Storytelling & Power BI

Creating reports that connect with different audiences

Power BI & Fabric SUMMIT 2024

SPENT HOURS BUILDING AN AWESOME REPORT
NO ONE USES IT

Special thanks to Fabric and Power BI Team at

Microsoft

This Summit presented to you by

RADACAD

Valerie Junk

Data Analytics & Visualization

Data Storytelling

BI Standardization

Process Improvement

PorcuBI

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Storytelling

- A narrative
- Structure
- Know what to expect
- Engaging
- Different stories for different audiences

Storytelling Benefits

Easy to follow and understand

Engaging

Time-saving

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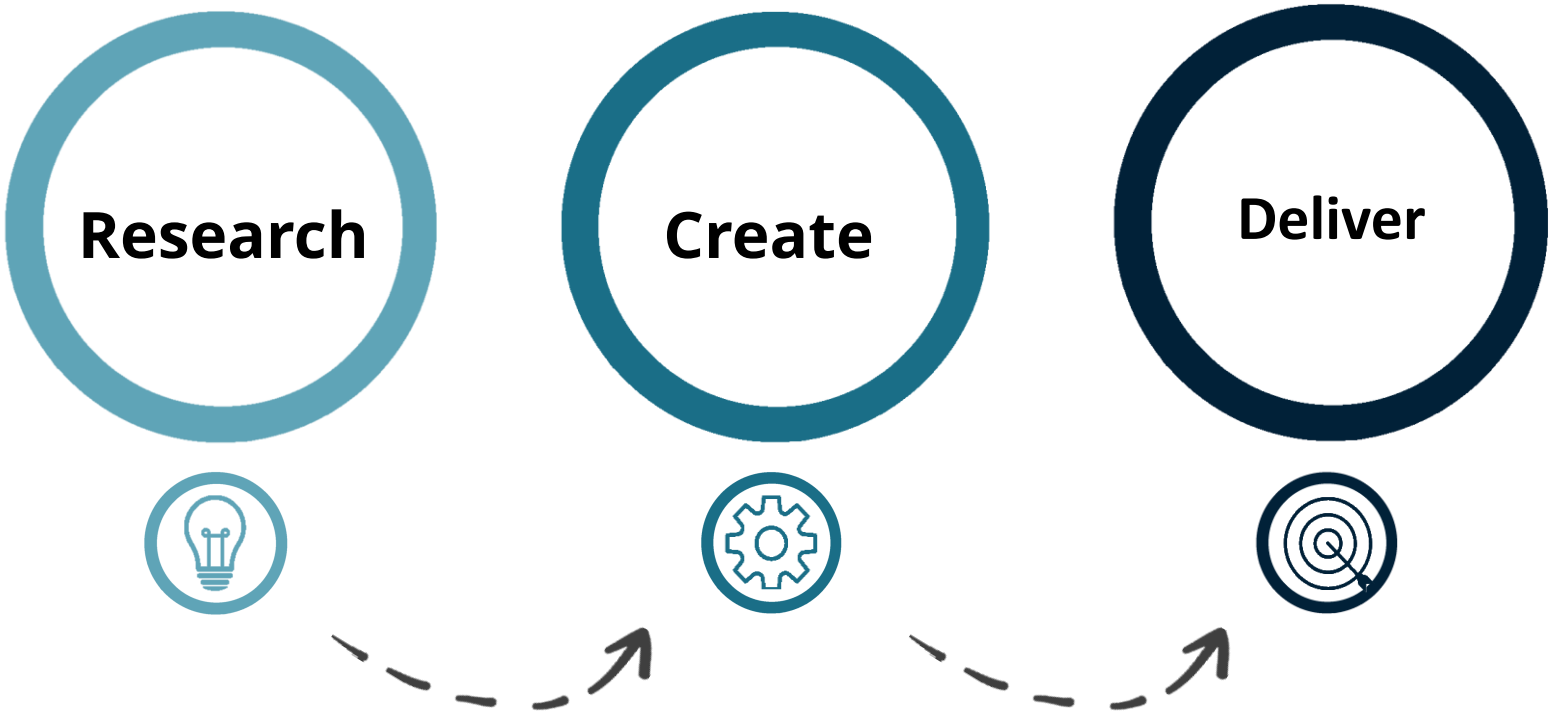
3 steps to use Storytelling



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

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Not a Key Message..

CONTEXT

SALES INSIGHTS

INFORMATION

ALL

ACTIONS TO TAKE

TBD

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3 Examples

- 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**.

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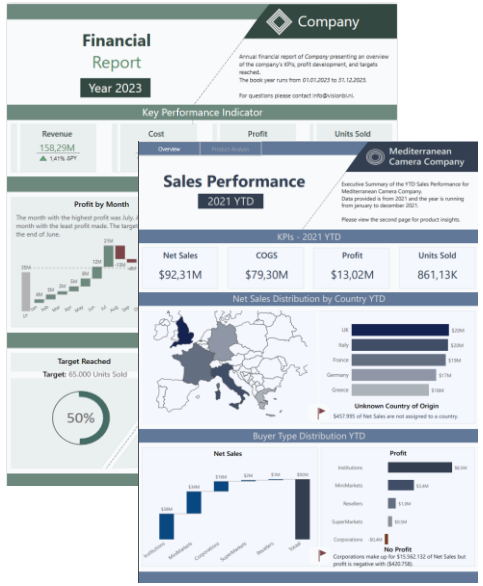
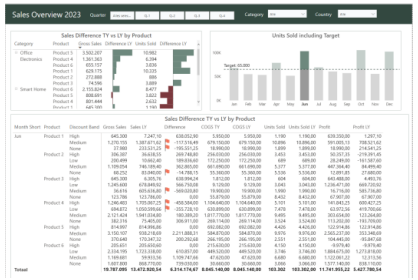
Different message = Different Design

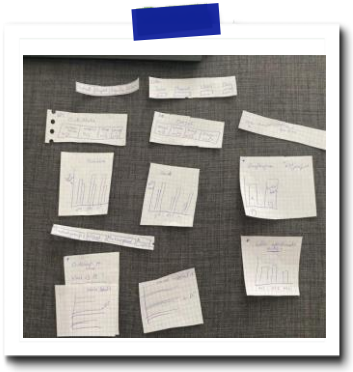




Create

Storyboard, Templates & Visuals

Storyboards & 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

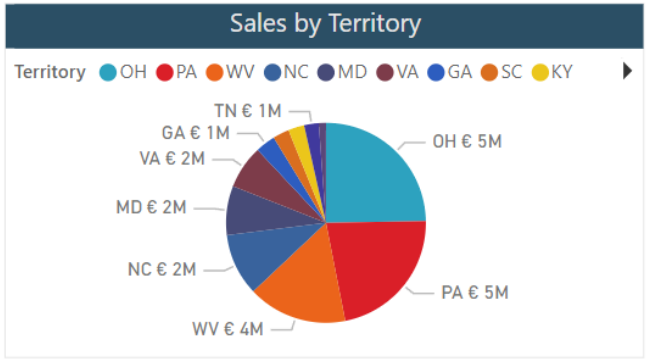
Keep it simple

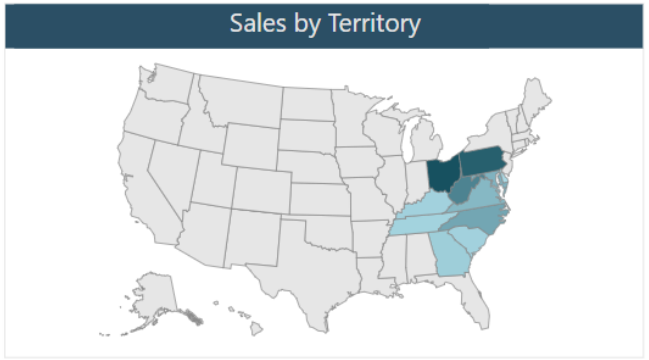
Templates & Consistency

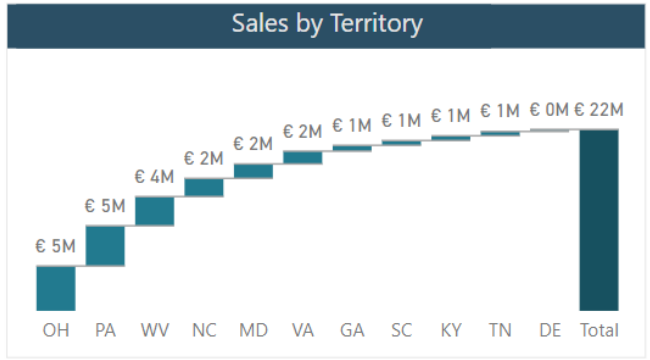
Expectation Management & ease of use

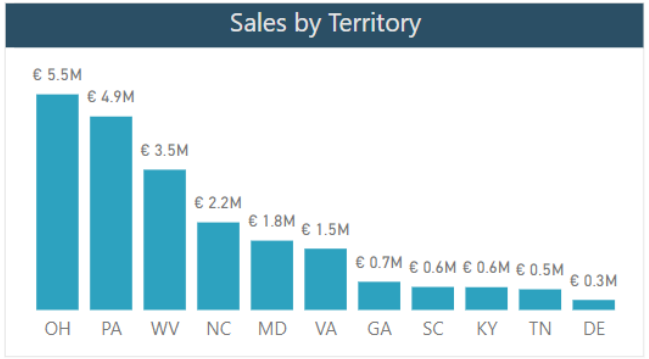
- Templates
- Color Schemes
- Way of Working

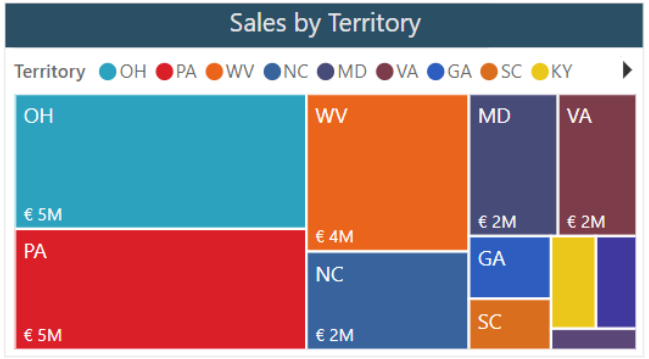
Choosing the Visual

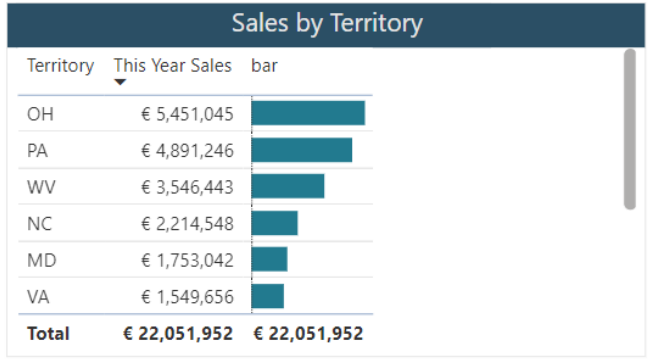






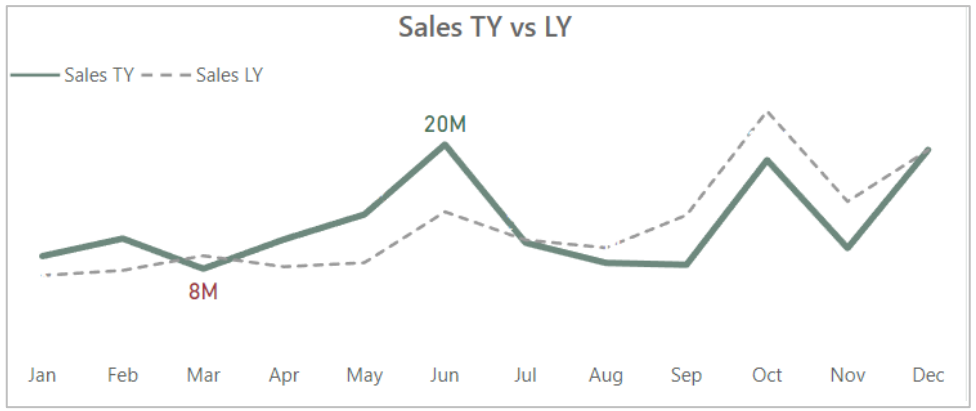


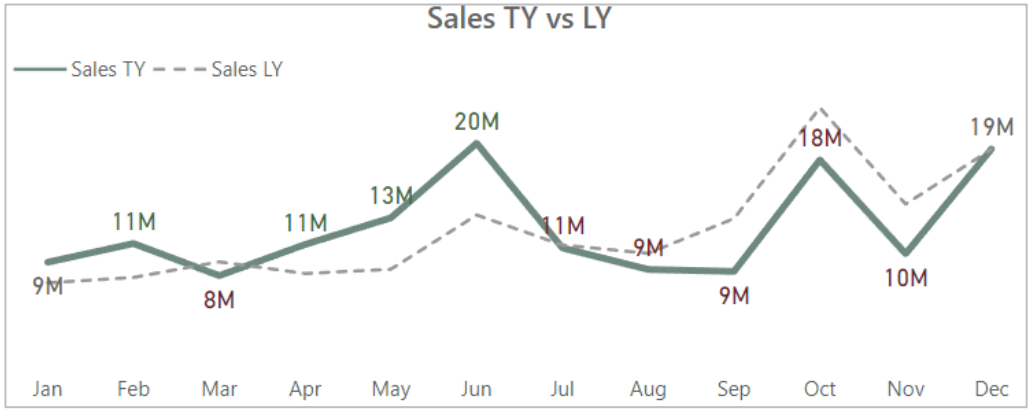




Declutter & Enrich

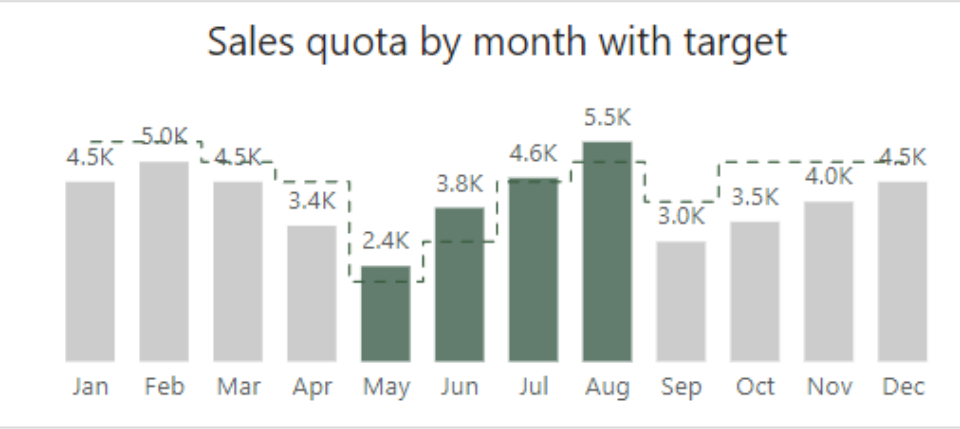
What information & how much guidance is needed?



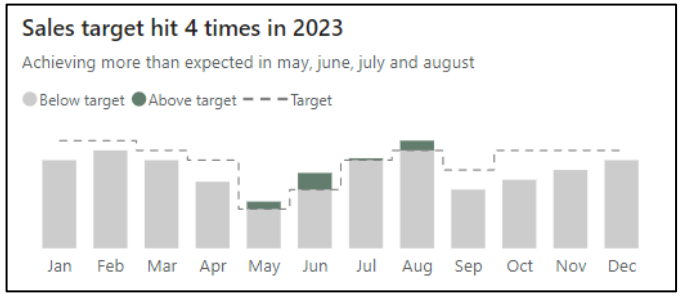


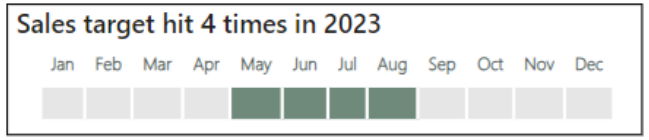
Add Context

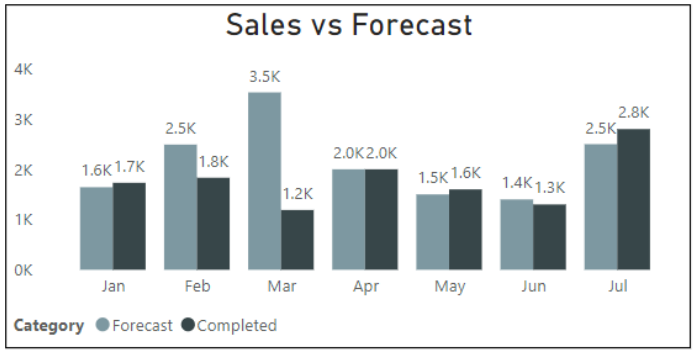
Dynamic title & color coding

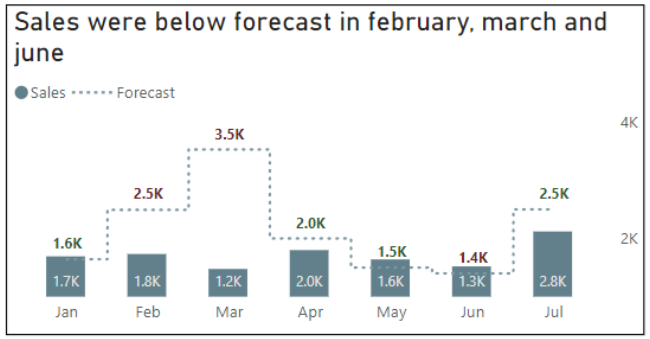


Simplify

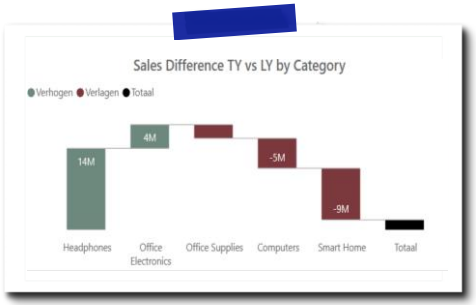

Sales target hit 4 times in 2023
Achieving more than expected in may, june, july and august
Below target
Above target
Target
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec

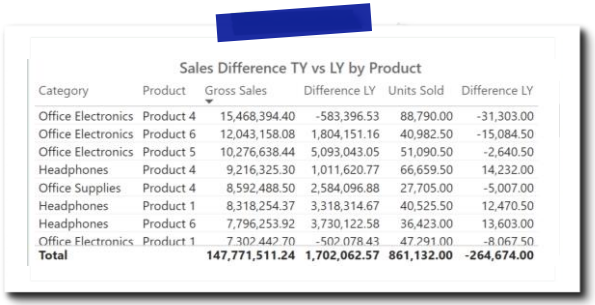

Sales target hit 4 times in 2023
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec

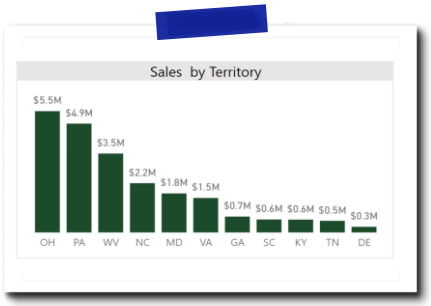

Sales vs Forecast
4K
3K
2K
1K
0K
1.6K
1.7K
2.5K
1.8K
3.5K
1.2K
2.0K
2.0K
1.5K
1.6K
1.4K
1.3K
2.5K
2.8K
Jan
Feb
Mar
Apr
May
Jun
Jul
Category
Forecast
Completed

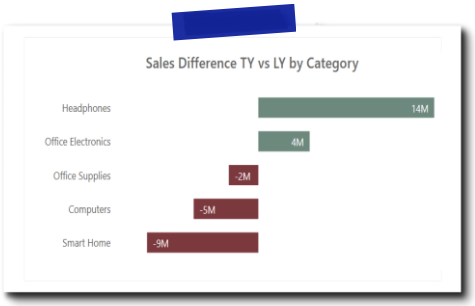

Sales were below forecast in february, march and june
Sales
Forecast
4K
2K
1.6K
1.7K
2.5K
1.8K
3.5K
1.2K
2.0K
2.0K
1.5K
1.6K
1.4K
1.3K
2.5K
2.8K
Jan
Feb
Mar
Apr
May
Jun
Jul

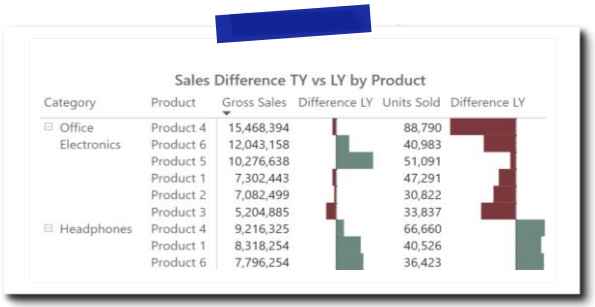
Check every visual







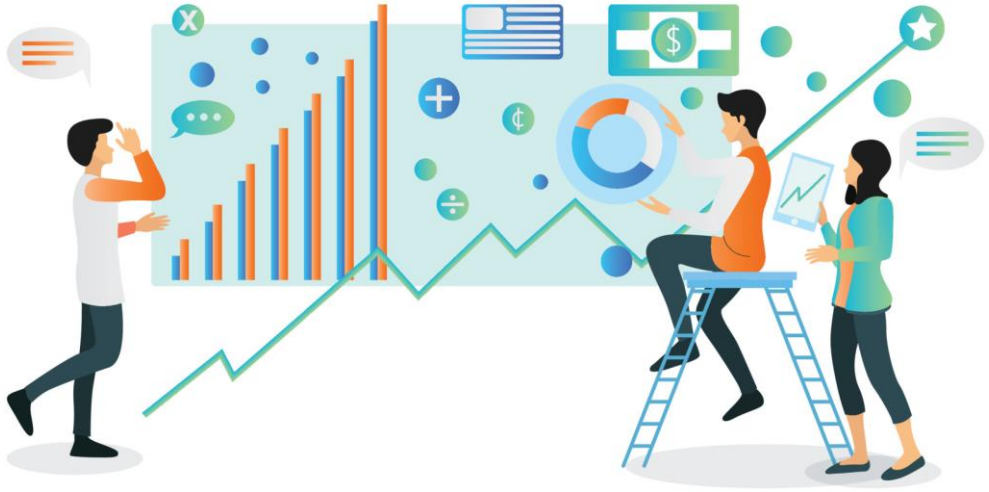




Deliver

Evaluate & Test

Evaluate & Test



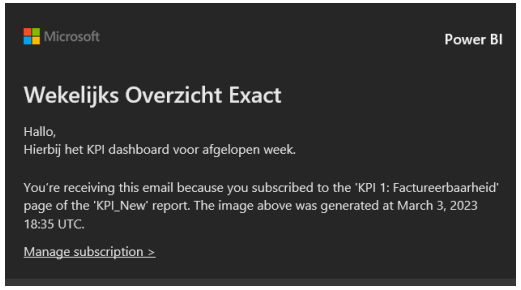
- Continuous testing
- User evaluation
- Reflect & Feedback
- Usage Report

Deliver

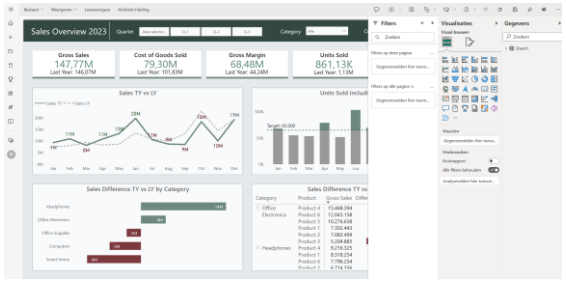
Consider, discuss and check the different ways of data consumption.

Some examples:

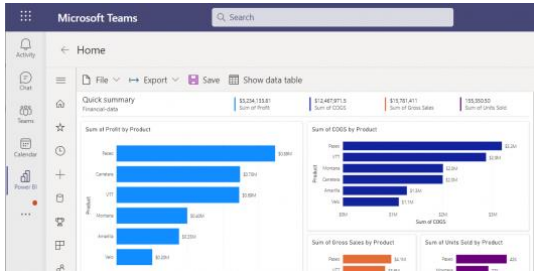
App



Mail (PDF)



Workspace



Teams

Takeaway

- Consider your audience
- 1 key message
- Use a Storyboard & Templates
- Evaluate
- Keep it simple

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Stay online for my live Q&A sessions!

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