# Case study: Benefits of using data reports

So far, you've learned that data reports are an invaluable tool for visualizing and communicating detailed business data to inform decision-making. Reports are informational and functional, ensuring data insights are accessible and actionable. In this reading, you'll learn more about the strategic application of data reports, and explore examples where reports significantly enhanced data-driven decision-making in a workplace setting.

## Strategic application of data reports

Data reports serve a significant role in navigating the complexities of data visualization, and ensuring that crucial data insights are accessible and actionable. Making data accessible and actionable means that your audience is able to understand your findings, and make decisions with the information they've learned. As an analyst, you'll create detailed and comprehensive reports to bridge the gap between raw data and meaningful, actionable insights.

**Pro tip:** Ensure that every piece of included data answers why it's relevant, and provides the action or consideration it demands.

## Effective use of reports: a case study

Here's a practical example to illustrate how data reports can drive effective decision-making:

Consider a technology company that utilizes data reports to help influence its product development strategy. The company recently finished a product life cycle: bringing an innovative cell phone to market. A report has been developed to assess user engagement and identify user pain points with the new cellphone. The report consolidates data from user feedback, cell phone usage metrics, and user support interactions. Given the information, the report enables the technology company to:

- Identify features that cause frustration, delay the product cycle, or aren't useful
- Hone in on user pain points throughout the user journey
- Uncover trends or commonalities among user feedback to better understand cell phone usage and user behavior

The report helps the technology company evaluate the user experience, understand their frustrations, and leverage these insights to strategize on product improvements in a data-driven way.

## Creating collaborative opportunities with reports

Beyond decision-making, reports facilitate collaboration and knowledge sharing among team members. Reports are detailed and static (not real-time), allowing for insights to be shared among various departments, and fostering a shared understanding and collaborative approach towards common organizational goals. Reports also allow different departments to leverage insights from a unified data source, and align their strategies with the business.

For example, a marketing team for a retail company launches an advertising campaign across multiple platforms (social media, ads, and traditional media) with the aim to increase sales and brand awareness. After the campaign, the marketing team creates a detailed report that includes metrics, like customer engagement and conversion rates. This report is shared with the sales, customer service, and product development teams. Then, a meeting is scheduled where teams discuss the findings of the report. Since the report is accessible to various departments, it allows different teams to explore the data independently and derive insights relevant to their functions. The sales team provides additional input on customer feedback and purchasing behaviors. The customer service team shares data on customer inquiries and complaints. The product development team considers this information for future product creation and improvement.

In the marketing example, the campaign analysis report not only serves the marketing team in evaluating areas of success and improvement, but also becomes a valuable asset for other departments to understand customer behaviors, preferences, and challenges. The report fosters a collaborative environment where each team can utilize the data to inform their decisions. The report ensures that departments are working together, and are aligned in their understanding and approach towards achieving organizational goals.

## Comparative insights: reports vs. dashboards

Knowing when to use reports over other visualization tools, like dashboards, is important for ensuring data is presented in a way that aligns with the audience's needs, and the context in which it will be used. Reports offer detailed, static data suitable for in-depth analysis, and are often used to inform strategy. They can also be used for operational purposes. Dashboards provide real-time data, often aiding senior executives in decision-making. Their notification and alerts systems are helpful for ongoing monitoring.

For example, a company is planning their strategy for the upcoming year. To plan an effective strategy, the company needs a comprehensive understanding of various metrics, like customer acquisition costs, conversion rates, and returns on advertising spending. A report would be most appropriate for this situation because it's detailed and static in nature, allowing the company to explore patterns, compare metrics, and perform in-depth analysis. This is

different from a situation where, for example, the customer support team needs to constantly monitor the number of open tickets, average response times, and customer satisfaction scores. That's a situation where a dashboard's real-time data and high-level insights would be more beneficial.

## Key takeaways

The strategic application of data reports involves using reports to derive actionable insights that guide decision-making and strategy formulation. Data reports serve as pivotal tools for collaboration and knowledge sharing within an organization. Recognizing when to use reports over other data visualization tools, like dashboards, ensures that data is presented most effectively for its intended use.

## Resources for more information

Explore data visualization techniques and how to design reports with these resources:
- Discover the most popular analysis techniques and tools to master the art of data visualization: 11 Data Visualization Techniques for Every Use-Case with Examples
- This resource provides techniques and tips to help you effectively present your data: 17 Data Visualization Techniques All Professionals Should Know
- Explore key differences and unique features of dashboards and reports, and learn how to use both tools effectively for data visualizations and decision-making: Power BI Dashboards vs Reports: A Comprehensive Guide