Free Training Transcript: Funnel Charts

Welcome to this How-to video on creating Funnel Charts. You can download the Exercise workbook to follow along in your own copy of Tableau.

What is a Funnel Chart?

Funnel charts are used for things like how many prospects are in each stage of the sales funnel, or how candidates move through an interview process.

Building a Basic Funnel Chart

This data set is looking at the number of prospects we have in our sale cycle and what phase they're in. Building a basic funnel chart is easy. We'll bring out number of prospects to the left side drop area. And bring Phase to color—now we see how many prospects are in each phase. We could manually sort the phase in the color legend, or if we sort descending, the nature of the sales funnel means it'll sort the phases into the correct order automatically. Next, we can bring number of prospects to size, and change the view to entire view—this will give it more of that funnel shape. That's the basic funnel, though we can add more information very easily. Bringing Phase to Label can be useful. And if we bring number of prospects to label, then add a quick table calculation for percent of total, we get another piece of useful information.

Building a Smooth Funnel Chart

Many funnel charts, though, look a bit more elegant. If we want a smoother funnel chart, we can do so by using a different mark type. This time, we'll bring number of prospects to columns and phase to rows, and sort descending again. If we change the mark type to Area, make the fit entire view, and, ah ha, there's a bit of that funnel shape. We only have half of it, though. To easily make the funnel symmetrical, we'll simply create a calculation for negative number of prospects and use that to fill in the other side of the funnel.

Right click on Number of Prospects and select create calculated field. Name it Negative Number of Prospects. And simply type a minus sign at the start, then click ok. If we bring this field to the left of the columns shelf, we see the classic funnel. We can do a couple things to tidy the view, but the meat of the chart is done. I like to hide the headers and format borders to not have a column divider. Then bring Phase to label and again bring number of prospects to label and make it percent of total. Since we hid the axis, we can

bring out number of prospects to label again so we can see the actual numbers as well. There's our funnel chart!

Conclusion

Thank you for watching this How to video on Funnel Charts. We invite you to continue with the Free Training videos to learn more about using Tableau.