ISM4415

Professor Ernesto Lee

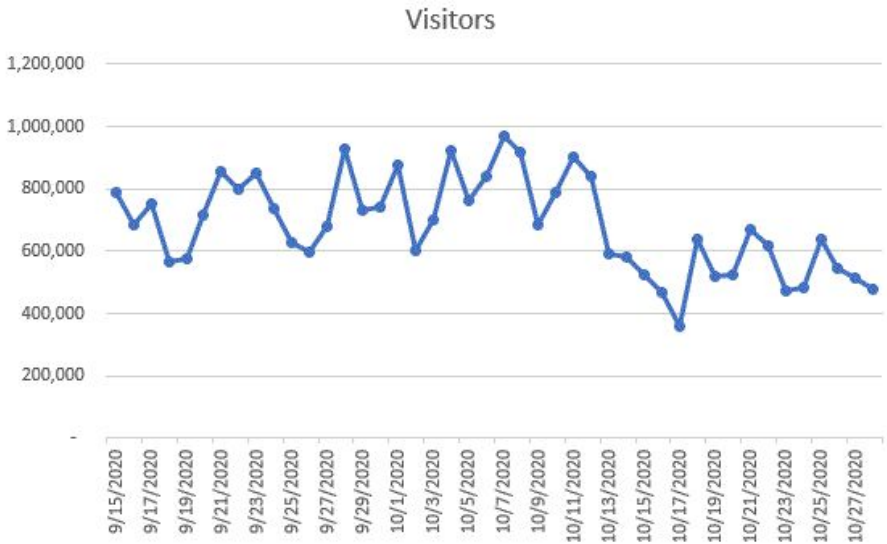
KYA : Know Your Audience

- **Peers**
- **Stakeholders**
- **Senior Leadership**

Content

- Agenda
- Key Findings
- Supporting Data
- Reiterate Key Findings
- Recommendations / Next Steps

Presentation Layout



Presentation Length

- **(Presentation length in minutes-10 minutes for questions) / 5 minutes per slide**
- **For an hour presentation that comes out to (60–10) / 5 = 10 slides.**

The Big Picture

- **KPI’s**
- **Incremental Revenue Impact**
- **Reductions in cost or time**

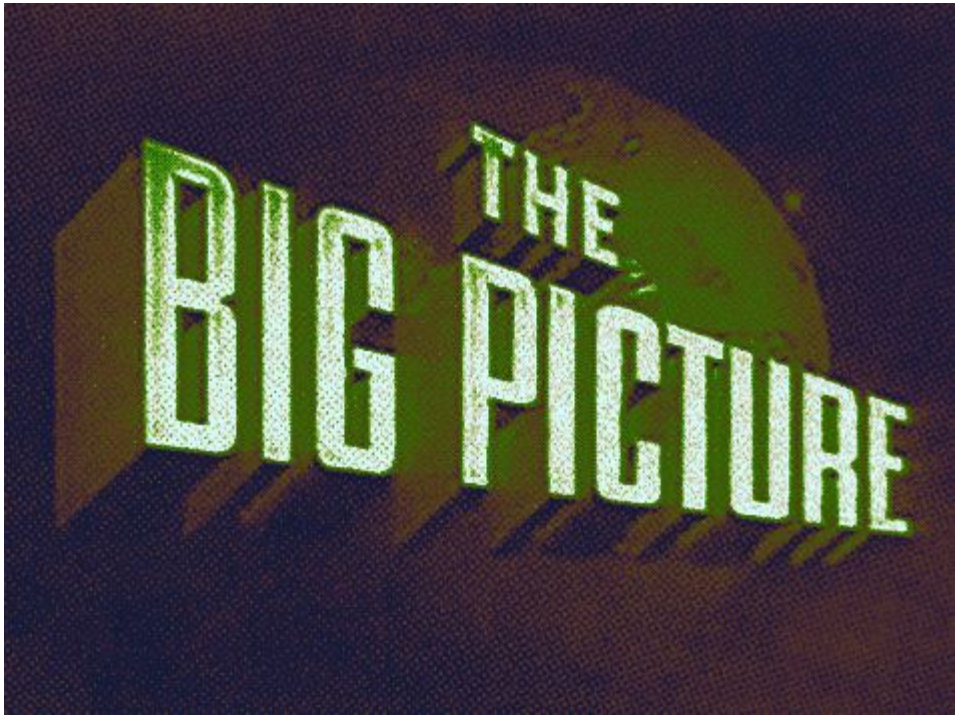


Tableau Paradigm

Professor Ernesto Lee

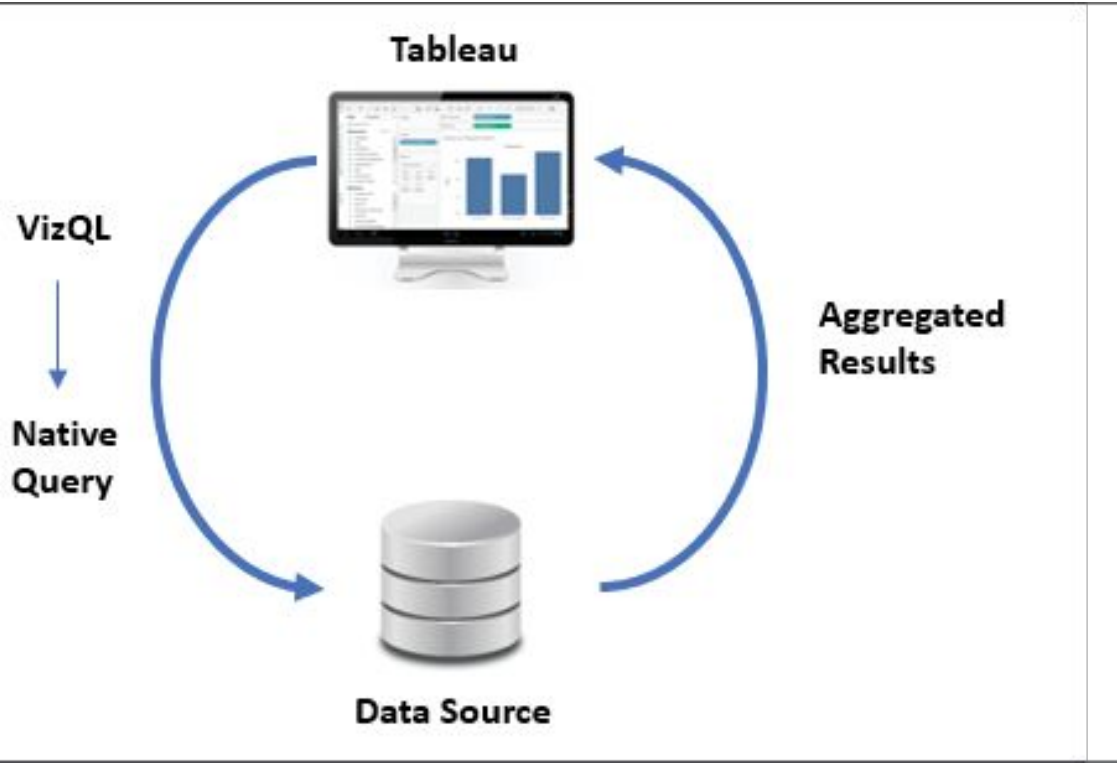
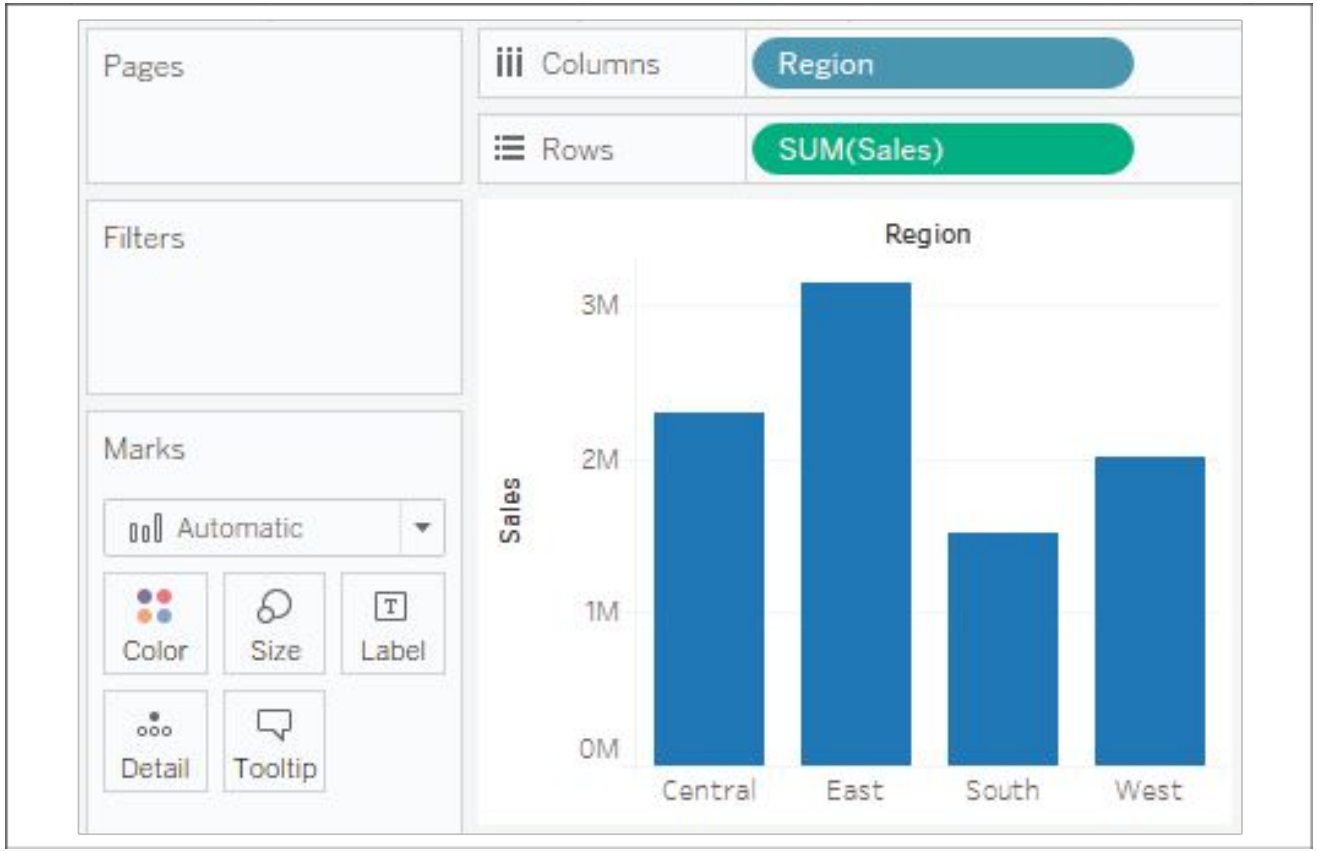


Tableau
VizQL
Native Query
Aggregated Results
Data Source

https://github.com/fenago/ISM4415 --- Chapter 2



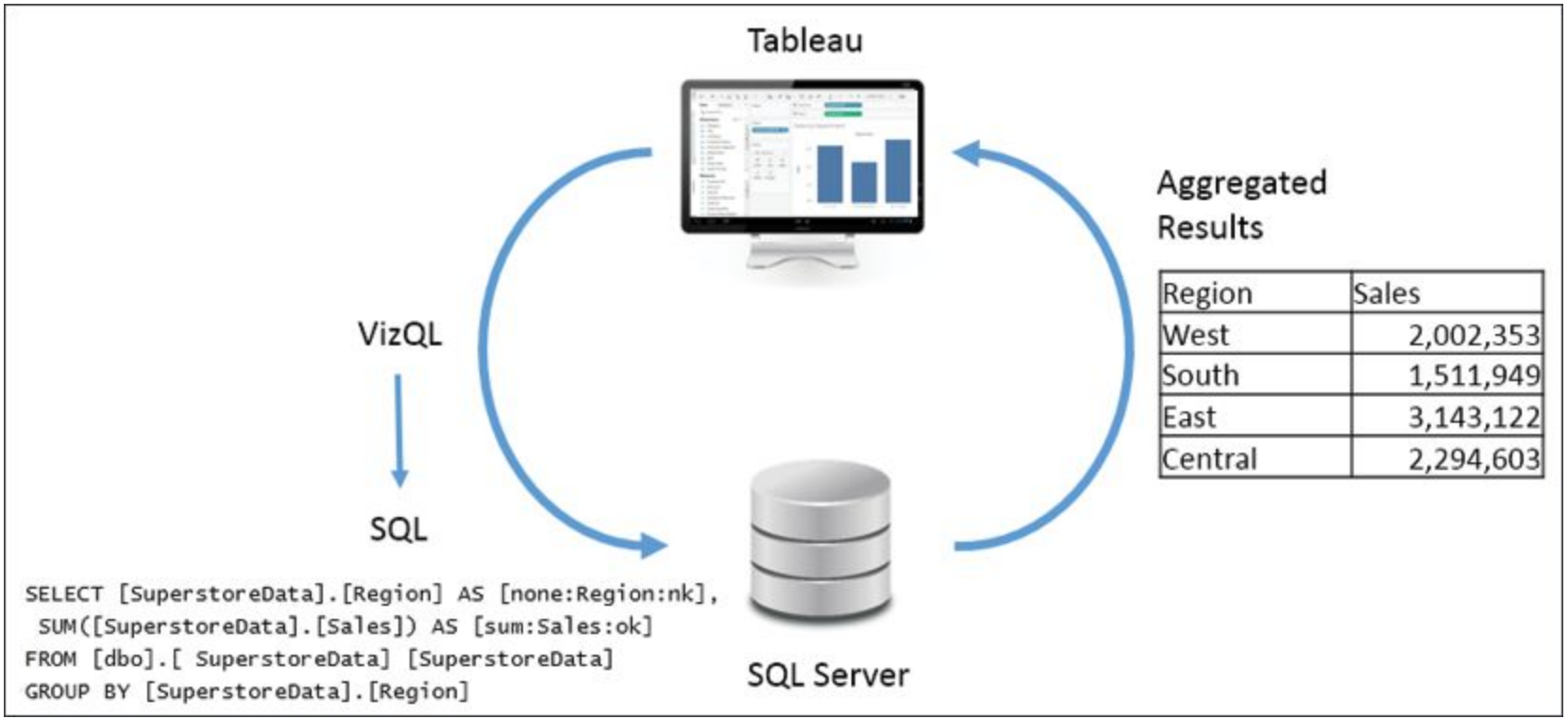
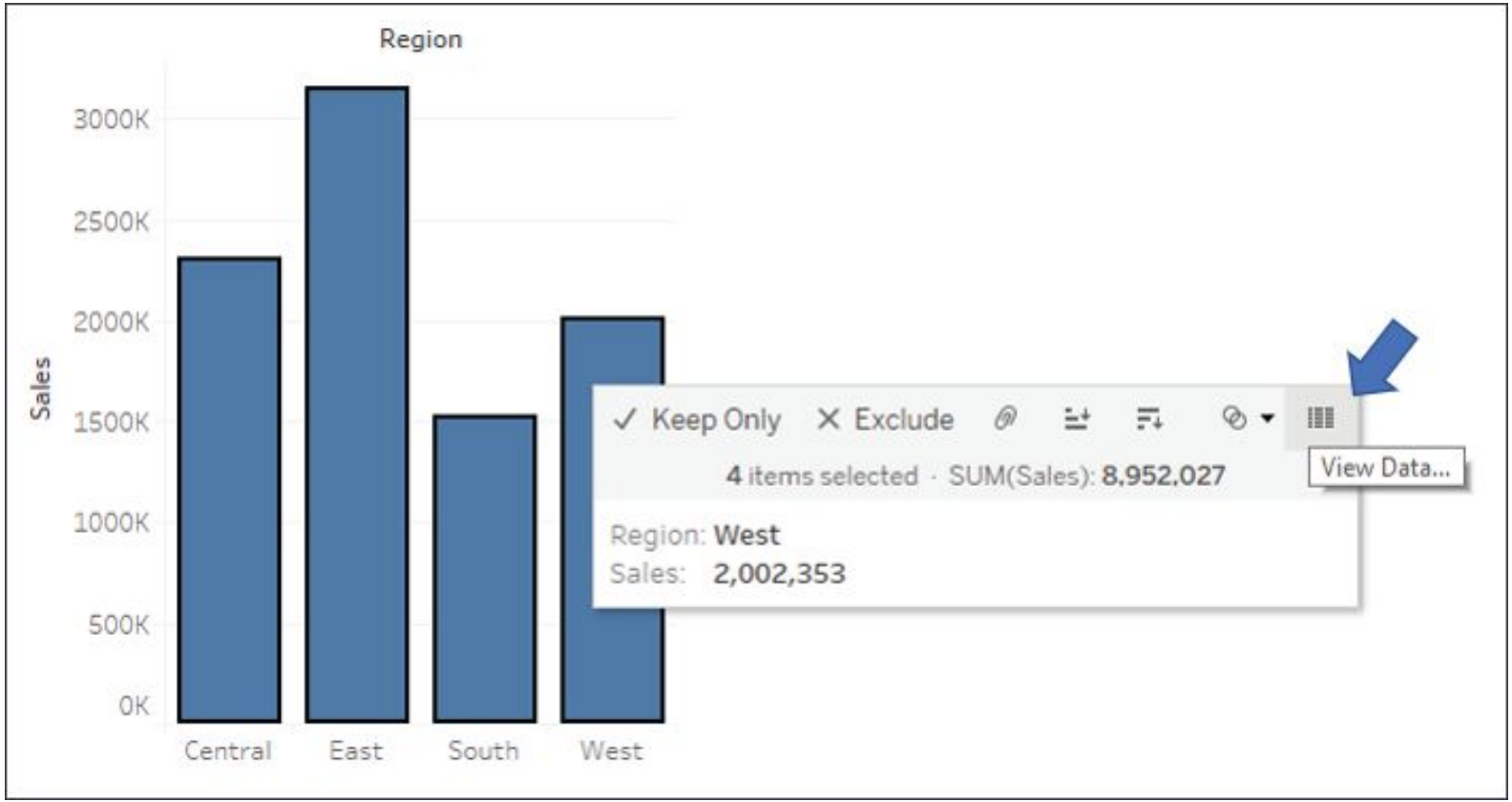
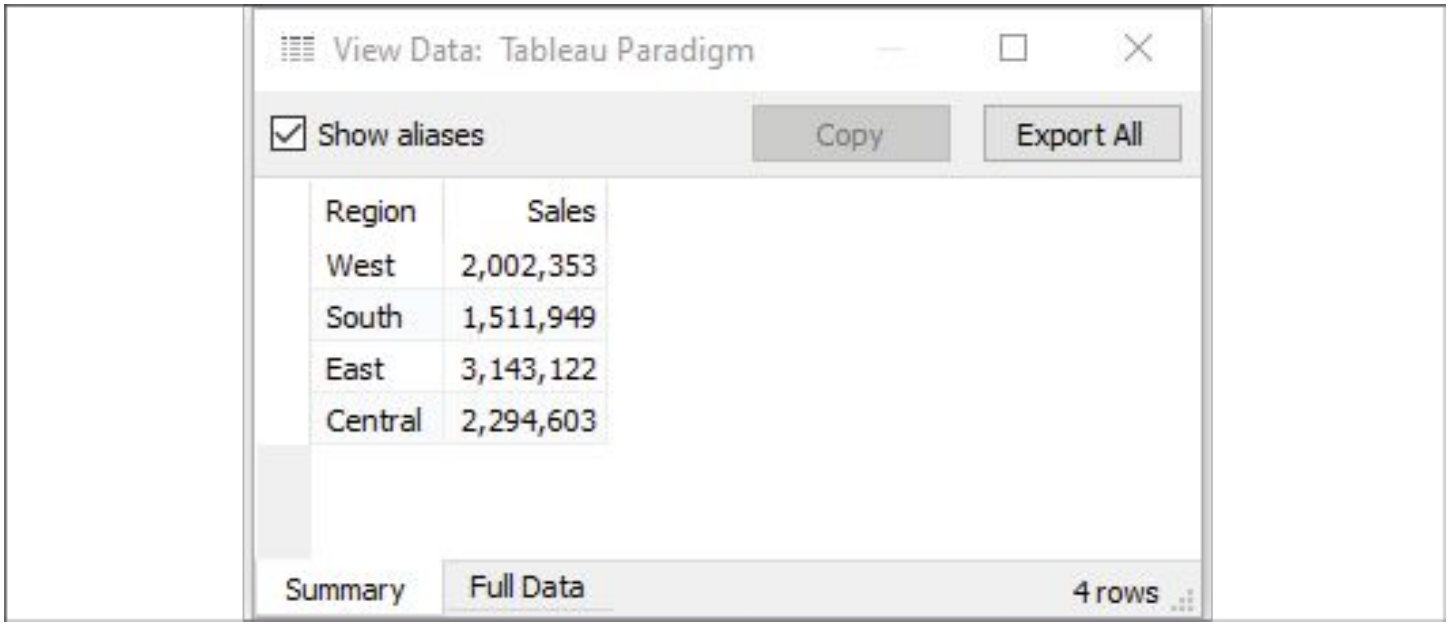
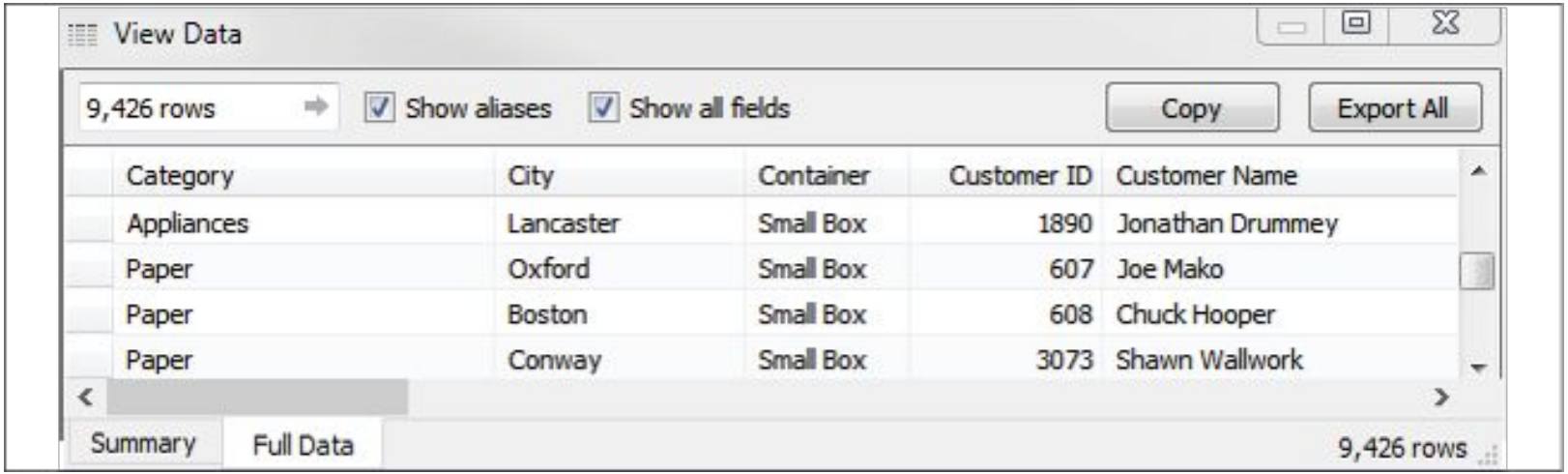
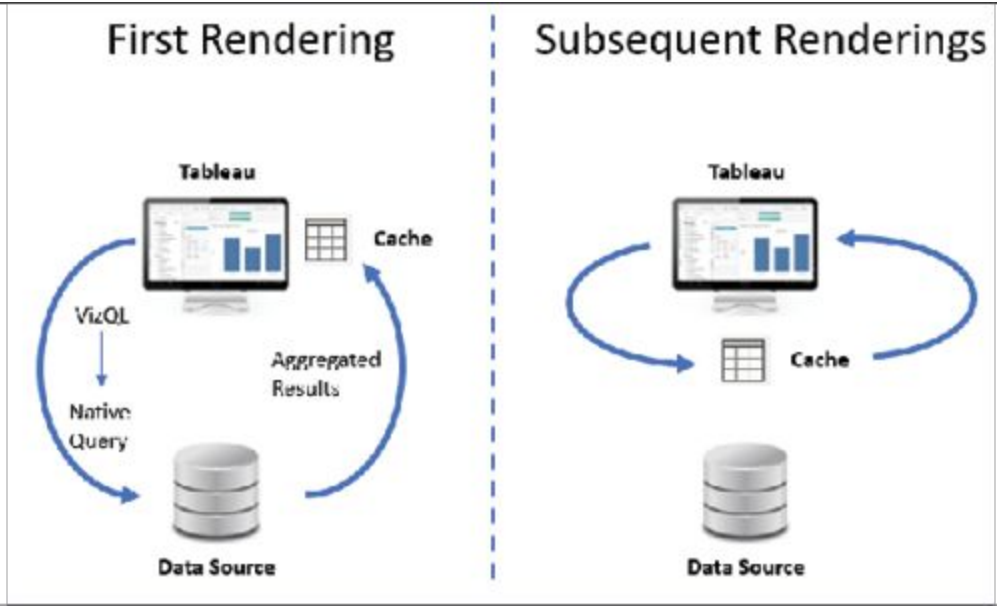


Tableau
VizQL
SQL
SQL Server
Aggregated Results
Region | Sales
West | 2,002,353
South | 1,511,949
East | 3,143,122
Central | 2,294,603
SELECT [SuperstoreData].[Region] AS [none:Region:nk],
SUM([SuperstoreData].[Sales]) AS [sum:Sales:ok]
FROM [dbo].[SuperstoreData] [SuperstoreData]
GROUP BY [SuperstoreData].[Region]

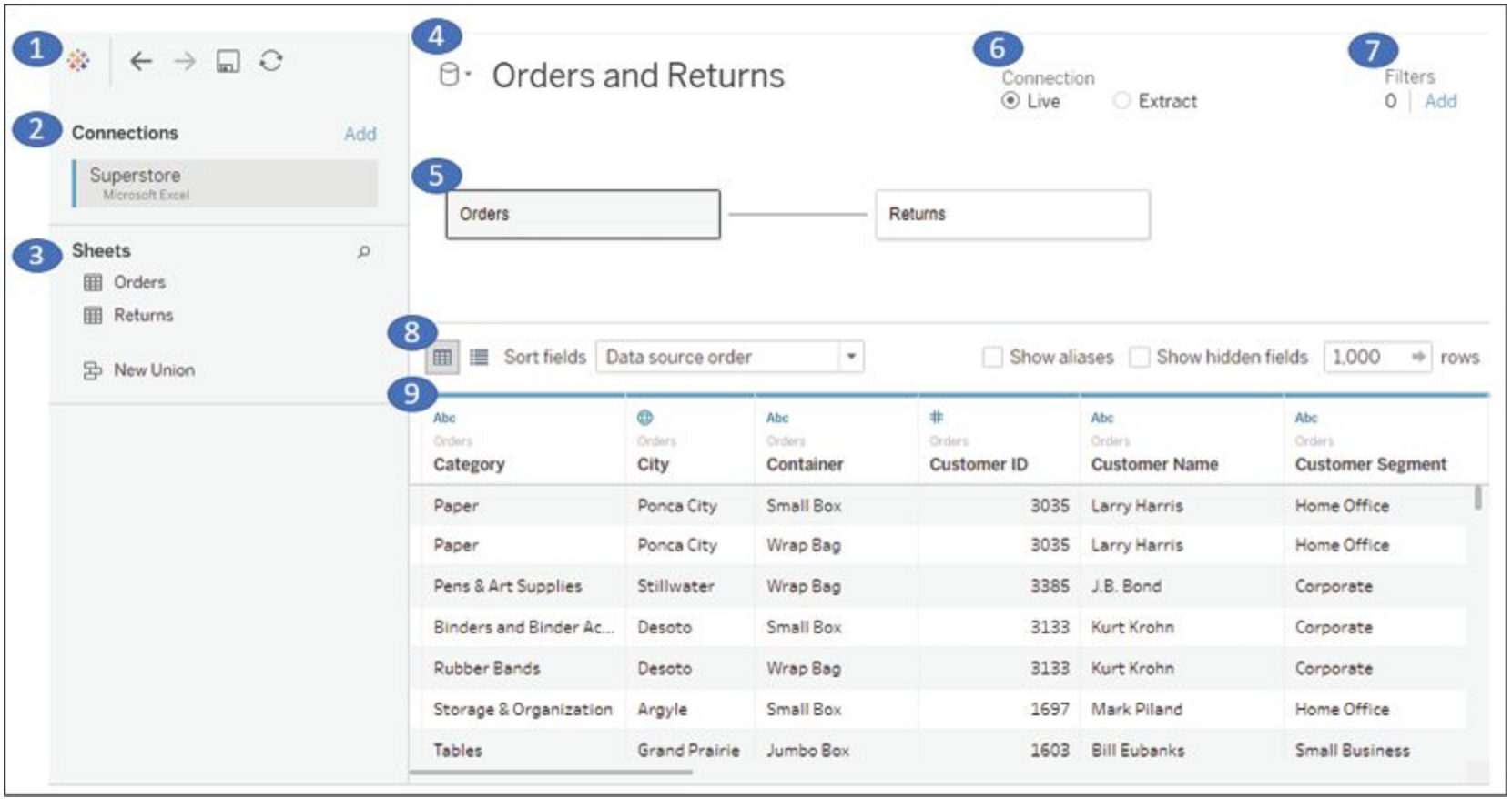

Region
3000K
2500K
2000K
1500K
1000K
500K
0K
Sales
Central
East
South
West
✓ Keep Only
✕ Exclude
View Data...
4 items selected · SUM(Sales): 8,952,027
Region: West
Sales: 2,002,353


View Data: Tableau Paradigm
Show aliases
Copy
Export All
Region
Sales
West
2,002,353
South
1,511,949
East
3,143,122
Central
2,294,603
Summary
Full Data
4 rows


View Data
9,426 rows
Show aliases
Show all fields
Copy
Export All
Category
City
Container
Customer ID
Customer Name
Appliances
Lancaster
Small Box
1890
Jonathan Drummey
Paper
Oxford
Small Box
607
Joe Mako
Paper
Boston
Small Box
608
Chuck Hooper
Paper
Conway
Small Box
3073
Shawn Wallwork
Summary
Full Data
9,426 rows


First Rendering
Tableau
Cache
VizQL
Native Query
Aggregated Results
Data Source
Subsequent Renderings
Tableau
Cache
Data Source

Connecting to Data

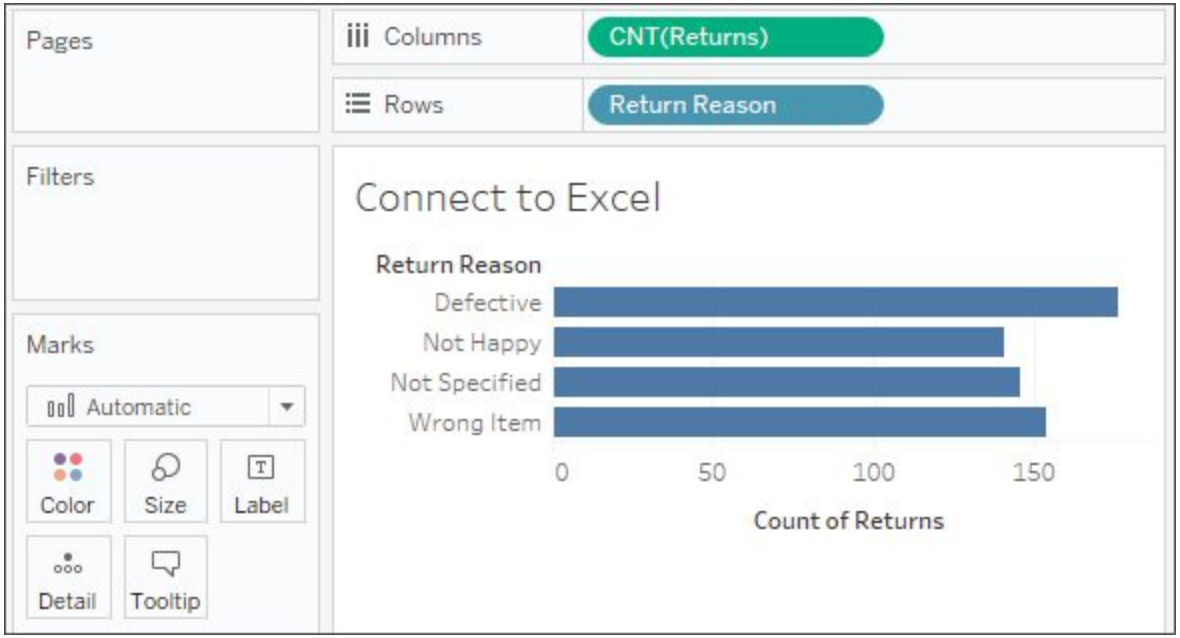

1
2
Connections
Add
Superstore
Microsoft Excel
3
Sheets
Orders
Returns
New Union
4
Orders and Returns
5
Orders
Returns
6
Connection
Live
Extract
7
Filters
0
Add
8
Sort fields
Data source order
Show aliases
Show hidden fields
1,000
rows
9
Abc
Orders
Category
Orders
City
Abc
Orders
Container
Orders
Customer ID
Abc
Orders
Customer Name
Abc
Orders
Customer Segment
Paper
Ponca City
Small Box
3035
Larry Harris
Home Office
Paper
Ponca City
Wrap Bag
3035
Larry Harris
Home Office
Pens & Art Supplies
Stillwater
Wrap Bag
3385
J.B. Bond
Corporate
Binders and Binder Ac...
Desoto
Small Box
3133
Kurt Krohn
Corporate
Rubber Bands
Desoto
Wrap Bag
3133
Kurt Krohn
Corporate
Storage & Organization
Argyle
Small Box
1697
Mark Piland
Home Office
Tables
Grand Prairie
Jumbo Box
1603
Bill Eubanks
Small Business

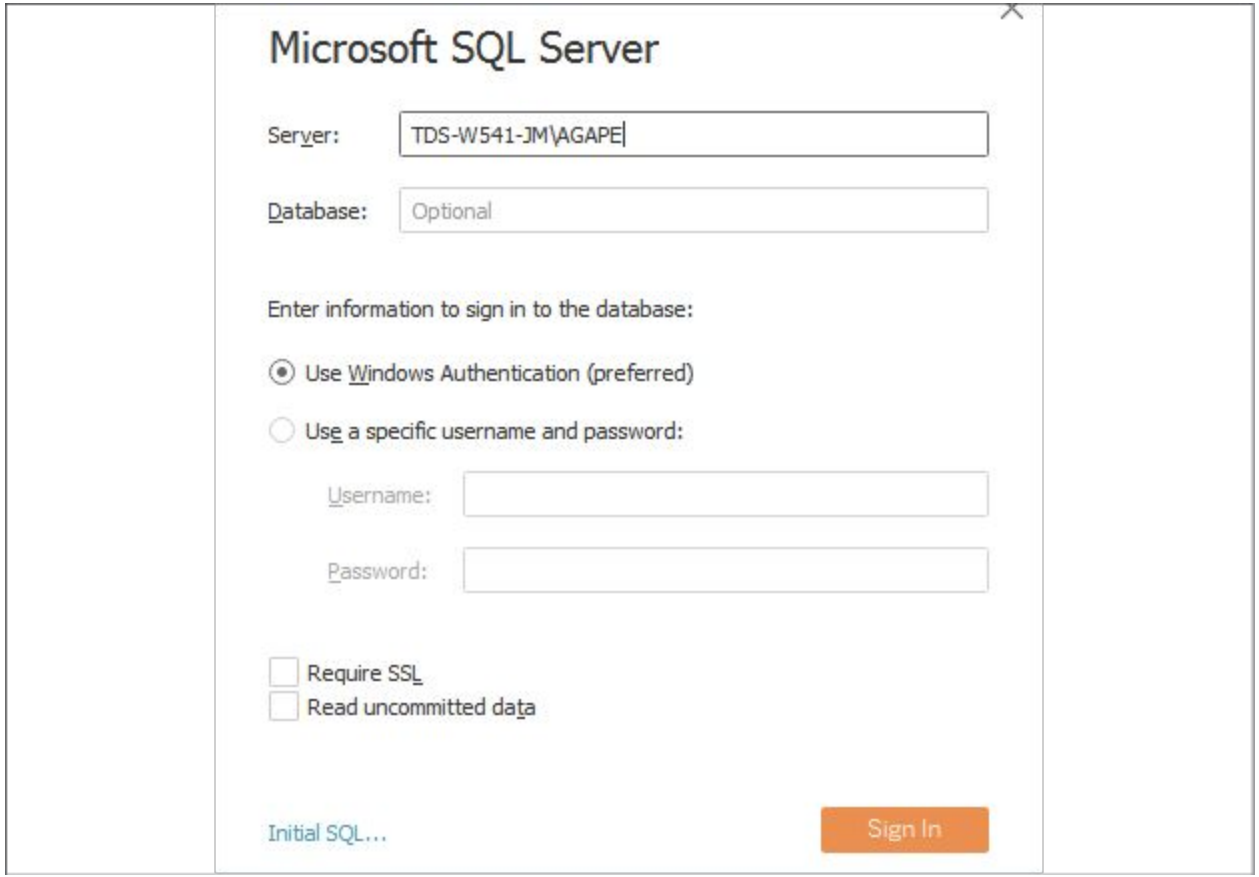
Navigate to the Connect to Excel sheet in the Chapter 02 Starter.twbx workbook.

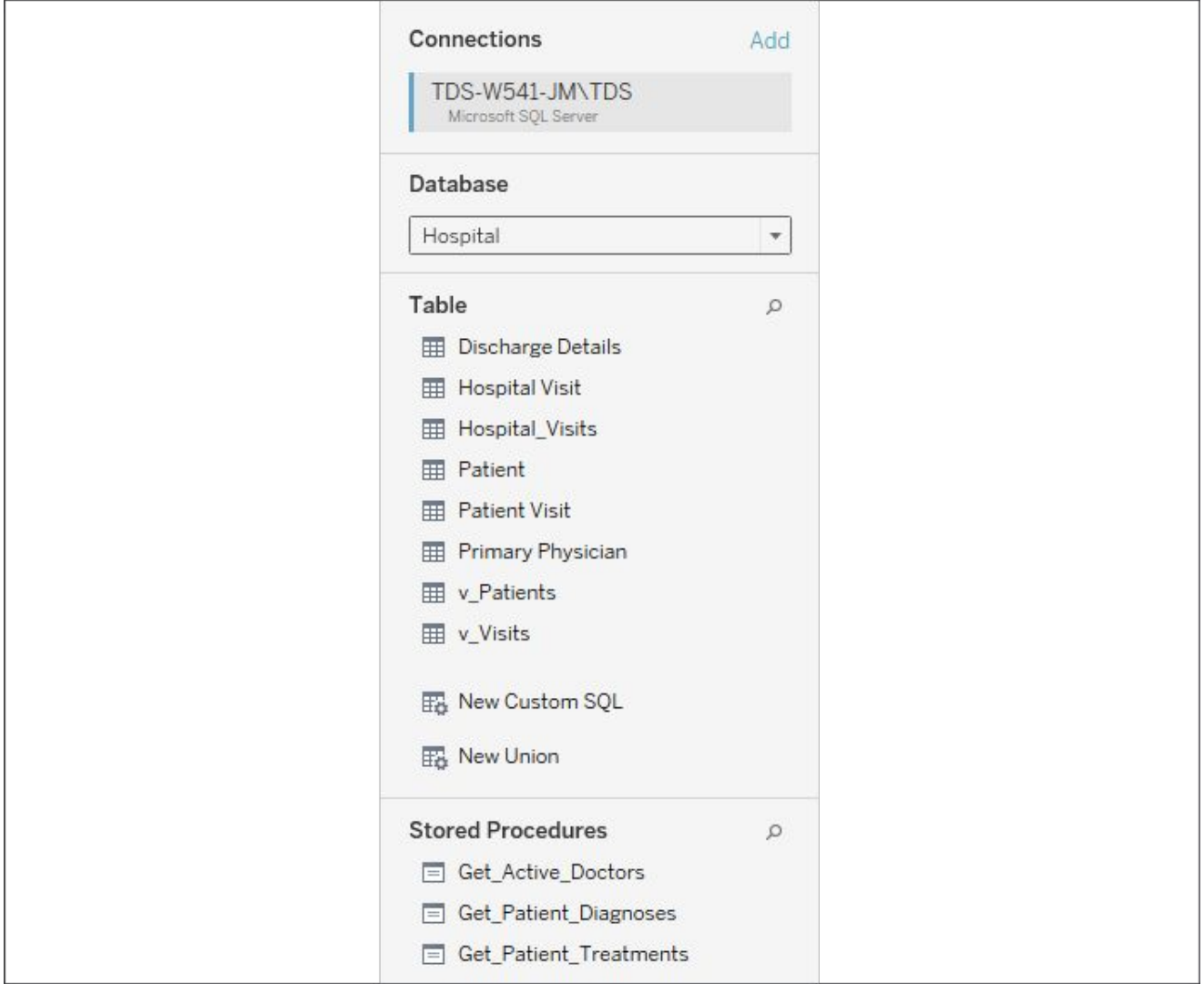
From the menu, select Data | New Data Source and select Microsoft Excel from the list of possible connections.

In the open dialogue, open the Superstore.xlsx file from the \Learning Tableau\Chapter 02 directory. Tableau will open the Data Source screen. You should see the two sheets of the Excel document listed on the left.

Double-click the Orders sheet and then the Returns sheet.


Pages
Columns
CNT(Returns)
Rows
Return Reason
Filters
Connect to Excel
Return Reason
Defective
Not Happy
Not Specified
Wrong Item
0
50
100
150
Count of Returns
Marks
Automatic
Color
Size
Label
Detail
Tooltip


Microsoft SQL Server
Server:
TDS-W541-JM\AGAPE
Database:
Optional
Enter information to sign in to the database:
Use Windows Authentication (preferred)
Use a specific username and password:
Username:
Password:
Require SSL
Read uncommitted data
Initial SQL...
Sign In

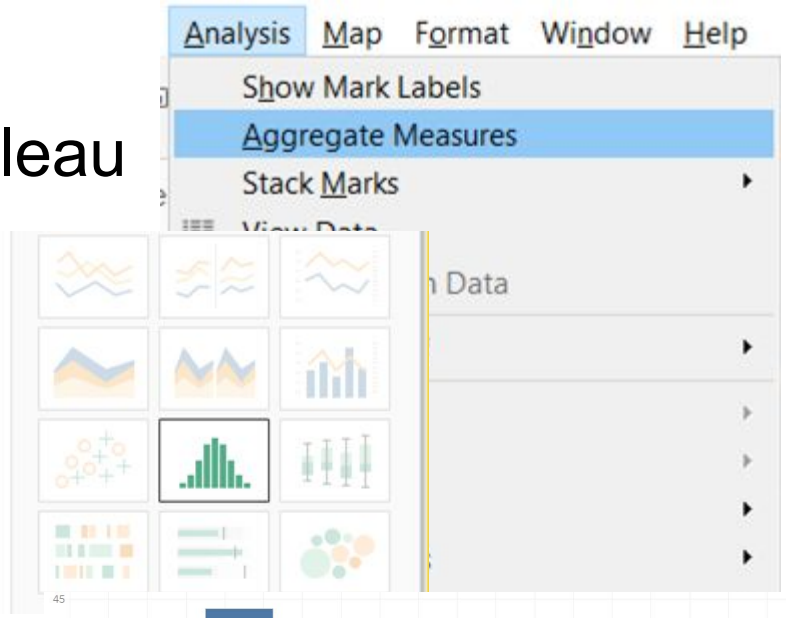

Connections
Add
TDS-W541-JM\TDS
Microsoft SQL Server
Database
Hospital
Table
Discharge Details
Hospital Visit
Hospital_Visits
Patient
Patient Visit
Primary Physician
v_Patients
v_Visits
New Custom SQL
New Union
Stored Procedures
Get_Active_Doctors
Get_Patient_Diagnoses
Get_Patient_Treatments

EDA

CTR
14.65%
10.6%
Cost per conversion
673.27
Quality Score
9.38
-0.1%

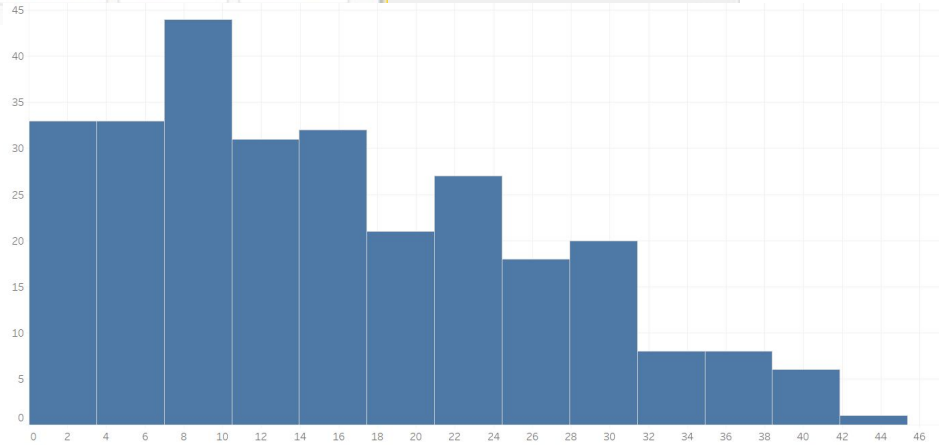
Univariate Analysis with Tableau

1. Drag a feature from the list of features from the left pane.
2. By default, if the feature is a Measure(like a numeric set of values), Tableau will aggregate the values into either sum or count. Make sure to uncheck the Aggregate measures from the Analysis options as shown below.



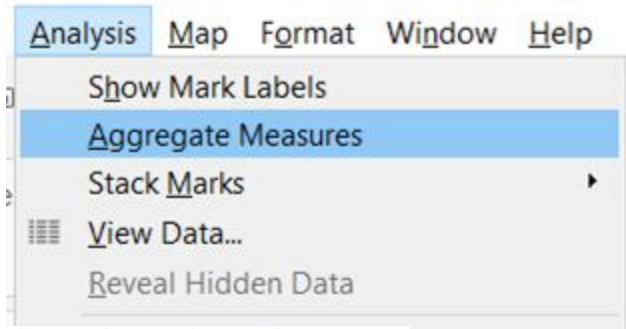
3. Choose the Histogram from the available visualizations.

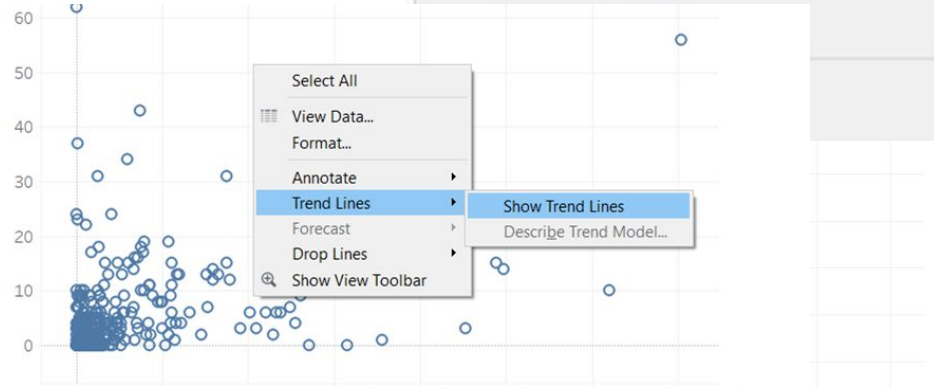
4. Resulting in a Histogram as shown below. If the variable on the x axis is not categorical. Tableau will automatically convert them to bins and that's a great value add.

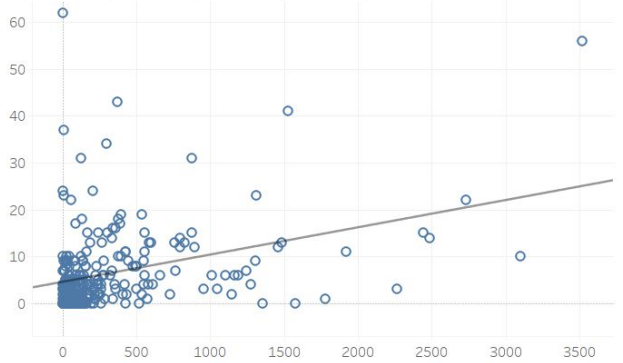


Bivariate Analysis with Tableau

1. Drag the x variable into the Columns pane.
2. Drag the y variable into the rows pane.
3. By default, if the feature is a Measure(like a numeric set of values), Tableau will aggregate the values into either sum or count. Make sure to uncheck the Aggregate measures from the Analysis options as shown below.



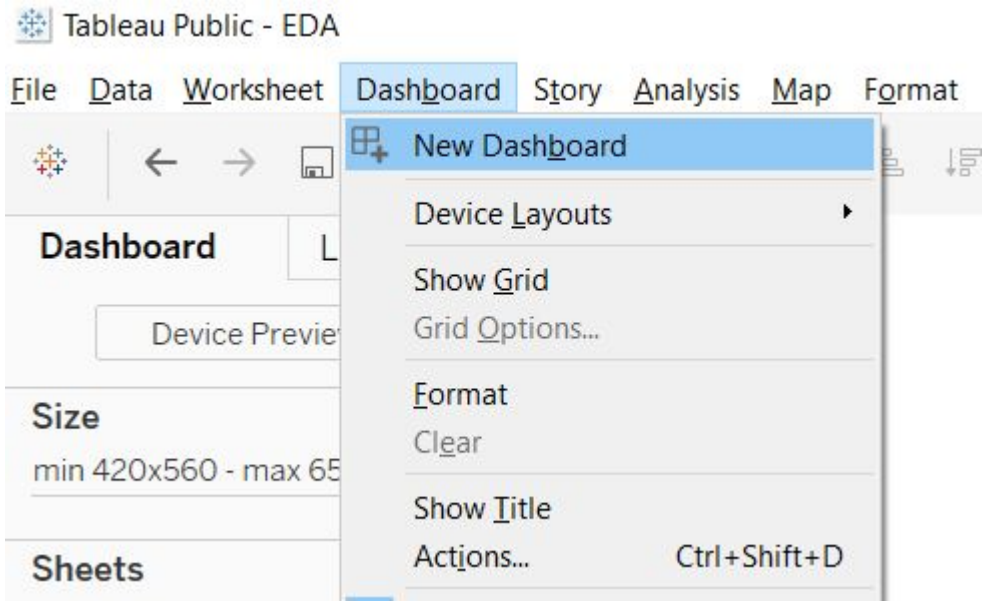


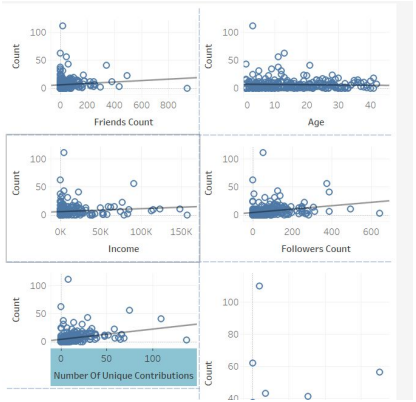


4. Use trend lines to highlight interesting trends in your data.

Dashboard

1. Select New Dashboard.
2. Just Add the sheets that you created one by one from the Sheets pane on the left.





Group Activity

Find the Exoneration and Execution Datasets at: ernesto.net/blog or https://ernesto.net/death-row/

Answer the following questions:

- Number of executions since 1976 (Histogram)
- Race of Defendants
- Race of Victims
- Exonerations by Race
- Executions by Region
- Executions of Juveniles
- Executions of Women
- At least 2 insights from a Bivariate Analysis