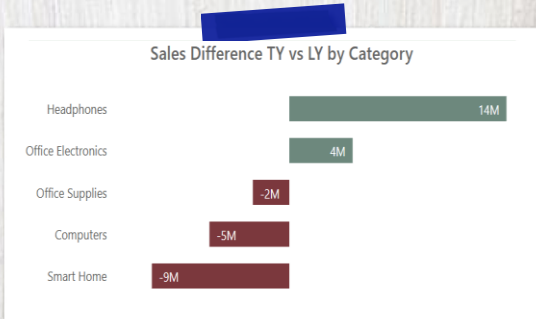
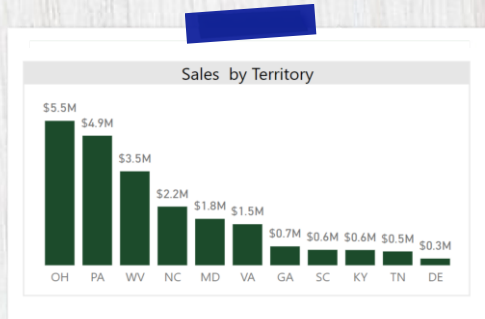
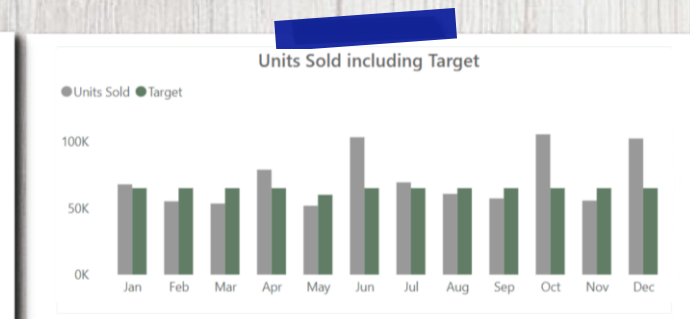
This visual shows you the Sales TY vs LY.
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CHECK THE VISUALS



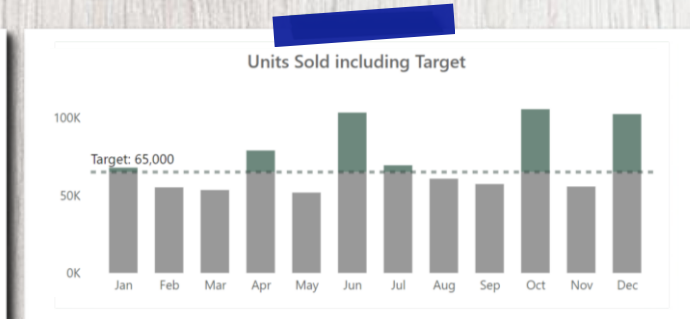
Sales Difference TY vs LY by Product

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	
	Product 1	7,302,443		47,291	
	Product 2	7,082,499		30,822	
Headphones	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

Storytelling

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Why?



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EVALUATE



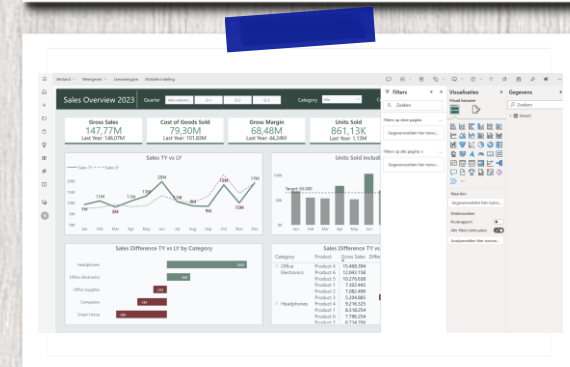
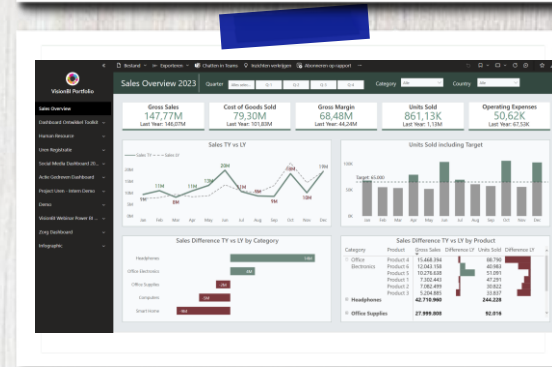
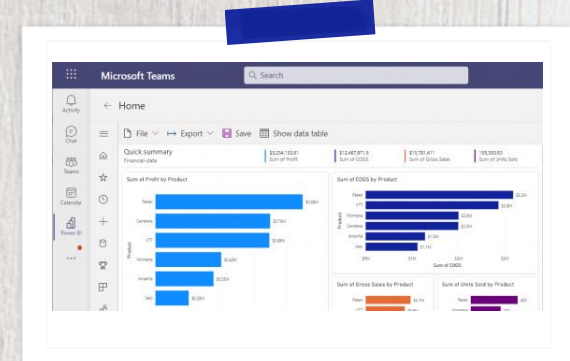
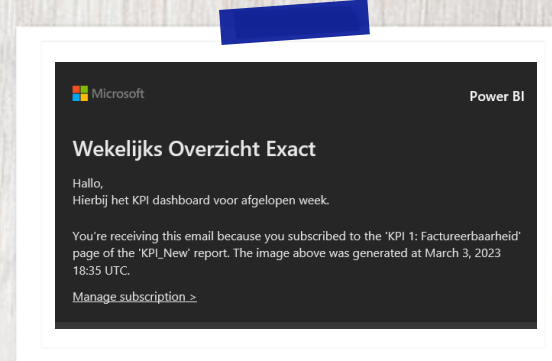
- Test run
- Reflect & Feedback
- Evaluate with users
- Usage Report



DELIVER

Chose a delivery option

- Mail
- Teams
- App
- Workspace
- Handout



BEST PRACTICES

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

