

# Storytelling & Power BI

Creating reports that connect with  
different audiences



Dashboard

Delivery

Disappointment

**SPENT HOURS  
BUILDING AN  
AWESOME  
REPORT**



**NO ONE  
USES IT**





# Valerie Junk

## PorcuBI

- Data Visualization & Storytelling
- Trainer

**in** valeriejunk

 porcubi



# Storytelling Benefits

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Easy to follow and understand



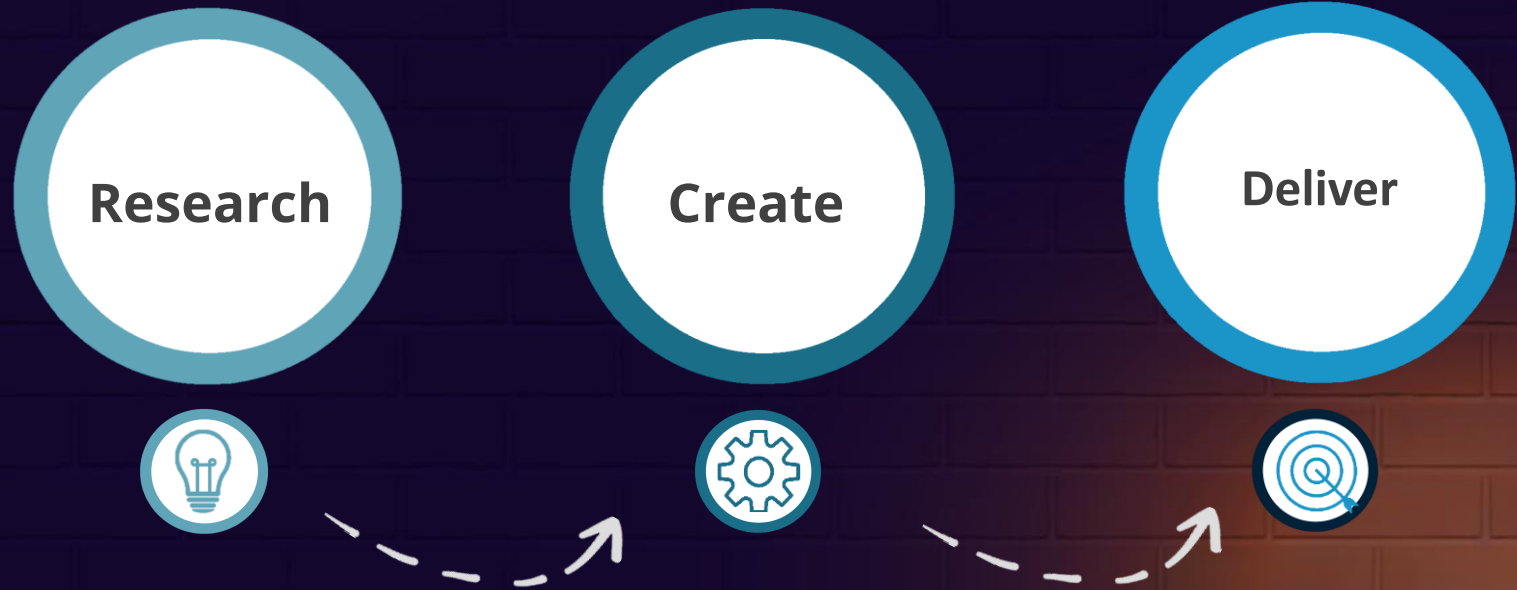
Engaging



Time-saving

# 3 Steps

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# Research

Audience, content & key message

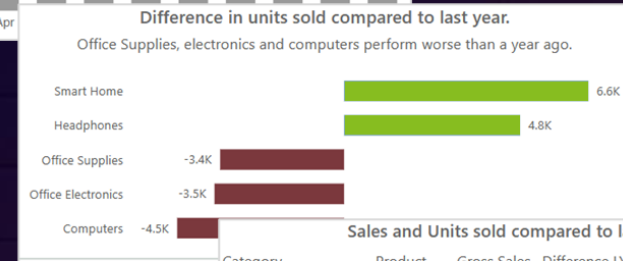
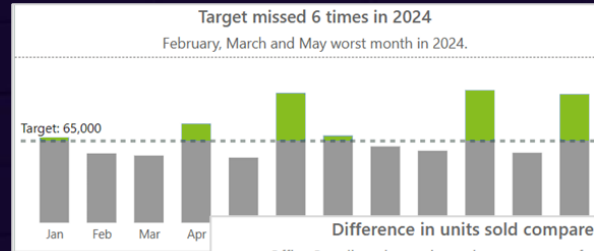
# The Audience

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- **Who** is the audience?
- What is the **experience** level?
- What **actions** do they want to take and why?
- What's the **process**?
- How is the report **used**?

# Add meaning

When you know the actions and processes, you can provide context and supporting information.



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

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CONTEXT



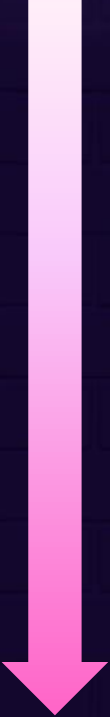
INFORMATION



ACTIONS TO  
TAKE

# 3 Examples

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- 
- 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 anomalies**.

# What's the message

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CONTEXT

SALES



INFORMATION

SALES



ACTIONS

TBD

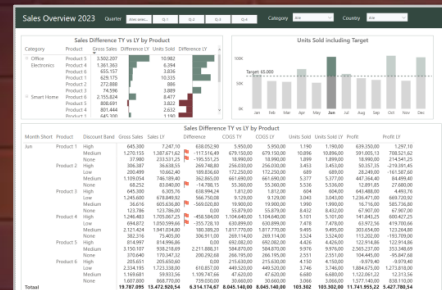
# Different Message

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# Different Design



# Message = Design



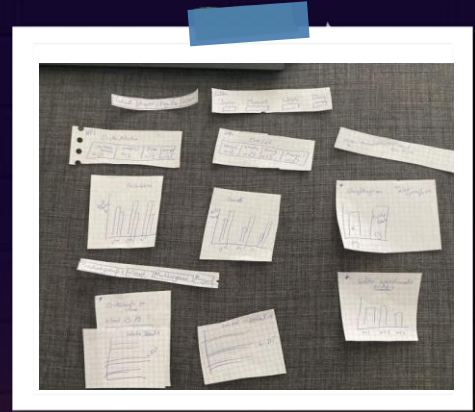
# Create

Storyboard, Templates & Visuals

# 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



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- # Company

## Financial Report

Year 2023

Annual Financial report of Company presenting an overview of the company's FY23 profit development, and target metrics.

The fiscal year runs from 01-01-2023 to 31-12-2023.

For questions please contact info@company.com

### Key Performance Indicator

Revenue	Cost	Profit	Units Sold
159,29M	95,77M	62,53M	861,13K
▲ 14% FY	▼ 218% FY	▲ 8% FY	▼ 321% FY

### Profit Development

Profit by Month

The month with the highest profit was Jun, lowest was the month with the least profit, month. The target of 23M was hit at the end of June.

### % Profit Increase Category vs LY

Category	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000	1999	1998	1997	1996	1995	1994	1993	1992	1991	1990	1989	1988	1987	1986	1985	1984	1983	1982	1981	1980	1979	1978	1977	1976	1975	1974	1973	1972	1971	1970	1969	1968	1967	1966	1965	1964	1963	1962	1961	1960	1959	1958	1957	1956	1955	1954	1953	1952	1951	1950	1949	1948	1947	1946	1945	1944	1943	1942	1941	1940	1939	1938	1937	1936	1935	1934	1933	1932	1931	1930	1929	1928	1927	1926	1925	1924	1923	1922	1921	1920	1919	1918	1917	1916	1915	1914	1913	1912	1911	1910	1909	1908	1907	1906	1905	1904	1903	1902	1901	1900	1899	1898	1897	1896	1895	1894	1893	1892	1891	1890	1889	1888	1887	1886	1885	1884	1883	1882	1881	1880	1879	1878	1877	1876	1875	1874	1873	1872	1871	1870	1869	1868	1867	1866	1865	1864	1863	1862	1861	1860	1859	1858	1857	1856	1855	1854	1853	1852	1851	1850	1849	1848	1847	1846	1845	1844	1843	1842	1841	1840	1839	1838	1837	1836	1835	1834	1833	1832	1831	1830	1829	1828	1827	1826	1825	1824	1823	1822	1821	1820	1819	1818	1817	1816	1815	1814	1813	1812	1811	1810	1809	1808	1807	1806	1805	1804	1803	1802	1801	1800	1799	1798	1797	1796	1795	1794	1793	1792	1791	1790	1789	1788	1787	1786	1785	1784	1783	1782	1781	1780	1779	1778	1777	1776	1775	1774	1773	1772	1771	1770	1769	1768	1767	1766	1765	1764	1763	1762	1761	1760	1759	1758	1757	1756	1755	1754	1753	1752	1751	1750	1749	1748	1747	1746	1745	1744	1743	1742	1741	1740	1739	1738	1737	1736	1735	1734	1733	1732	1731	1730	1729	1728	1727	1726	1725	1724	1723	1722	1721	1720	1719	1718	1717	1716	1715	1714	1713	1712	1711	1710	1709	1708	1707	1706	1705	1704	1703	1702	1701	1700	1699	1698	1697	1696	1695	1694	1693	1692	1691	1690	1689	1688	1687	1686	1685	1684	1683	1682	1681	1680	1679	1678	1677	1676	1675	1674	1673	1672	1671	1670	1669	1668	1667	1666	1665	1664	1663	16
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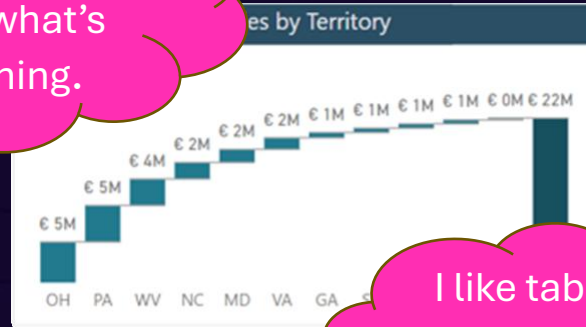
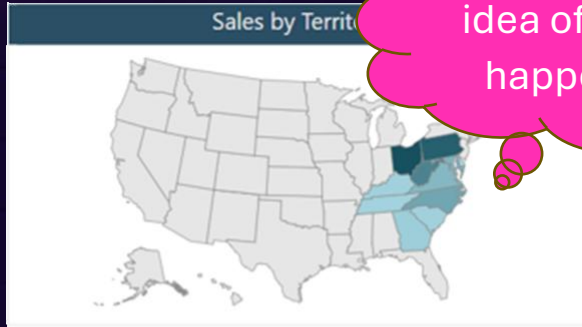
# Using a Grid

- Organized
- Create it in Power BI (or Figma or Power Point...)
- Can help with discussing layout



# The perfect visual

I just want an idea of what's happening.

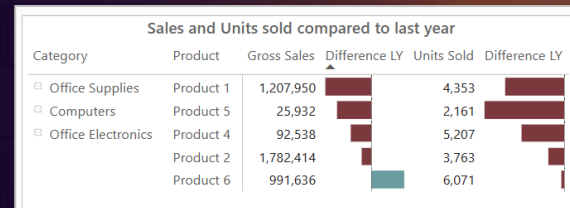
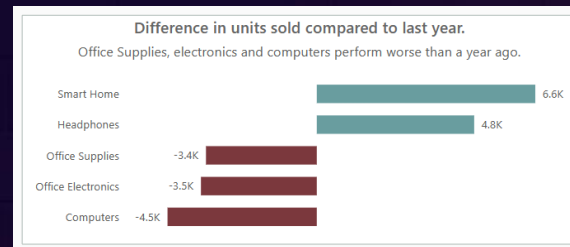
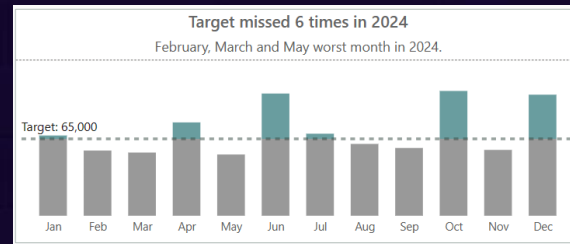
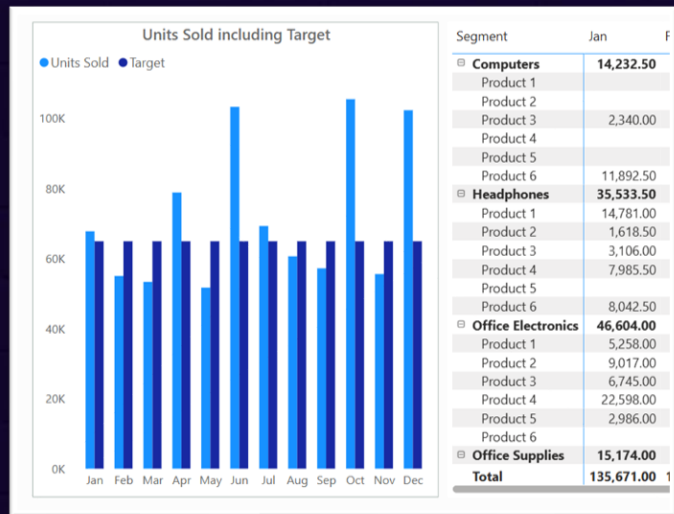


I like tables but my coworker prefers visuals.



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

# Tell the Story



# Meaningful (Sub)titles

- Provide context
- Guide the end-user
- The audience does not need to analyze data



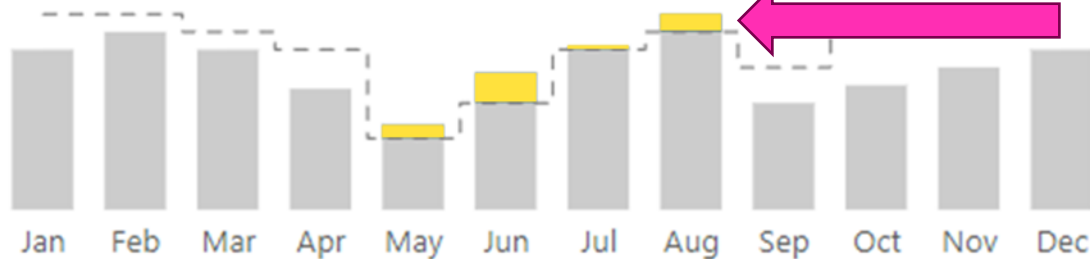
# Adding Context

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Sales target hit 4 times in 2025

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

● Below target ● Above target - - - Target



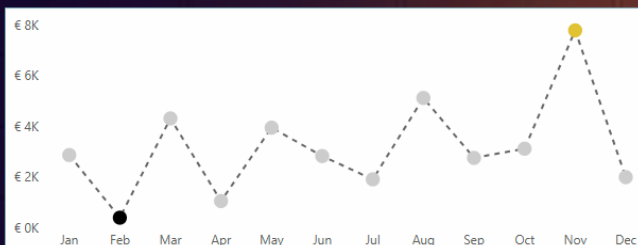
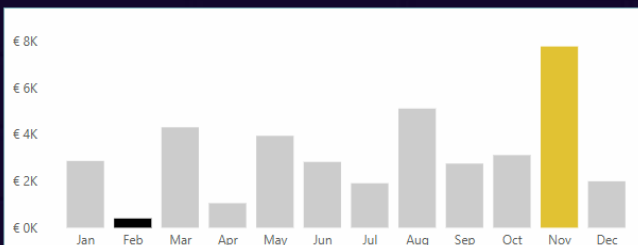
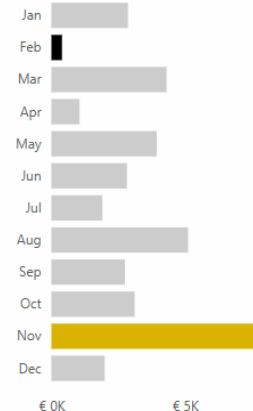
# What's important?

2025 Sales Report

Month	Sales TY	Sales LY
Jan	€ 2,867.46	€ 3,073.44
Feb	☆ € 395.70	€ 10,455.49
Mar	€ 4,312.97	€ 602.10
Apr	€ 1,051.91	€ 727.15
May	€ 3,946.97	€ 3,611.28
Jun	€ 2,827.69	€ 1,569.62
Jul	€ 1,908.18	€ 3,763.09
Aug	€ 5,119.11	€ 1,134.45
Sep	€ 2,754.67	€ 4,722.37
Oct	€ 3,118.06	€ 4,539.13
Nov	★ € 7,786.46	€ 1,778.50
Dec	€ 1,994.75	€ 3,970.27

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# Deliver

Evaluate & Test



# IT'S PERFECT!



# Continuous process

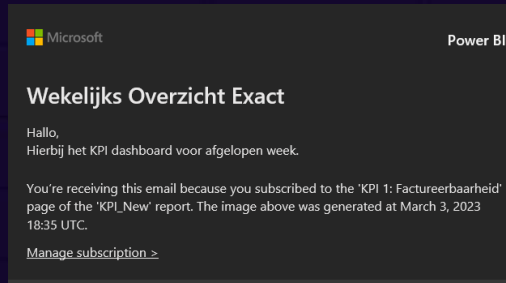
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- **Involve** the audience early on
- **Don't stop directly** after implementation
- **Evaluate** with the actual audience

# Usage



App



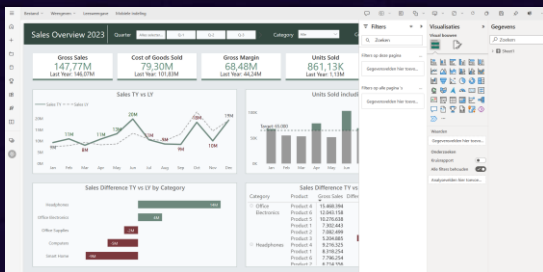
## Wekelijks Overzicht Exact

Hallo,  
Hierbij het KPI dashboard voor afgelopen week.

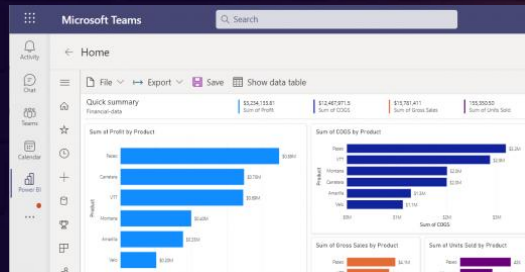
You're receiving this email because you subscribed to the 'KPI 1: Factuureerbaarheid' page of the 'KPLNew' report. The image above was generated at March 3, 2023 18:35 UTC.

[Manage subscription >](#)

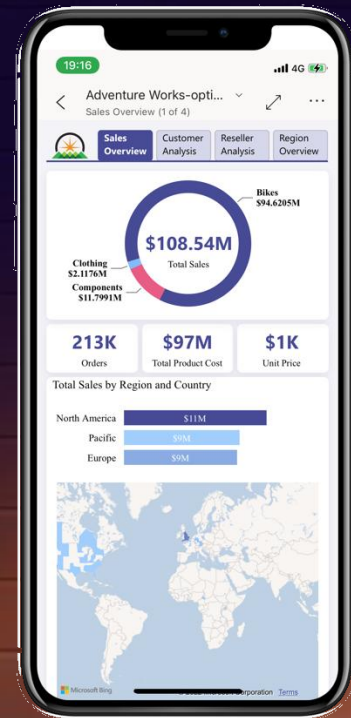
Mail (PDF)



Workspace



Teams






Phone

# What if it doesn't work?

- Avoid adding unnecessary data, filters, or options.
- Stick to the story -> but also be open for improvement
- Provide guidance.

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

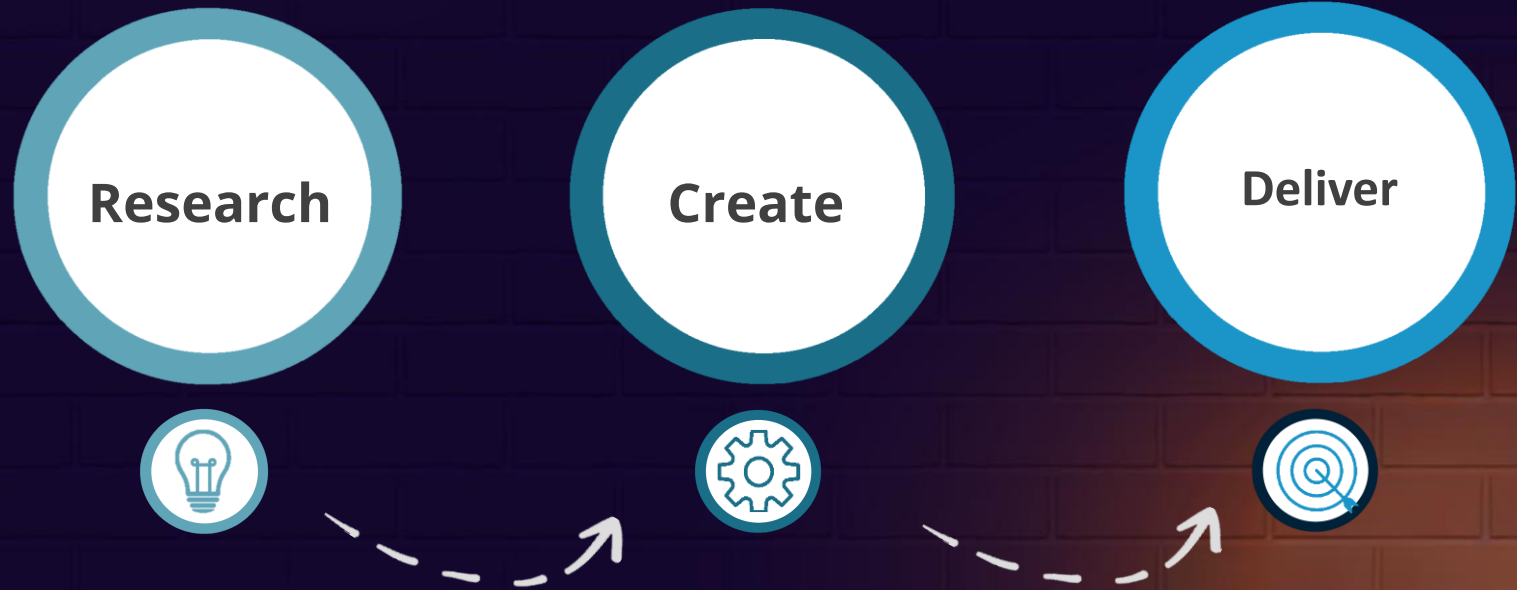
Trend (up or down)			
Category	Product	Gross Sales	Difference LY
Office Electronics	Product 4	15,468,394	▼
	Product 6	12,043,158	▲
	Product 5	10,276,638	▲

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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# Valerie Junk

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PorcuBI



valeriejunk



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