



Storytelling & Power BI

Creating reports that connect with different audiences

Valerie Junk



HEADLINER

resco



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SPEAKER DINNER





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**SPENT HOURS
BUILDING AN
AWESOME
REPORT**



**NO ONE
USES IT**



Storytelling Benefits



Easy to follow and understand

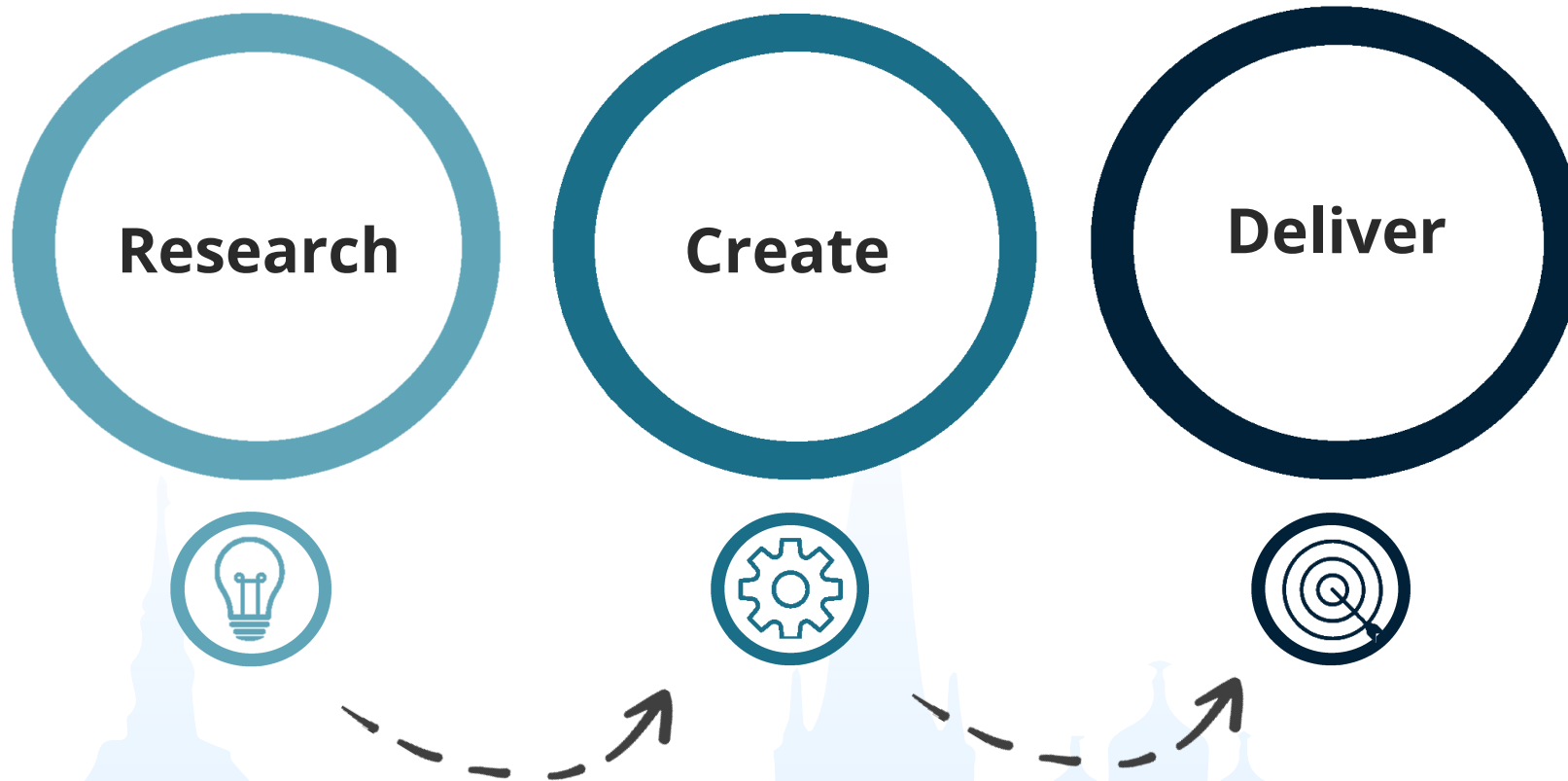


Engaging



Time-saving

3 Steps to use Storytelling



Research

Audience, content & key message

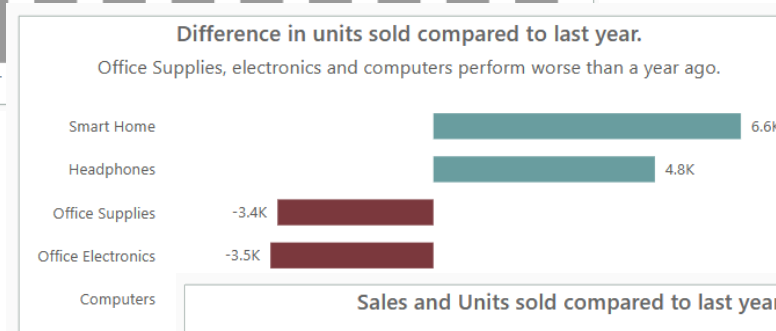
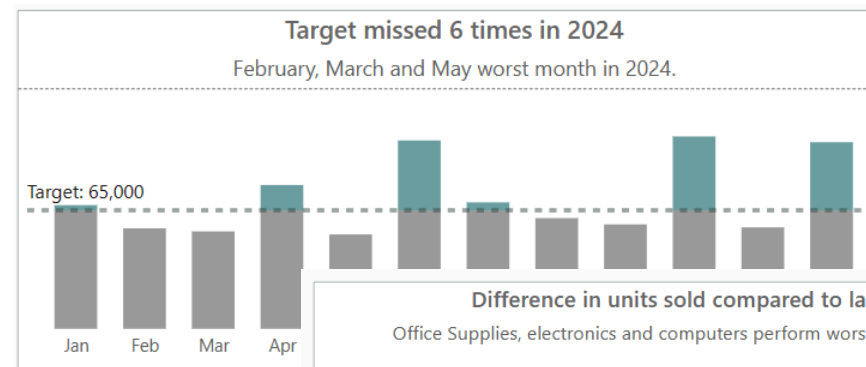
The audience

- **Who** is the audience?
- What is the **experience** level?
- What **information** do they really need?
- What **actions** do they want to take and why?
- What's the **process**?



Why actions & motivation?

- 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	

What's the message?

1 key message (sentence)



CONTEXT



INFORMATION



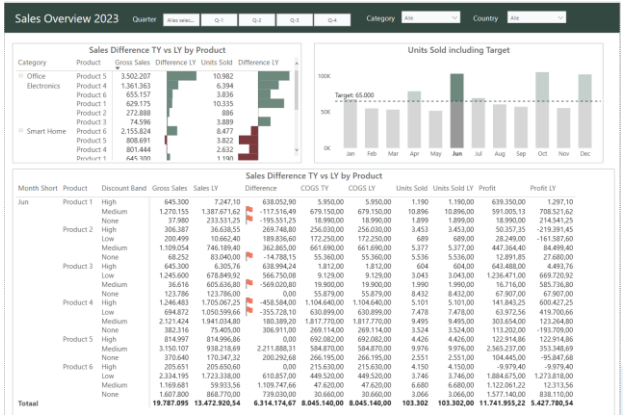
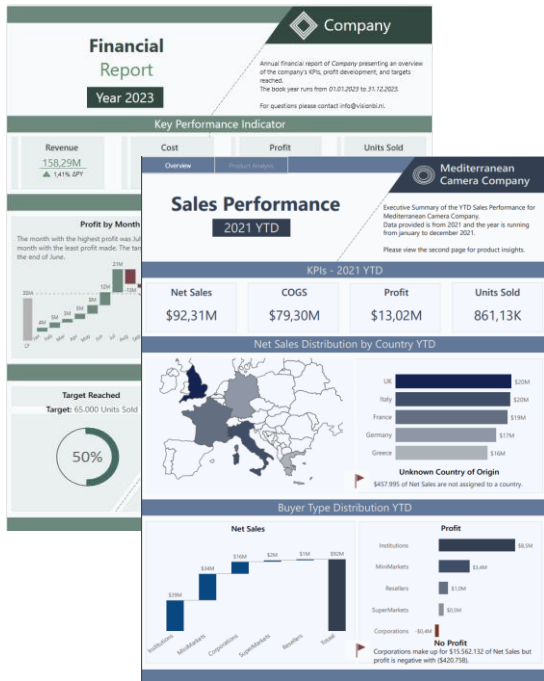
ACTIONS TO TAKE

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**.

Message = Design



Create

Storyboard, Templates & Visuals

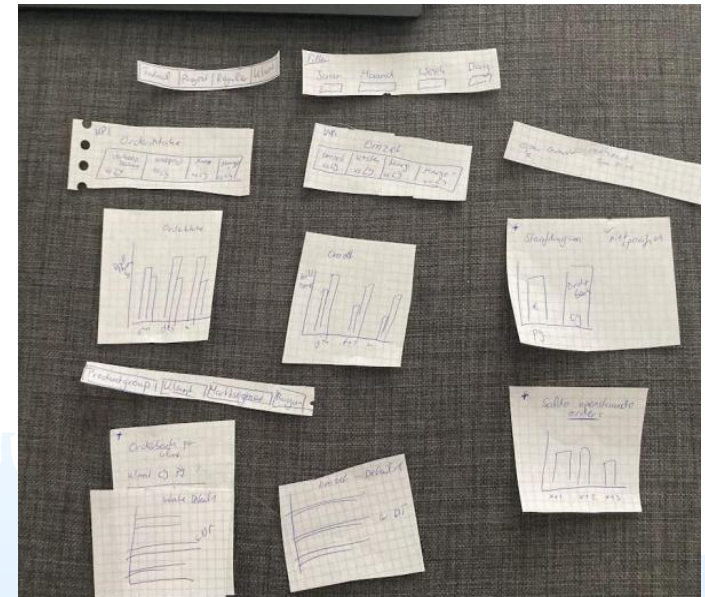
Storyboards & Mock-ups

Gather all the information

- Sticky Notes (easy to rearrange)

Translate pieces to design

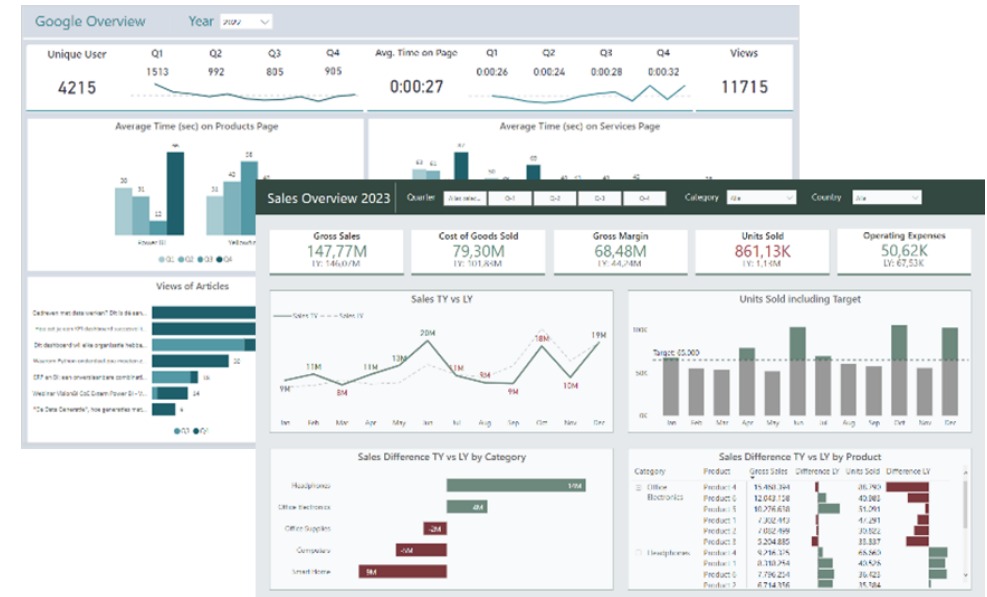
- Each piece tells a part of the story
- Check your story



Templates & Consistency

Improve the ease of usage

- Uniformity
- Focus on the data, not on handling the tool.
- Starting point



Using a Grid

- Organizing your story elements/visuals
- Create it in Power BI (or Figma or Power Point...)
- Can help with discussing layout



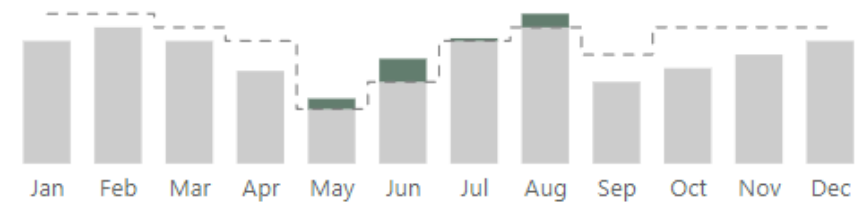
Adding Context

- Legend
- Color coding
- Meaningful titles
- Icons

Sales target hit 4 times in 2023

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

● Below target ● Above target - - Target

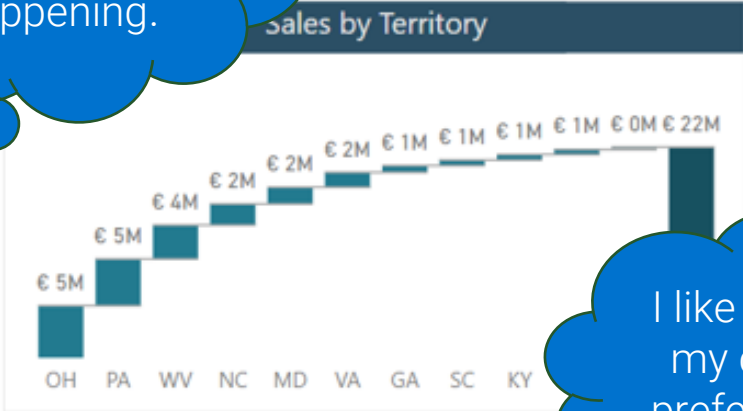


Month	Sales	Sales LY
January	€ 5.940,9	€ 3.073,44
February	€ 10.851,19	€ 10.455,49
March	€ 4.915,07	€ 602,10
April	€ 1.779,06	€ 727,15
May	€ 7.558,25	€ 3.611,28
June	€ 4.397,31	€ 1.569,62
July	€ 5.645,56	€ 3.737,38
August	€ 6.253,56	€ 1.134,45
September	€ 7.477,04	€ 4.722,37
October	€ 7.657,19	€ 4.539,13
November	€ 9.564,96	€ 1.778,50
December	€ 5.965,02	€ 3.970,27

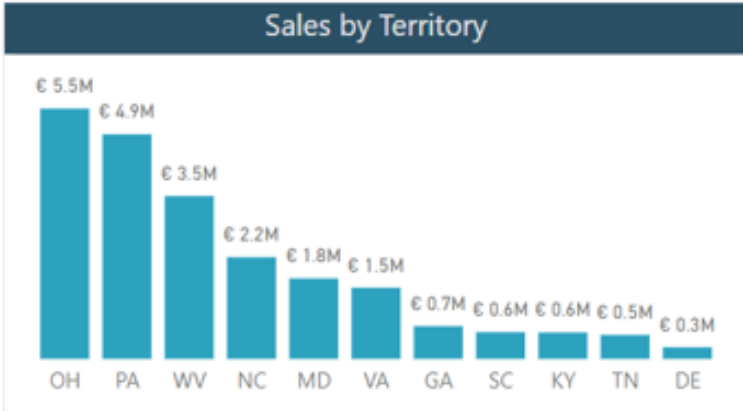
Month	Sales	Sales LY	Sales Difference
January	€ 69,38	€ 1.615,93	1.546,55 -€
February	€ 359,97	€ 246,65	€ 113,32
March	€ 205,33	€ 354,90	149,57 -€
April	€ 908,82		€ 908,82
May	€ 2.418,83	€ 1.050,30	€ 1.368,53
June		€ 1.306,03	1.306,03 -€
July	€ 1.194,17	€ 1.306,45	112,28 -€
August		€ 186,54	186,54 -€
September	€ 489,1	€ 2.668,24	2.179,14 -€
October	€ 1.242,82	€ 1.407,45	164,63 -€
November	€ 4.496,29	€ 454,12	€ 4.042,17
December	€ 699,3	€ 1.819,98	1.120,68 -€

Choosing the “right” visual

I just want an idea what's happening.



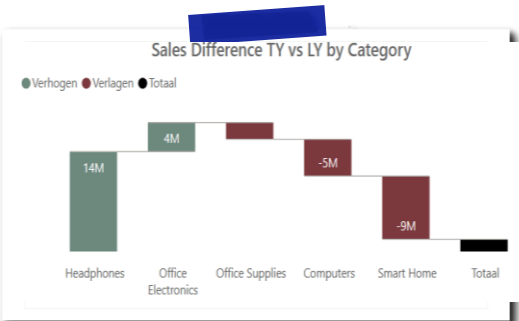
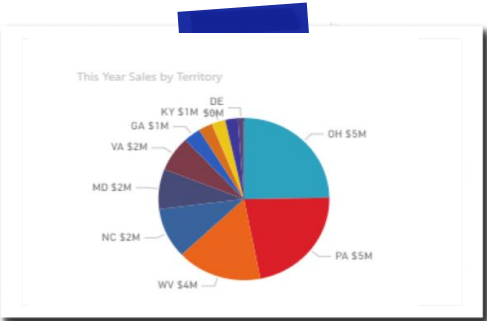
I like tables but my coworker prefers visuals.



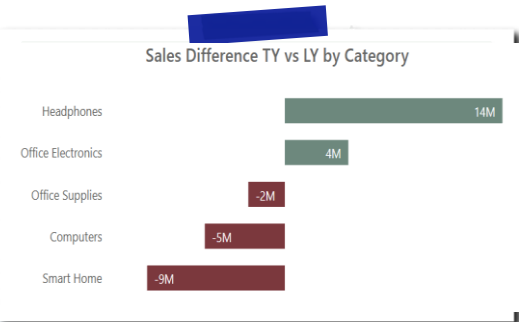
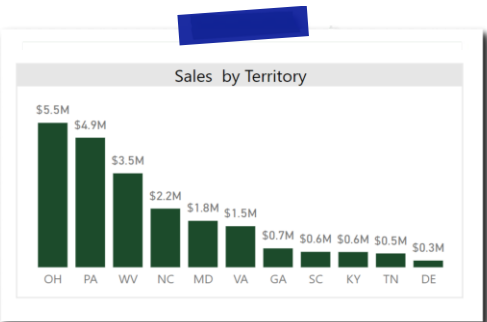
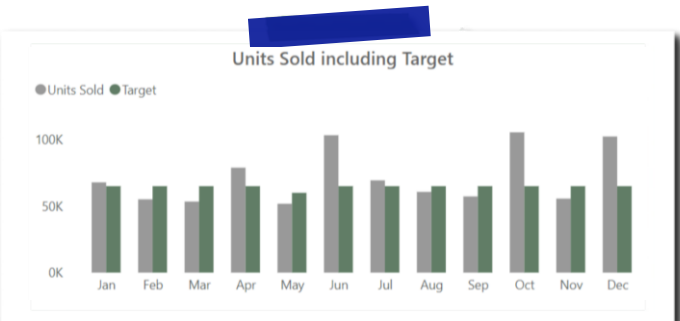
Sales by Territory

Territory	This Year Sales	bar
OH	€ 5,451,045	<div></div>
PA	€ 4,891,246	<div></div>
WV	€ 3,546,443	<div></div>
NC	€ 2,214,548	<div></div>
MD	€ 1,753,042	<div></div>
VA	€ 1,549,656	<div></div>
Total	€ 22,051,952	€ 22,051,952

Check every visual



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
	Product 6	12,043,158.08	1,804,151.16	40,982.50	-15,084.50
	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
	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
	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
	Product 6	7,796,254		36,423	
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	-583,396.53	88,790	-31,303.00
	Product 6	12,043,158	1,804,151.16	40,982.50	-15,084.50
	Product 5	10,276,638	5,093,043.05	51,090.50	-2,640.50
Headphones	Product 1	7,302,443	-502,078.43	47,291	-8,067.50
	Product 2	7,082,499		30,822	
Headphones	Product 3	5,204,885		33,837	
	Product 4	9,216,325	1,011,620.77	66,660	14,232.00
Headphones	Product 1	8,318,254	3,318,314.67	40,526	12,470.50
	Product 6	7,796,254	3,730,122.58	36,423	13,603.00



Deliver

Evaluate & Test



IT'S PERFECT!

Evaluate & Test

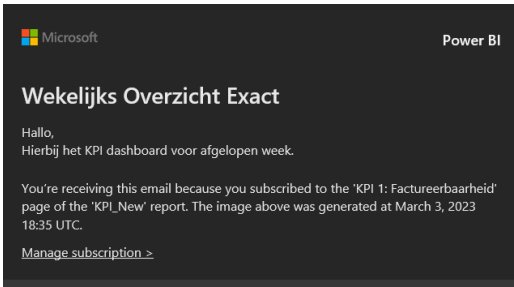
- Involve the audience early on
- Don't stop directly after implementation
- Evaluate with the actual audience



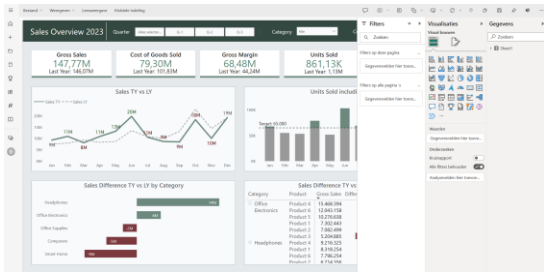
Usage



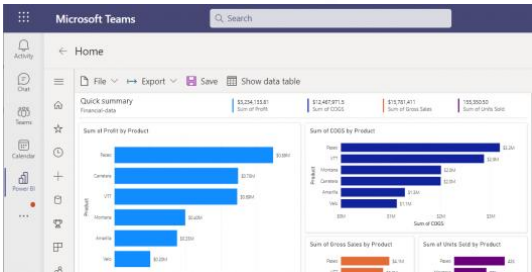
App



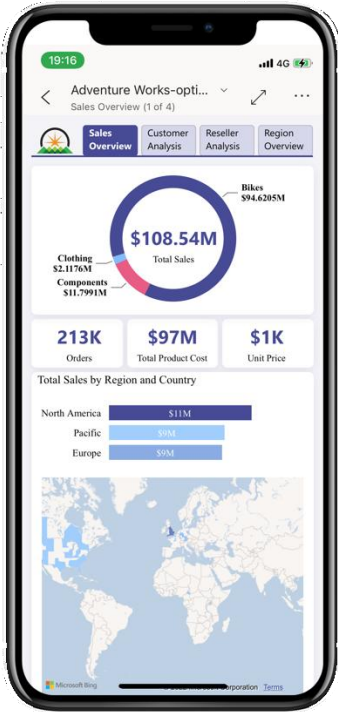
Mail (PDF)



Workspace



Teams






Phone

What if it doesn't work?

- Avoid adding unnecessary data, filters, or options just to complete the task.
- Review the visuals.
- Provide guidance during the process.

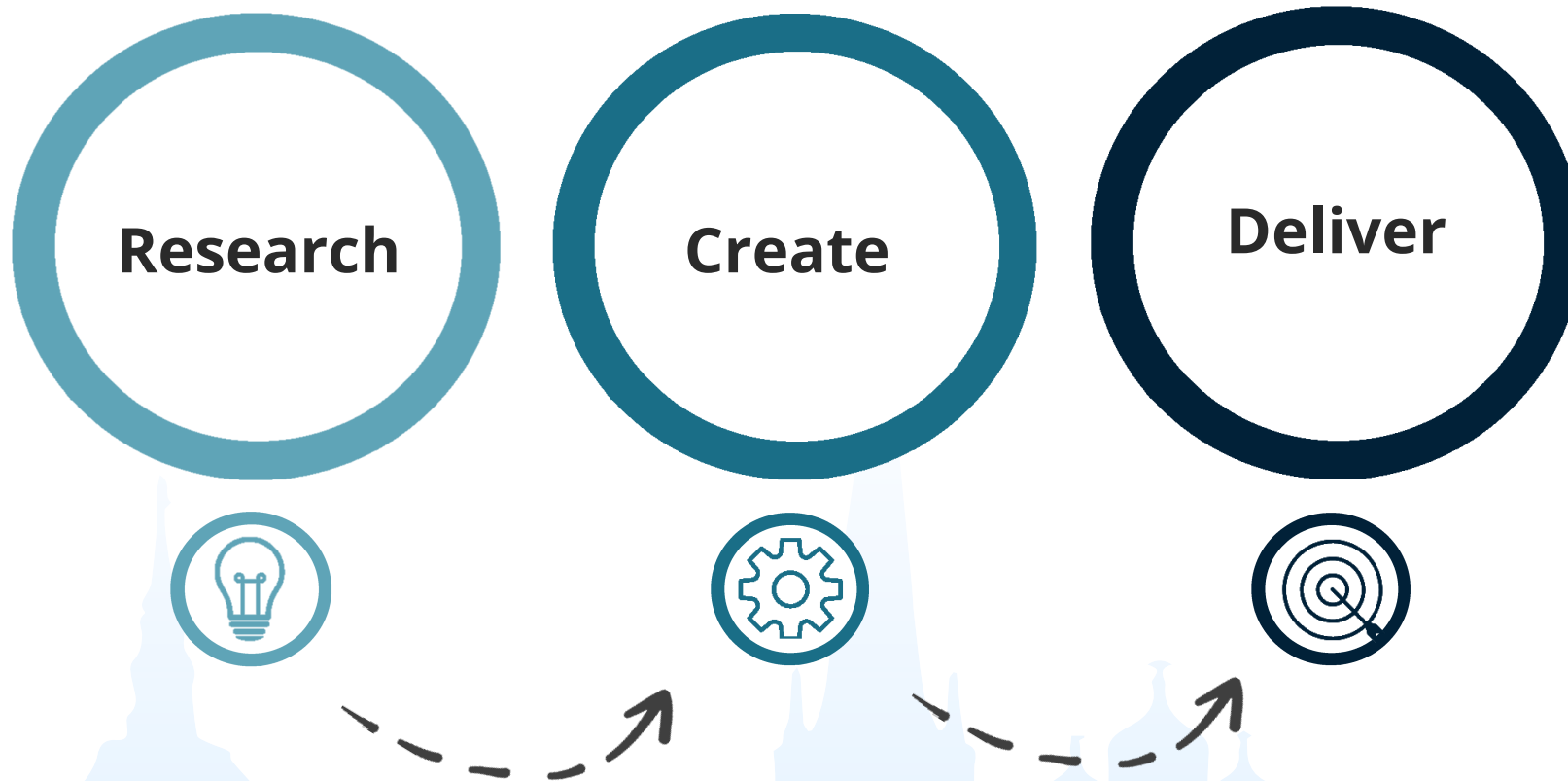
No Conditional Formatting			
Category	Product	Gross Sales	Difference LY
Office Electronics	Product 4	15,468,394	-583,396.53
	Product 6	12,043,158	1,804,151.16
	Product 5	10,276,638	5,093,043.05

Trend (up or down)			
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	

Conditional Formatting: Min Max			
Category	Product	Gross Sales	MinMax
Office Electronics	Product 4	15,468,394	
	Product 6	12,043,158	
	Product 5	10,276,638	★
	Product 1	7,302,443	
	Product 2	7,082,499	
	Product 3	5,204,885	☆

It's a process



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