

European
Power Platform
Conference



BRUSSELS
11-13 JUNE — 24

Storytelling & Power BI

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Building THE report

- Dashboard
- Delivery
- Disappointment



Storytelling

Storytelling Benefits



Easy to follow and understand

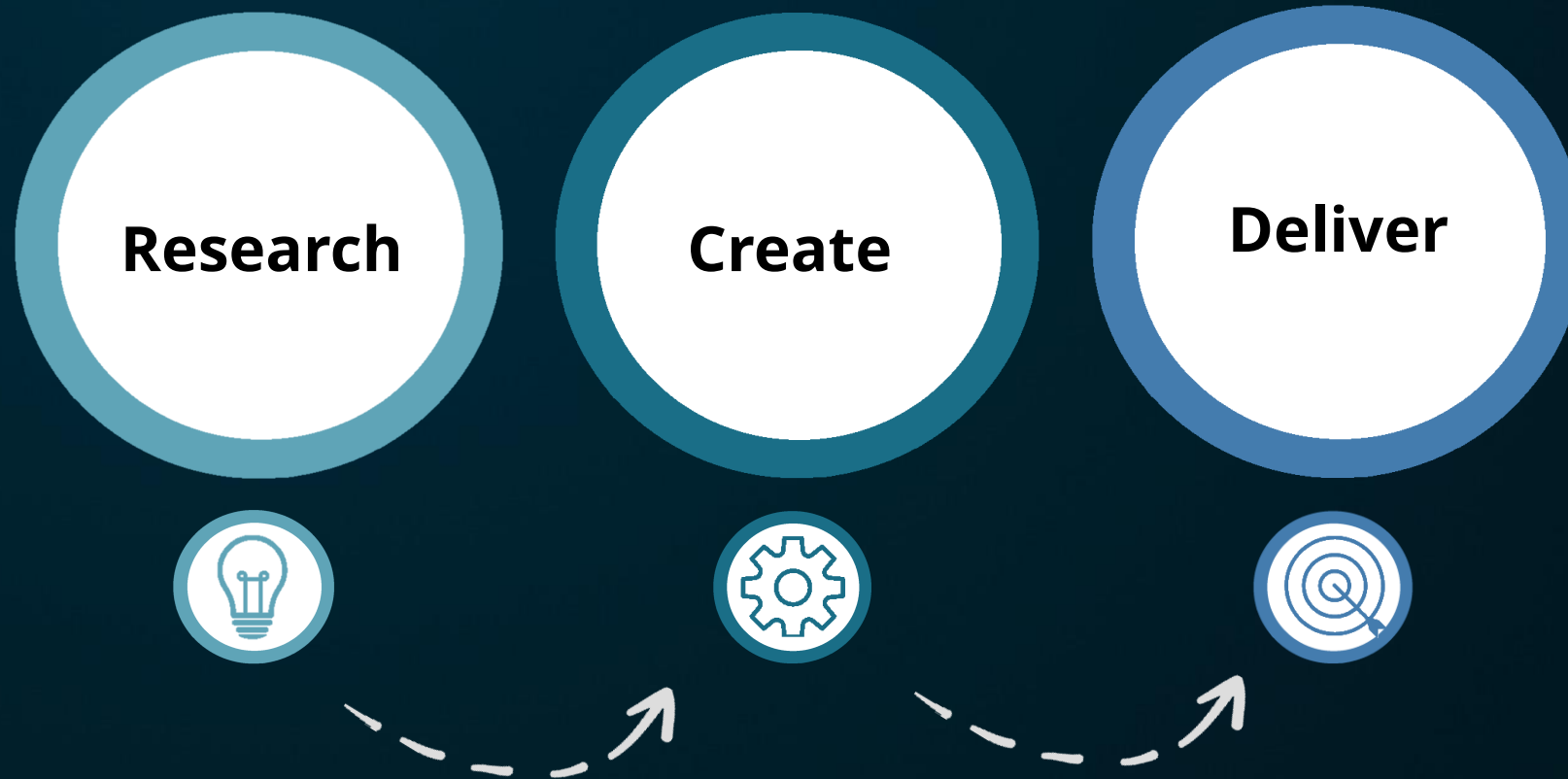


Engaging



Time-saving

3 Step approach



Research

Audience, Content & Key Message

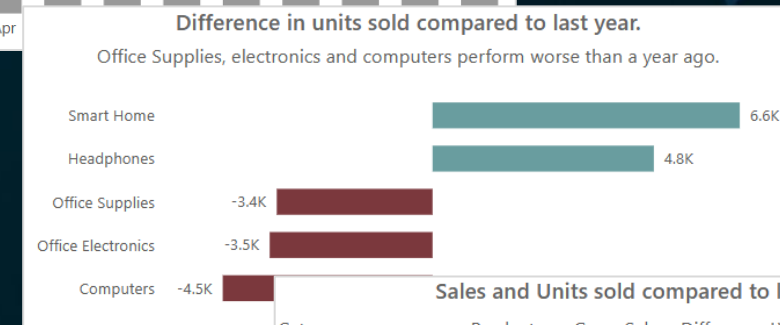
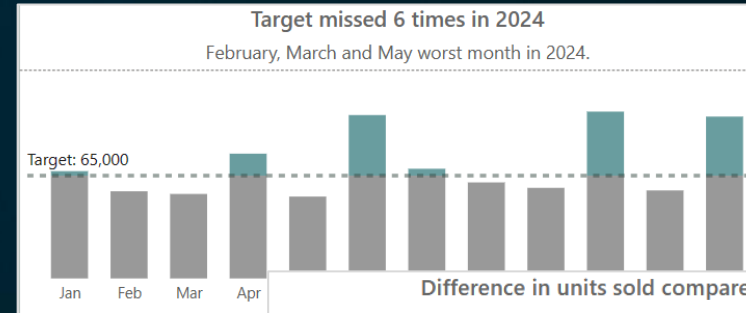
The Audience

- Who is the audience?
- What is the experience level?
- What information do they need?
- Actions to take
- Motivation / Scares



Why actions & motivation are important.

- When you know the actions and processes, you can provide context and supporting information.
- Adding meaning to the visuals.

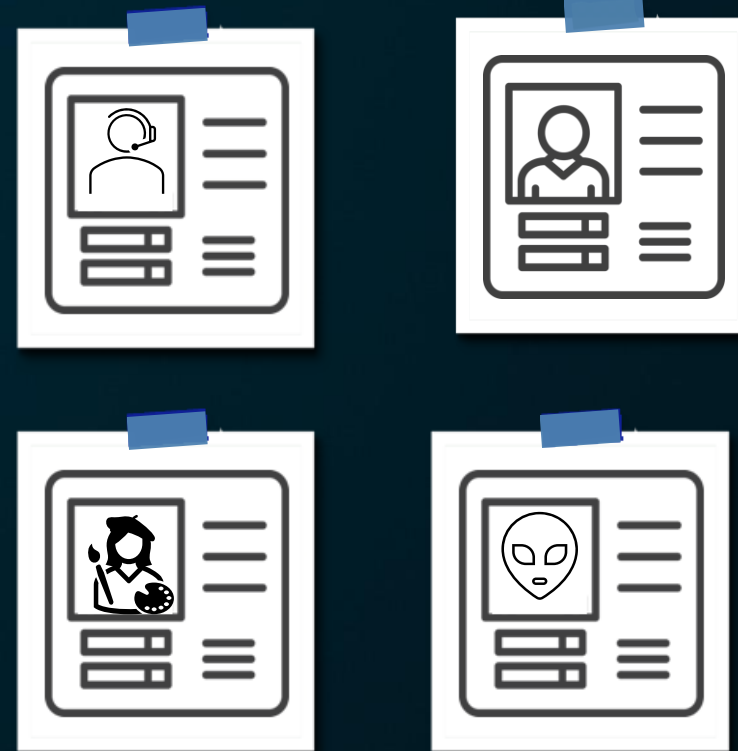


Sales and Units sold compared to last year

Category	Product	Gross Sales	Difference LY	Units Sold	Difference LY
Office Supplies	Product 1	1,207,950		4,353	
Computers	Product 5	25,932		2,161	
Office Electronics	Product 4	92,538		5,207	
	Product 2	1,782,414		3,763	
	Product 6	991,636		6,071	

Creating Personas

- Who is the audience?
- What is the experience level?
- What information do they need?
- Actions to take
- Motivation / Scares



What's the message?



CONTEXT



INFORMATION



ACTIONS TO TAKE

Not a key message



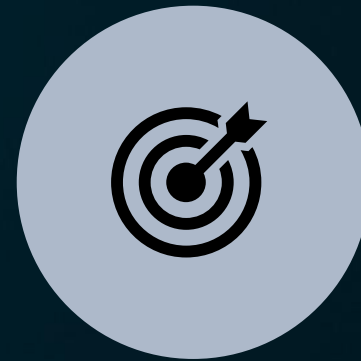
CONTEXT

SALES



INFORMATION


ALL



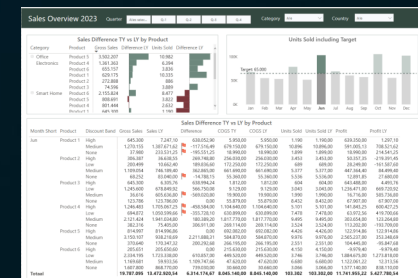
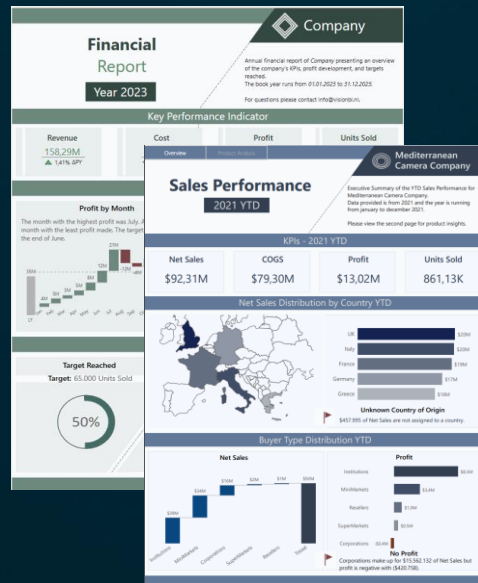
ACTIONS TO TAKE

TBD

3 examples

- 
- Each **year**, we share with the **whole company** our **key sales results** (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 **anomalies**.

Different Message = Different Design

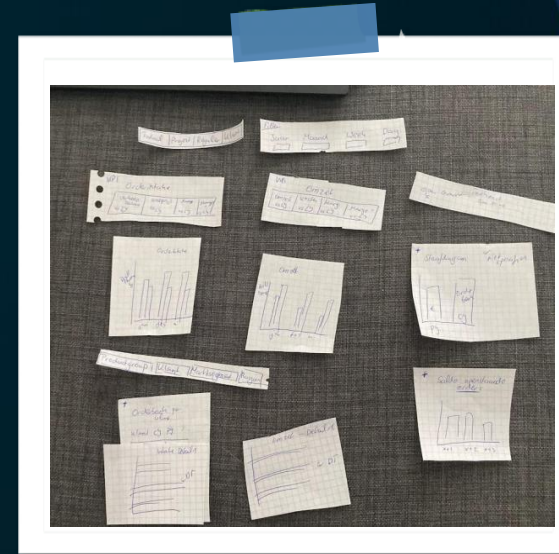


Create Storyboard, Templates & Visuals

Using a Storyboard & Mock-ups

Gather all the information

- Sticky Notes (easy to rearrange)



Translate pieces to design

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



Using Templates

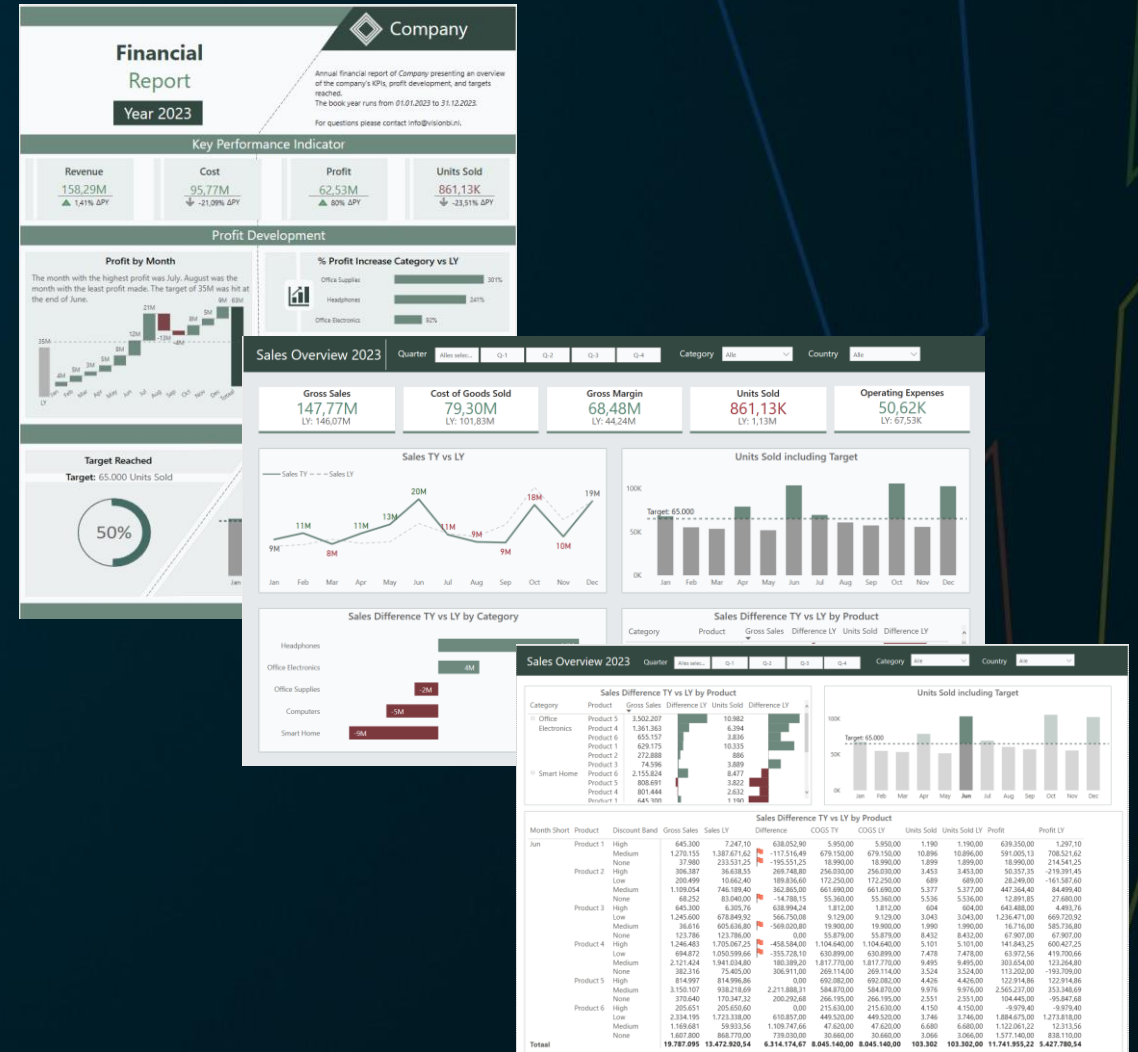
Improve the ease of usage

- Focus on the data, not on handling the tool.

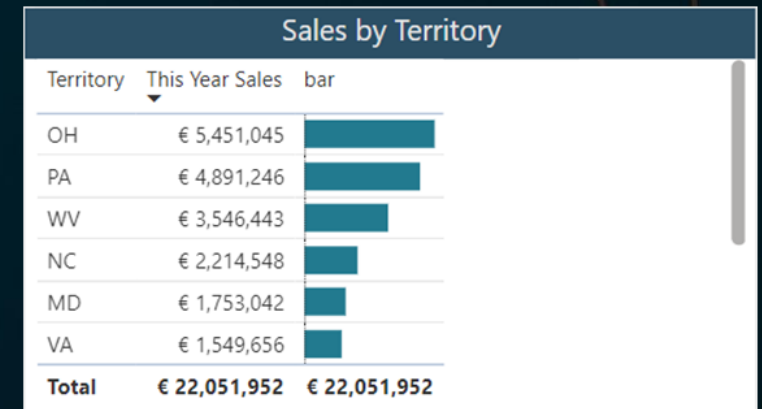
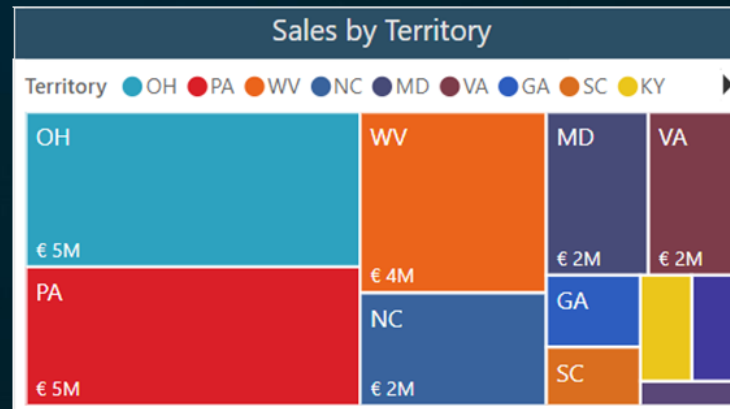
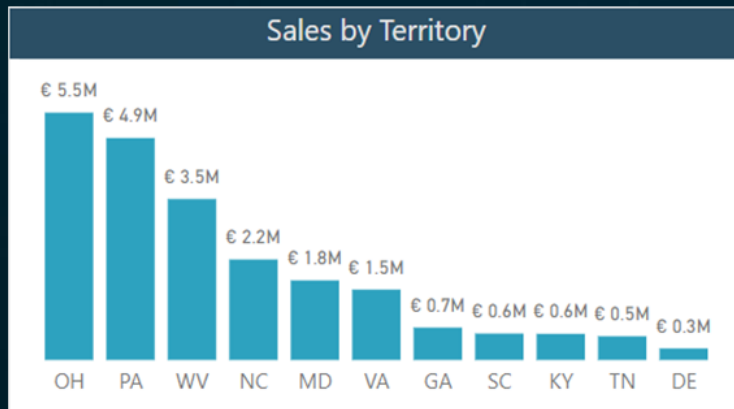
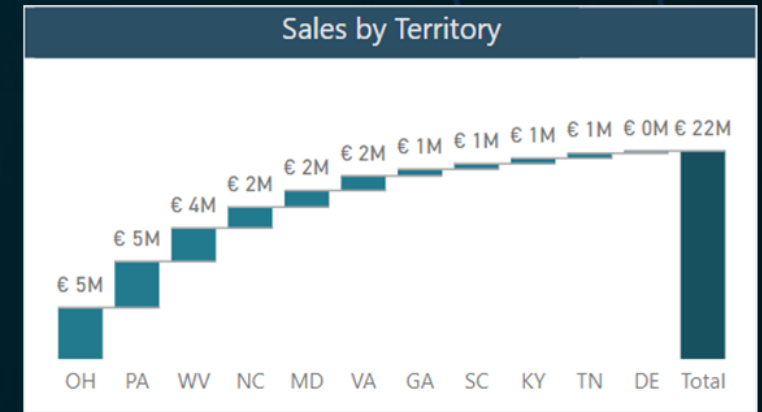
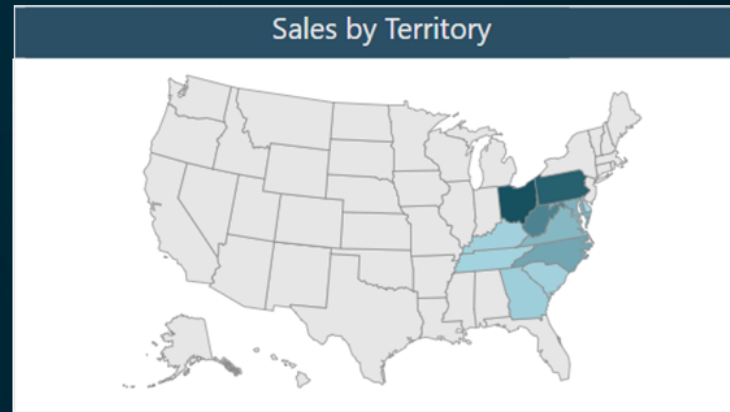
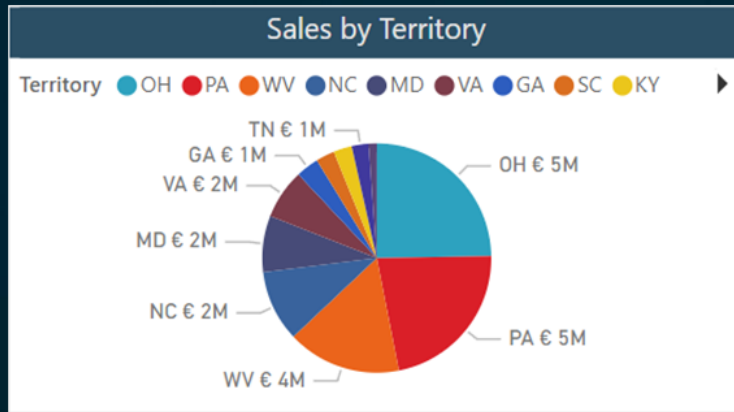
- Templates

- Color schemes

(example: color.adobe.com)

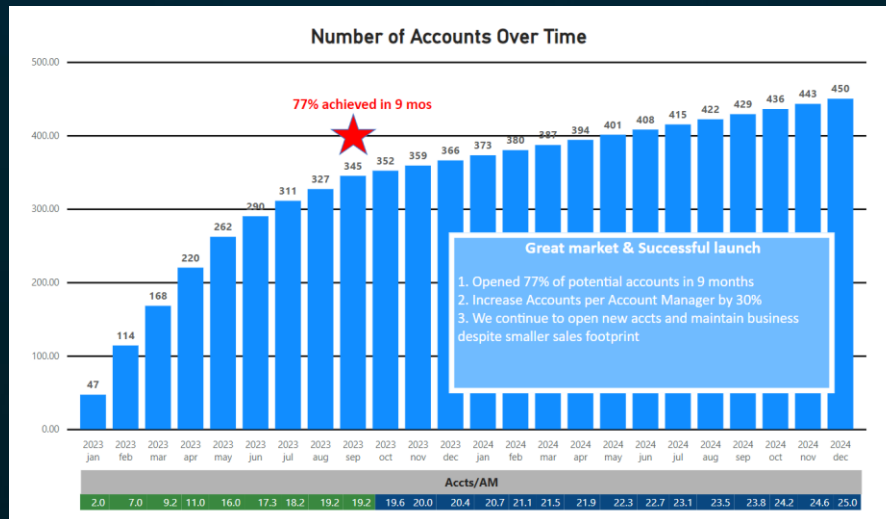


Choosing the “right” visual



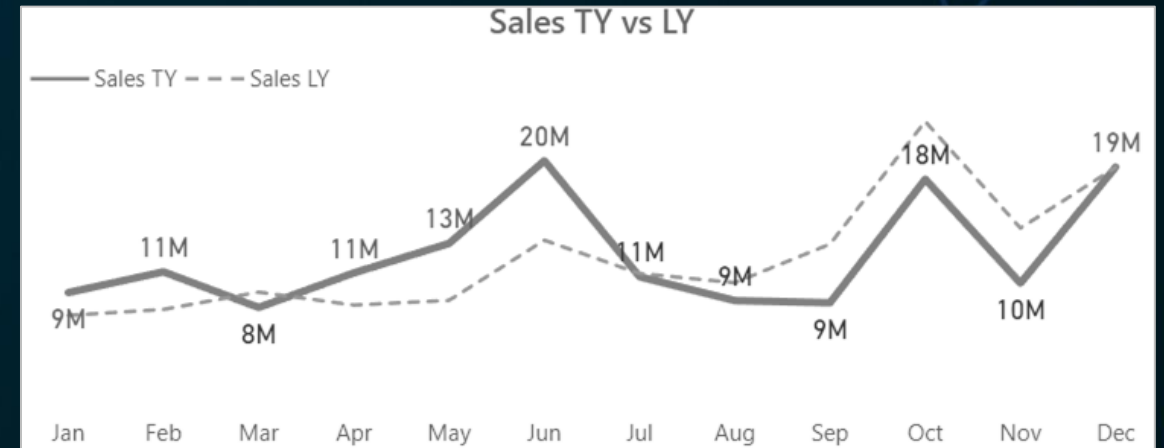
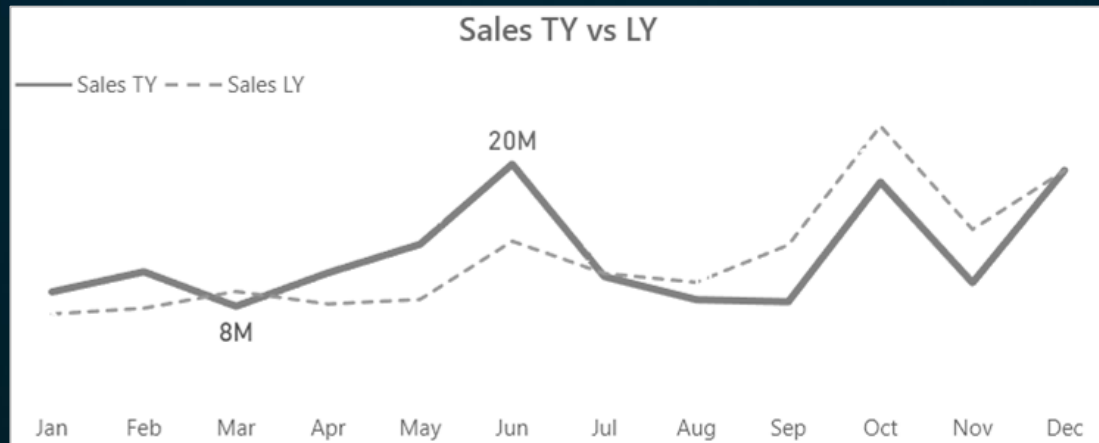
Simple, Relevant and easy to interpret

- Too complex = Frustration
- Don't overestimate how much time a user is willing to spend finding information.



Declutter & Enrich

What is important? How much guidance is needed?

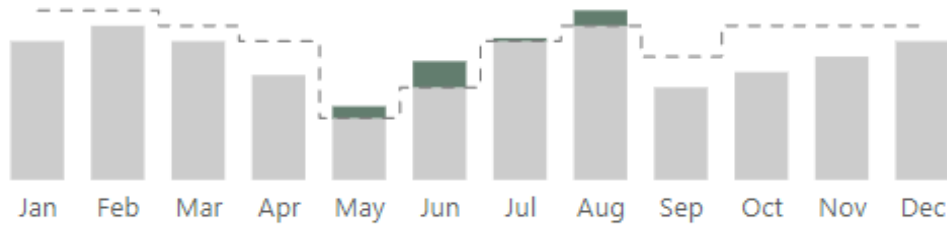


Simplify (if possible)

Sales target hit 4 times in 2023

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

● Below target ● Above target - - Target



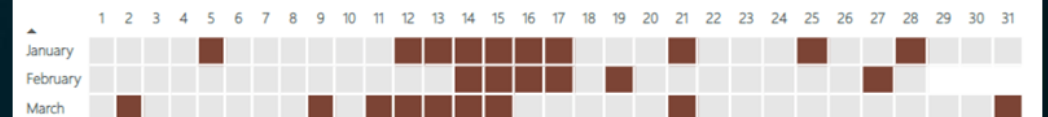
Sales target hit 4 times in 2023

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec



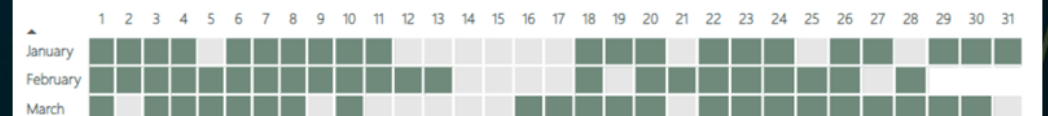
Daily Overview - Target Missed

Dark red columns = missed daily target.



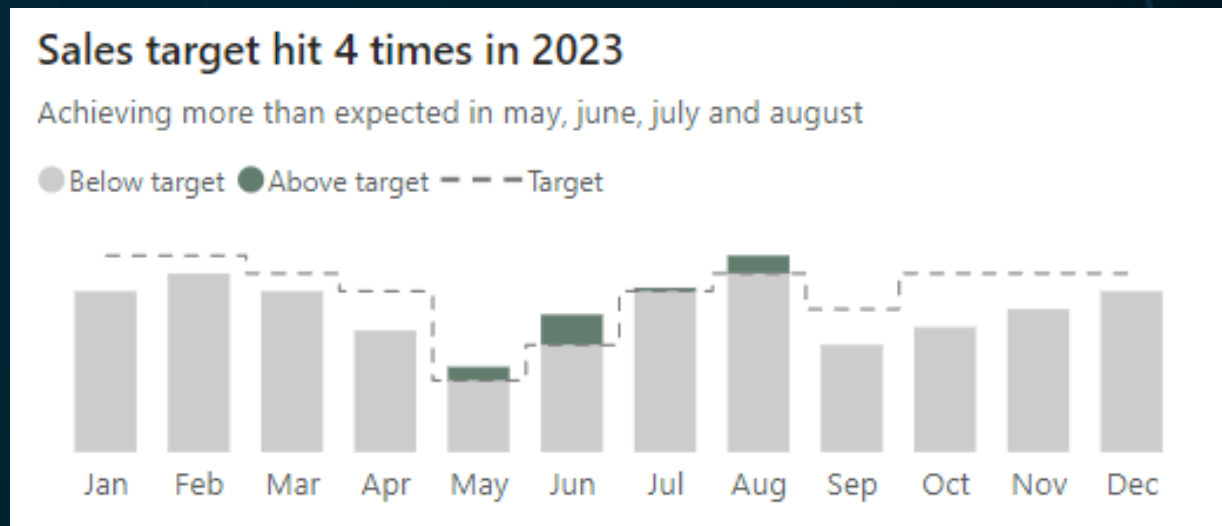
Daily Overview - Target Hit

Dark green columns = hit daily target.

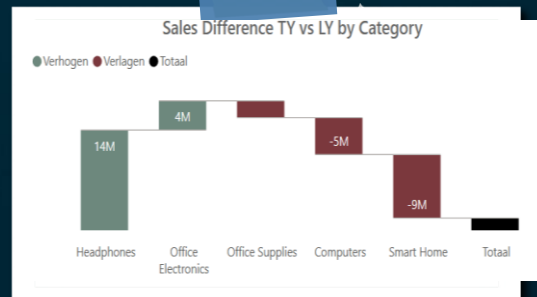
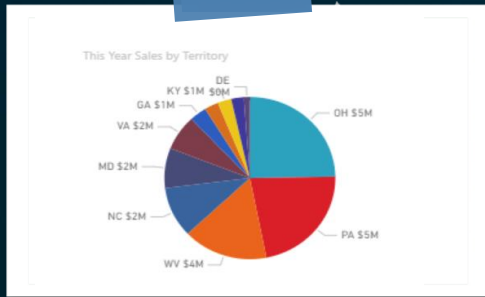


Adding Context

- Legend
- Color coding
- Dynamic titles

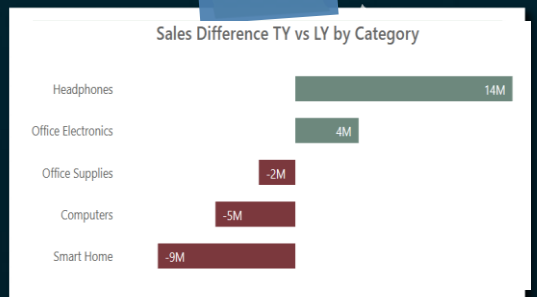
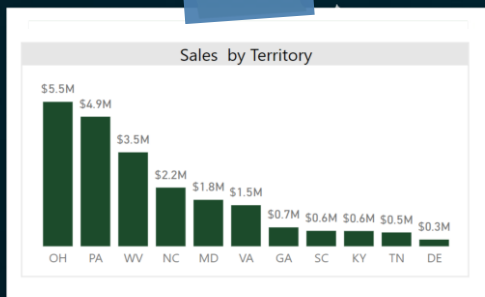
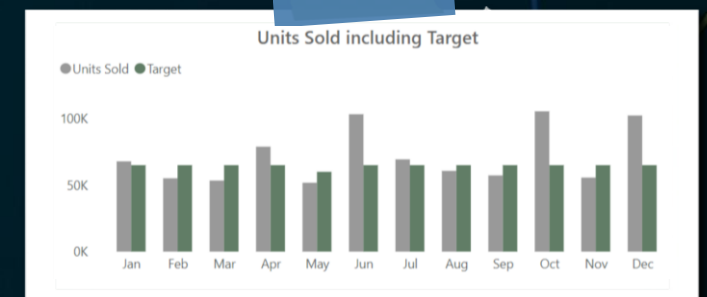


Check your visuals – Do they tell the story?



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	
Headphones	Product 4	9,216,325		66,660	
	Product 1	8,318,254		40,526	
	Product 6	7,796,254		36,423	



Deliver

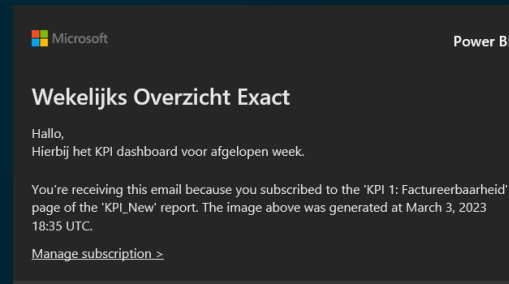
Evaluation & Testing

Deliver

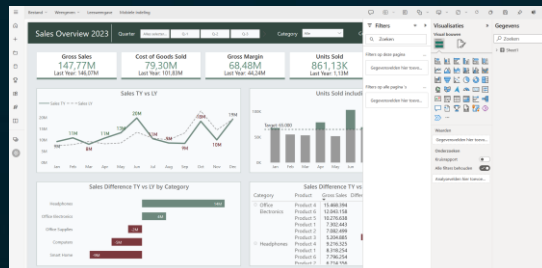
- Check the way the report is used



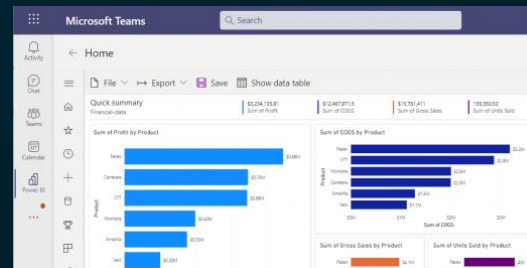
App



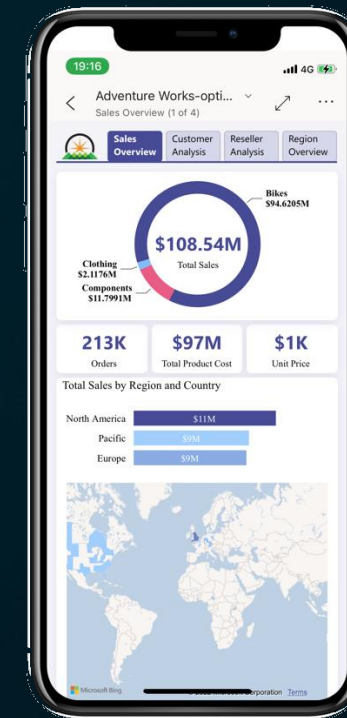
Mail (PDF)



Workspace



Teams



Phone

Evaluate & Test

- Continuous testing
- User evaluation
- Reflect & Feedback
- Usage Report



Continuous process

- Don't wait till the end to evaluate.
- Get your audience involved as soon as possible.
- Test different versions of visuals.
- Don't make assumptions.

No Conditional Formatting			
Category	Product	Gross Sales	Difference LY
Office Electronics	Product 4	15,468,394	-583,396.53
	Product 6	12,043,158	1,804,151.16
	Product 5	10,276,638	5,093,043.05

No Conditional Formatting			
Category	Product	Gross Sales	Difference LY
Office Electronics	Product 4	15,468,394	▼
	Product 6	12,043,158	▲
	Product 5	10,276,638	▲

Conditional Formatting: Bar Charts			
Category	Product	Gross Sales	Difference LY
Office Electronics	Product 4	15,468,394	▼
	Product 6	12,043,158	▲
	Product 5	10,276,638	▲

Takeaway

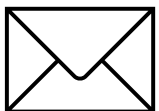
Consider your audience

1 key message

Use a Storyboard & Templates

Evaluate

Contact



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PLEASE RATE THIS
SESSION ON THE APP

