Memo

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| To: | Sylvia Unwin |
| From: | Whitney King |
| Date: | November 7, 2014 |
| Re: | Assignment 6 |
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I did three charts, as well as three tables of information to complete this module. I found the Tableau training to be extremely informative and easy to follow, so I was glad that was utilized in this part of our class. I am looking forward to doing more of those videos in the future. I didn’t run into any issues following along with the sample files they provided, and was able to easily setup the database provided in the lesson to do the work.

The biggest challenge was settling on design decisions for each chart so I felt comfortable that the information being presented could be easily understood. Please see screenshots of each chart below, as well as the requested documentation. I chose to do each write-up in paragraph from as using dictation to explain the data to someone in the marketing organization.

**Education**

**Layout:** For this first sheet, I chose a simple but effective chart that is more of a hybrid between a table and chart than anything. It utilizes an effective color scale to show the transition of each sale amount from lowest to highest for each country broken down by education. The color scaling on this chart really helped me get a "quick and dirty" look at sales trends, and I wanted to include at least one simple chart in the workbook.

**What It Shows:** Sales Amount broken down country and education levels. Color shows Sales Amount with light green being less and blue being more. The data is filtered on Order Date, which keeps 2011 - 2013 and filters out 2010 and 2014 as they didn't seem to be complete data sets.

**Education Impact:** Thanks to the extremely detailed color scale, we can easily identify trends based on this demographic at a quick glance. Due to the shading of the amounts and ordering of educational level from the most education to the least, you can see a few interesting things. In the United States, people with Graduate, Bachelors or Partial College degrees spent more money than almost all other countries each year. This was true for all countries except Australia, where each year, people with Bachelor’s degrees have consistently spent the most money... it does seem that customers with Bachelor’s degrees can be trusted to spend the most money. On the other end of the scale, across the board customers with only partial high school spent less money.



**Occupation**

**Layout:** I chose the circle view layout for this graph, as it gave a good visual representation of the total sales by occupation, without overcrowding the pane with too much information. Single points of data were appropriate for this, and line or bar graphs didn't seem to convey the data in the manner it needs to be digested (as a comparison of definite points of data).

**What It Shows:** Sales Amount for each Customer broken down by Order Date. Color shows details about Occupation. The data is filtered on Order Date, which keeps 2011 - 2013 and filters out 2010 and 2014 as they didn't seem to be complete data sets. Minimum and maximum sales numbers each year are shown in the pane, and the tooltip will display individual sales numbers for any plot point.

**Occupation Impact:** This graph clearly shows definite impacts yearly sales based on occupation. Year over year, Professionals retain the most purchasing power in the United States and Australia, while Clerical positions lead sales in France, Germany and the United Kingdom. The only country showing demographic change in sales is Canada where Skilled Manual Labor was leading the way for two years, however in 2013 Professionals accounted for the most sales in that country. In Canada, Australia and the United States, Manual Labor has always accounted for the least amount of sales. In France, Germany and the United Kingdom, customers working in Management have accounted for the least amount of sales.



**Gender**

**Layout:** Since there were only two genders to compare, this seemed like a great opportunity to try out a world map chart. Excel doesn't have this feature for charts and it's a great feature, so I was eager to use this type of chart in this worksheet. I chose to use the pages feature for the map and show sales growth over time in order to really drive home the growth in sales being experienced across the globe.

**What It Shows:** Map of the world showing countries by profits, with a page for each quarter of each year. Color shows Sales Amount. Details are shown for Country. The data is filtered on Order Date, which keeps 2011 - 2013 and filters out 2010 and 2014 as they didn't seem to be complete data sets.

**Gender Impact:** Overall, the differences in sales for each country by gender were not many to speak of. While there were small differences in the amounts for each gender in each country, and some countries like Australia and Germany saw wider gaps between on average than others, for the most part there was not a significant difference in any country between male and female. In total Females did count for a little over $200k in more sales then men, but this is spread out across both years and countries where females always bought slightly more than men except in the UK and France. More sales have accrued over time, but there haven't been any notable shifts in demographics.

