

Activity: The data journey: Putting it all together



Activity Overview

In this activity, you'll create an executive summary that captures the work you completed for the capstone lab.

In your role as a data professional, you may be involved in creating executive summaries. Executive summaries are documents that summarize the most important points about a project, giving decision makers a brief overview of the most relevant information. Executive summaries can also be used to help new team members quickly become acquainted with a project. The format is designed to provide stakeholders with helpful information about the project, since they likely won't have all of the project's details. To improve the readability and accessibility of executive summaries, technical jargon should be avoided. Although the design and layout of executive summaries can vary, there are key elements that are common among them.

Elements of an executive summary

Executive summaries are used across a wide variety of organizations in many different fields. Depending on the type and scope of the information, they typically include the following elements:

Project title: A project's theme is incorporated into the executive summary title to create an immediate connection with the target audience. The title should be descriptive and reflective of the work that was done for the project.

Overview: The overview provides a high-level perspective of the project. It's a brief section that outlines the purpose of the project and why it's needed in relation to the broader business needs.

Objective: The objective states the target goal(s) and impact of the project. The target goal(s) should be specific and measurable (if applicable).

Results: The results section lists specific outcomes from the project. It's common for the objective, impact, and results to overlap. However, the results section should identify the outcome of the specific project in question, not the broader business needs. When possible, it

should use numbers and/or visuals to represent the data or outcomes. Visuals should be accessible, meaning they should be large enough to be legible, have high-contrast and resolution, and include a caption and/or alt text.

Next Steps/Recommendations: This section includes information that supports the actions the team plans to take. This can also include recommendations for decision makers based on the insights gained over the course of the project, as well as general project reflections. When you are adding to this section, include at least one recommendation and one suggested next step.

Note that each organization may have its own ideas regarding whether or not the overview or objective section(s) should mention the impact of a project. Generally speaking, there may be overlap between the overview, impact, and objectives of a project. The impact describes how meeting the goal addresses broader business needs. The focus of the impact should always be on the bigger picture. Sometimes, an organization will allocate a separate section for the impact.

With these elements in mind, you will create an executive summary that summarizes your findings from the capstone project. Be sure to complete this activity before moving on. The next course item will quiz your comprehension, and then you'll be provided with a completed exemplar to compare to your own work.

Scenario

Review the following scenario. Then, access the supporting materials before moving on to the next course item to take the quiz.

As the cloud data analyst for TheLook Fintech, you've just completed a major project that helped the company extract important information from their data. First, you used BigQuery to store loan data in a standard table. You deduplicated the purpose data and produced a report that displayed the total number of loans issued by day and year. Then, you used Looker Enterprise to build a dashboard that allowed you to visualize and analyze the data.

With this project complete, Trevor, the head of the treasury department, asked you to create an executive summary to share your findings with other executives in the company who were not directly involved in the tasks of the project. You respect the executives' valuable time, so you need to include only the most important information about the project in the summary.

Step-By-Step Instructions

Consult the supporting materials to answer the quiz questions in the asset that follows. After you complete the quiz, you can compare your work to the exemplar provided.

Step 1: Access supporting material

The following supporting material will help you complete this activity. Keep them open as you proceed to the questions.



 **RIGHT CLICK LINKS TO OPEN IN NEW TAB** 

Link to template: [Executive summary](#)

Step 2: Locate the screenshots you took for the report and dashboard



Review the products you created to help you recall important information from the capstone project labs. In Part 1, you created a report that detailed the total number of loans issued by day and year. The report helped the company better understand their cash flow, and this type of data might be valuable to share with stakeholders. In Part 2, you created charts, a table, and a dashboard that visualized loan data. Reviewing these materials will help determine the most important information to include in the summary.

Step 3: Draft the executive summary



Fill in the **Executive summary** template using the information and visuals you gathered in **Step 2**. Include the data and visuals that represent the most impactful results from the capstone. You will also need to consider what information will be the most relevant for stakeholders. For example, stakeholders will be interested in how the project affects broader business needs. To accommodate this stakeholder expectation, be sure to outline this information in the **Objective** section.

In the **Results** section, consider how your report, dashboard, and visualization improved the company's insights into their loan data. When possible, include statistics or numbers to help the audience visualize the data.

In the **Next Steps** section, include at least one recommendation and one suggested next step for the team to take.

Step 4: Answer questions about executive summaries



Go to the next course item to answer quiz questions about executive summaries. Then compare your work to the exemplar provided.

Pro Tip: Save the template

Finally, be sure to save a blank copy of the template you used to complete this activity. You can use it for further practice or in your professional projects. This template will help you work through your thought processes and demonstrate your experience to potential employers.

What to Include in Your Response



Be sure to address the following criteria in your completed activity:

- A meaningful title that is reflective of the work that was done for the project
- An overview that includes 2–3 sentences explaining the purpose of the project
- An objective that states the project's target goal and its impact
- A results section that lists specific outcomes from the project
- A next steps section that includes one recommendation and one suggested next step