

Building a Data-Driven Story

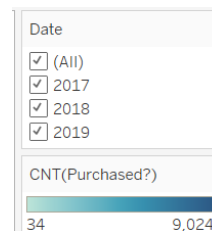
Five visualizations and a dashboard have been created using Tableau with bank marketing data.

For each visual, there is a corresponding screenshot along with a description that communicates the narrative of the visual to the target audience. Additionally, the description elaborates on how the visual incorporates design methodologies and takes into account audience considerations (Gestalt principles).

Visual 1

Client subscribed a term deposit based on job

Job	Purchased?	
	no	yes
admin.	4,540	631
blue-collar	9,024	708
entrepreneur	1,364	123
housemaid	1,131	109
management	8,157	1,301
retired	1,748	516
self-employed	1,392	187
services	3,785	369
student	669	269
technician	6,757	840
unemployed	1,101	202
unknown	254	34



Story:

The visual is a table describing the purchase that is client subscribing to term deposit. The table shows statistics of purchases for different jobs. We can see that the clients having management jobs are subscribing the most and clients with blue-collar jobs are subscribing the least.

Design methodologies and audience considerations:

The table is a simple way of showing the figures and color shades are telling the values of purchase made or not. Dark blue to light green is the color spectrum. There is a filter on date, the audience can select it to interact with the visual. The filter is on Year, and it is a simple way of interacting with the visual. This visual shows simplicity to tell the information about the impact of job of clients on the purchase made. The Audience is board members who can filter on year to interact with the visual. The information of outcome of contacting the clients is an important insight of current campaign.

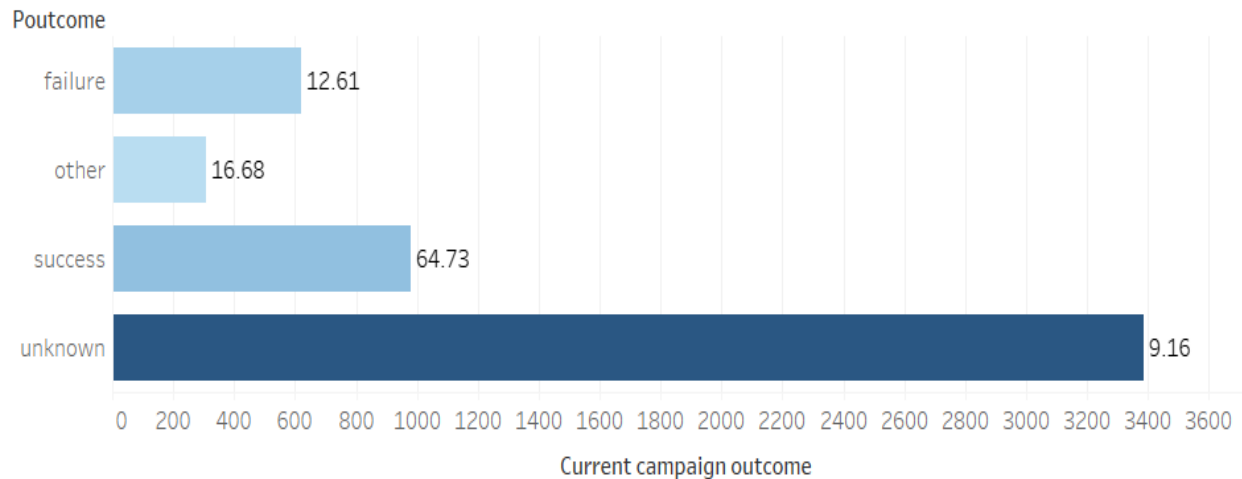
Visual 2

Clients subscribed in current campaign

307

3,386

Percentage of Client Subscribed based on what they did in previous campaign



Story:

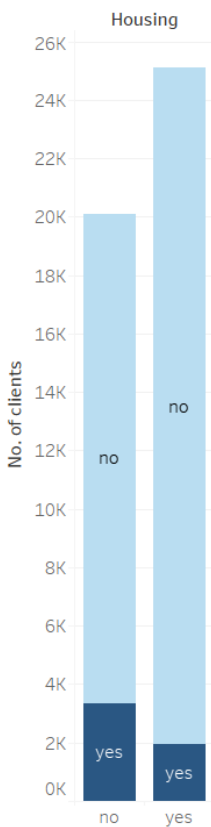
The chart bar length shows the number of clients in previous campaign and the label at the end is the percentage of clients who subscribed to the current campaign based on what they did in previous campaign. It seems that contacting the clients who subscribed to the previous campaign will be a successful option.

Design methodologies and audience considerations:

The chart has only shades of blue, light blue means less clients subscribed, and dark shade of blue means more clients subscribed. The legend is also telling about the shades of blue telling the number of clients in the campaign. The label is used to tell the percentage of people subscribed to the current campaign based on what they did in previous campaign. The audience, which is board members would like to see how clients acted in current campaign based on how they acted in previous campaign.

Visual 3

Clients Subscribed: With or Without Housing Loan



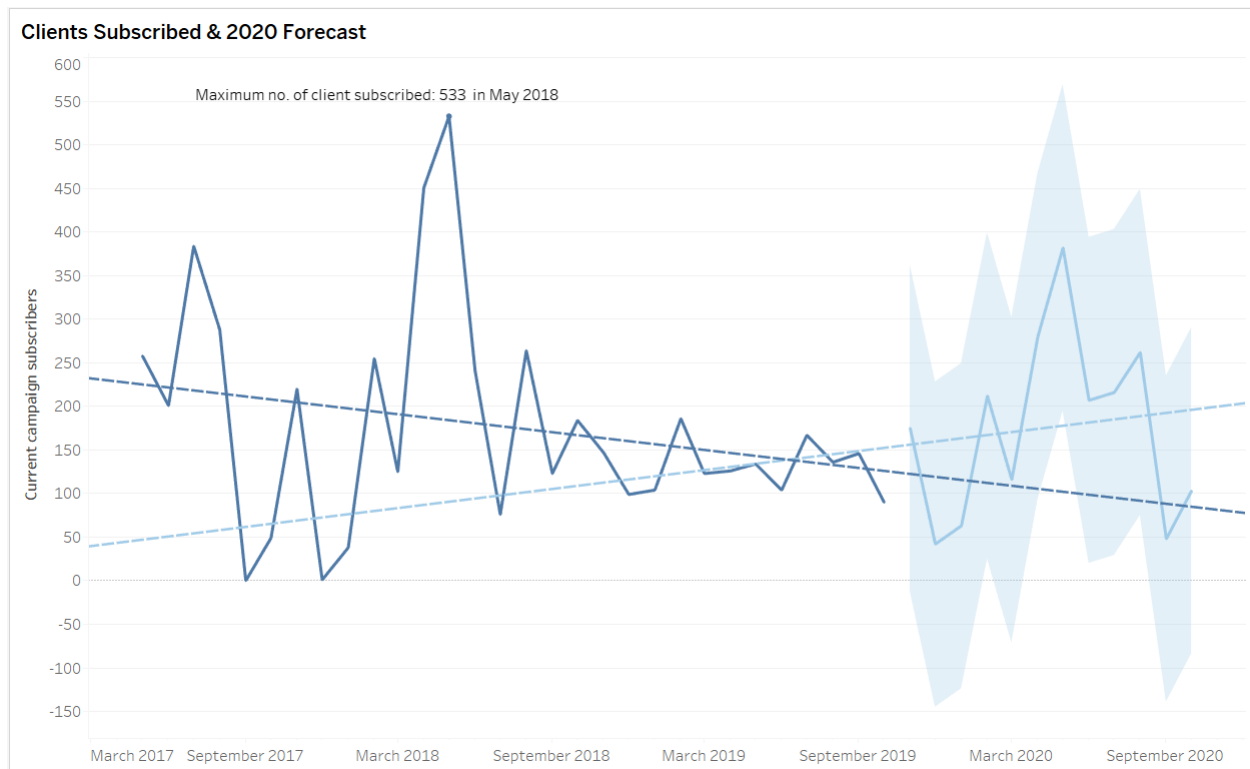
Story:

The chart shows clients subscribing to term deposit based on if they have a housing loan. For the year 2017-2019, the clients without a housing loan are subscribing to term deposit more than they with a housing loan.

Design methodologies and audience considerations:

The shade of blue is used which is neutral for telling if the client subscribed to the current campaign or not. The yes and no labels are written in the middle of the bar which will be easier for the audience to know about the data. The vertical axis is edited to a more understandable name. The legend for color code is not needed as bars are labeled as this will have less clutter in the presentation. The Audience is Board members and the information of if the housing loan is affecting the client subscribing to term deposit. As housing loans can be a big investment so it is a important information to be considered for the current campaign.

Visual 4



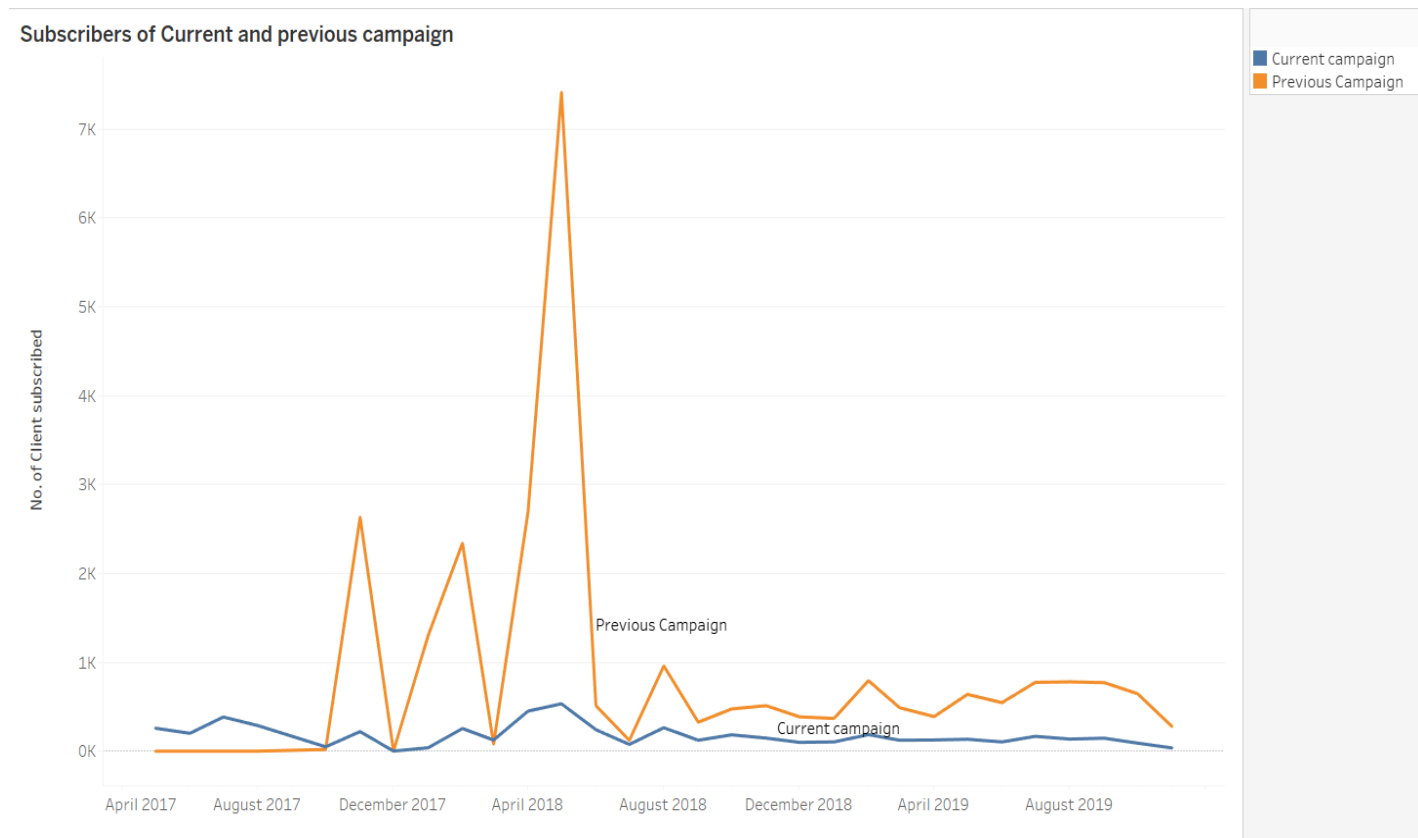
Story:

The chart shows the number of clients subscribed to the current campaign from year 2017- 2019 and then forecast data for 2020. The trend of line with original data is negative but the trend after forecasting data is positive.

Design methodologies and audience considerations:

The color of the line is blue which is neutral color. The axis of date is hidden as it is clear it is a date axis as it has label of month year. The maximum point and its date are labeled, which is a significant point in the graph. The vertical axis label and title of chart is simple and will make audience to better understand what line chart is saying. The line chart is a simple way of conveying performance and forecast of the current campaign to board members. It is important data to be conveyed to board members as the presentation is about potential client subscription for the current campaign.

Visual 5



Story:

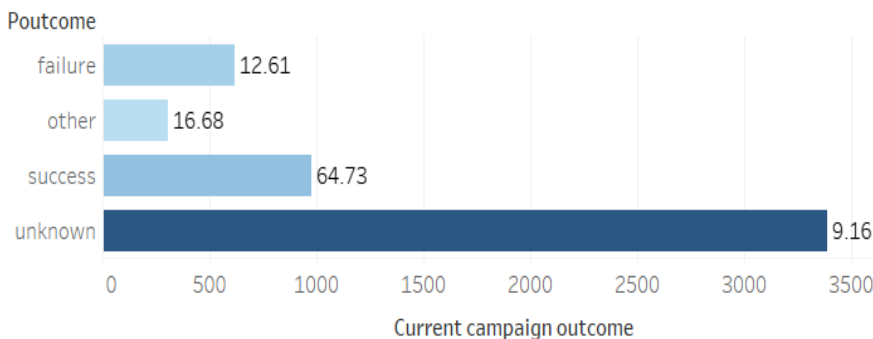
The chart shows the number of clients subscribed to the current campaign and previous campaign from year 2017- 2019. It looks like there is a big decrease in the number of clients subscribed to the current campaign compared to the previous campaign.

Design methodologies and audience considerations:

The time axis is removed by reading date as Month Year, audience can understand axis is date. Orange and blue are used for differentiating lines of the previous and current campaign. Label and color legend is used to denote the lines and it will be easier for the audience to not get confused. The title and vertical axis are labeled which makes the information in the graphs easier to understand. The board members as audience can get a measure of current campaign performance through the simple line chart. Dual axis is not used in the chart to have less confusion about the measures and so 2 lines are used with common axis.

2. I have developed a dashboard using Tableau that integrates various visuals to effectively convey insights to my audience. Included below is a screenshot of the dashboard, along with a description of the narrative it presents and a discussion of the dashboard's design.

Percentage of Client Subscribed based on what they did in previous campaign



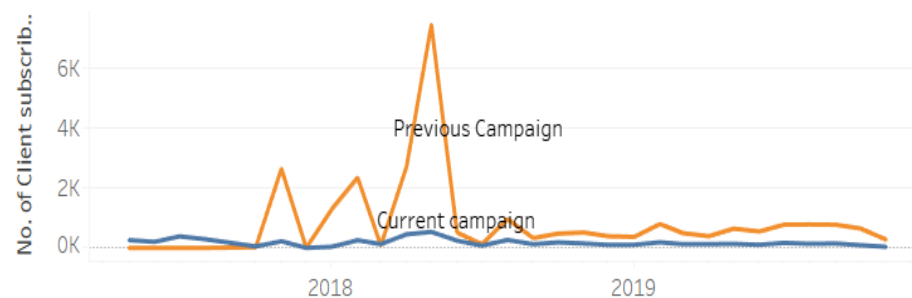
Date

(All) ▼

Client subscribed a term deposit based on job

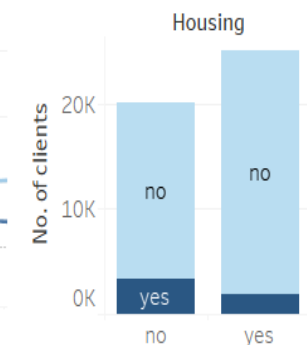
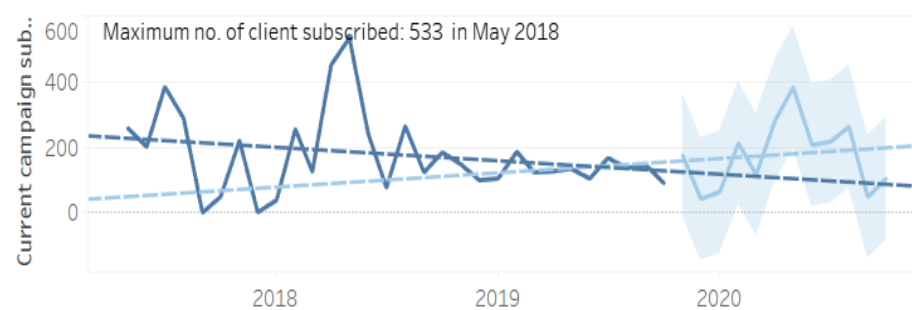
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Subscribers of Current and previous campaign



Clients Subscribed: With or Without Housing Loan

Clients Subscribed & 2020 Forecast



Story:

The dashboard displays information regarding the potential for client subscriptions for the current campaign for year 2017-2019. The information can also be filtered for different years.

Design methodologies and audience considerations:

The insight I am communicating here is potential for client subscription for current campaign for years 2017-2019. The 3 visuals talk about the potential clients based on job, housing loan and what they did in

previous campaigns. One line chart shows the past current campaign data and forecast for one year. The trend line is given so that the audience can observe the trend before the forecast and after. The other line chart shows the current and previous campaign comparison. The dashboard is interactive with a filter, where audience can choose different years from 2017-2019. All the visuals are present in the proper space and using neutral colors. The axis name is hidden where the information is obvious.