data *visualization*

Dashboards and Storytelling with Tableau

A Design Checklist of the Who, What, Why and How

Good data story choices:

Identify the who, what, why, and how behind the storytelling projects
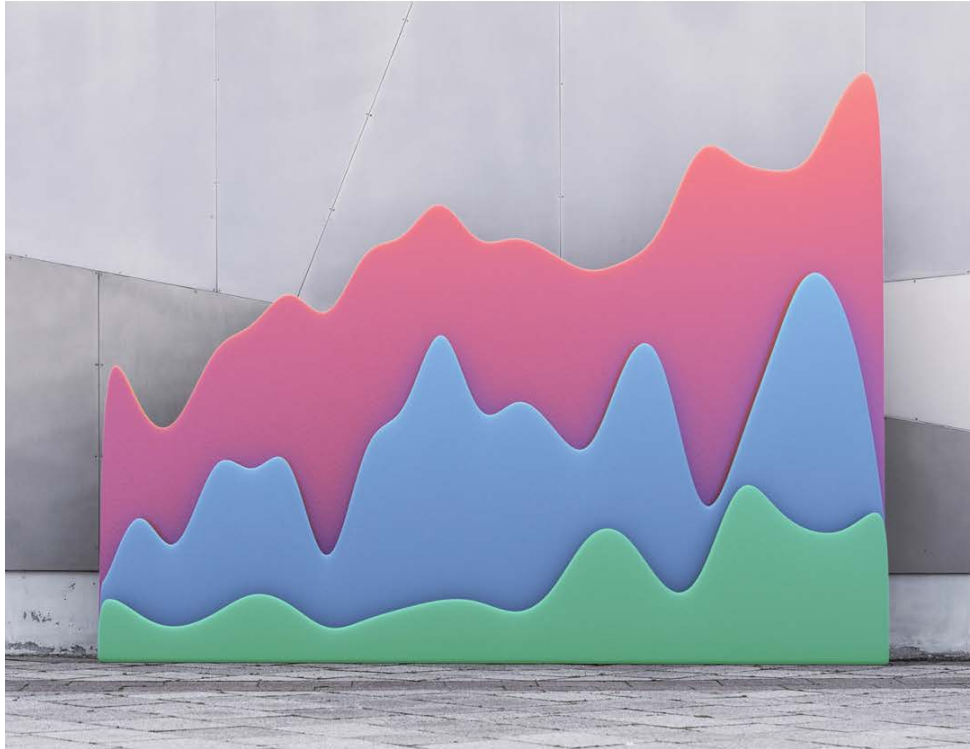
What key elements will drive your data story?

Who is audience?

Who are stakeholders?

Who are the SMEs?

What data is available?

Why includes goals and objectives

How includes point of view

Refine and optimize:

Who, what, and why lead to how

Keep a checklist of factors in play

Ask who in this scenario:

Audience: SVP
of Sales Operations

Key Stakeholder
or Presenter: Sylvia

Receivers:
Executive Team

Contributors: SMEs

Ask what and why in this scenario:

What data set and use case?

Why? What's the purpose of creating your story?

Frame in context
of the 3 Cs:

Context:
Acme year over year
sales stagnate

Challenge:
Marketing campaign
to get sales moving

Conclusion: TBD

Ask how in this scenario:

Format: Tableau story narrated by Sylvia

Timeframe:
Under 5 minutes

Parameters: 3 points

Stay fluid in Tableau:

Use variety of sources and options

Use Story Points to build and organize

Toggle to refine and optimize

Add or remove as the story requires

Iteration with Data, Views, and Stories

| Data Source | Population | Health | Technology | Economy | Tourism | Business | Ease of Biz Index | Story |

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Use only what's needed for 3 Cs

Be focused and selective:

- In presentation

- In how you extract and interpret data

- Draw correct conclusions

Ice cream sales correlate with crime but don't cause it

Look for variables directly related to cause

Find story to best explain correlation and cause

Be careful about conclusions

Note Two Important Considerations:

1. Expressiveness: Do you have data to express story accurately?

2. Effectiveness: Does presentation style effectively convey data's meaning?