

REPORTING WORK AND EXPERIENCE

# Portfolio

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Data Analyst · MSc Data Science

# About me

First class MSc in Data Science

Experienced data analyst

Microsoft certified

PL-300 Power BI Data Analyst Associate

Report developer



# Agenda

My heroes and inspirations

Selected reports overview

Power BI training

Power BI developer guide

→ My heroes and inspirations

Selected reports overview

Power BI training

Report developer guide



## My heroes and inspirations

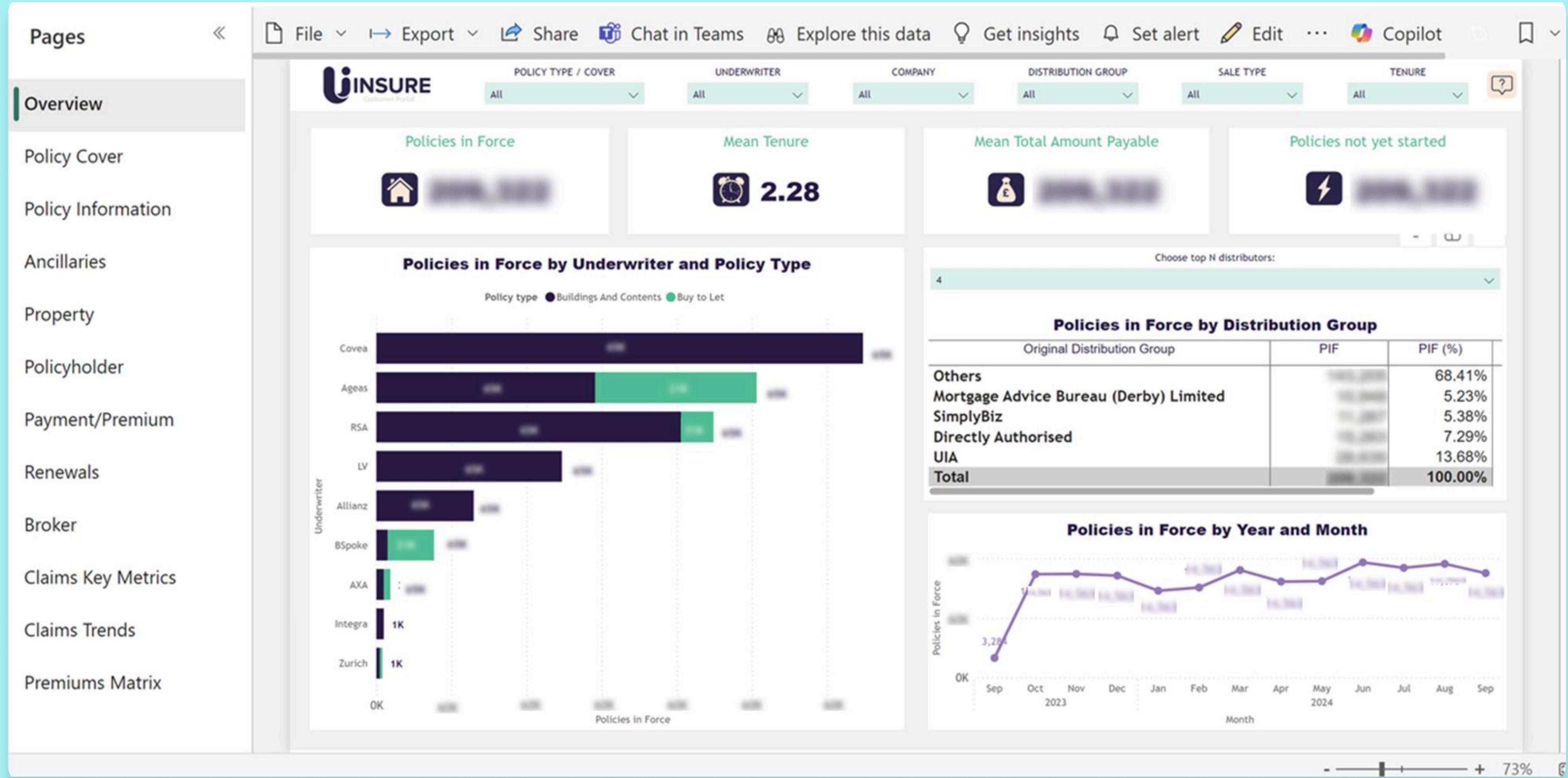
Left to right: Adam Saxon and Patric Leblanc (Guy in a Cube),  
Alberto Ferrari and Marco Russo (SQLBI), Reza Rad (Radacad)

My heroes and inspirations

→ **Selected reports overview**

Power BI training

Report developer guide

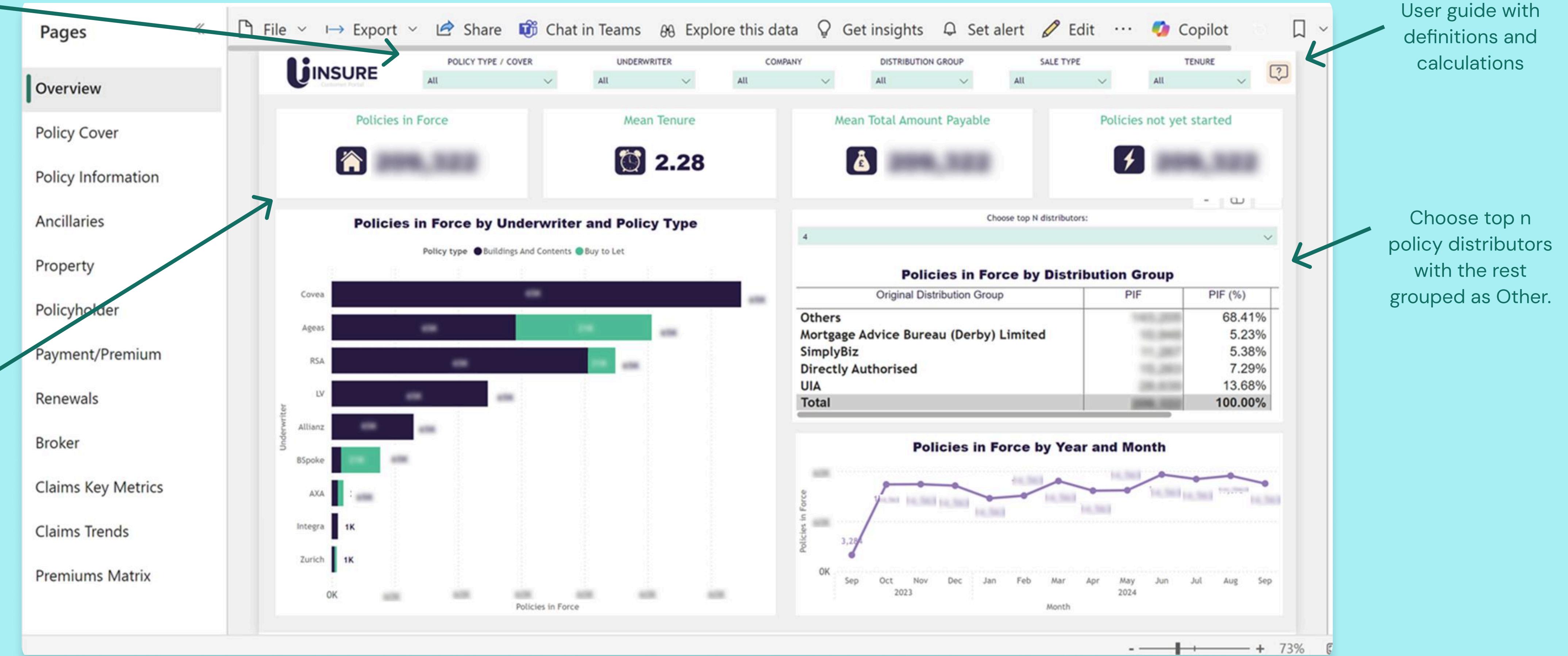


# Report on live insurance policies (first work)

Used by the whole business to monitor live insurance policies

Filters synchronised across the entire report. Connected to all FACT tables for data accuracy.

Informative and clear cards with brand icons



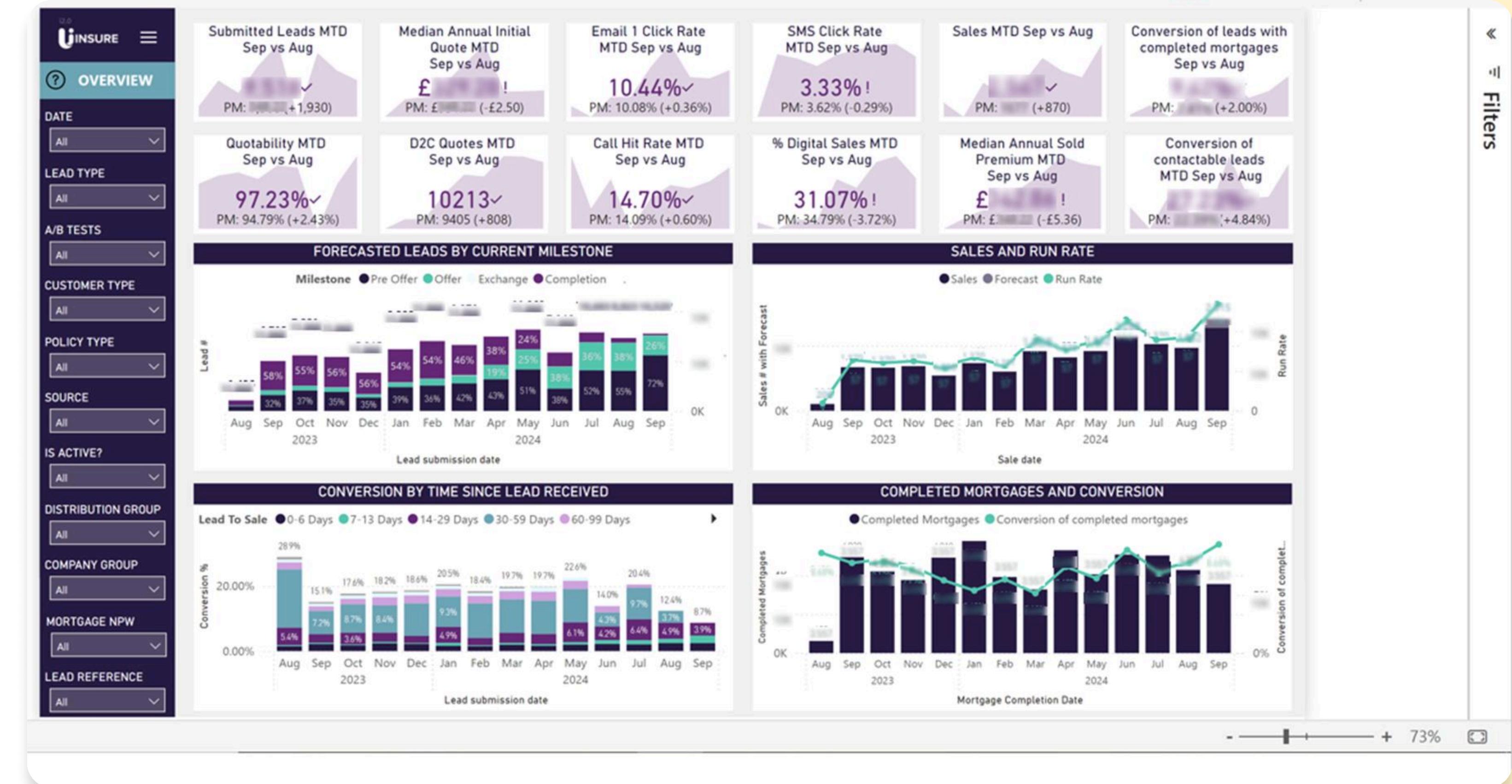
# First report

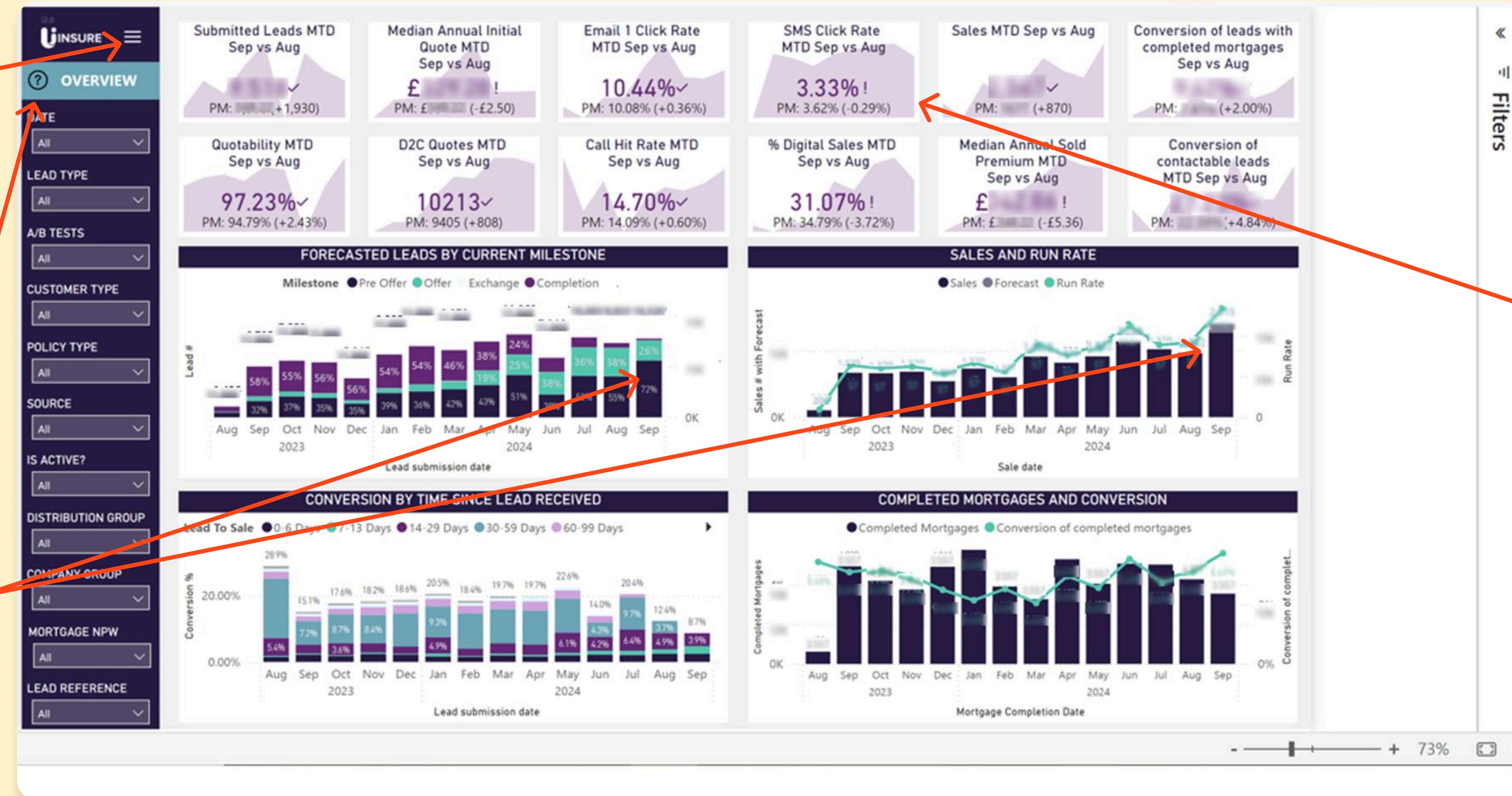
Deep dive

# i2.0 report

## Journey of the insurance lead.

### Used daily by executives and upper management.





# i2.0 report

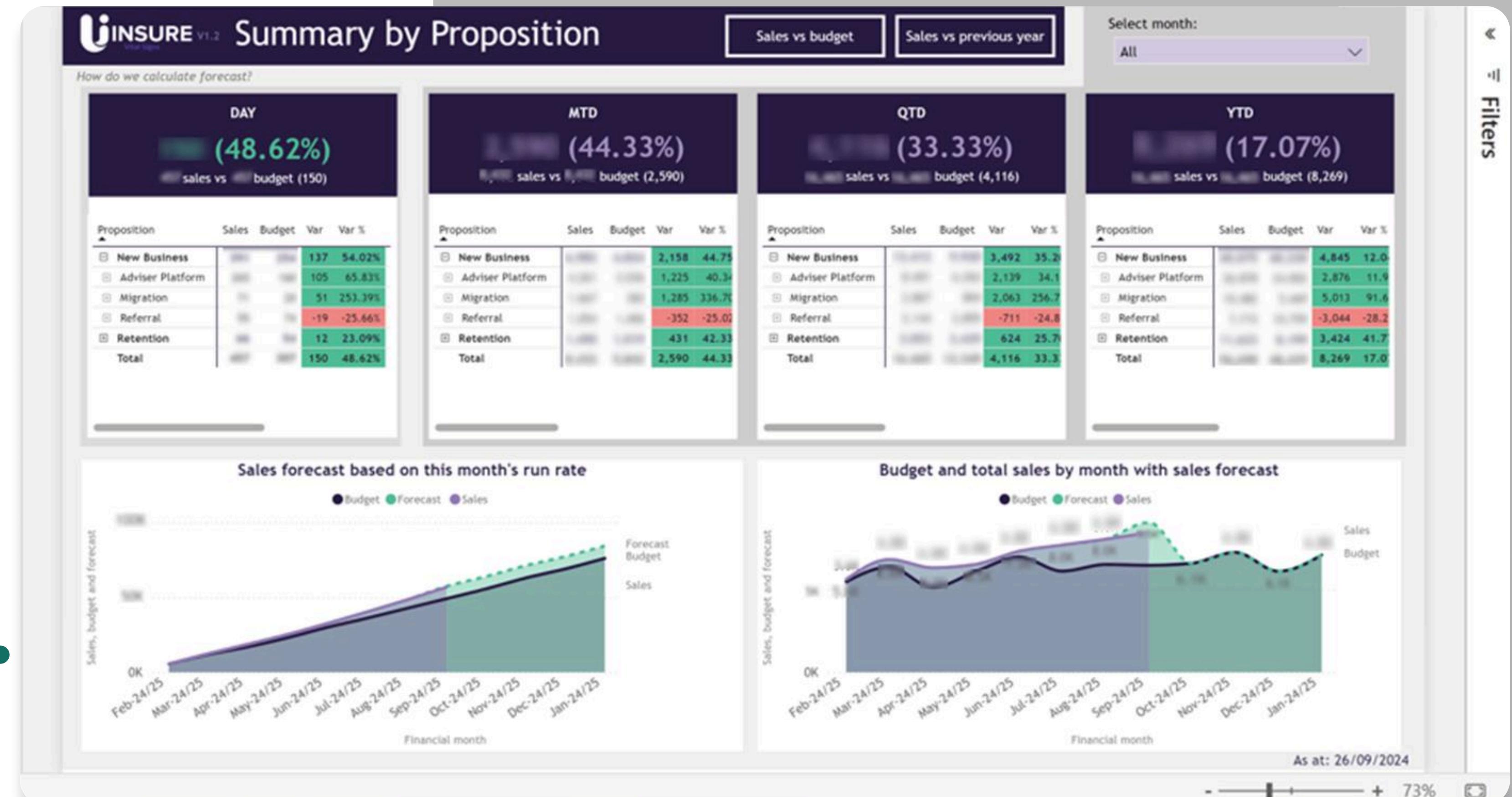
Dashboard deep dive

Month-to-date metric compared to the same period last month

# Budget report

## Sales vs budget.

### Used by executives to monitor targets.



Dashboard page

# Budget report

Dashboard deep dive

The screenshot shows the UINSURE V1.2 Summary by Proposition dashboard. At the top, there are four cards representing different time periods: DAY (48.62%), MTD (44.33%), QTD (33.33%), and YTD (17.07%). Each card displays sales vs budget percentages and counts. Below these cards are two line charts: one for Sales forecast based on this month's run rate and another for Budget and total sales by month with sales forecast. A tooltip on the left explains how the forecast is calculated. On the right, there are filters for selecting a month and a 'Filters' button. Arrows from the surrounding text point to various features: a tooltip, the time period cards, the sales tables, the charts, the month selection, and the 'Filters' button.

Informative tooltip with forecast calculations

DAY/MTD/QTD/YTD cards:

- variance to budget with %
- divided by sales category (proposition)
- colour-coded variance to quickly identify underperformers

How do we calculate forecast?

Sales vs budget      Sales vs previous year

Select month:  
All

Filters

DAY (48.62%)  
sales vs budget (150)

MTD (44.33%)  
sales vs budget (2,590)

QTD (33.33%)  
sales vs budget (4,116)

YTD (17.07%)  
sales vs budget (8,269)

Proposition Sales Budget Var Var %

Proposition	Sales	Budget	Var	Var %
New Business	137	2158	54.02%	
Adviser Platform	105	1225	65.83%	
Migration	51	1285	253.39%	
Referral	-19	-352	-25.66%	
Retention	12	431	23.09%	
Total	150	2,590	48.62%	

Proposition	Sales	Budget	Var	Var %
New Business	2,158	3,492	44.75	35.20%
Adviser Platform	1,225	2,139	40.34	34.10%
Migration	1,285	2,063	336.70	256.70%
Referral	-352	-711	-25.02	-24.80%
Retention	431	624	42.33	25.70%
Total	2,590	4,116	44.33	33.30%

Proposition	Sales	Budget	Var	Var %
New Business	3,492	4,845	35.20	12.00%
Adviser Platform	2,139	2,876	40.34	11.90%
Migration	2,063	5,013	336.70	91.60%
Referral	-711	-3,044	-25.02	-28.20%
Retention	624	3,424	25.70	41.70%
Total	4,116	8,269	33.30	17.00%

Sales forecast based on this month's run rate

Budget and total sales by month with sales forecast

As at: 26/09/2024

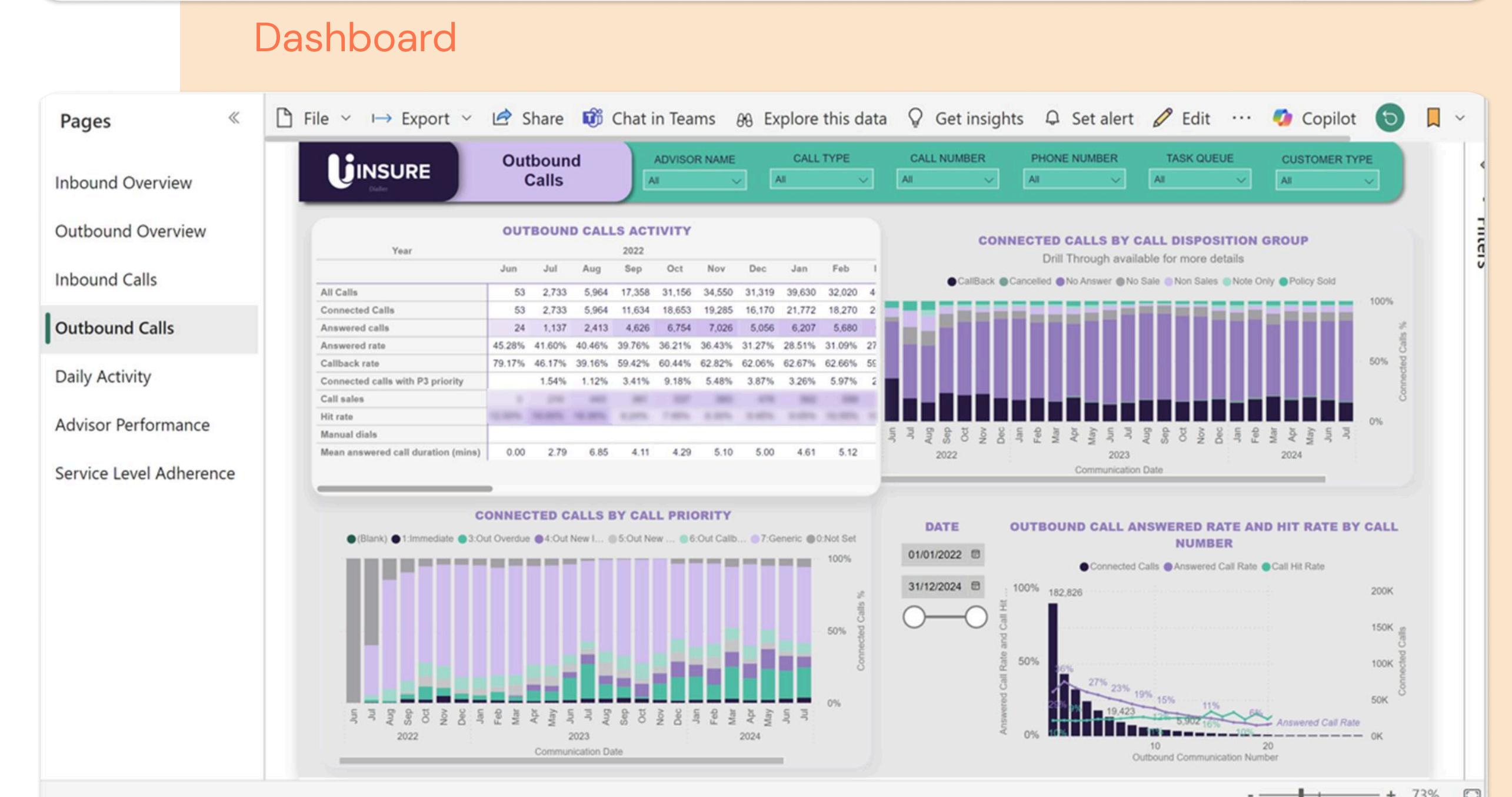
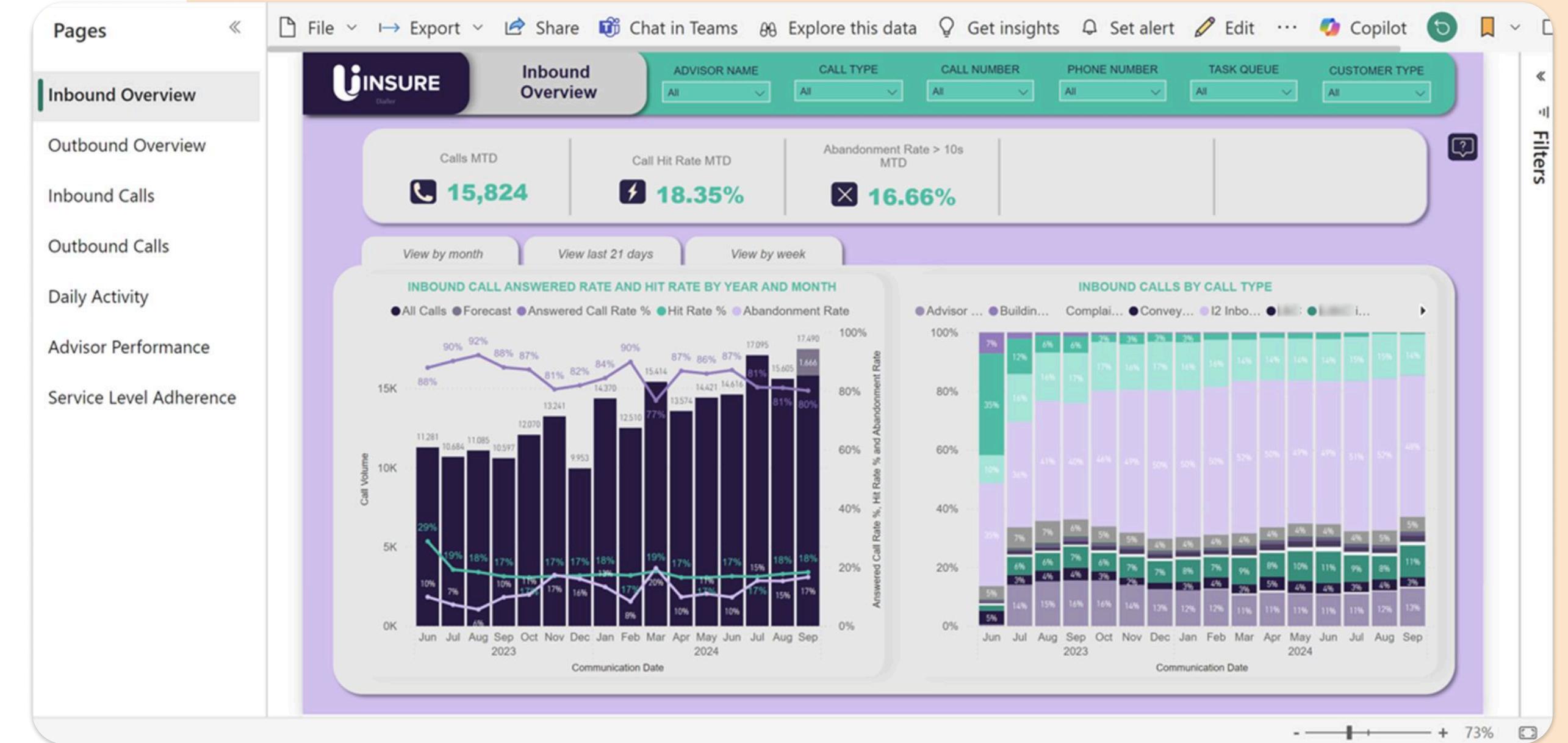
Forecast based on the month-to-date performance

Select month to see sales up to and including the selected month

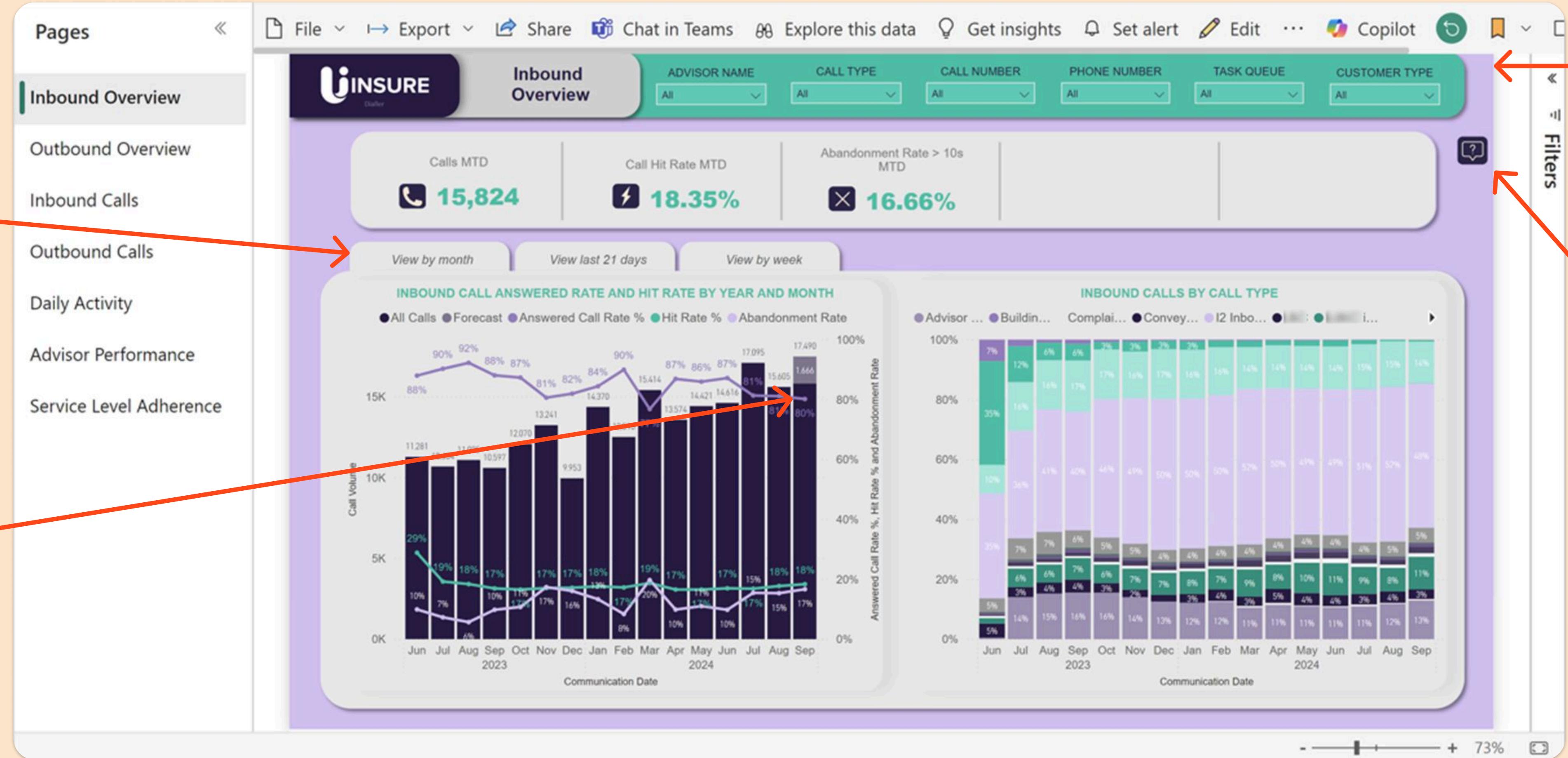
Swap view to compare sales vs budget in current financial year or vs last year's sales

# Call centre report

## Used by sales managers to monitor calls and sales.

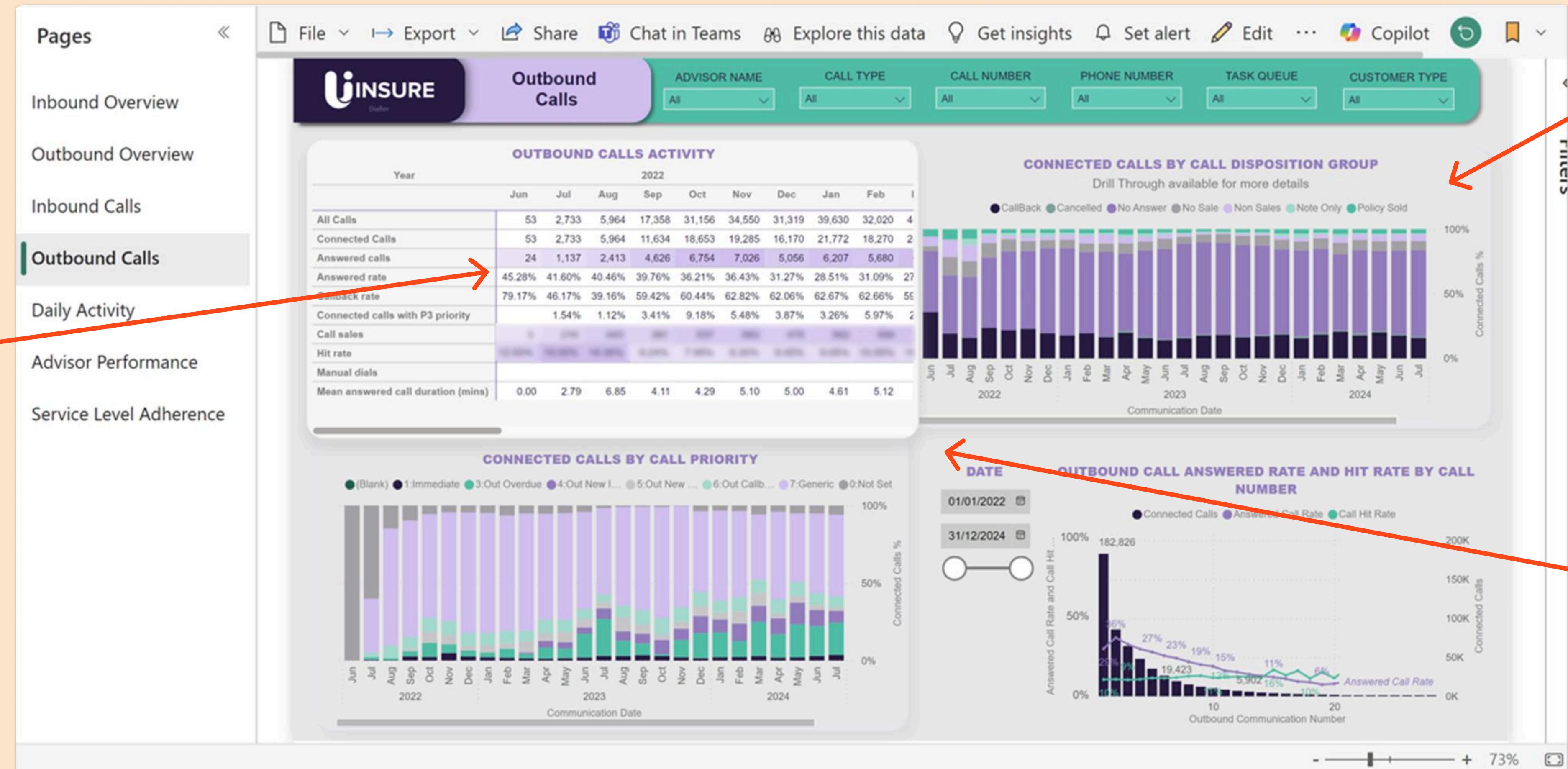


Calls page



# Call centre report

Dashboard deep dive



# Call centre report

Report page deep dive

Visual with a drill-through. Sends users to page with more details. Used to analyse and identify specific calls.

Shadow highlights the primary table and guides the user to the supporting visuals

# Cancellations report

## Used to monitor the rates of cancellation calls and requests



Dashboard page



Status bar for the last 7 days average for cancellations calls and requests

Last 7 days:

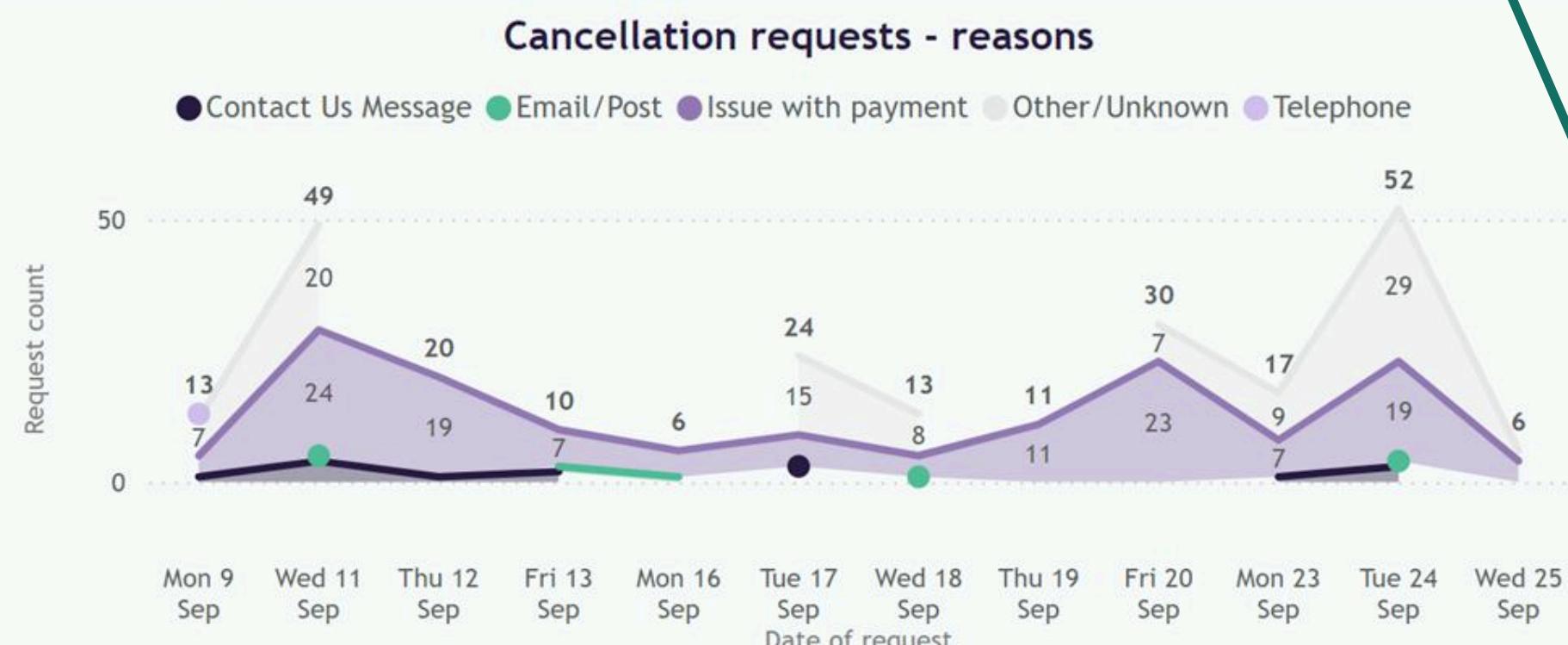
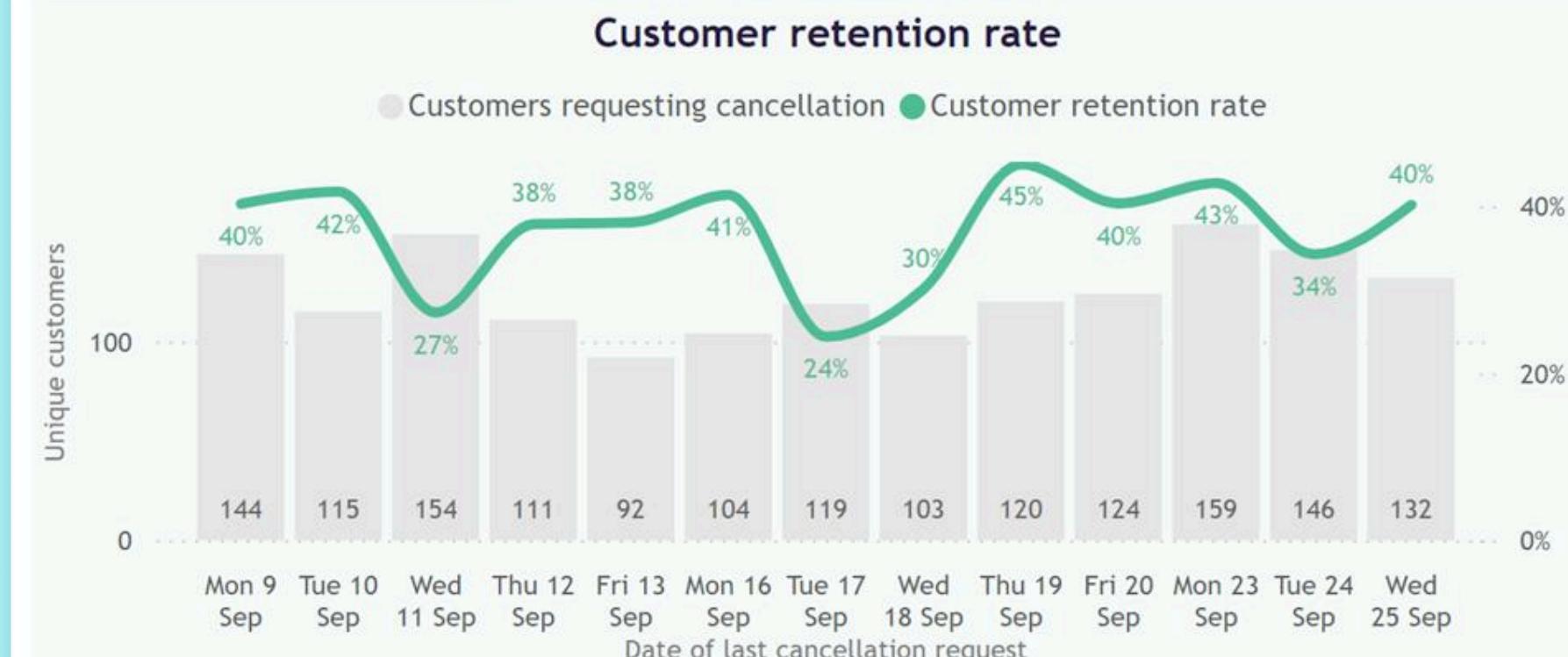


10.65% more inbound cancellation calls

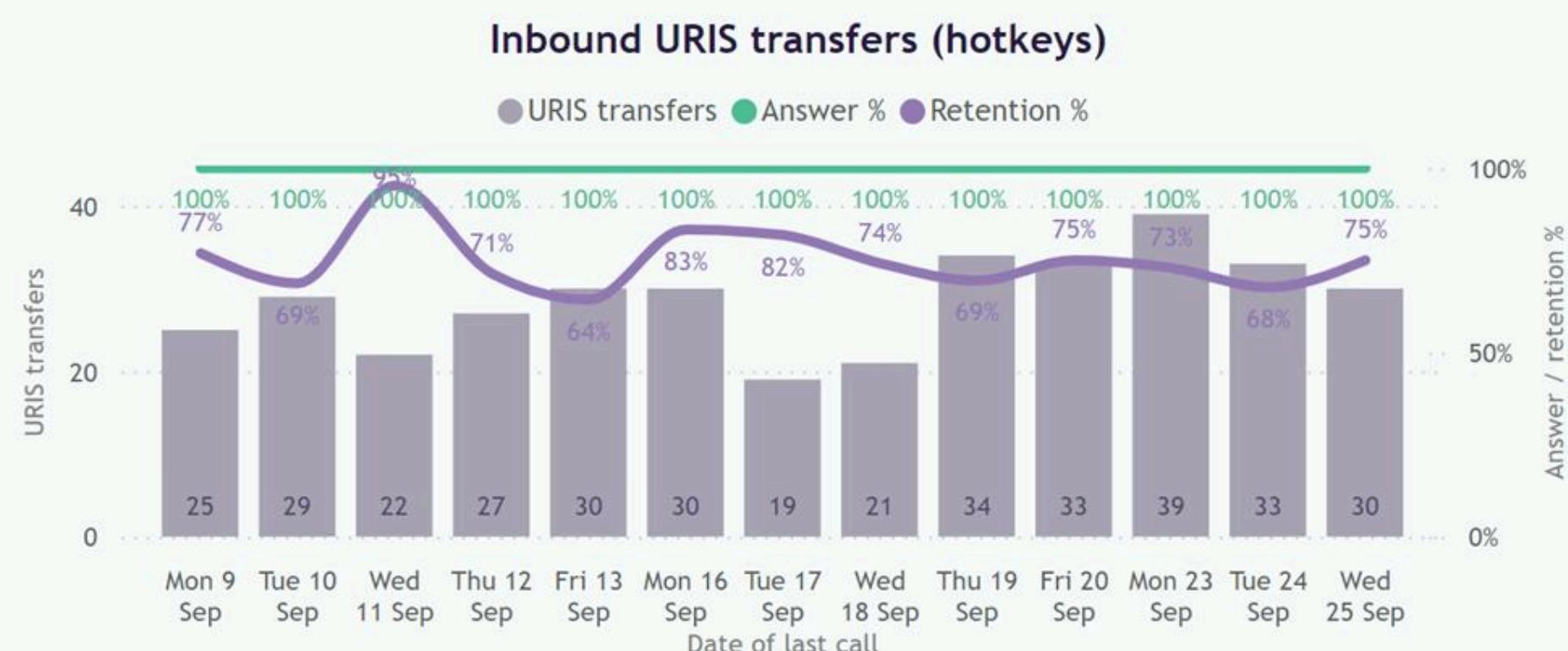
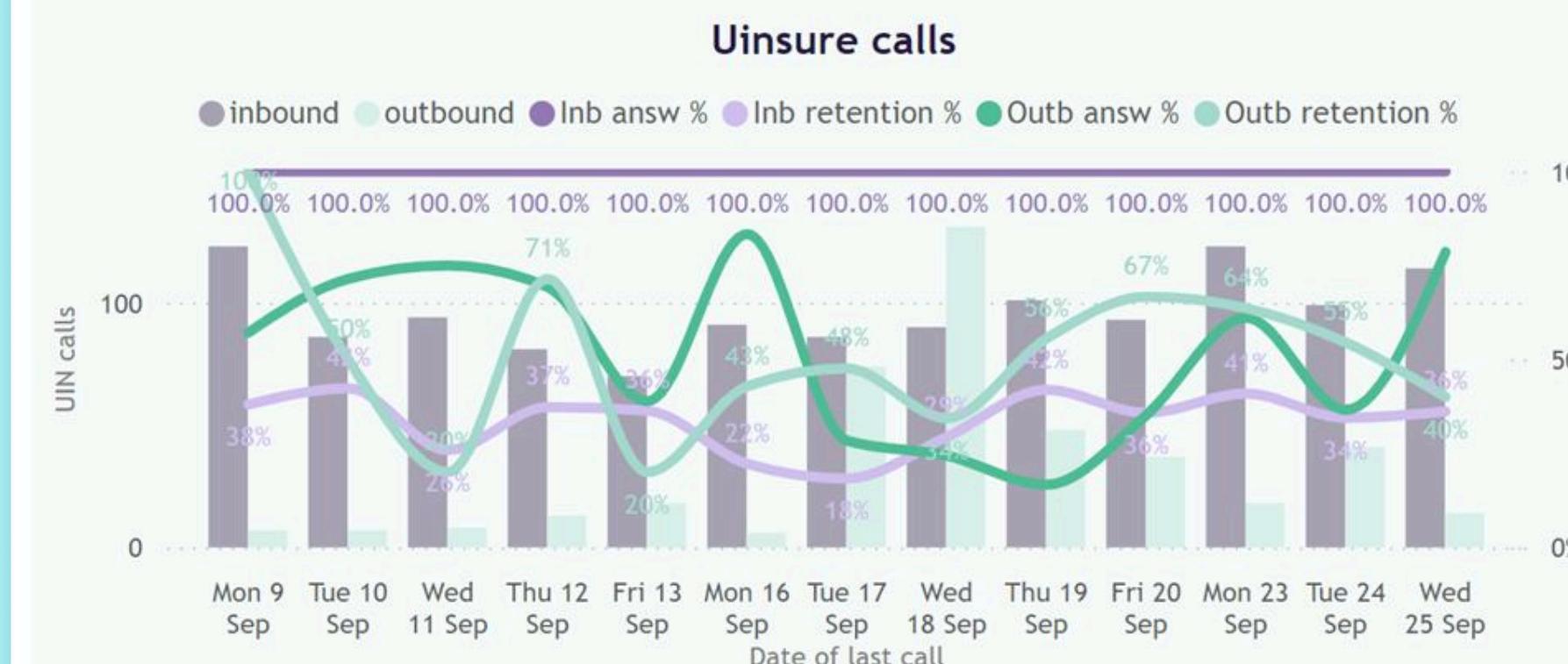


13.55% more cancellation requests

Pop-up menu



User guide with definitions and calculations



Bookmark navigation to swap between daily/weekly/monthly view

Daily

Weekly

Monthly

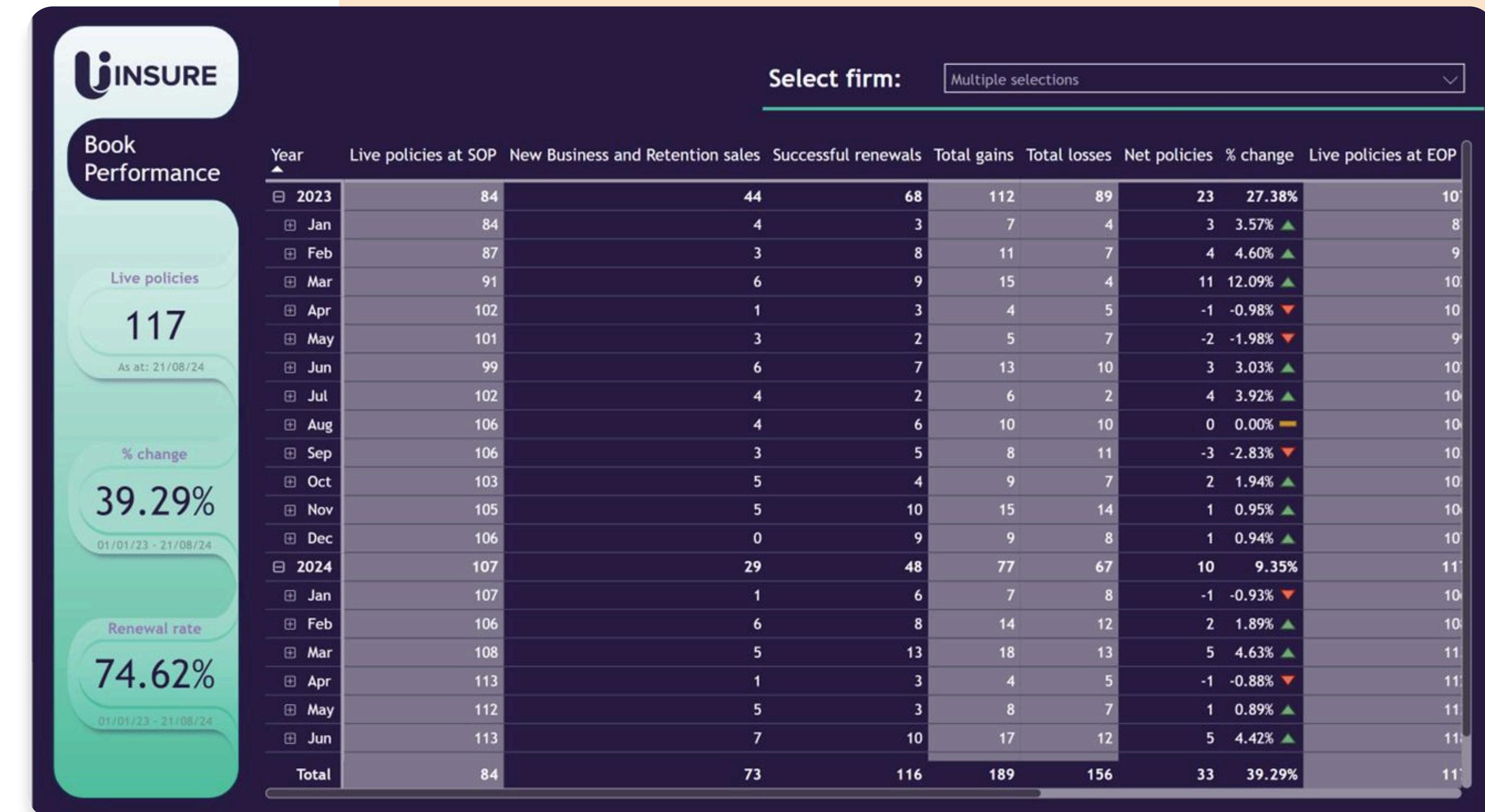
# Cancellations report

Dashboard deep dive

# Book performance report

Overview of policies started and stopped in month.

Shared with external stakeholders.



Dashboard page (data has been randomised for privacy)



Select firm:

Multiple selections

## Book Performance

Important metrics with date period

Live policies  
117

As at: 21/08/24

% change  
39.29%

01/01/23 - 21/08/24

Renewal rate  
74.62%

01/01/23 - 21/08/24

Year	Live policies at SOP	New Business and Retention sales	Successful renewals	Total gains	Total losses	Net policies	% change	Live policies at EOP
2023	84		44	68	112	89	23 27.38%	101
Jan	84		4	3	7	4	3 3.57% ▲	88
Feb	87		3	8	11	7	4 4.60% ▲	99
Mar	91		6	9	15	4	11 12.09% ▲	100
Apr	102		1	3	4	5	-1 -0.98% ▼	101
May	101		3	2	5	7	-2 -1.98% ▼	99
Jun	99		6	7	13	10	3 3.03% ▲	100
Jul	102		4	2	6	2	4 3.92% ▲	100
Aug	106		4	6	10	10	0 0.00% □	100
Sep	106		3	5	8	11	-3 -2.83% ▼	100
Oct	103		5	4	9	7	2 1.94% ▲	100
Nov	105		5	10	15	14	1 0.95% ▲	100
Dec	106		0	9	9	8	1 0.94% ▲	100
2024	107		29	48	77	67	10 9.35%	111
Jan	107		1	6	7	8	-1 -0.93% ▼	108
Feb	106		6	8	14	12	2 1.89% ▲	108
Mar	108		5	13	18	13	5 4.63% ▲	111
Apr	113		1	3	4	5	-1 -0.88% ▼	111
May	112		5	3	8	7	1 0.89% ▲	111
Jun	113		7	10	17	12	5 4.42% ▲	111
Total	84		73	116	189	156	33 39.29%	111

"Events in progress" logic implemented to show events (policies) starting in month and ending in month.

## Book Performance report

Dashboard deep dive



## Book Performance

Live policies

117

As at: 21/08/24

% change

39.29%

01/01/23 - 21/08/24

Renewal rate

74.62%

01/01/23 - 21/08/24

Select firm:

Multiple selections



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Apr	102					5	-1 -0.98% ▼	100
May	101					7	-2 -1.98% ▼	99
Jun	99					10	3 3.03% ▲	102
Jul	102					2	4 3.92% ▲	104
Aug	106					10	0 0.00% □	104
Sep	106					11	-3 -2.83% ▼	101
Oct	103					7	2 1.94% ▲	103
Nov	105					14	1 0.95% ▲	117
Dec	106					8	1 0.94% ▲	117
2024	107					67	10 9.35%	117
Jan	107					8	-1 -0.93% ▼	108
Feb	106					12	2 1.89% ▲	108
Mar	108					13	5 4.63% ▲	113
Apr	113					5	-1 -0.88% ▼	112
May	112					7	1 0.89% ▲	113
Jun	113					12	5 4.42% ▲	113
Total	84					156	33 39.29%	113

New Business sales breakdown (excl. retentions)

- 1 Referral
- 2 Advised
- 0 Migration
- 0 Commercial
- 0 Uncategorized

Losses breakdown

- 0 NTU
- 1 MTC
- 0 Failed renewals
- 1 Declined renewals
- 5 Hit end of term (renewed)
- 0 Uncategorized

On hover tooltip available with details of each loss in the time period.

# Book Performance report

Dashboard deep dive continued

My heroes and inspirations

Selected reports overview

→ **Power BI training**

Report developer guide

# Power BI

5 minutes to WOW!



This session:

1. What even is this '*Power BI*'?
2. I'm still not sure... and I've got Excel, right?... Right?!
3. I have this Power BI report link... what do I do?

2

# Power BI Report authoring



This session

1. What do I need to create a PBI report?
2. Power BI workspaces walkthrough
3. Power BI Desktop walkthrough
4. Getting the data
5. Introduction to data modelling in PBI
6. Introduction to measures
7. Introduction to data visualisation in PBI
8. Publishing and sharing reports

4

**I gave training on using and creating Power BI reports**

I made my own training materials and delivered multiple presentations

My heroes and inspirations

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Power BI training

→ **Report developer guide**



## Power BI Developer Guide

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# I take initiative and develop my team

I wrote a **report developer guide** which is now used for new hires. It standardised how reports were made, provided design resources and taught source control using GitHub

# Thanks!

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