From Data to Action

Driving decision-making with Power BI

THANK YOU

Data Community Austria

Platinum

smart casual datadesign · redgate · TIMEXTENDER

Gold

b.telligent · Lucient · Measure Killer · T · Spot by NetApp

Silver

veeam

Bronze

ACP CUBIDO Digital Solutions · Power BI Camp · Savory DATA · SOLISYON

People don't buy products – they buy solutions to their problems
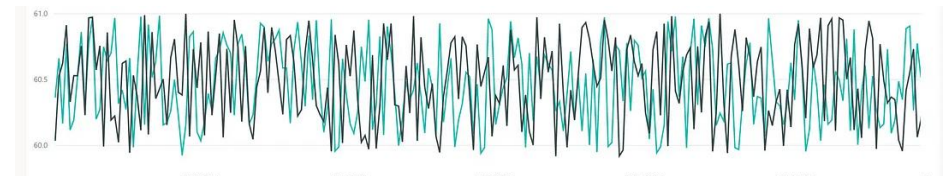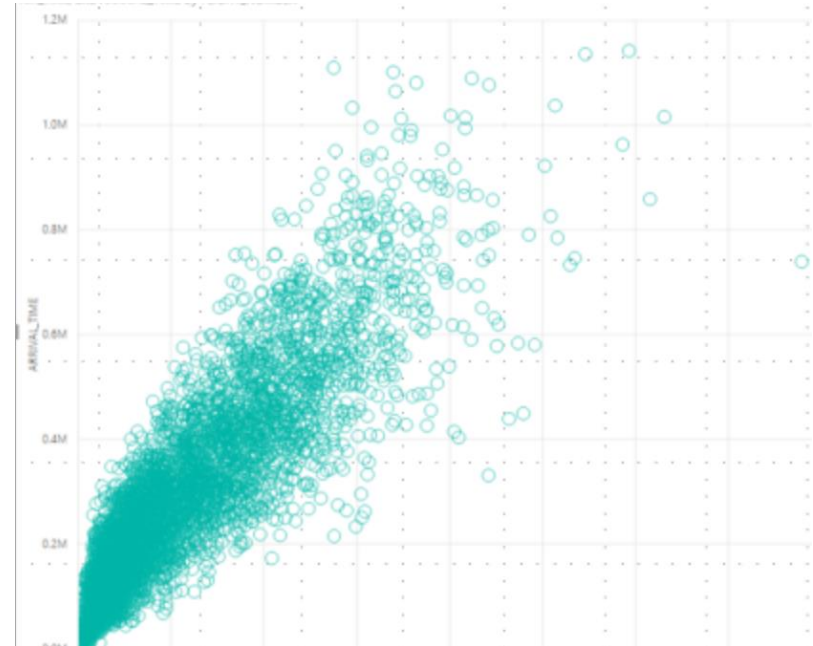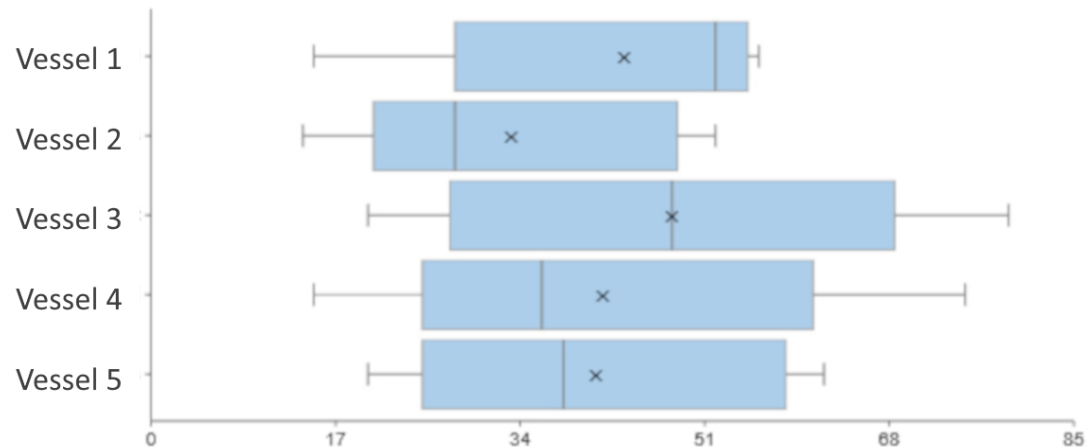
Why care?
A real example

Vessel tracking

- Loading time

- Start time

- Time of arrival

- Unloading

Need: Efficiency report to evaluate and adjust vessel speed

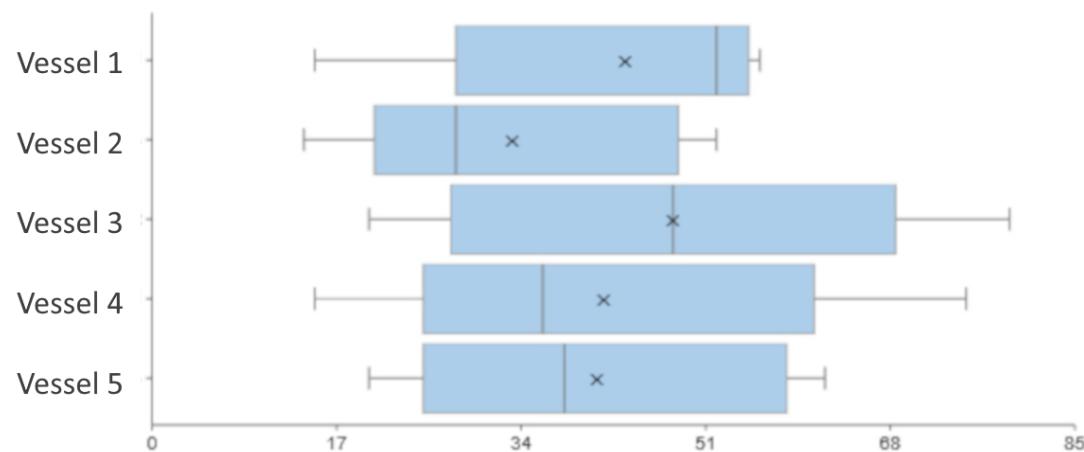# What they got

- 20 page "report"

- 53 visuals

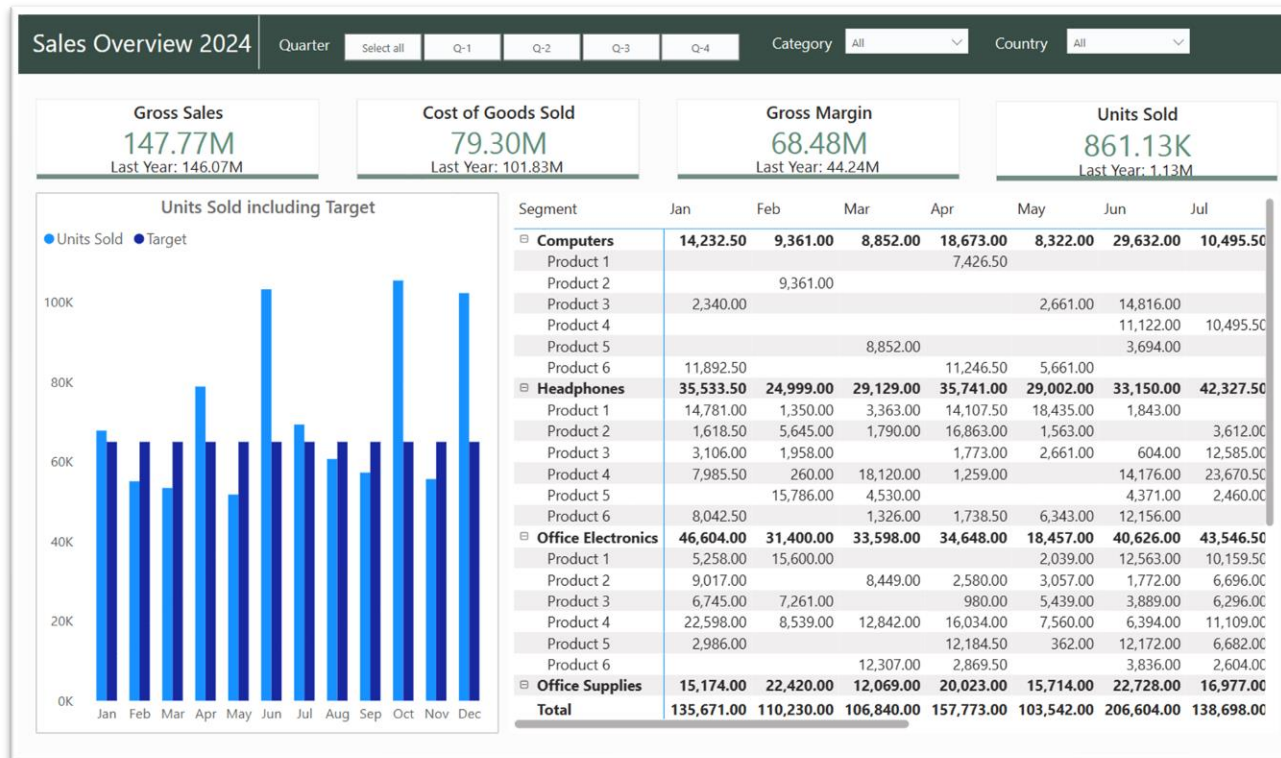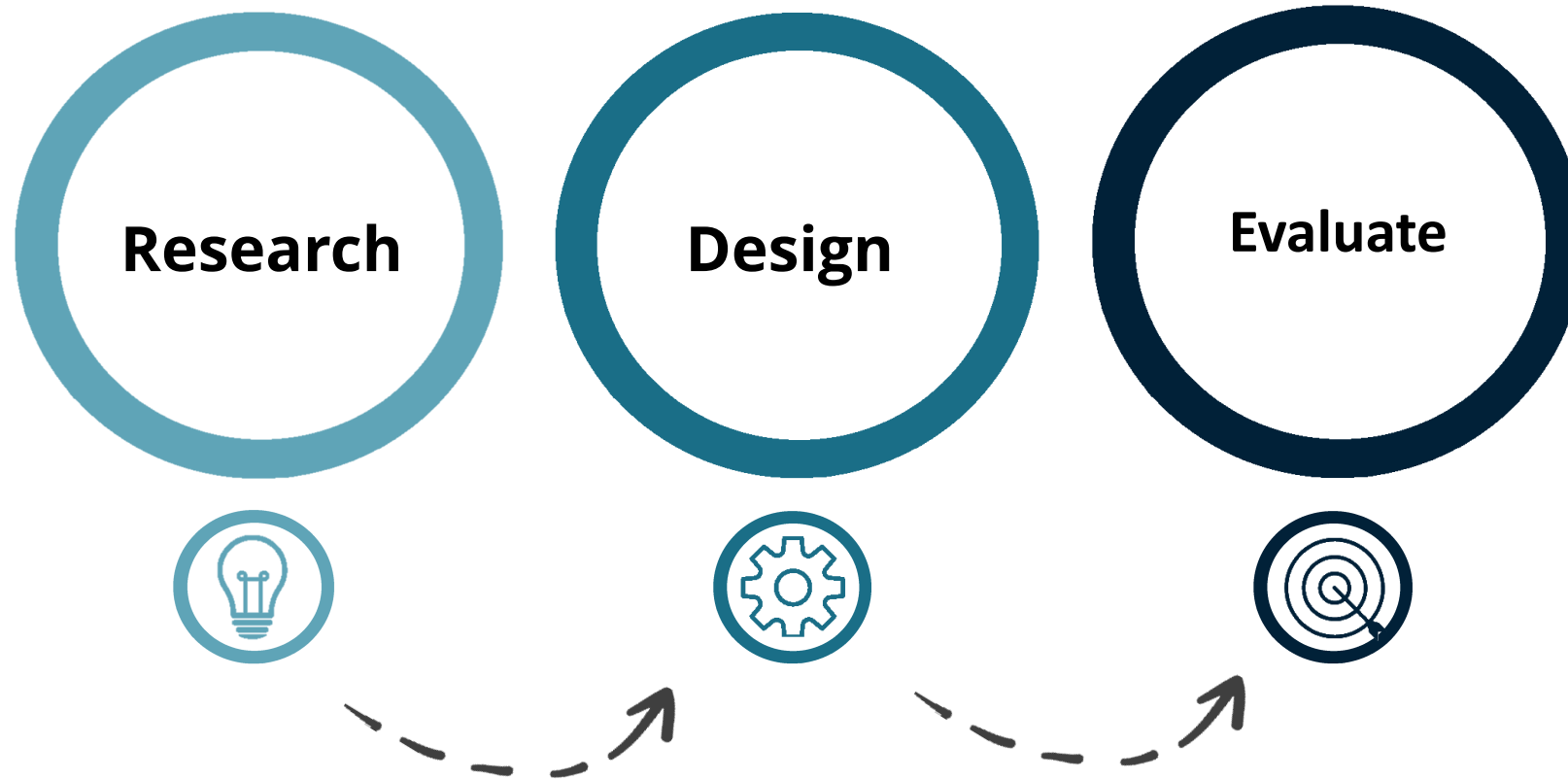- No KPIs

- Almost no text (description)

It shouldn't be a treasure hunt

- The answer is in there (somewhere...)

- "Everybody knows this, right?"

- "The user did not tell me what to do!"

- "I do not know how to ask what they want."
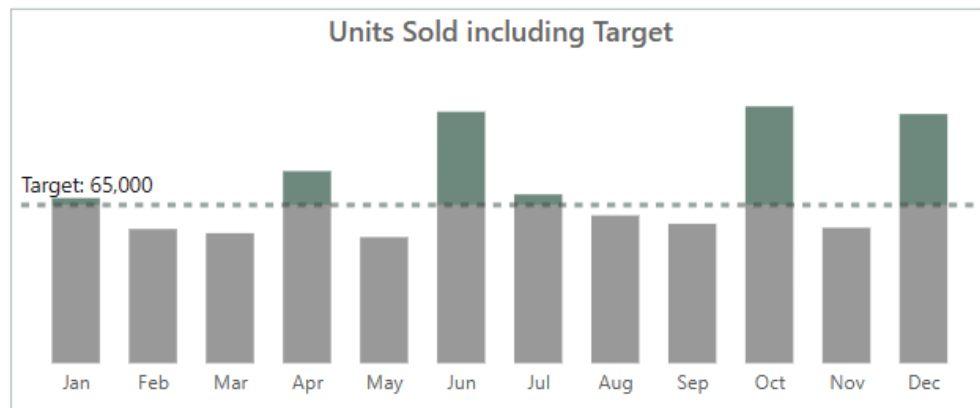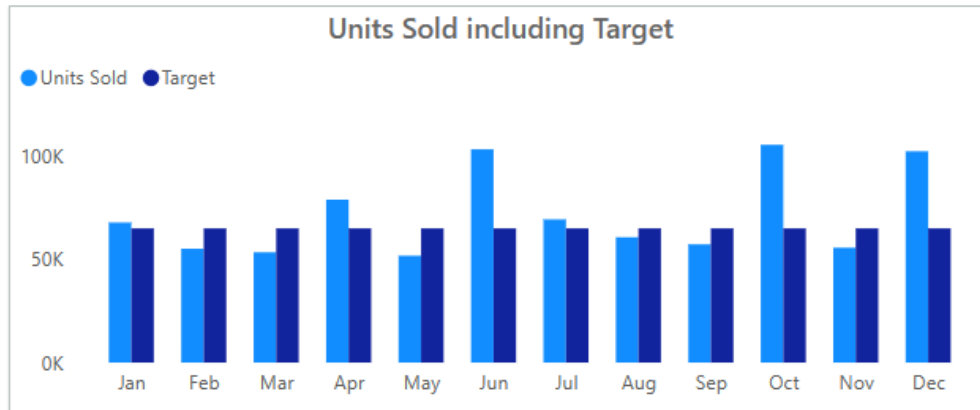
From data to action

Research

Design

**Evaluate**

Who is the audience?

- Who is the audience?

- What is the experience level?

- What information do they need?

- What actions do they want to take?

- What's the process?

Why actions are important

Units Sold including Target

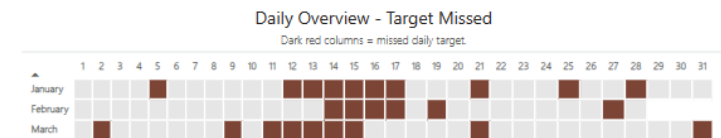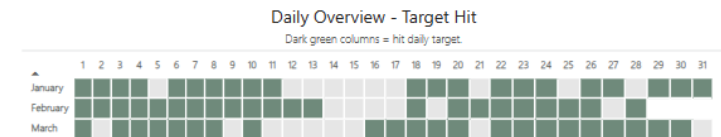Units Sold including Target
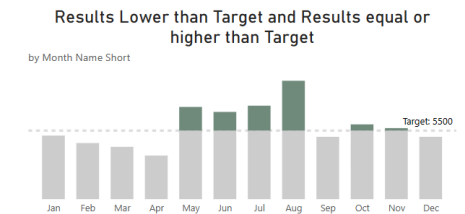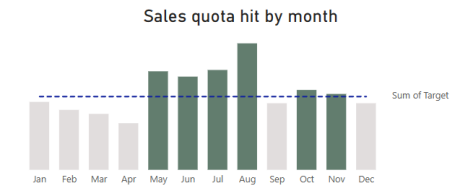
- A visual has no real meaning when the information has no purpose.

- When you know the actions and processes, you can provide context and supporting information.
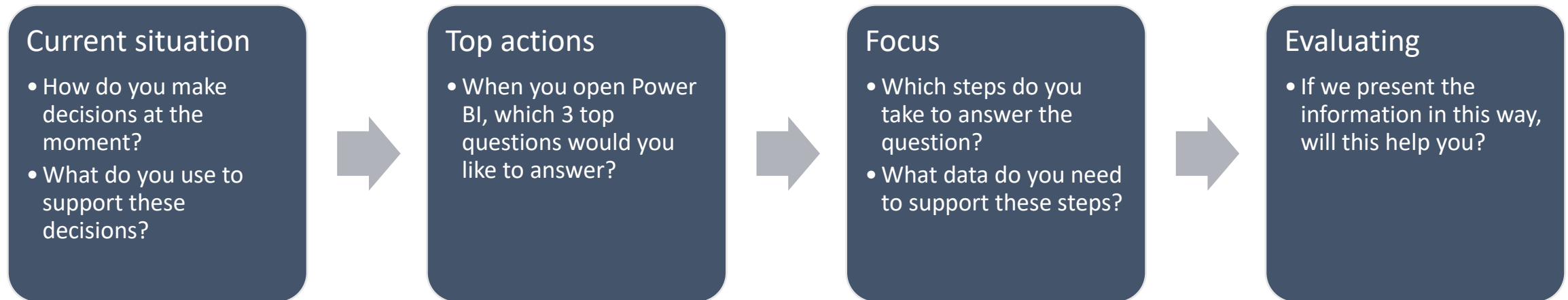
Actions = add purpose

Communication is key
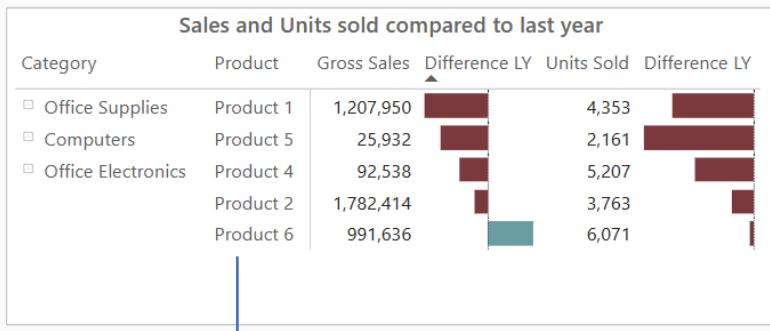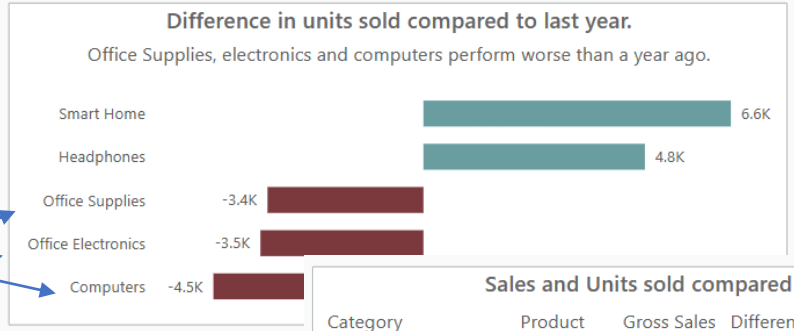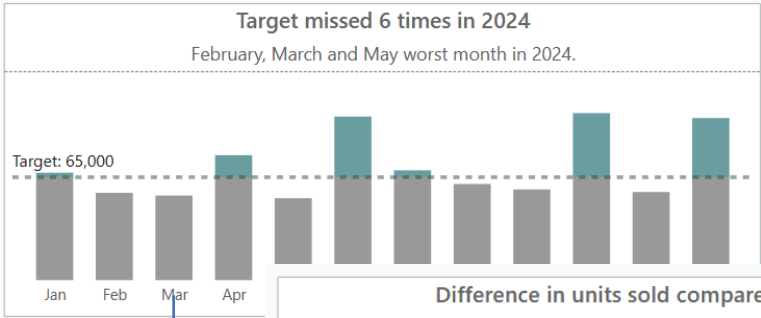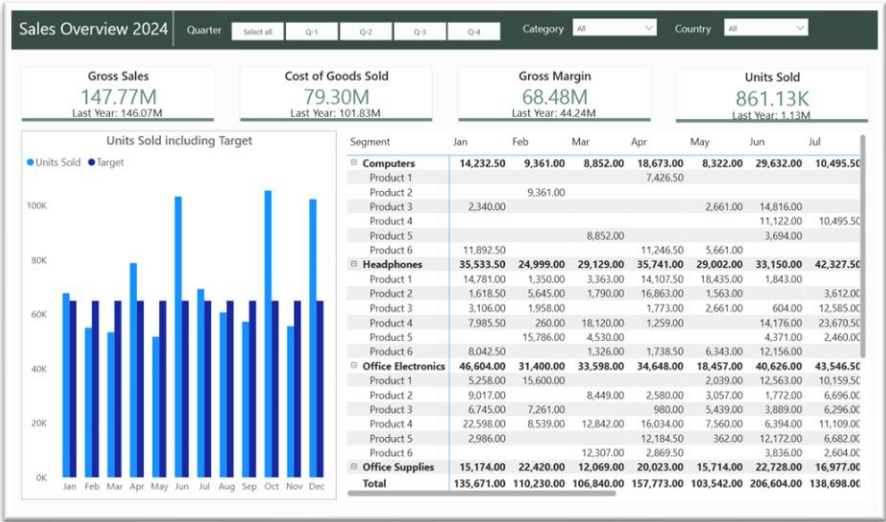
- Provide examples

- What is the most important information for you to be able to do your work?

- Actions taken currently

  - Based on data

  - Based on feeling

- Wishes

Guiding the audience

- Sometimes, the audience does not know where to start

| Current situation	Top actions	Focus	Evaluating
• How do you make decisions at the moment? • What do you use to support these decisions?	• When you open Power BI, which 3 top questions would you like to answer?	• Which steps do you take to answer the question? • What data do you need to support these steps?	• If we present the information in this way, will this help you?

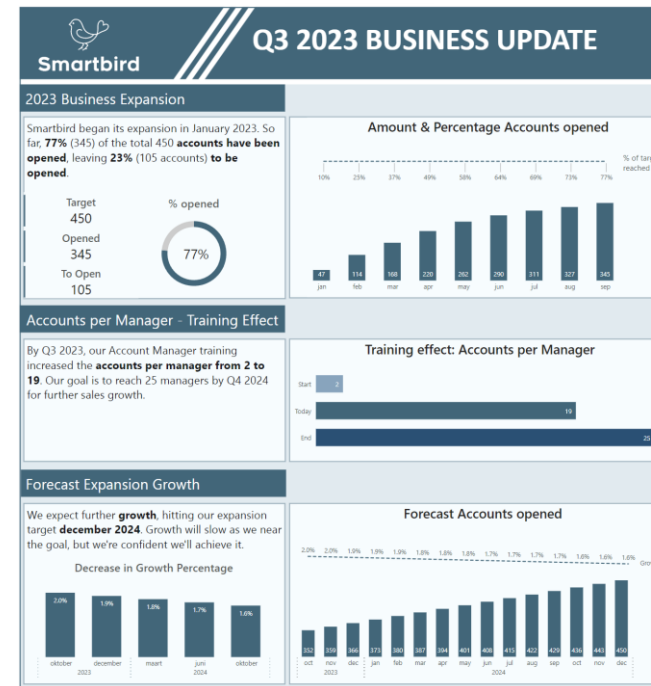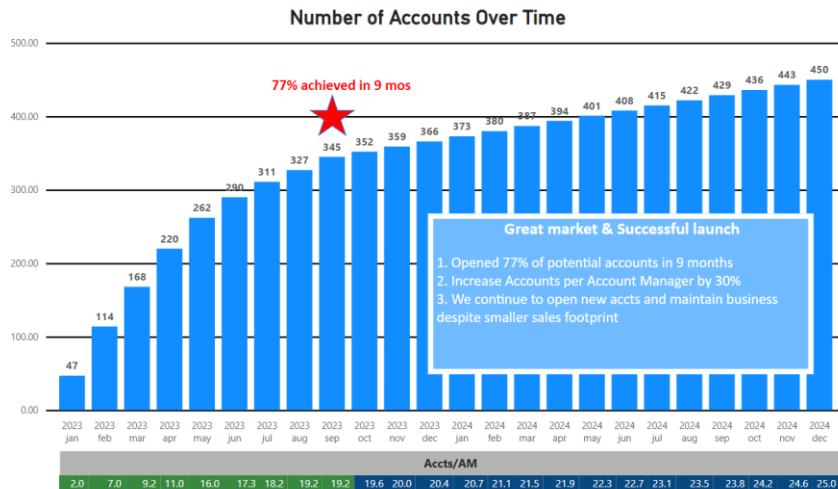# Design

Context, Simplicity & Relevance

Goal = Visual

- Goal determines design

- Same data can be visualized in different ways

- Choices seem endless
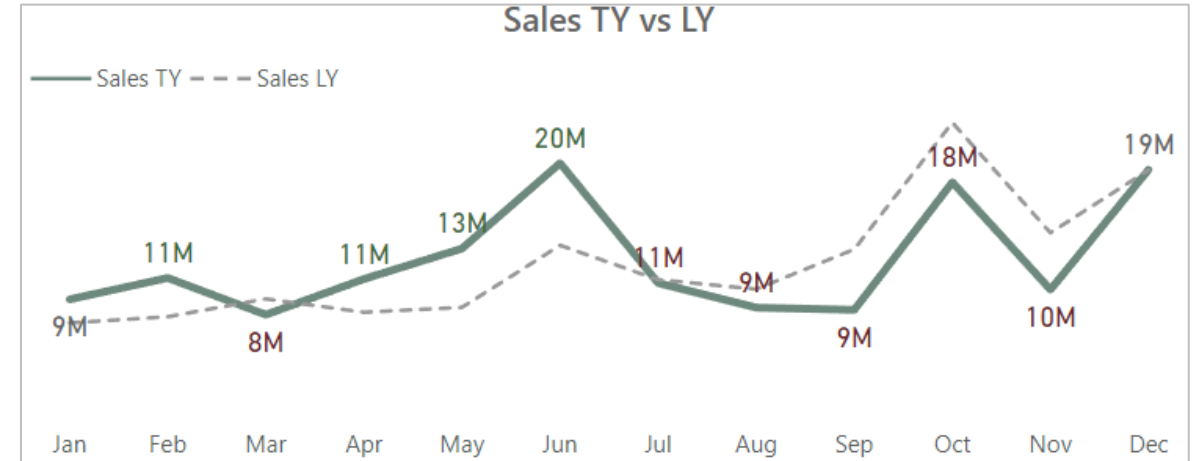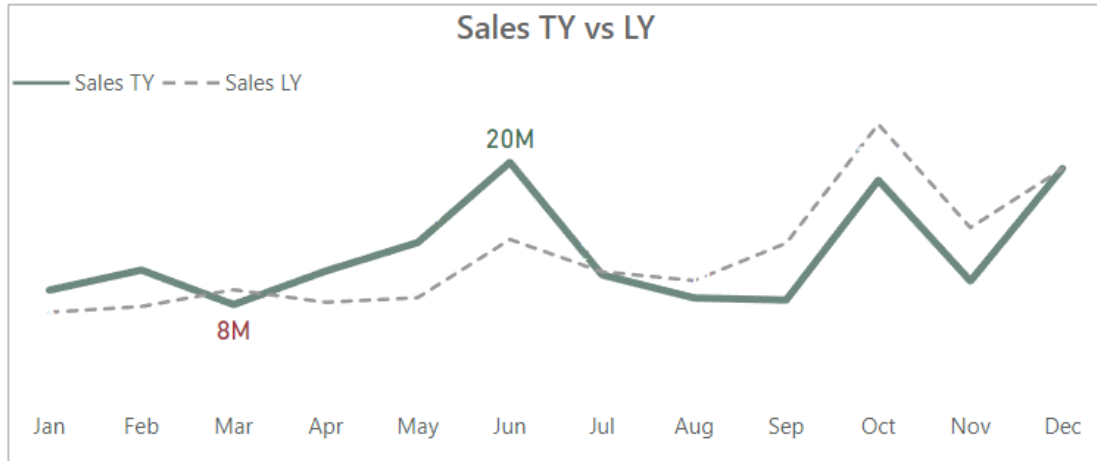   - Get inspired: https://data-goblins.com/power-bi/bar-charts
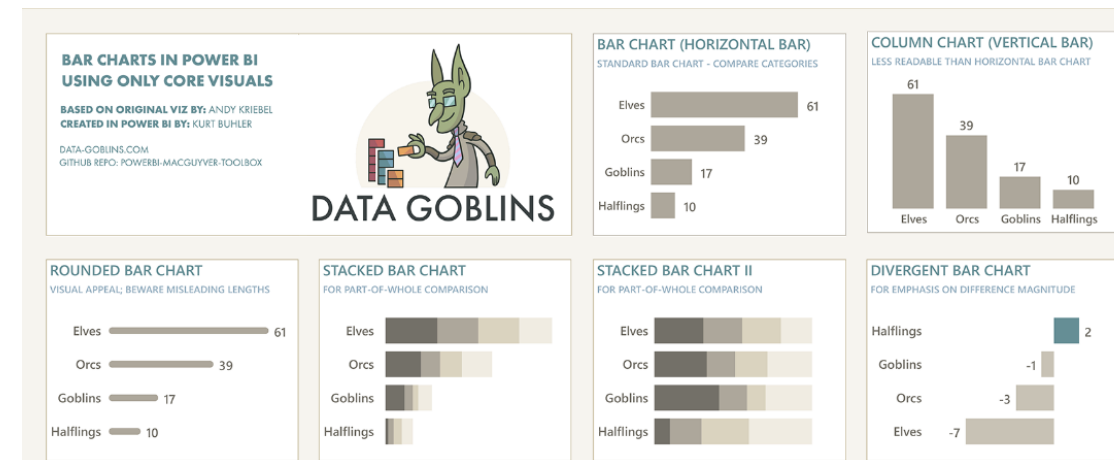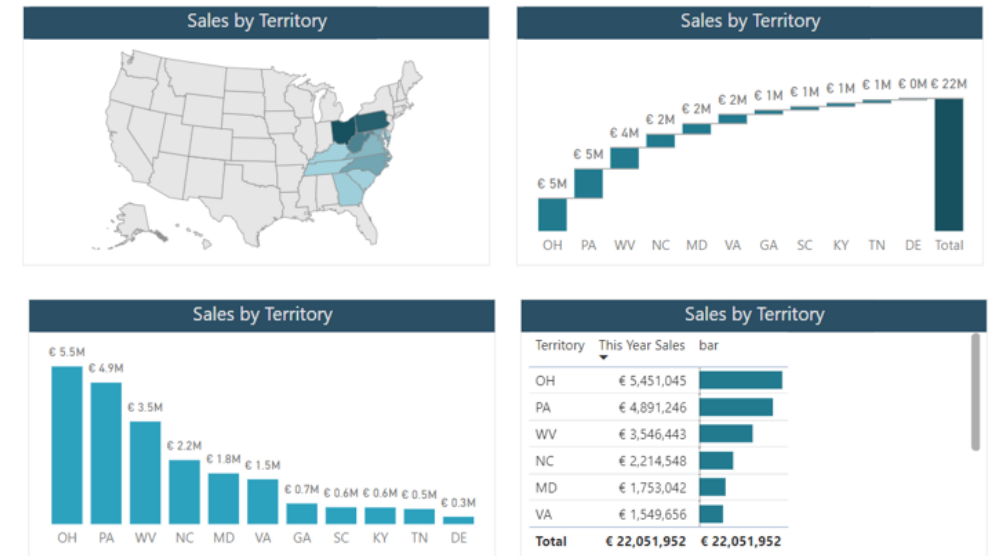
Simple, Relevant & easy to use

- Too complex = Frustration

- Don't overestimate the time the users is willing to spend to find information
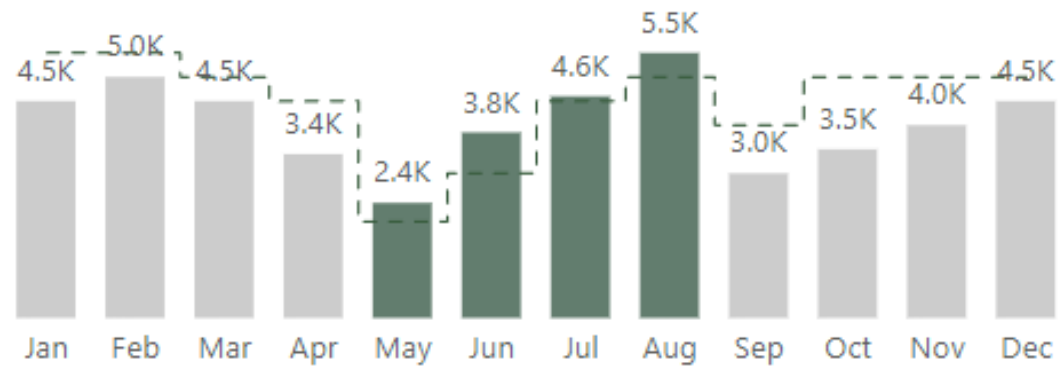
Declutter & Enrich

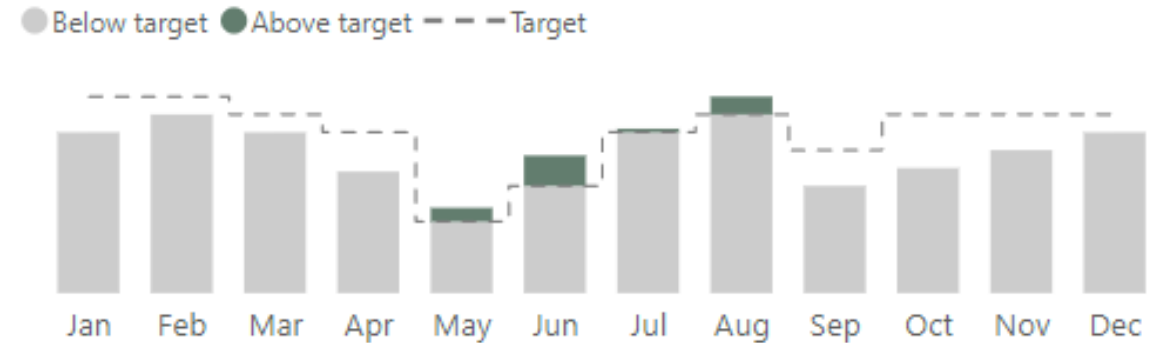What information & how much guidance is needed?
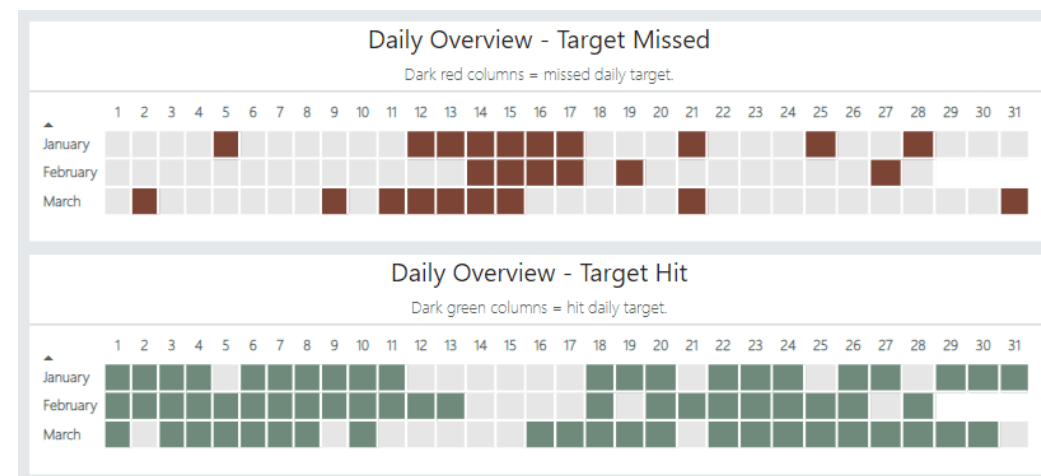
Add Context

Dynamic title & color coding

If possible - Simplify

Check every visual

Small improvements – huge effect

Sales Difference TY vs LY by Product

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**				

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Evaluate

Evaluate & Test

Evaluate
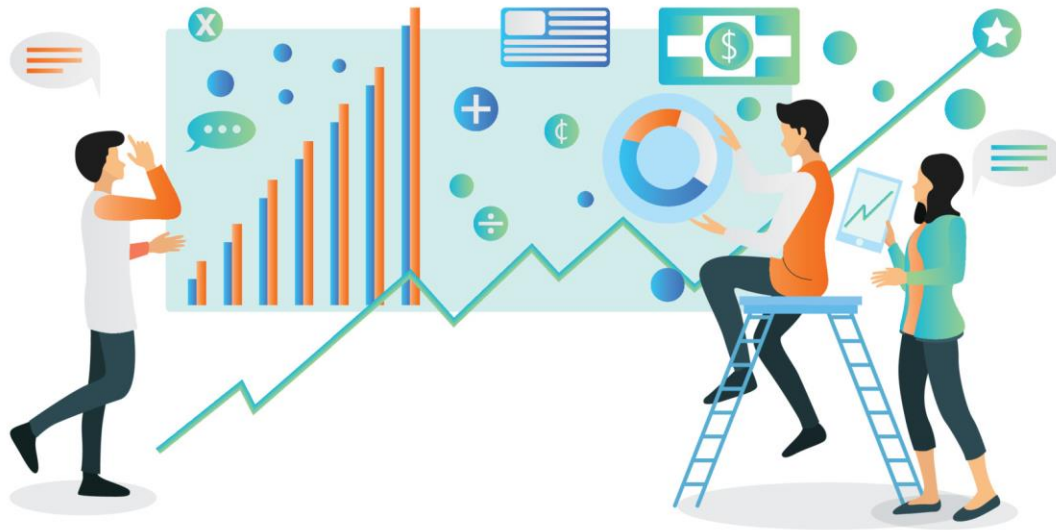
- Continuous process

- Evaluate with audience

- Reflect & Feedback

Continuous process

- Don't evaluate just at the end.

- Get your audience involved as soon as possible.

- Test different versions of visuals.

- ~~Test~~ Don't make assumptions.

- Guide your audience through the process.

Gather feedback

- It's scary!

- It's not about you; it's about the usefulness of the report for the specific audience

- Only way to improve

Takeaway

- Get to know your audience.

- Understand the processes.

- What is the real question?

- No one size fits all!

- Evaluate continuously!

Contact

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in https://www.linkedin.com/in/valeriejunk/
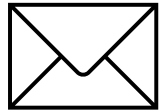
𝕏 @porcubi

Evaluations, evaluations...

https://evals.datagrillen.com/evals_vienna.aspx