



# DASHBOARDS, BI TOOLS & AI IN ANALYTICS

Week 4

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# INTRODUCTION TO BUSINESS INTELLIGENCE (BI)

## What is Business Intelligence?

BI = process of transforming data into actionable insights

### Purpose

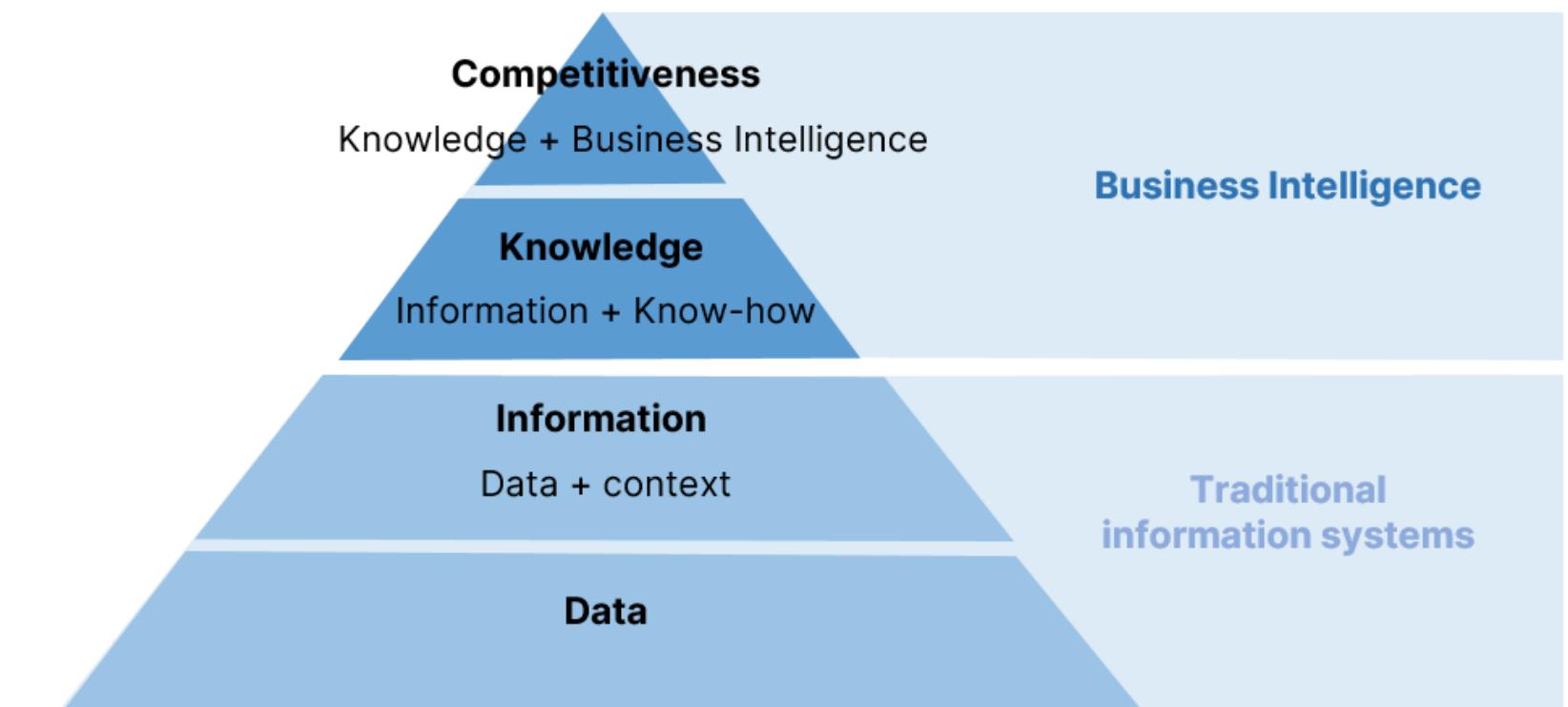
Enable data-driven decision making across all organisational levels

### Core Function

Bridge the gap between IT systems and business strategy

### Key Outcome

Turn information into competitive advantage



# FROM DATA TO DECISIONS

Raw Data	Key Performance Indicators	Strategic Decisions
<ul style="list-style-type: none"><li>Customer transaction records</li></ul>	<ul style="list-style-type: none"><li>Monthly Revenue: £2.3M</li></ul>	<ul style="list-style-type: none"><li>Increase marketing spend in high-performing regions</li></ul>
<ul style="list-style-type: none"><li>Website clickstream data</li></ul>	<ul style="list-style-type: none"><li>Customer Acquisition Cost: £45</li></ul>	<ul style="list-style-type: none"><li>Optimise product pricing strategy</li></ul>
<ul style="list-style-type: none"><li>Sales performance metrics</li></ul>	<ul style="list-style-type: none"><li>Conversion Rate: 3.2%</li></ul>	<ul style="list-style-type: none"><li>Expand successful product lines</li></ul>
<ul style="list-style-type: none"><li>Marketing campaign results</li></ul>	<ul style="list-style-type: none"><li>Average Order Value: £85</li></ul>	<ul style="list-style-type: none"><li>Improve customer retention programmes</li></ul>

# POPULAR BI TOOLS OVERVIEW

## Choosing the Right Tool:

- Budget and licensing requirements
- Technical expertise of your team
- Integration with existing systems
- Scalability and performance needs

**Enterprise Leaders**

**Tableau**  
Industry standard for data visualization

**Microsoft Power BI**  
Seamless Office 365 integration

**Modern Cloud Solutions**

**Qlik Sense**  
Associative analytics engine

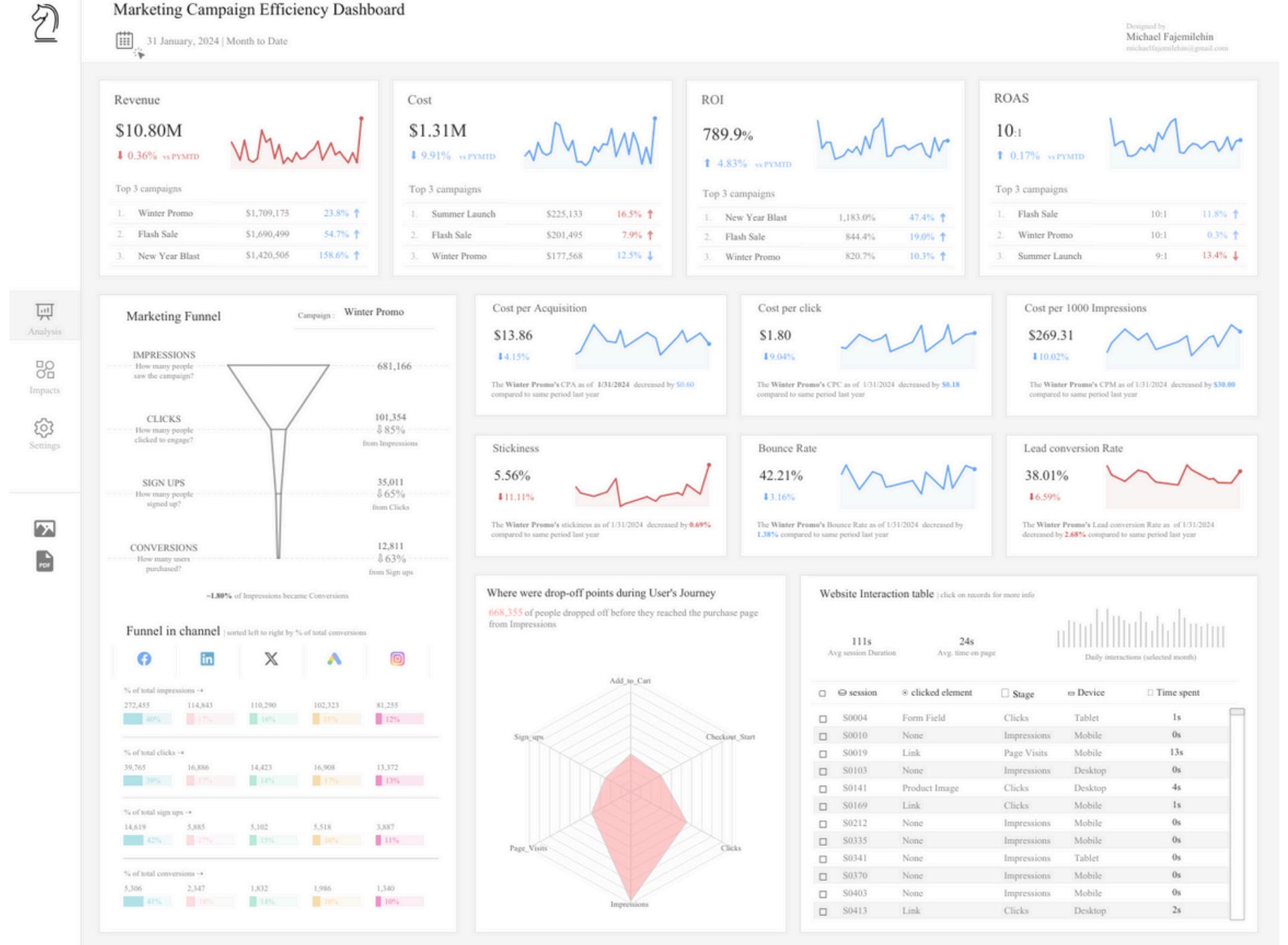
**Looker**  
SQL-based modelling approach

**Metabase**  
Open-source, user-friendly interface

**Google Data Studio**  
Free, web-based reporting

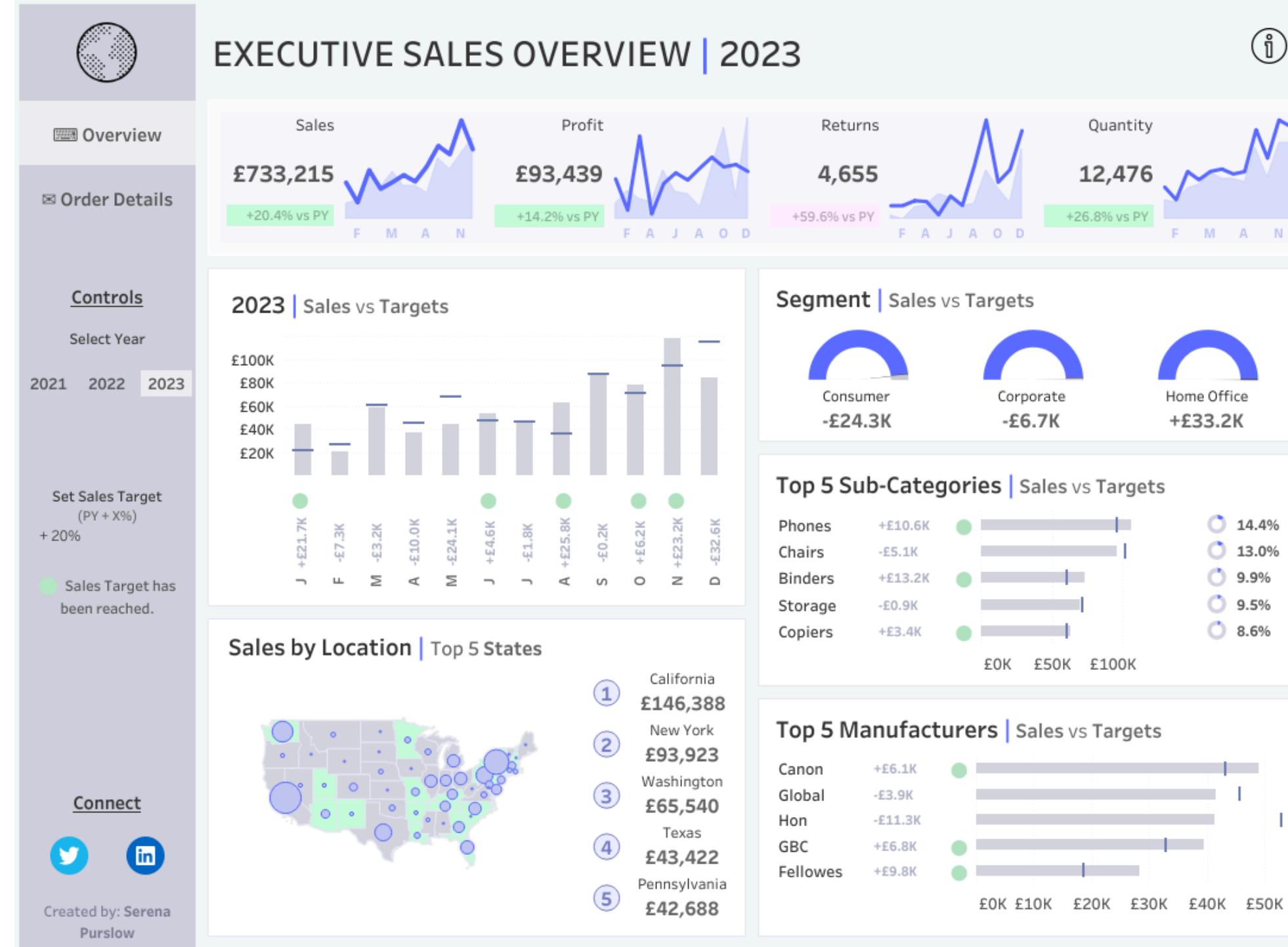
# TABLEAU VS POWER BI

Features	Power BI	Tableau
Data Virtualization	✓	✓
Data Connectivity	✓	✓
Data Querying	✓	✓
Data Management - ETL	✓	✓
Data Security	✓	✓
Natural Language Processing	✓	✓
Ease of Learning	✓	✓
Free Version	Power BI Desktop	Tableau Public
 Good	 Best	



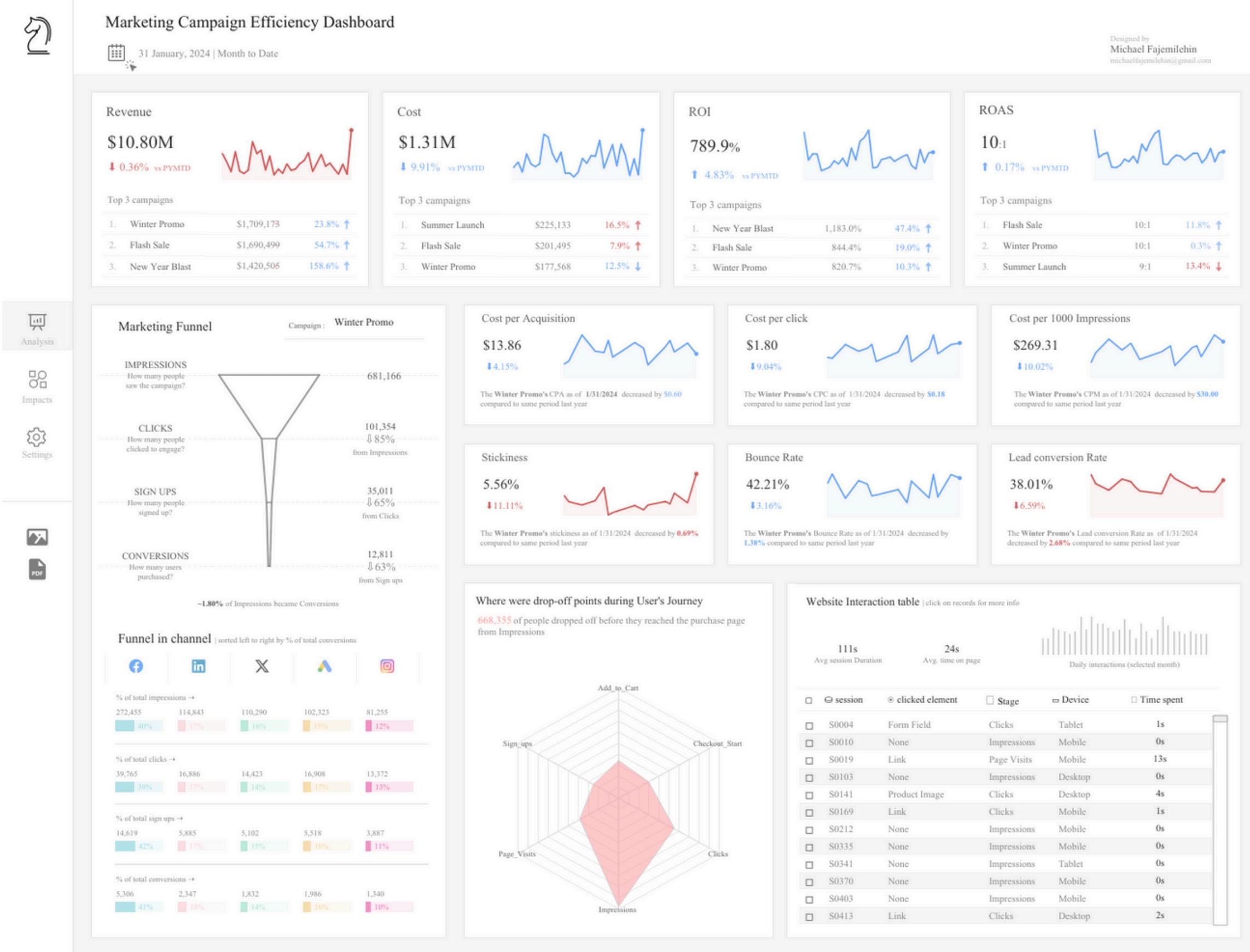
# REAL-WORLD DASHBOARD EXAMPLES

# SALES PERFORMANCE DASHBOARD



- Tracks overall revenue performance across time and regions
- Monitors sales targets vs actuals to measure success
- Identifies top-performing products, segments, or regions
- Helps spot sales trends, seasonality, and anomalies
- Supports sales forecasting and strategic planning
- Enables quick performance comparison by country, product, or team

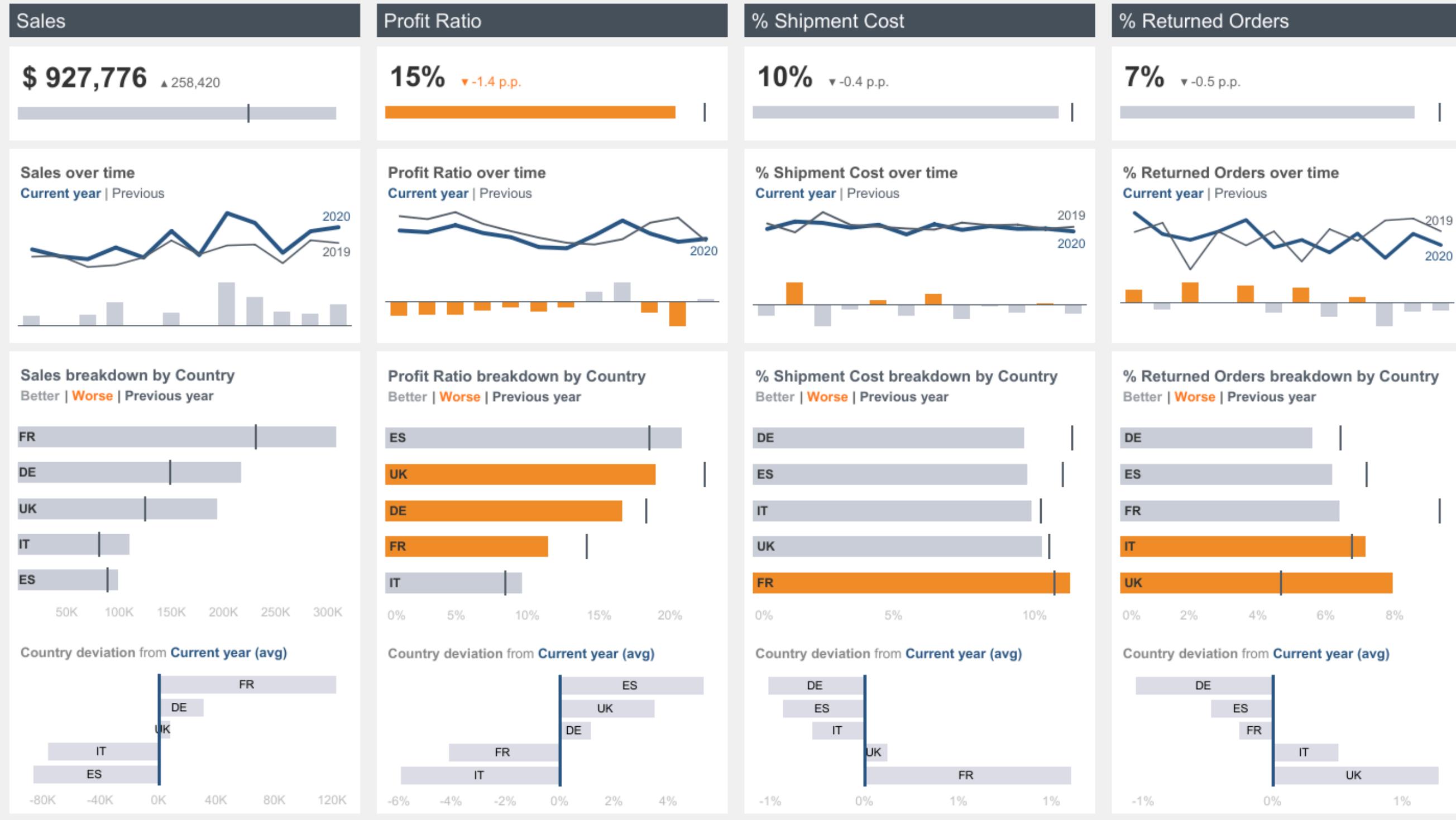
# MARKETING CAMPAIGN ROI



- Measures campaign efficiency and ROI in real time
- Tracks cost metrics like CPA, CPC, CPM for budgeting
- Analyses user funnel performance (impressions → conversions)
- Identifies top-performing channels and campaigns
- Highlights drop-off points in the user journey
- Provides insights for campaign optimisation and reallocation

# EXECUTIVE SUMMARY

## Executive Dashboard | EU



- Provides a high-level overview of business performance
- Combines key metrics: sales, profit, costs, returns
- Enables leadership to monitor performance across countries
- Identifies operational inefficiencies or cost drivers
- Supports strategic decision-making with comparative insights
- Highlights areas needing attention without deep drilling

# TABLEAU PUBLIC: YOUR GATEWAY TO DATA VISUALISATION

- Full Tableau Desktop functionality for free
- Access to comprehensive visualisation library
- Drag-and-drop interface for easy chart creation
- Community of millions of public visualisations

## Perfect For:

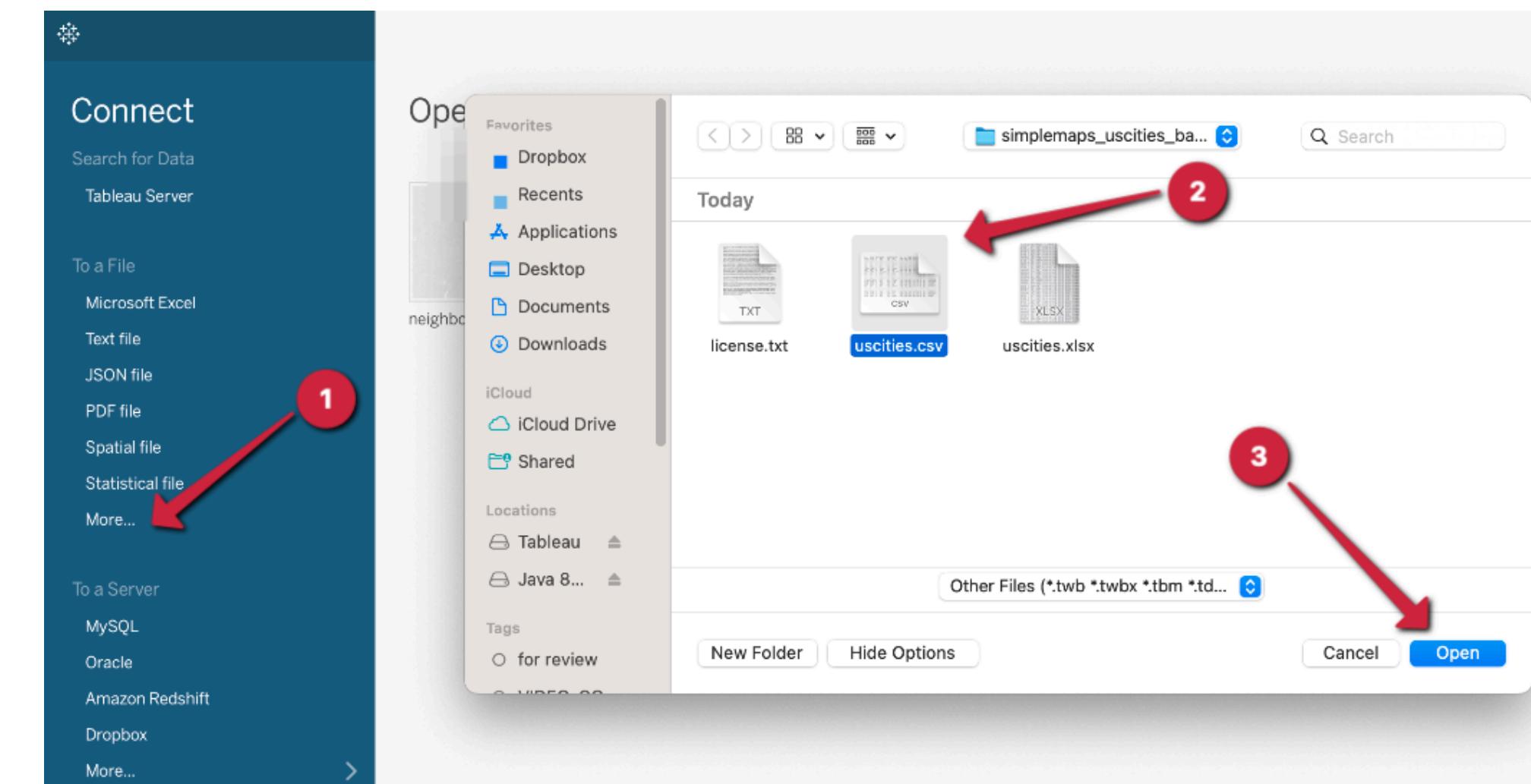
- Learning data visualisation skills
- Building a public portfolio
- Sharing insights with broader audiences
- Academic and educational projects

Tableau Desktop	Tableau Public	Tableau Reader
All listed <b>data sources</b> can be connected to using this App.	Only <b>Excel and text files</b> can be connected to using this App.	Does not need to connect to a Data Source.

# GETTING STARTED WITH TABLEAU PUBLIC

## Step 1: Upload Your Data

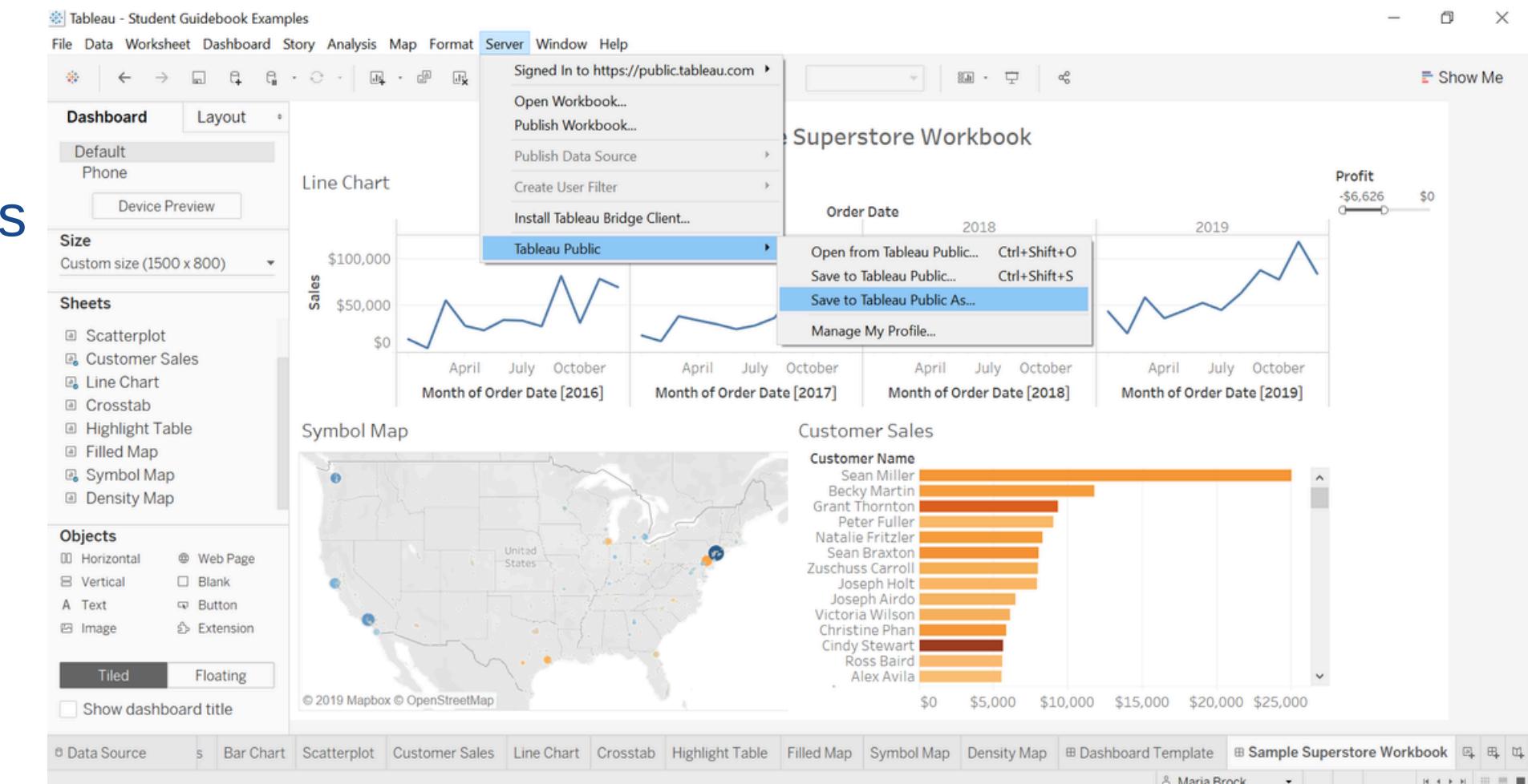
- Supported formats: CSV, Excel, Google Sheets
- Maximum file size: 1GB
- Automatic data type detection
- Preview your data before proceeding



# GETTING STARTED WITH TABLEAU PUBLIC

## Step 2: Create Your First Chart

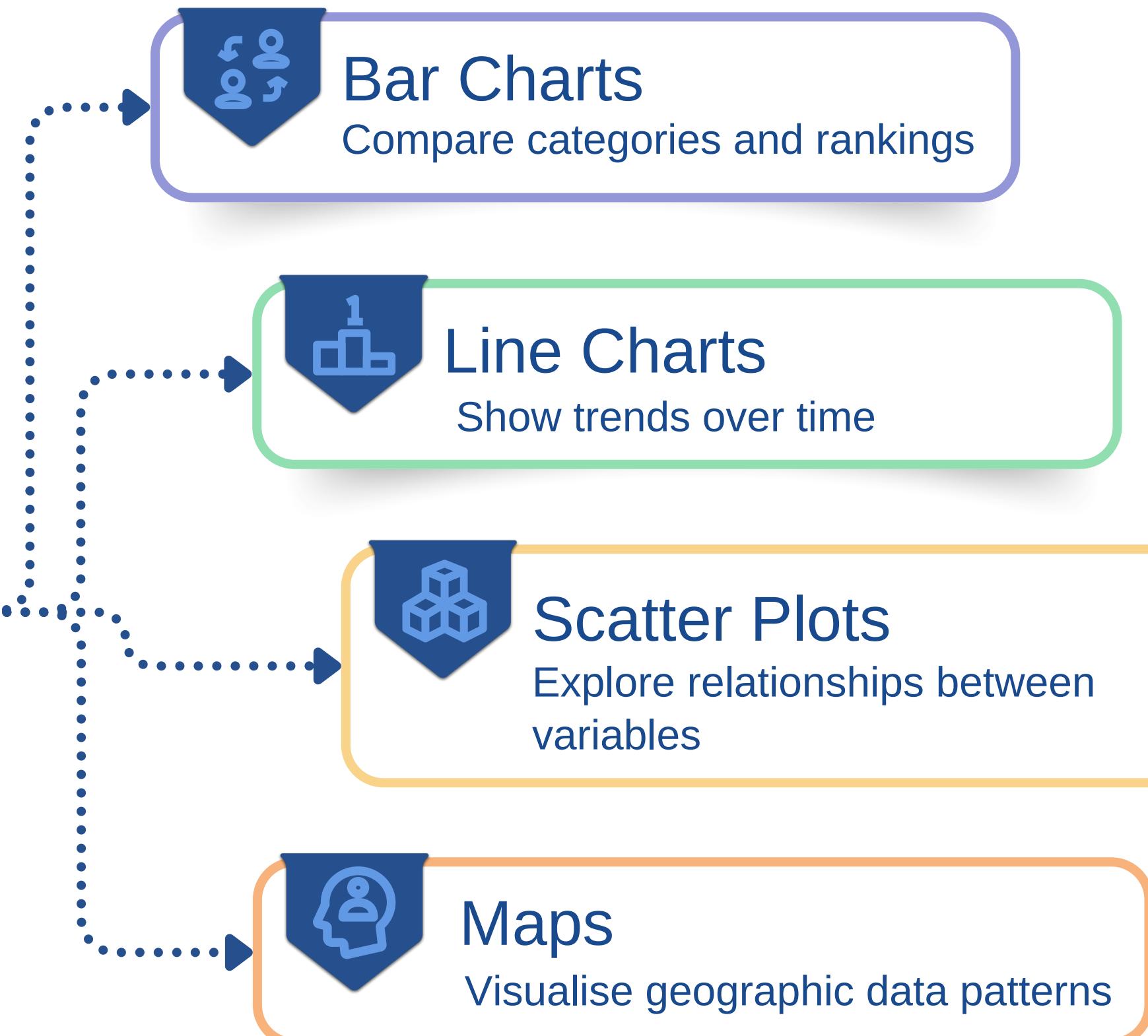
- Drag dimensions to columns/rows
- Drop measures onto the view
- Tableau automatically suggests chart types
- Customise colours, labels, and formatting



## Step 3: Publish and Share

- Save your work to Tableau Public
- Generate shareable links
- Embed in websites and presentations
- Join the Tableau Public community

# ESSENTIAL CHART TYPES



# ADDING INTERACTIVITY

## Filters

Allow users to focus on specific data subsets

## Parameters

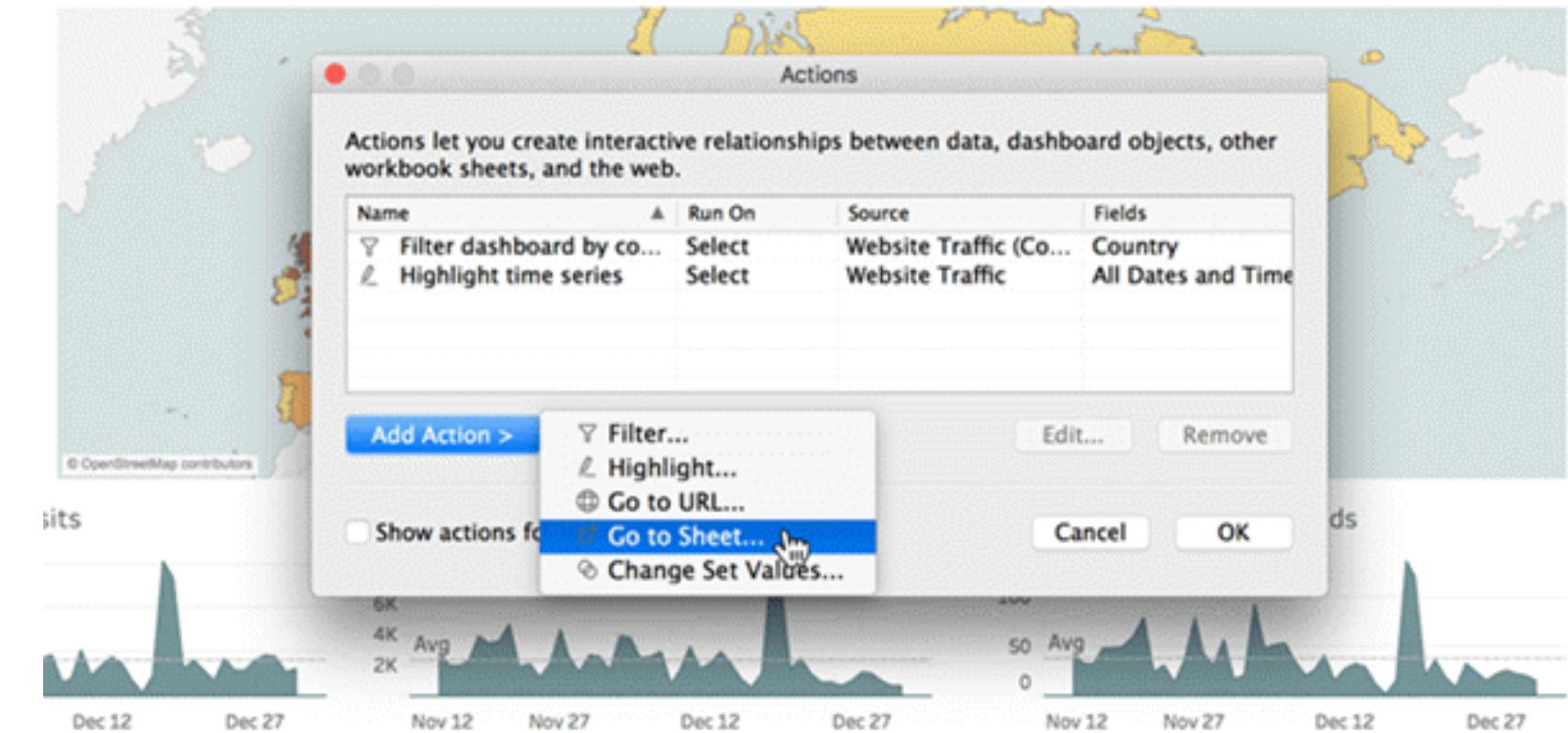
Enable dynamic calculations and scenarios

## Actions

Link multiple visualisations together

## Tooltips

Provide additional context on hover

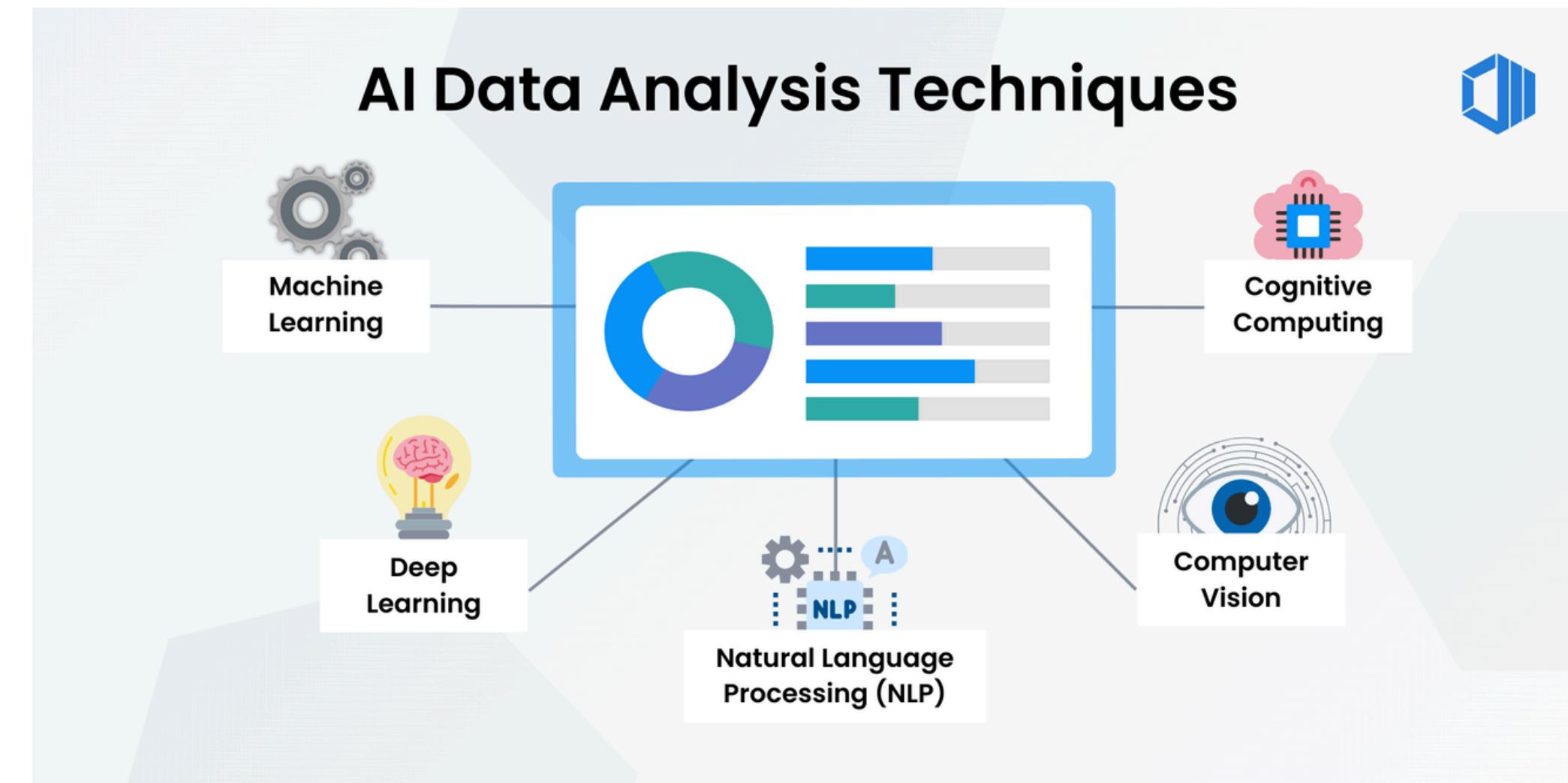


## Best Practices:

- Choose charts that match your data and question
- Use colour purposefully to highlight insights
- Keep interactions intuitive and responsive
- Test your dashboard with actual users

# AI IN DATA ANALYSIS

The incorporation of artificial intelligence technologies into data analysis workflows to automate, enhance, and accelerate the process of extracting meaningful insights from data.





## AI analytics

- Automated data preprocessing
- Dynamic pattern discovery
- Real-time insights
- Automated hypothesis generation
- Infinite scalability potential

VS



## Traditional analytics

- Manual data cleaning and preparation
- Rule-based analysis
- Static reporting
- Human-driven hypothesis testing
- Limited scalability

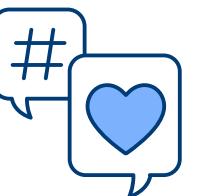
# What AI Brings to Analytics



**Pattern Recognition** – Detect complex trends beyond human analysis



**Automation** – Speeds up model creation and testing

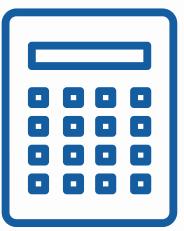


**Natural Language Processing (NLP)** – Analyses text data (e.g., reviews, feedback)



**Recommendation Systems** – Personalised outputs and insights

# CORE AI TECHNOLOGIES IN DATA ANALYSIS



## Machine Learning

- Supervised learning for prediction
- Unsupervised learning for pattern discovery
- Reinforcement learning for optimization



## Natural Language Processing

- Text mining and sentiment analysis
- Automated report generation
- Query processing in natural language



## Computer Vision

- Image and video data analysis
- Document processing and OCR
- Visual pattern recognition



# KEY BENEFITS OF AI INTEGRATION



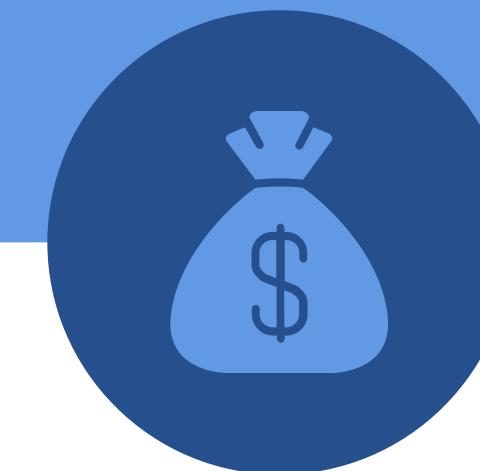
## Efficiency Gains

- 80% reduction in data preparation time
- Automated anomaly detection
- Real-time processing capabilities



## Enhanced Accuracy

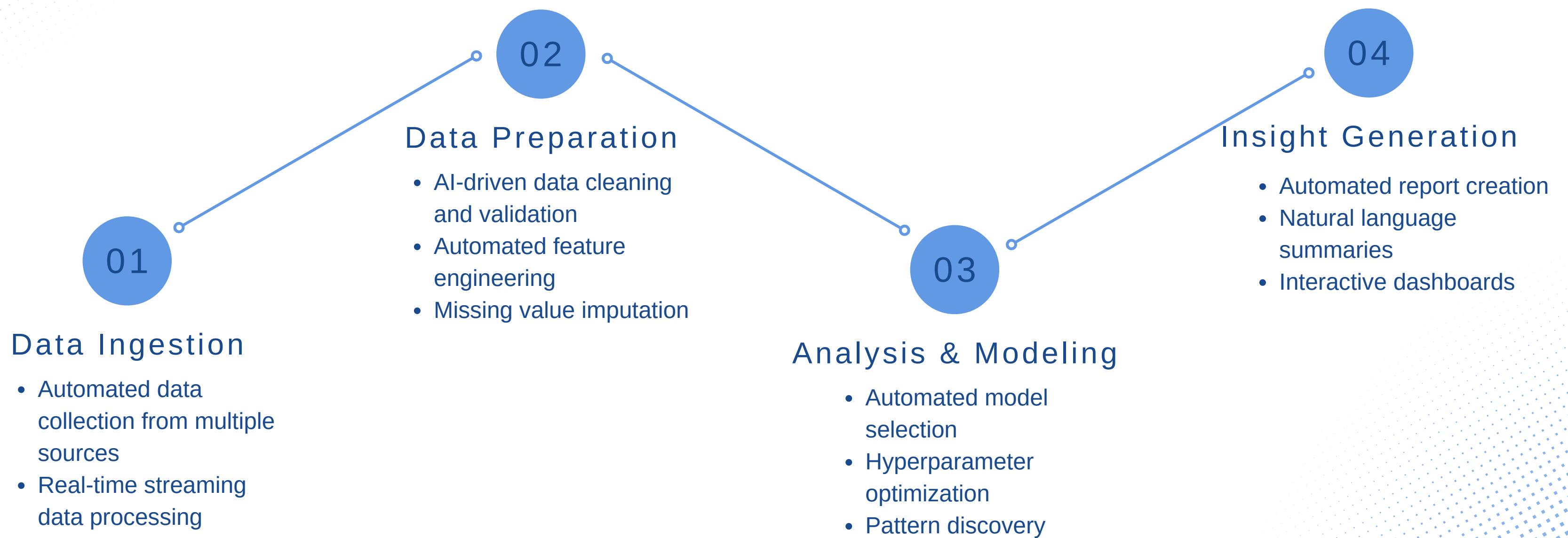
- Reduced human error
- Advanced pattern recognition
- Predictive capabilities



## Scalability

- Handle massive datasets
- Process multiple data sources simultaneously
- Adapt to growing data volumes

# AI-POWERED DATA ANALYSIS WORKFLOW



# WHERE AI FITS IN THE ANALYTICS LIFECYCLE

## Data Cleaning & Preparation

AI-powered tools like *Tableau Prep*, *DataRobot*

## Insight Generation

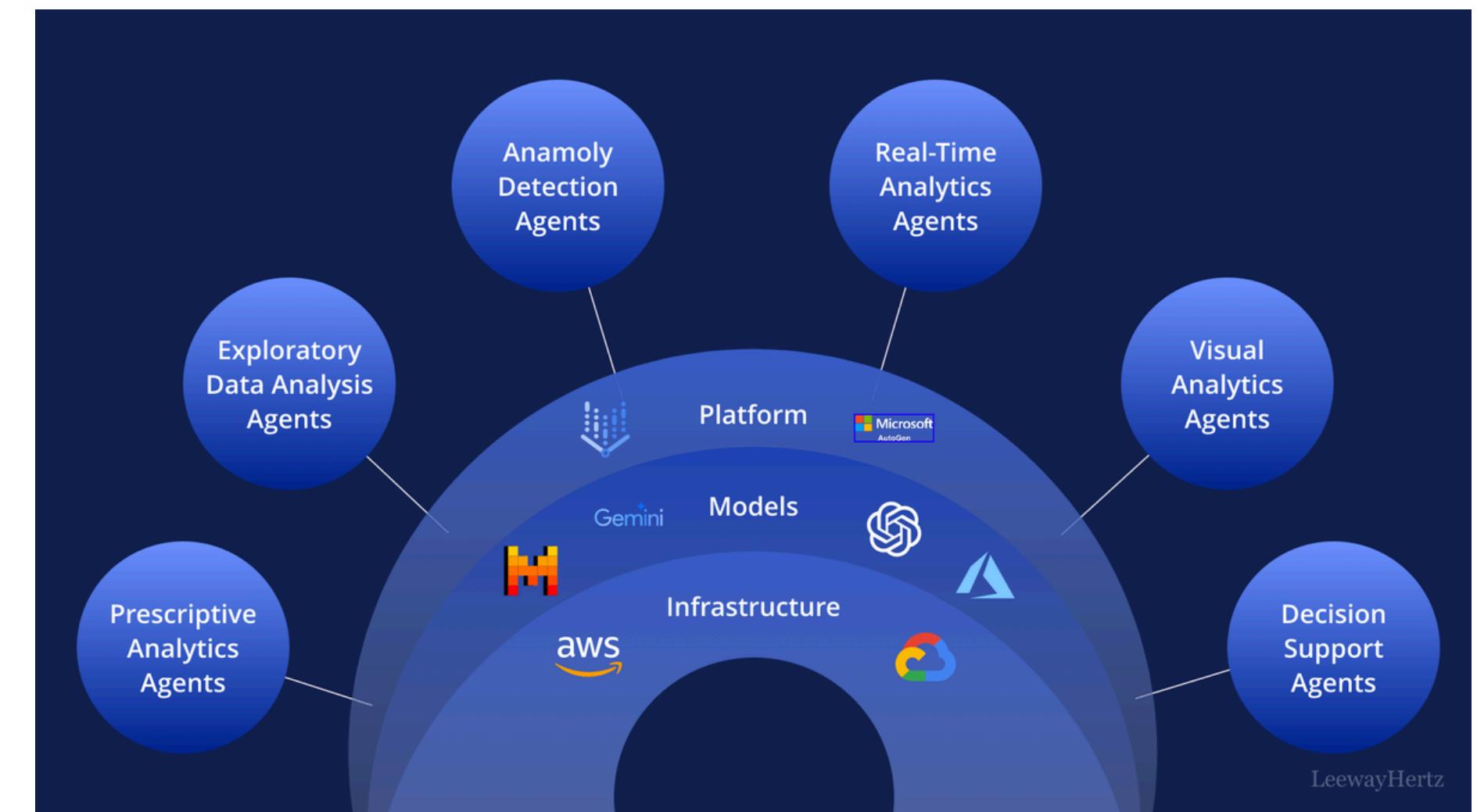
Smart suggestions, anomaly detection

## Modelling

AutoML platforms build predictive models

## Communication

Generative AI summarises findings or explains visuals



# POPULAR AI TOOLS AND PLATFORMS



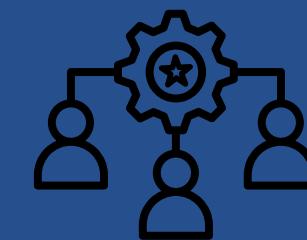
## Commercial Platforms

- Microsoft Power BI with AI features
- Tableau with Einstein Analytics
- IBM Watson Analytics
- Google Cloud AI Platform



## Open Source Solutions

- Python libraries (scikit-learn, TensorFlow, PyTorch)
- R packages for statistical analysis
- Apache Spark for big data processing
- Jupyter notebooks for interactive analysis



## AutoML Platforms

- Google AutoML
- Amazon SageMaker
- H2O.ai
- DataRobot

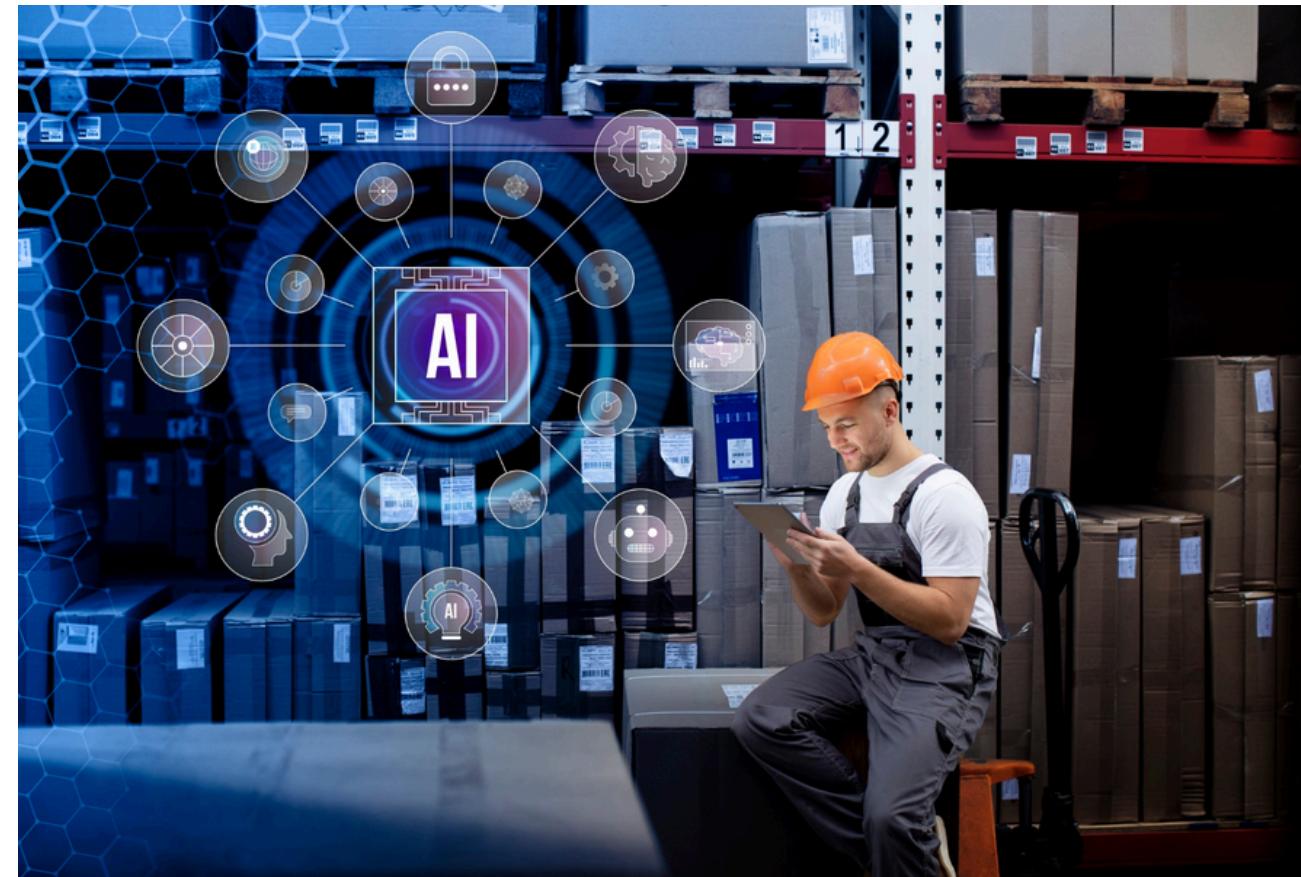
# AI SUCCESS STORY 1 - FRAUD DETECTION

- **Challenge:** Manual review of 100,000+ daily transactions
  - **Solution:** Pattern recognition using transaction history and behaviour
  - **Results:** 90% reduction in false positives, £2M annual savings
  - **Impact:** Improved customer experience, reduced operational costs



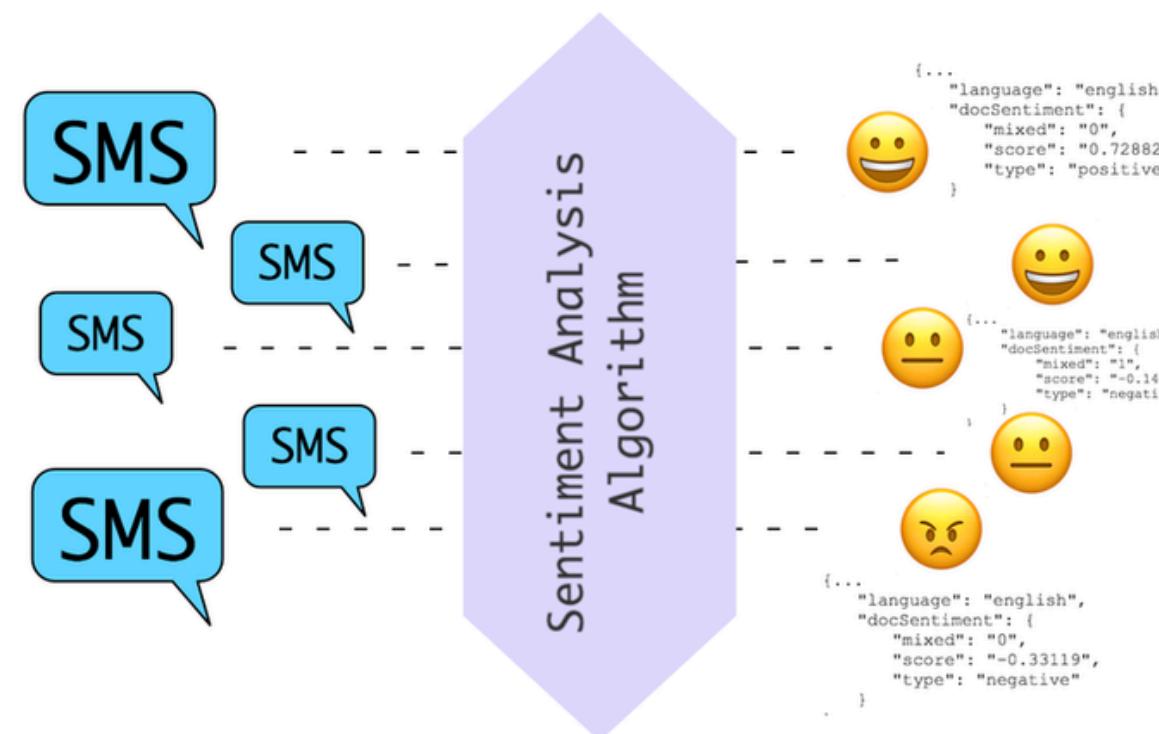
# AI SUCCESS STORY 2 - DEMAND FORECASTING

- **Challenge:** Inventory shortages and overstocking across 500+ stores
- **Solution:** Time series ML with weather, promotions, and seasonal data
- **Results:** 15% reduction in inventory costs, 25% improvement in stock availability
- **Impact:** Optimised supply chain, improved customer satisfaction



# AI SUCCESS STORY 3 - CUSTOMER SENTIMENT ANALYSIS

- **Challenge:** Manual monitoring of social media and review sites
- **Solution:** NLP analysis of customer feedback across all channels
- **Results:** Real-time brand sentiment tracking, 40% faster response times
- **Impact:** Proactive customer service, improved brand reputation



# AI RISKS & ETHICAL CONSIDERATIONS

## Technical Risks

### Overfitting

Models may not generalise to new data

### Data Quality

Poor inputs lead to unreliable outputs

### Black Box Problem

Difficulty explaining AI decisions

### Bias Amplification

AI can perpetuate historical prejudices

## Business Risks

### Over-reliance

Reduced human judgement and oversight

### Privacy Concerns

Sensitive data exposure and misuse

### Regulatory Compliance

Evolving legal requirements

### Competitive Disadvantage

Falling behind in AI adoption

# BEST PRACTICES FOR IMPLEMENTATION

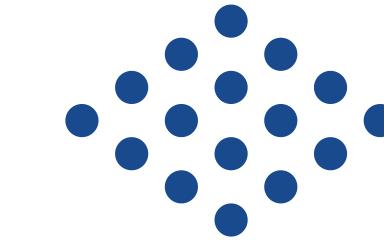


## Data Foundation

- Ensure high-quality, clean data
- Establish robust data governance
- Implement proper data security measures

## Model Development

- Start with simple models and iterate
- Focus on interpretability and explainability
- Validate models thoroughly
- Monitor performance continuously



## Organizational Readiness

- Invest in team training and development
- Establish clear governance frameworks
- Create cross-functional collaboration
- Define success metrics and KPIs

# DASHBOARD CREATION WITH AI TOOLS IN ACTION

# E-COMMERCE DATASET OVERVIEW

Order_ID	Order_Date	Customer_ID	Product_Name	Product_Category	Revenue (£)	Quantity	Profit_Margin (%)	Customer_Channel	Region	City
100001	06-04-2024	C1456	Reiciendis Plus	Electronics	56.53	2	25%	Referral	South East	Southampton
100002	29-07-2023	C2728	Dolores Pro	Electronics	27.8	2	20%	Social Media	East Midlands	Derby
100003	22-03-2024	C3232	Inventore Lite	Toys & Games	95.35	3	20%	Email	North East	Sunderland
100004	30-10-2024	C2138	Dolorum Lite	Accessories	191.87	3	25%	SEO	North East	Newcastle
100005	30-07-2024	C2470	Ipsum X	Kitchenware	60.26	1	60%	Social Media	South East	Reading
100006	03-12-2024	C1322	Blanditiis X	Home & Living	178.24	3	35%	Referral	South East	Brighton
100007	19-01-2024	C1933	Vitae Pro	Home & Living	172.51	1	50%	Paid Ads	Scotland	Aberdeen
100008	13-06-2025	C2494	Dolore Plus	Accessories	77.5	3	25%	Social Media	South West	Bath
100009	24-10-2023	C2002	Inventore Max	Accessories	82.1	5	35%	Referral	North West	Manchester

## Dataset Structure:

- Orders:** 10,000 transactions over 2 years
- Products:** 500 items across 8 categories
- Customers:** 2,500 unique buyers
- Geography:** UK regions and cities

## Business Questions We'll Answer:

- Which products drive the most revenue?
- How do sales vary by season and region?
- What's our customer acquisition cost by channel?
- Where should we focus our marketing efforts?

# DATA MODELLING IN TABLEAU

## CALCULATED FIELDS:

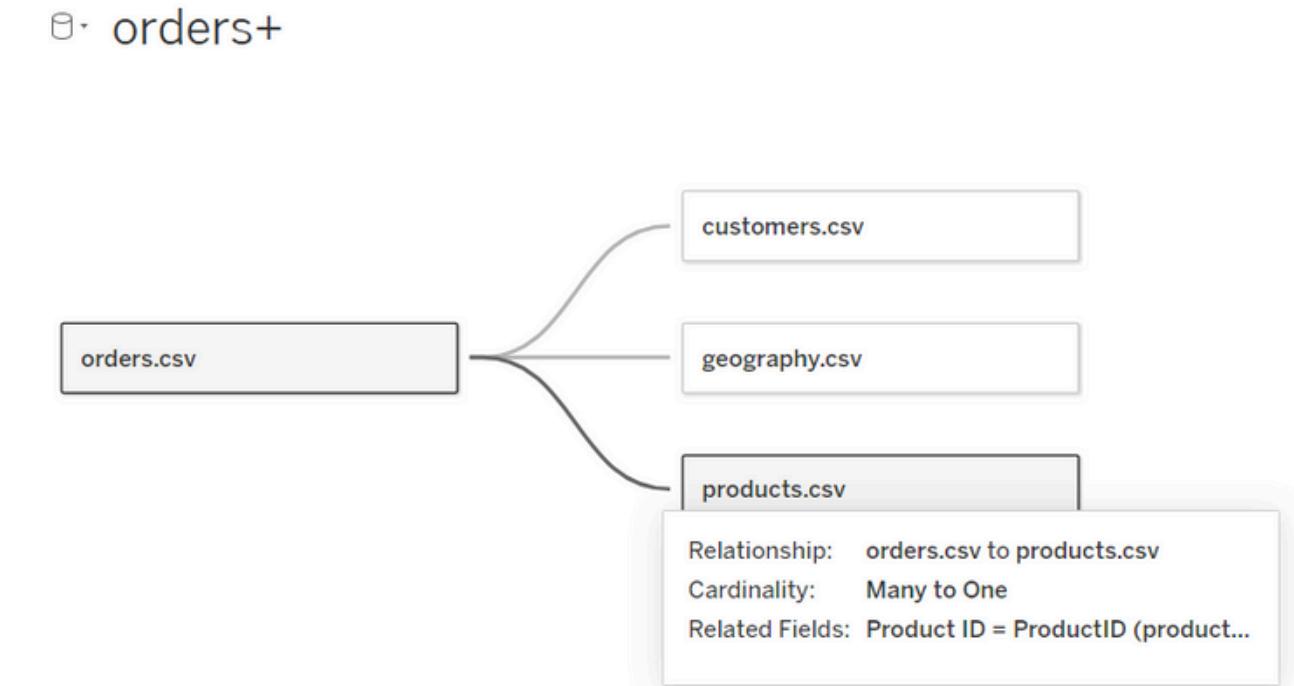
- Profit Margin = (Revenue - Cost) / Revenue
- Customer Lifetime Value = SUM(Revenue) / COUNT(DISTINCT Customer ID)
- Month-over-Month Growth = (Current Month - Previous Month) / Previous Month

## ESSENTIAL RELATIONSHIPS:

- Orders ↔ Products (Product ID)
- Orders ↔ Customers (Customer ID)
- Orders ↔ Geography (Region Code)

## DATA TYPE CONSIDERATIONS:

- Dates: Ensure proper date formatting
- Numbers: Distinguish between dimensions and measures
- Text: Clean and standardise categorical data
- Geographic: Validate location data for mapping



# KEY PERFORMANCE INDICATORS (KPI'S)

## Revenue Metrics:

- **Total Revenue:** £2,347,890 ( $\uparrow$ 12% vs last month)
- **Average Order Value:** £84.50 ( $\downarrow$ 3% vs last month)
- **Monthly Recurring Revenue:** £195,658 ( $\uparrow$ 8% vs last month)

## Customer Metrics:

- **Customer Acquisition Cost:** £15.20 ( $\uparrow$ 8% vs last month)
- **Customer Lifetime Value:** £425.80 ( $\uparrow$ 15% vs last month)
- **Monthly Active Customers:** 1,847 ( $\uparrow$ 22% vs last month)

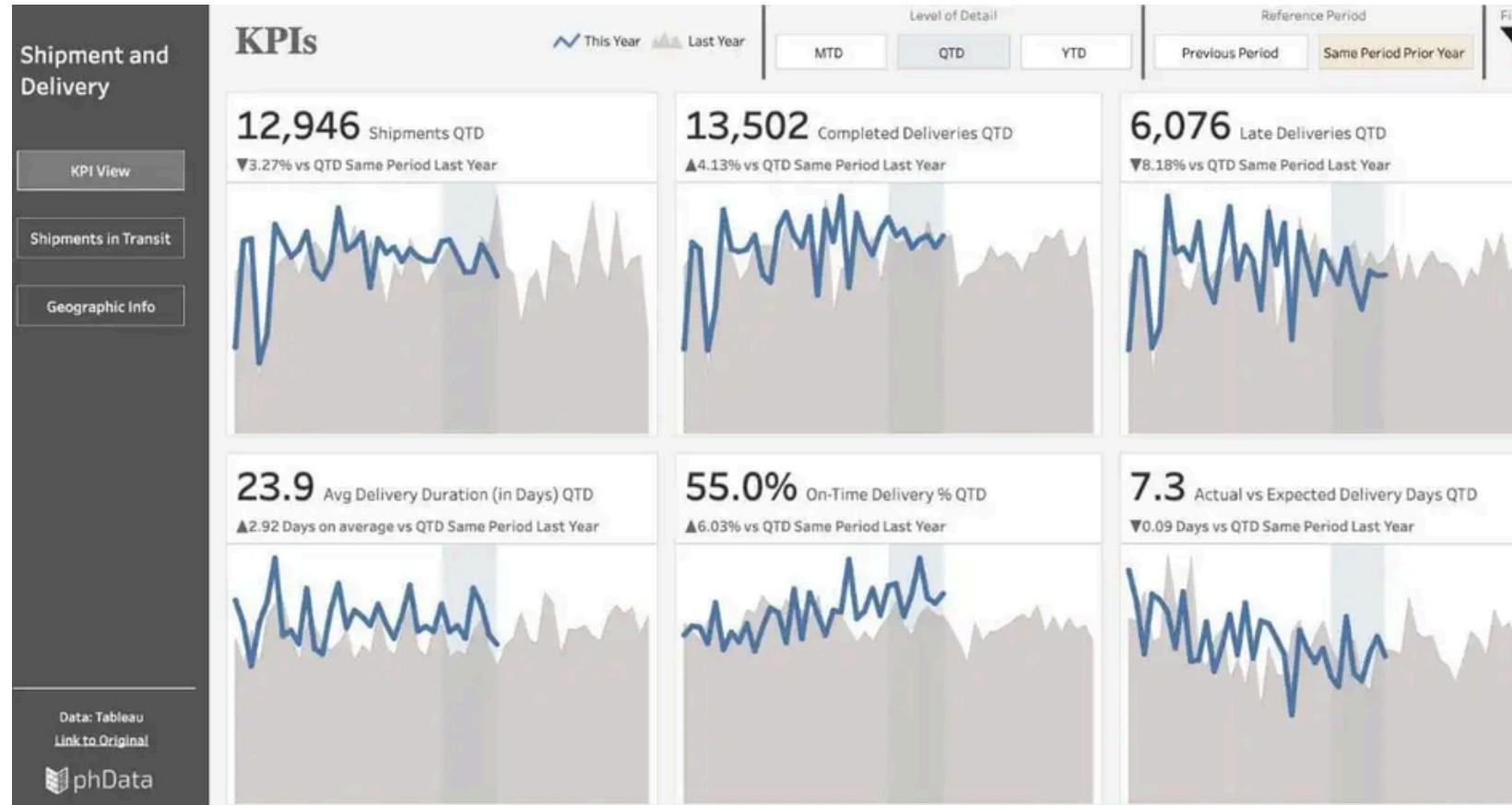
## Operational Metrics:

- **Conversion Rate:** 3.2% ( $\uparrow$ 0.4% vs last month)
- **Cart Abandonment Rate:** 67.8% ( $\downarrow$ 2.1% vs last month)
- **Return Rate:** 8.5% ( $\uparrow$ 1.2% vs last month)

## Why These Matter:

- Revenue metrics show business health
- Customer metrics guide acquisition and retention
- Operational metrics identify improvement opportunities

# TIME SERIES ANALYSIS



## Monthly Revenue Pattern:

- Peak Season: November-December (£400k+ monthly)
- Steady Growth: January-March (£180k-220k monthly)
- Summer Dip: July-August (£160k-180k monthly)
- Back-to-School: September boost (£250k)

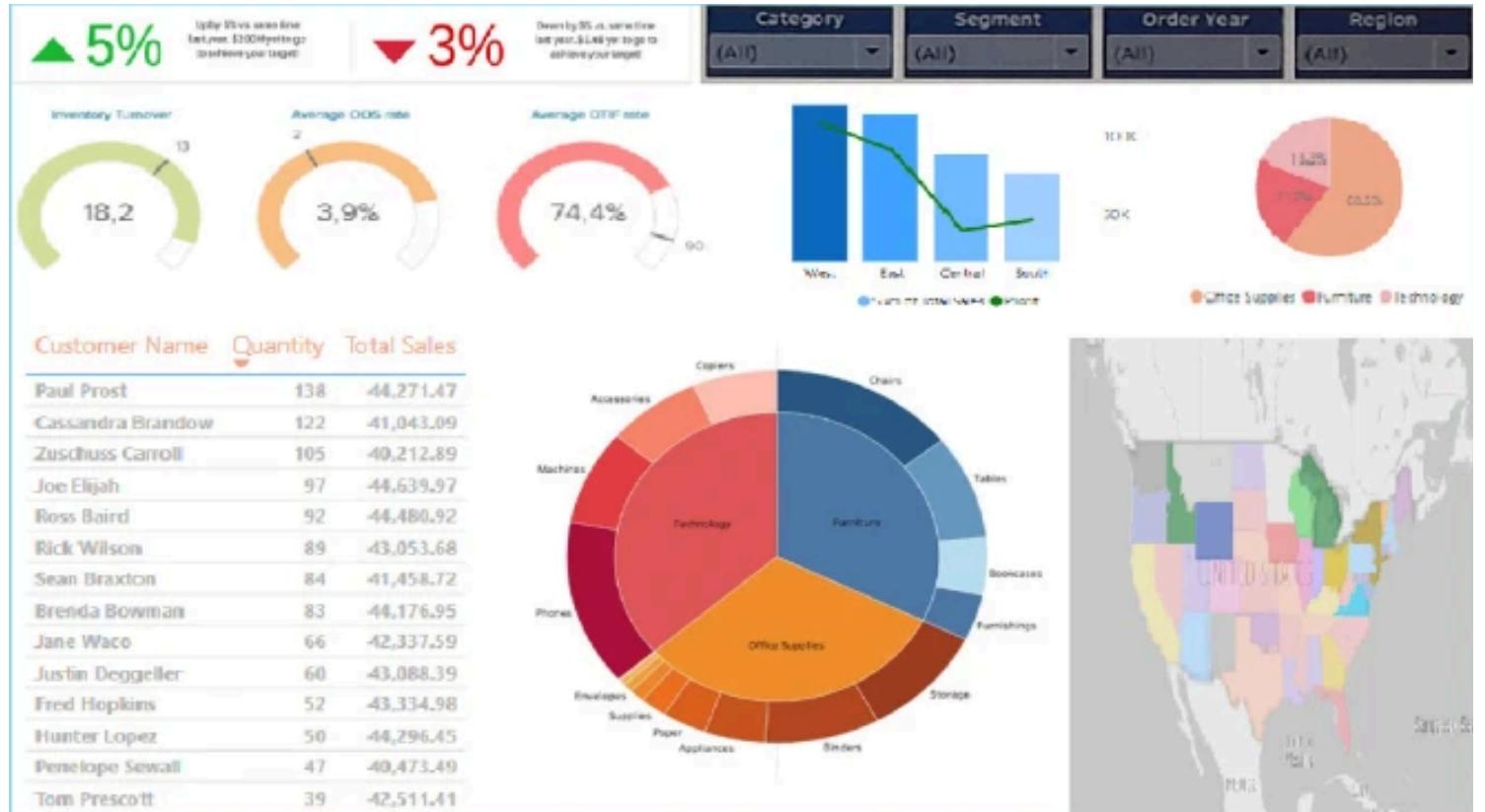
## Key Insights:

- 45% of annual revenue occurs in Q4
- Consistent year-over-year growth of 18%
- Seasonal patterns are predictable and actionable
- COVID-19 impact visible in March-May 2020

## Forecasting Implications:

- Inventory planning for seasonal peaks
- Marketing budget allocation by month
- Cash flow management for low periods
- Staff scheduling for peak seasons

# PRODUCT CATEGORY ANALYSIS



## Top Performing Categories:

- Electronics: £687k revenue (29% of total)
- Clothing: £562k revenue (24% of total)
- Home & Garden: £423k revenue (18% of total)
- Books: £298k revenue (13% of total)

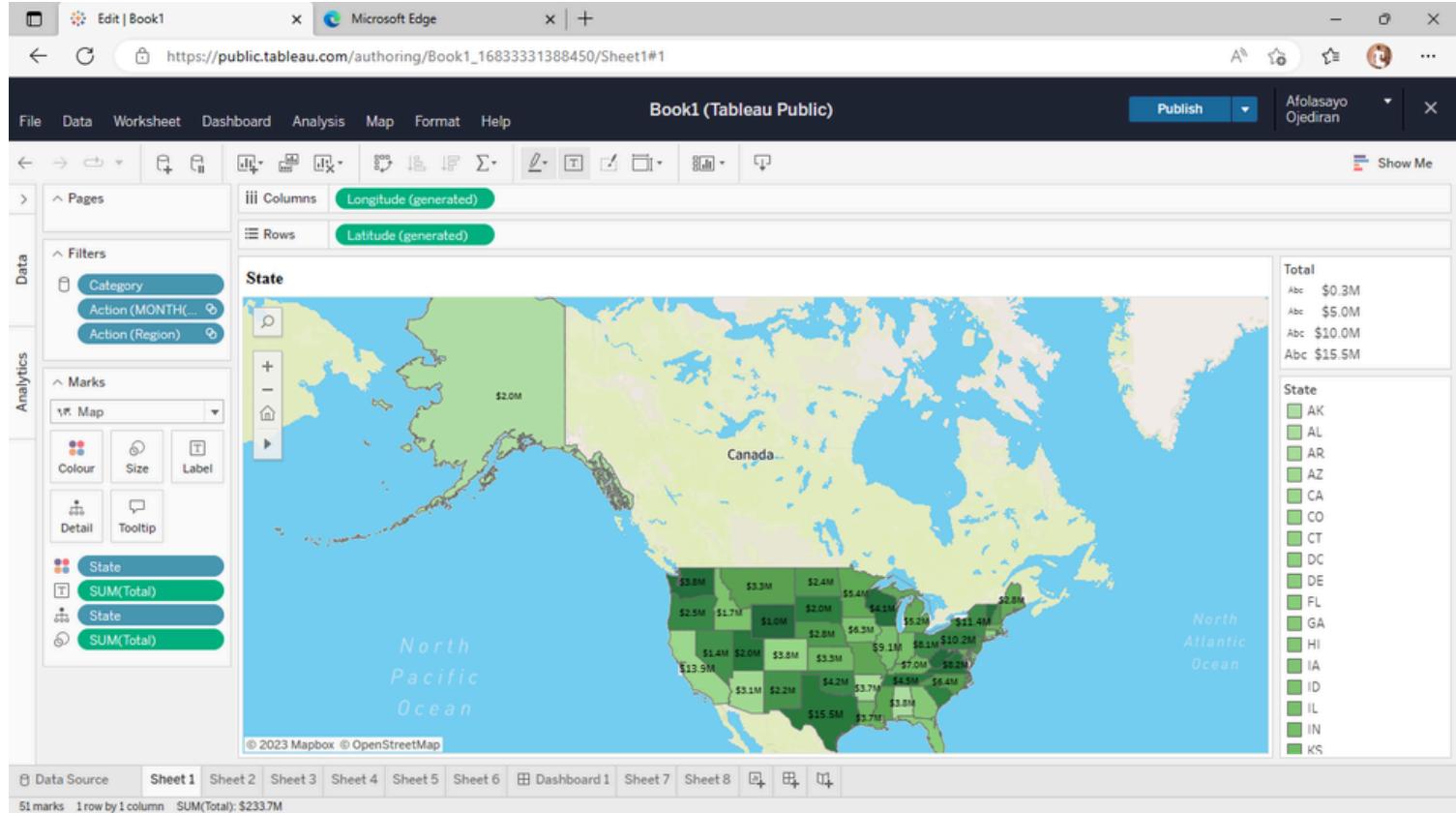
## Category Insights:

- Electronics has highest revenue but lowest profit margins (12%)
- Clothing shows consistent growth across all seasons
- Home & Garden peaks during spring months
- Books declining 5% year-over-year

## Strategic Implications:

- Focus marketing spend on high-margin categories
- Seasonal inventory planning by category
- Consider expanding successful product lines
- Investigate book category decline

# GEOGRAPHIC PERFORMANCE



## Revenue by Region:

- London: £758k (32% of total)
- South East: £445k (19% of total)
- North West: £367k (16% of total)
- Scotland: £298k (13% of total)

## Regional Insights:

- London dominates but may be saturated
- Strong performance in traditional commercial centres
- Untapped potential in Wales and Northern Ireland
- Rural areas show lower online adoption

## Expansion Opportunities:

- Targeted marketing in underperforming regions
- Regional pricing strategies
- Local partnership opportunities
- Logistics optimisation for remote areas

# INTERACTIVE DASHBOARD FILTERS

## Essential Filter Types

- **Date Range:** Monthly, quarterly, yearly views
- **Product Category:** Focus on specific segments
- **Geographic Region:** Regional performance analysis
- **Customer Segment:** New vs returning customers

## Filter Best Practices

- **Logical Grouping:** Related filters together
- **Clear Labels:** Intuitive naming conventions
- **Default States:** Sensible starting positions
- **Visual Feedback:** Show filter impacts immediately

## User Experience Considerations

- Maintain context when filtering
- Provide "reset" functionality
- Show number of records affected
- Ensure mobile-friendly design

# DASHBOARD DESIGN PRINCIPLES

## LAYOUT STRATEGY

- Top Row: Key metrics and KPIs
- Middle Section: Primary charts and trends
- Bottom Area: Detailed breakdowns and filters
- Right Panel: Context and explanations

## CONSISTENCY ELEMENTS

- Colour Palette: Maximum 5 colours with clear meaning
- Typography: 2-3 font sizes maximum
- Spacing: Regular grid system
- Alignment: Clean, professional appearance

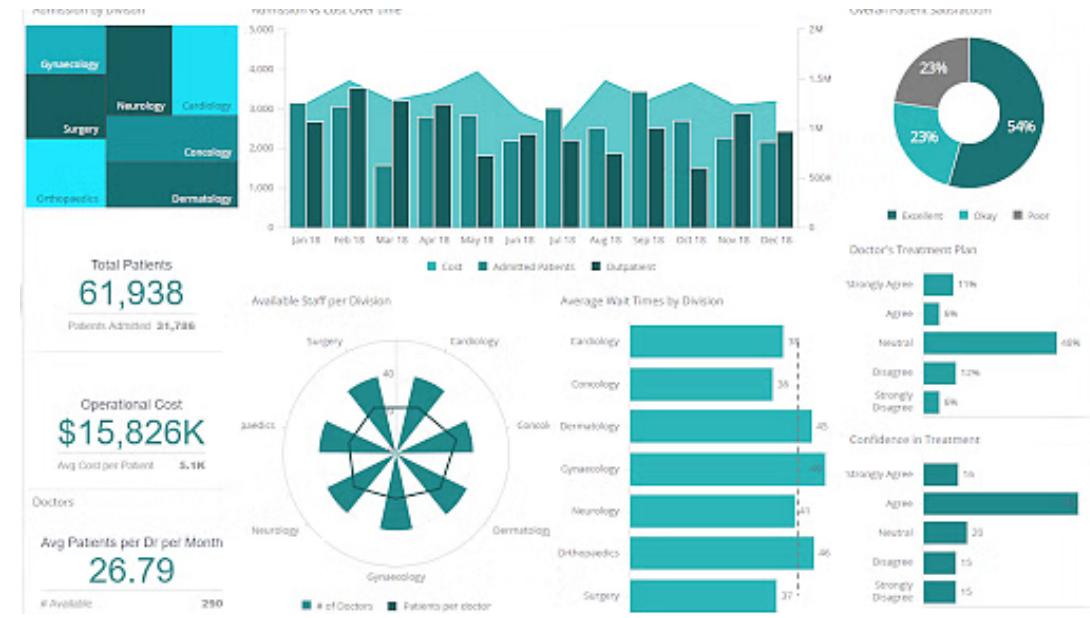
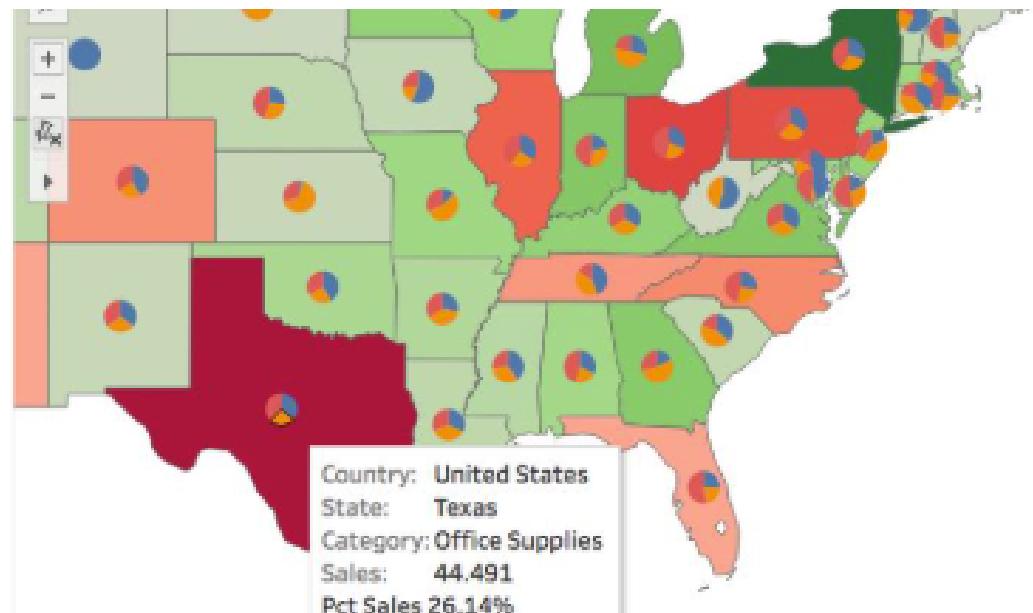
## VISUAL HIERARCHY

- Primary: Most important metrics (largest, top-left)
- Secondary: Supporting charts (medium size)
- Tertiary: Detailed data and filters (smallest)

## USER TESTING

- Can users find key insights in 30 seconds?
- Do interactions work as expected?
- Is the story clear without explanation?

# DRILL-THROUGH CAPABILITIES



## Multi-Level Analysis

- **Level 1:** National performance overview
- **Level 2:** Regional breakdown and trends
- **Level 3:** City-level detail and opportunities
- **Level 4:** Individual customer behaviour

## Navigation Design

- **Breadcrumbs:** Show current location in hierarchy
- **Click Indicators:** Visual cues for interactive elements
- **Context Preservation:** Maintain filters across levels
- **Return Options:** Easy navigation back to overview

## Business Value

- **Executive Level:** High-level strategic insights
- **Management Level:** Operational performance detail
- **Analyst Level:** Detailed investigation capabilities
- **Field Level:** Local market intelligence

# DASHBOARD BEST PRACTICES

## Visual Design Principles:

- 5-Second Rule: Key insights visible immediately
- Colour Purpose: Use colour to highlight, not decorate
- White Space: Breathing room improves comprehension
- Consistency: Standardised fonts, colours, and layouts

# DASHBOARD BEST PRACTICES

## Content Strategy:

- Pyramid Structure: Most important information at top
- Context Always: Provide comparisons and benchmarks
- Actionable Insights: Clear next steps from data
- Story Flow: Logical progression through information

# DASHBOARD BEST PRACTICES

## Technical Considerations:

- Performance: Fast loading times essential
- Responsiveness: Works on all device sizes
- Accessibility: Colour-blind friendly palettes
- Scalability: Handles growing data volumes

# COMMON MISTAKES TO AVOID

- 01 Too much information on one screen
- 02 Inconsistent colour coding
- 03 Missing context or benchmarks
- 04 Poor mobile experience

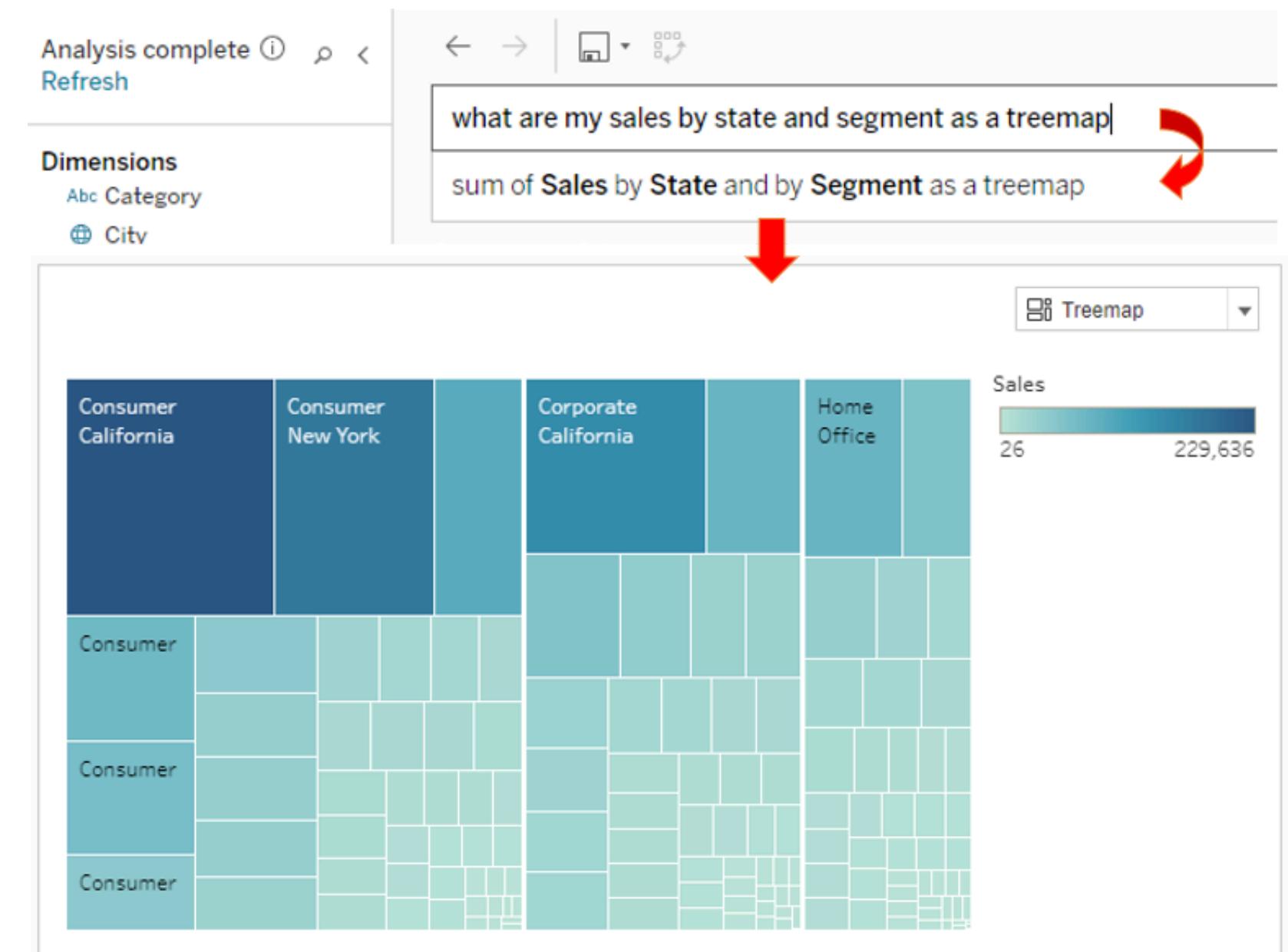
# TABLEAU'S ASK DATA FEATURE

## How Ask Data Works?

- Type questions in plain English
- Tableau interprets intent and generates visualisations
- Instant results with suggested follow-up questions
- Learns from your data structure and relationships

## Example Queries:

- "Show me sales by region last quarter"
- "What products had the highest profit margin?"
- "How did marketing campaigns perform in 2023?"
- "Which customers haven't purchased recently?"



## Benefits of Ask Data Feature

- **Accessibility:** No technical skills required
- **Speed:** Immediate insights without chart building
- **Exploration:** Encourages data discovery
- **Self-Service:** Reduces analyst workload

## Limitations of Ask Data Feature

- **Simple Queries:** Complex analysis still requires traditional approach
- **Data Quality:** Depends on well-structured, clean data
- **Ambiguity:** May misinterpret unclear questions
- **Context:** Limited understanding of business nuances

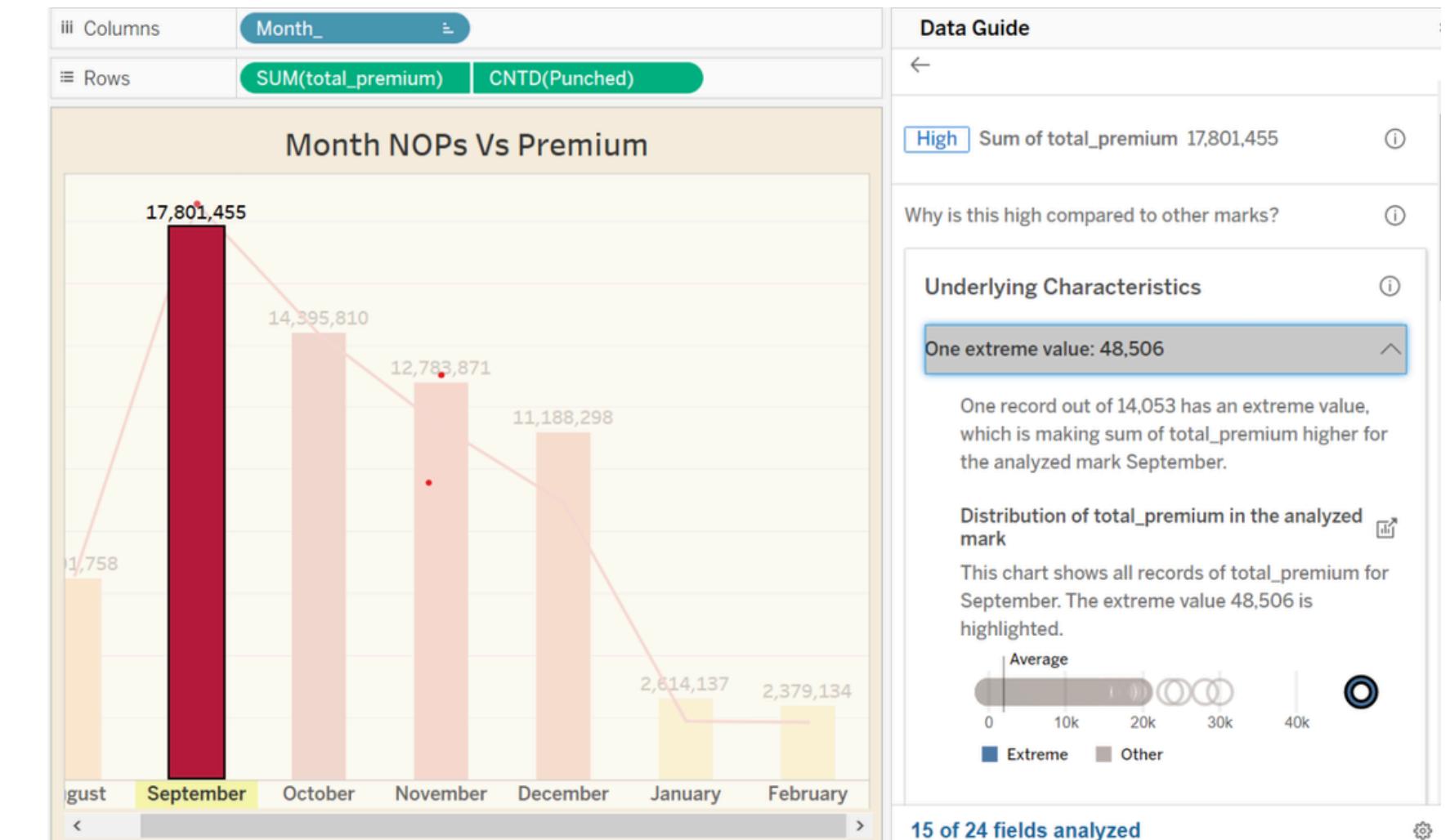
# TABLEAU'S EXPLAIN DATA INSIGHTS

## What Explain Data Does?

- Automatically identifies statistical outliers
- Suggests potential explanations for unusual patterns
- Provides confidence levels for insights
- Highlights correlations and trends

## Types of Explanations:

- **Outlier Detection:** Unusual data points and their causes
- **Trend Analysis:** Underlying patterns in time series
- **Correlation Discovery:** Relationships between variables
- **Seasonal Patterns:** Recurring cycles in data



# Business Applications

- **Anomaly Investigation:** Quickly understand unusual results
- **Root Cause Analysis:** Identify factors behind performance changes
- **Opportunity Identification:** Spot trends before they become obvious
- **Quality Assurance:** Detect data quality issues

# Critical Considerations

- **Validation Required:** AI suggestions need human verification
- **Context Matters:** Statistical significance ≠ business relevance
- **Bias Awareness:** Explanations may reflect data biases
- **Domain Expertise:** Business knowledge essential for interpretation

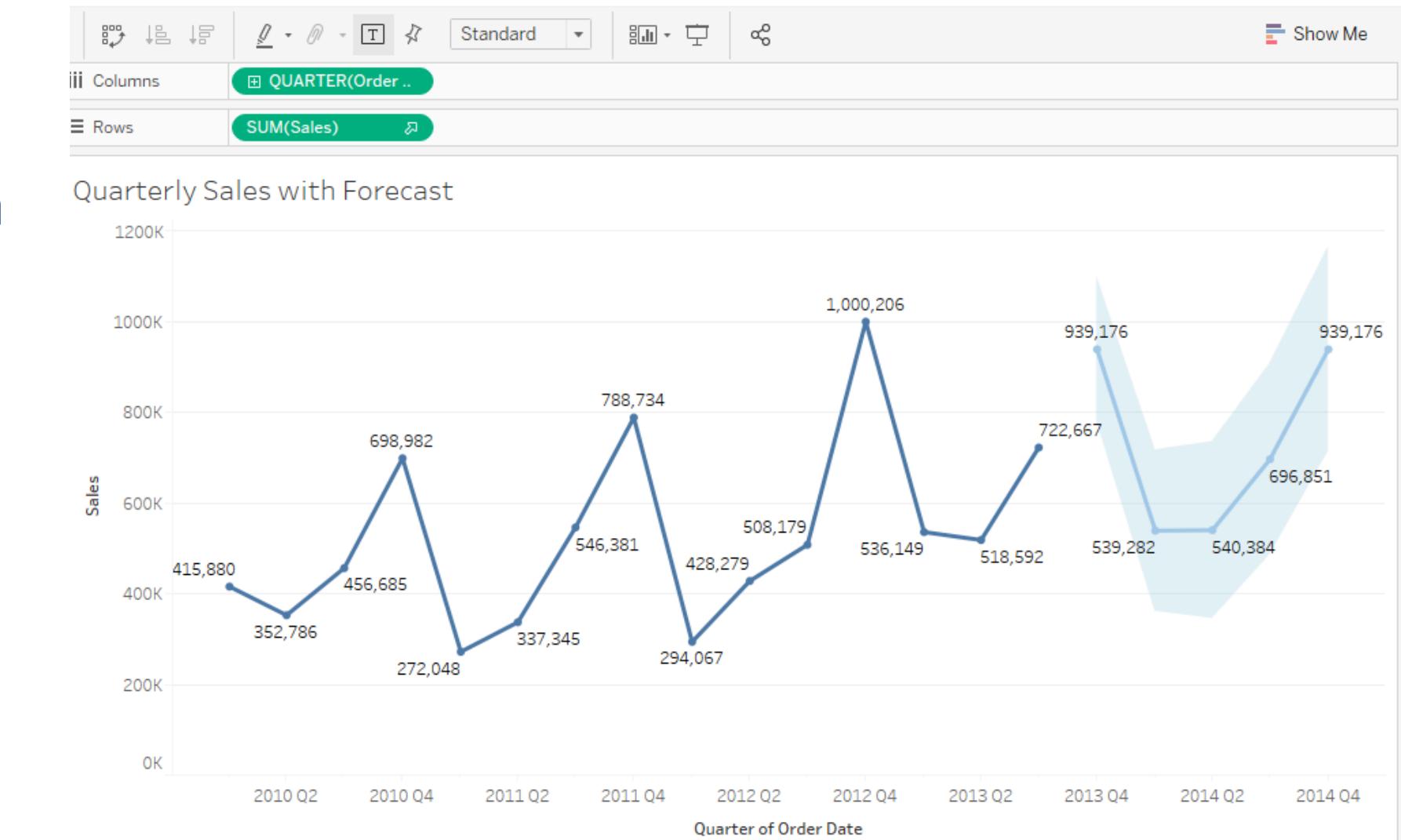
# TABLEAU'S BUILT-IN FORECASTING

## Forecasting Capabilities

- **Trend Detection:** Automatic identification of growth patterns
- **Seasonality:** Recognition of cyclical patterns
- **Confidence Intervals:** Uncertainty quantification
- **Multiple Models:** Exponential smoothing and other algorithms

## Practical Applications:

- Sales Forecasting: Predict next quarter's revenue
- Inventory Planning: Anticipate demand fluctuations
- Resource Allocation: Staff scheduling based on predicted workload
- Budget Planning: Financial projections and variance analysis



Step by Step - Forecast in Tableau

~ <https://community.tableau.com/s/question/0D54T00000C6V3USA/step-by-step-forecast-in-tableau>

## Best Practices

- **Sufficient History:** Minimum 24 data points recommended
- **Data Quality:** Clean, consistent historical data essential
- **External Factors:** Consider events that may affect future performance
- **Regular Updates:** Refresh forecasts as new data arrives

## Limitations

- **Black Swan Events:** Cannot predict unprecedented disruptions
- **Changing Patterns:** Struggles with structural shifts
- **External Variables:** Doesn't account for market changes
- **Accuracy Decreases:** Less reliable for longer time horizons

# TABLEAU PREP OVERVIEW

## Visual Data Preparation

### Data Preparation Challenges:

- **Multiple Sources:** Combining data from different systems
- **Quality Issues:** Missing values, duplicates, inconsistencies
- **Format Variations:** Different date formats, naming conventions
- **Transformation Needs:** Calculations, aggregations, pivoting



Visual Interface: Drag-and-drop data transformation



Automated Suggestions: AI-powered cleaning recommendations



Flow Documentation: Clear audit trail of changes



Reusable Workflows: Save and share preparation processes

# TABLEAU PREP OVERVIEW

## Key Features:

- **Smart Defaults:** Automatic handling of common issues
- **Data Profiling:** Visual summary of data quality
- **Union and Join:** Combine multiple data sources
- **Pivot Operations:** Reshape data for analysis

## Business Benefits:

- **Time Savings:** Reduce data preparation time by 60%
- **Consistency:** Standardised data processing
- **Collaboration:** Share preparation workflows
- **Governance:** Documented data lineage

# BUSINESS PRESENTATION STRUCTURE

## 01 What

*Present the Data*

- Clear Findings: State your key insights directly
- Supporting Evidence: Show the data that backs up your claims
- Context: Provide benchmarks and comparisons
- Confidence Level: Indicate certainty in your conclusions

e.g.

Customer acquisition cost increased 23% in Q3

## 02 So What

*Explain the Impact*

- Business Implications: What does this mean for the organisation?
- Opportunity Size: Quantify the potential impact
- Risk Assessment: What happens if we don't act?
- Stakeholder Effects: Who is affected and how?

This threatens our profitability and growth targets

## 03 Now What

*Recommend Actions*

- Specific Steps: Clear, actionable recommendations
- Timeline: When actions should be taken
- Resource Requirements: What's needed to implement
- Success Metrics: How to measure progress

Optimise ad spend and improve conversion rates by December



# THE ART OF DATA STORYTELLING



## Story Structure:

- **Setup:** Establish **context** and business situation
- **Conflict:** Identify challenges or opportunities
- **Resolution:** Present insights and recommendations
- **Call to Action:** Specific next steps



## Narrative Techniques:

- **Hook:** Start with a surprising or compelling fact
- **Progression:** Build complexity gradually
- **Tension:** Highlight stakes and **urgency**
- **Resolution:** Provide clear **solutions**



## Visual Storytelling:

- **Consistent Design:** Maintain theme throughout
- **Progressive Disclosure:** Reveal information strategically
- **Emotional Connection:** Use visuals that resonate
- **Clear Pathway:** Guide audience through your logic

# COMMON PITFALLS TO AVOID IN STORYTELLING

- Data Dumping  
Showing everything instead of key insights
- Lack of Context  
Not explaining why data matters
- Weak Conclusion  
Failing to provide clear next steps
- Overcomplication  
Making simple insights unnecessarily complex



# QUESTIONS?

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