## From Data to





### SPENT HOURS BUILDING AN AWESOME REPORT



NO ONE USES IT



# Valerie Junk PorcuBI

- Data Visualization
- Data-driven Storytelling
- Power BI Architect

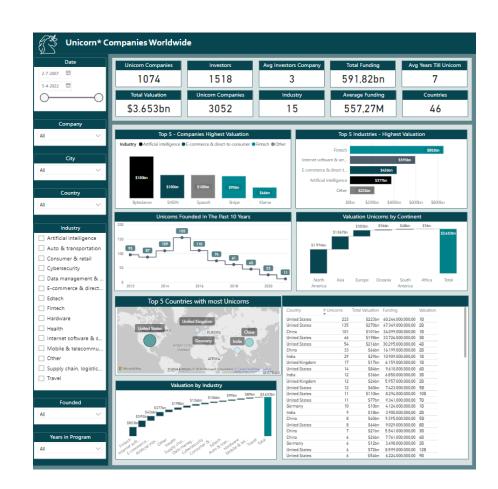




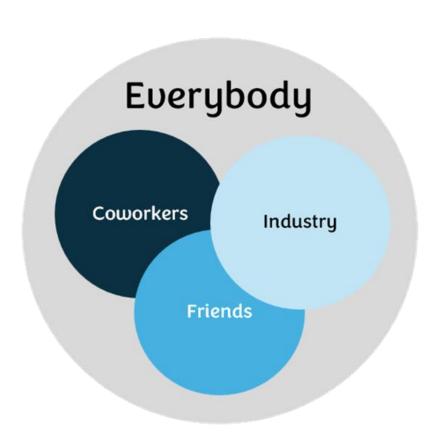
## Action-driven design

- Guiding the user
- Relevance
- Usability
- Insights related to actionable steps

You don't need everything!



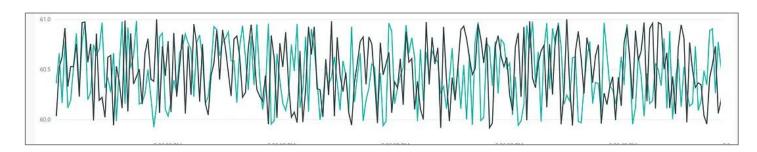
## Everybody knows?

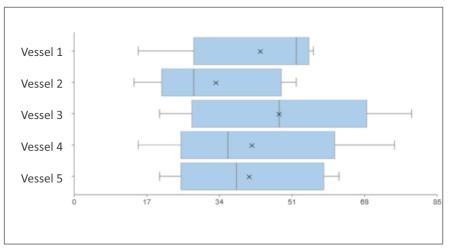


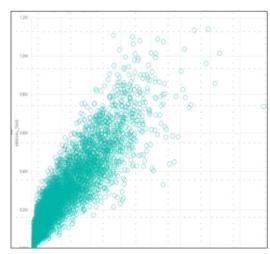
Everybody else

## Why care?









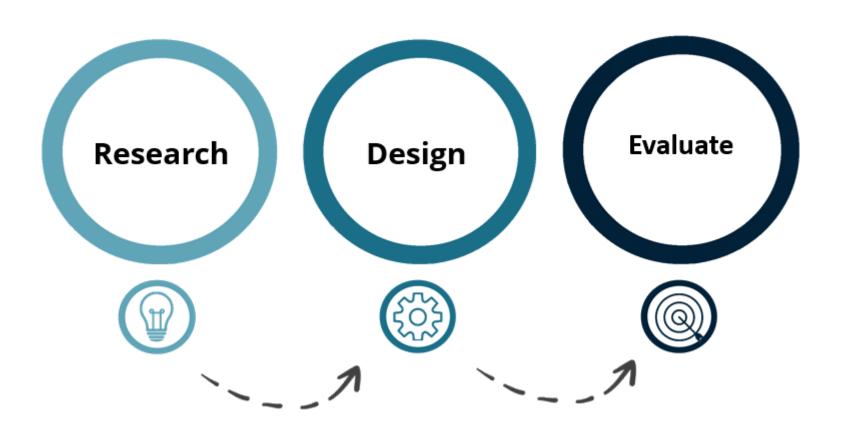


#### **Treasure hunt**

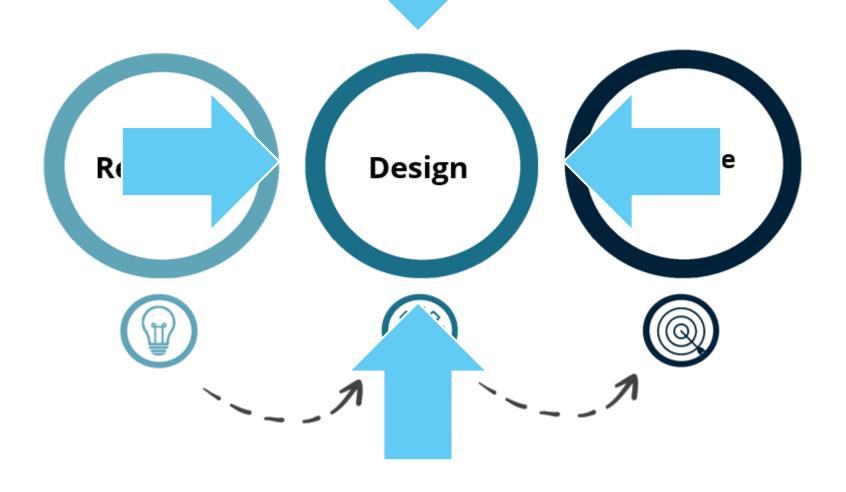
- The answer is in there (somewhere...)
- "Everybody knows this, right?"
- "The user did not tell me what to do!"



### From data to action!



### From dat to action!



## Research

Who, What & Why?

### The audience

• Who is the audience?

What is the experience level?

What actions do they want to take and why?

What's the process?



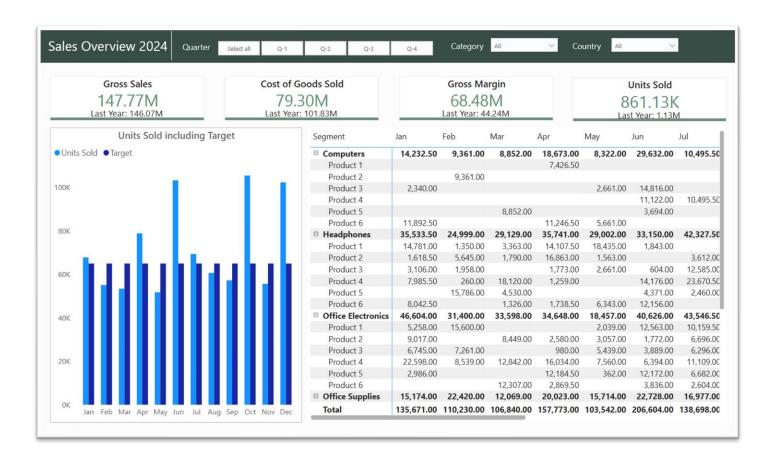
### Why do we need to know this?

Visual without meaning

no purpose.



## Design for insights



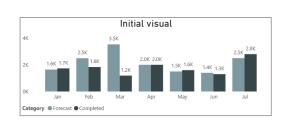
## Design for insights





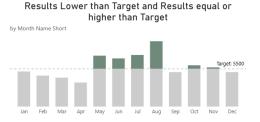
## Communication is key

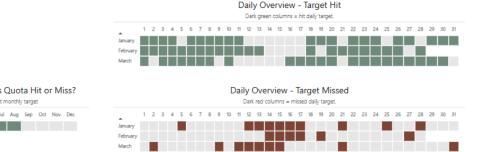
- What is the most critical information for you to make a decision?
- Can you explain what happens when..
- Provide examples!







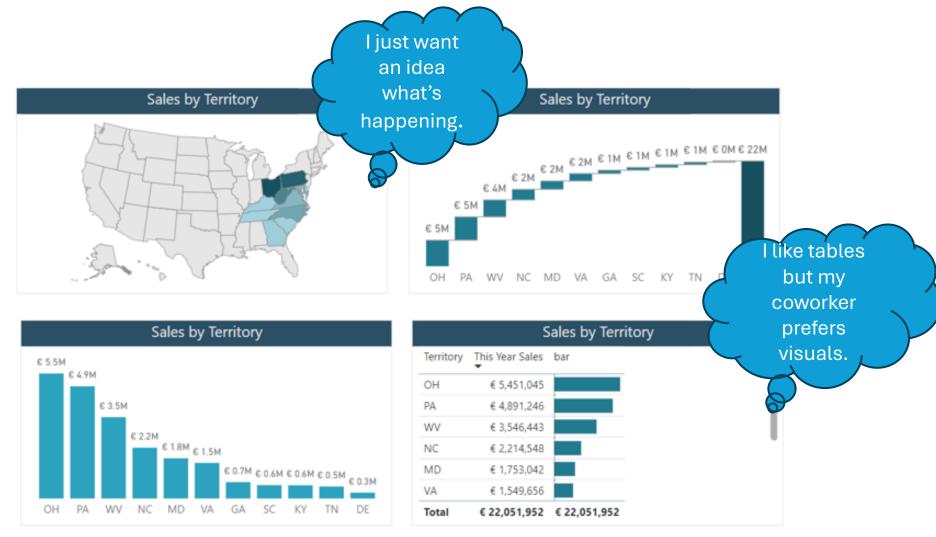




## Design

**Context, Simplicity & Relevance** 

### Perfect visual?



## Small changes – huge effect

	Sales Diffe	rence TY vs L	by Produ	ct
Category	Gross Sales	Difference LY	Units Sold	Difference LY
☐ Office Electronics				
Product 4	€ 15,468,394	-583,396.53	88,790	-31,303.00
Product 6	€ 12,043,158	1,804,151.16	40,983	-15,084.50
Product 5	€ 10,276,638	5,093,043.05	51,091	-2,640.50
Product 1	€ 7,302,443	-502,078.43	47,291	-8,067.50
Product 2	€ 7,082,499	-313,509.85	30,822	-10,722.00
Product 3	€ 5,204,885	-1,438,575.67	33,837	16,389.00
☐ Headphones				

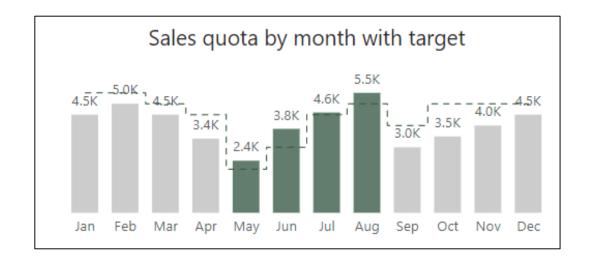
	Sales Diffe	rence TY vs LY l	by	duct	
Category	Gross Sales	Difference LY	₹.	<del>Ci</del> fference Units	
☐ Office Electronics					
Product 4	€ 15,468,394	-€ 583,396.53	$\overline{}$	-31,303.00	
Product 6	€ 12,043,158	€ 1,804,151.16		-15,084.50	
Product 5	€ 10,276,638	€ 5,093,043.05		-2,640.50	igwidtharpoons
Product 1	€ 7,302,443	-€ 502,078.43		-8,067.50	
Product 2	€ 7,082,499	-€ 313,509.85	abla	-10,722.00	$\triangleright$
Product 3	€ 5,204,885	-€ 1,438,575.67	$\overline{}$	-16,389.00	
☐ Headphones					

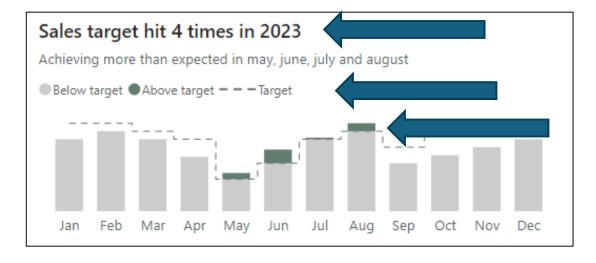
	Sales Diffe	rence TY vs L	Y by Produc	et
Category	Gross Sales	Difference LY	Units Sold	ence LY
☐ Office Electronics				
Product 4	€ 15,468,394		88,790	
Product 6	€ 12,043,158		40,983	
Product 5	€ 10,276,638		51,091	
Product 1	€ 7,302,443		47,291	
Product 2	€ 7,082,499		30,822	
Product 3	€ 5,204,885		33,837	
☐ Headphones				

	Sales Diffe	rence TY vs		y Product		
Category	Gross Sales	Difference LY		Units Sold	Difference LY	
☐ Office Electronics						- 1
Product 4	€ 15,468,394	-583,396. <del>5</del>		88,790	-31,303.00 🛣	
Product 6	€ 12,043,158	1,804,151.16		40,983	-15,084.50	
Product 5	€ 10,276,638	5,093,043.05	$\bigstar$	51,091	-2,640.50	
Product 1	€ 7,302,443	-502,078.43		47,291	-8,067.50	
Product 2	€ 7,082,499	-313,509.85	$\stackrel{\wedge}{\simeq}$	30,822	-10,722.00	
Product 3	€ 5,204,885	-1,438,575.67		33,837	-16,389.00	
☐ Headphones						

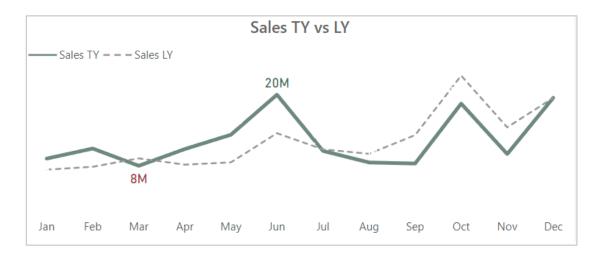
## **Adding Context**

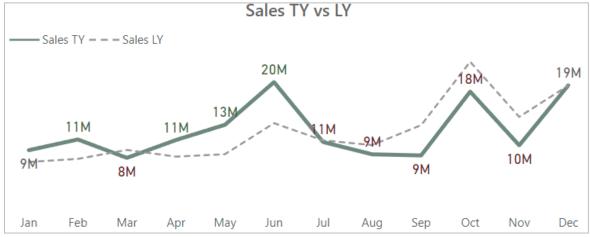
Titles, Legend & Colour coding





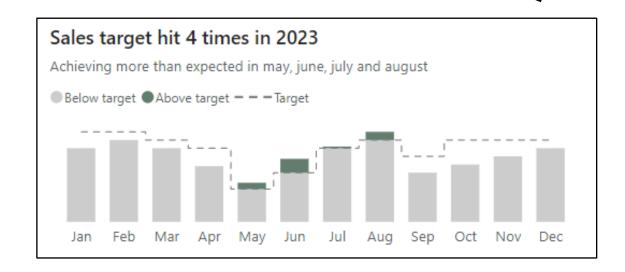
### Declutter and/or Enrich

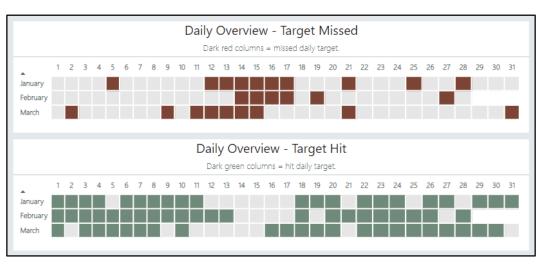




## Simplify

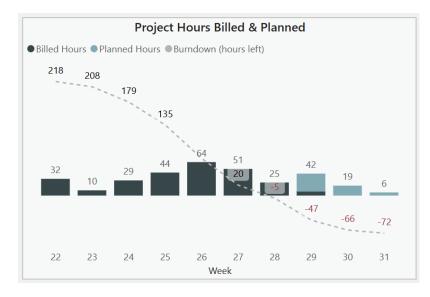


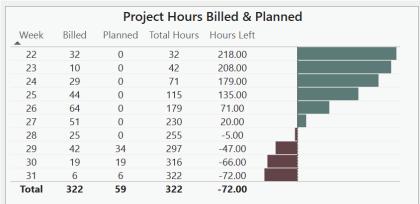




### Table vs Visual

	roject	mours Bi	lled & Plan	inea
Week	Billed	Planned	Total Hours	Hours Left
22	32	0	32	218.00
23	10	0	42	208.00
24	29	0	71	179.00
25	44	0	115	135.00
26	64	0	179	71.00
27	51	0	230	20.00
28	25	0	255	-5.00
29	42	34	297	-47.00
30	19	19	316	-66.00
31	6	6	322	-72.00
Total	322	59	322	-72.00





## Simple & relevant

		Conditio	nal Formattii	ng						
Category	Product	Gross Sales	Sales LY	Sum of Units Sold	Units Sold LY					
□ Computers	Product 1	49,128	459,198.71	4,094.00	29,191.50					
	Product 2	732,090	2,457,246.88	9,216.00	24,811.00					
	Product 3	2,256,856	905,136.92	7,796.00	23,129.00					
	Product 4	128,796	2,875,448.87	11,091.50	40,892.00					
	Product 5	69,627	1,117,383.93	5,845.00	16.219.00					
	Product 6	85,214	633,802.59	7,233.00			Conditio	nal Formatti	ng	
□ Headphones	Product 1	8,318,254	4,999,939.70	40,525.50	Category	Product	Gross Sales	Sales LY	Sum of Units Sold	Units Sold
	Product 2	6,714,356	3,353,474.59	35,383.50	□ Computers	Product 1	49,128	459,198.71	4.094.00	29,191.
	Product 3	5,797,674	2,992,397.84	30,872.50	Computers	Product 2	732,090	2,457,246.88		24,811.
	Product 4	9,216,325	8,204,704.54	66,659.50		Product 3	2,256,856	905,136.92		23,129.
	Product 5	4,868,096	5,166,997.55	34,364.00		Product 4	128,796	2,875,448.87	11,091.50	40,892.
	Product 6	7,796,254	4,066,131.34	36,423.00		Product 5	69,627	1,117,383.93		16,219.
□ Office	Product 1	7,302,443	7,804,521.13	47,291.00		Product 6	85,214	633,802.59		27,021.
Electronics	Product 2	7,082,499	7,396,008.97	30,822.00	□ Headphon		8,318,254	4,999,939.70		28,055.
	Product 3	5,204,885	6,643,460.68	33,837.00	- Ticaapiioii	Product 2	6,714,356	3,353,474.59	35,383.50	33,525.
	Product 4	15,468,394	16,051,790.92	88,790.00	1	Product 3	5,797,674	2,992,397.84	30,872.50	24,773.
	Product 5	10,276,638	5,183,595.39	51,090.50		Product 4	9,216,325	8,204,704.54	66,659.50	52,427.
	Product 6	12,043,158	10,239,006.92	40,982.50		Product 5	4,868,096	5,166,997.55		34,317.
						Product 6	7,796,254	4,066,131.34		22,820.
					□ Office	Product 1	7,302,443	7,804,521.13		55,358.
					Electronics		7,082,499	7,396,008.97	30,822.00	41,544.
						Product 3	5,204,885	6,643,460.68	33,837.00	50,226.
						Product 4	15,468,394		88,790.00	120,093.
						Product 5	10,276,638	5,183,595.39		
						Product 6		10,239,006.92		56,067.

## Evaluate



## Continuous process

- Involve the audience early on
- Don't stop directly after implementation
- Evaluate with the actual audience



## Assumptions

- Don't assume that what worked last time will work this time.
- Proactive approach
  - How have processes changed?
  - Did decision-making change?



### What if it doesn't work?

- Avoid adding unnecessary data, filters, or options just to complete the task.
- Review the visuals to ensure they meet the audience's needs.
- Provide guidance.



	Trend	l (up or do	wn)
Category	Product	Gross Sales ▼	Difference LY
		15,468,394	
Electronics	Product 6	12,043,158	
	Product 5	10,276,638	

Co	onditional	Formatting: Bar Charts
Category	Product	Gross Sales Difference LY
Office Electronic s	Product 4 Product 6 Product 5	15,468,394 12,043,158 10,276,638

C	onditional	Formatting	g: Min Ma
Category	Product	Gross Sales	MinMax
□ Office	Product 4	15,468,394	
Electronic	Product 6	12,043,158	
S	Product 5	10,276,638	*
	Product 1	7,302,443	
	Product 2	7,082,499	
	Product 3	5,204,885	$\stackrel{\wedge}{\sim}$

### Takeaway

- Talk to the end user!
- Understand the processes.
- You can't fix wrong assumptions with design.
- Evaluate continuously!

#### Contact



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