

From data to action

Driving decision-making with Power BI

Valerie Junk



A big thank you to our partners

 plainwater
de kracht van heldere data

 webdashboard
Powered by In Summa

 sogeti
Part of Capgemini

 dashData
power to your people

 BEILO BI
ZEELAND

 infotopics
apps for power bi

 Motio

 Kimura

 FabriCode

 SIGNON
ICT TRAININGEN

 valcon

 KASPAROV
FINANCE & BI

 ilionx

 creates.

 nine
altitudes

 Tabular Editor
Better Data Models Faster

 raedt-BI

 OKVIZ

 Blauwdruk BI

 THE
DATA
COOKS

 DataShareHub

 easydash

 DTX

 GET
RESPONSIVE

 DataHues.

 Quanto
collective analytics

 ANOTHER
DIMENSION

 Control
Over Reports

 DATAKINGDOM

 ONE
PORTAL

 DataCentral

 dexs

 Barbanson
Data Solutions

 mountdata
guide to impact

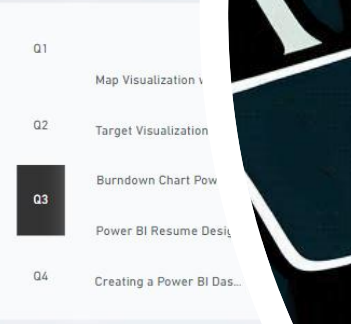
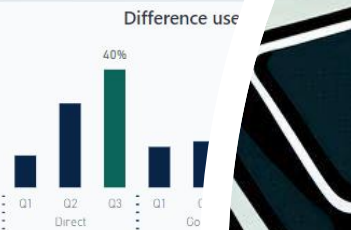
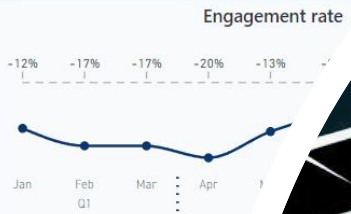
 Fellowwind

 DATATAKO

 AXELIO

 MINOVA

Website Analytics 2025



**SPENT HOURS
BUILDING AN
AWESOME
REPORT**



**NO ONE
USES IT**



Valerie Junk

wortell

- Data Visualization
- Storytelling
- Trainer



in valeriejunk

▶ porcubi



ACTION-DRIVEN DESIGN

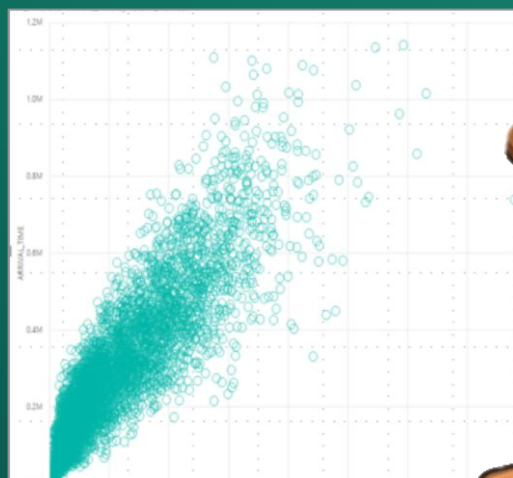
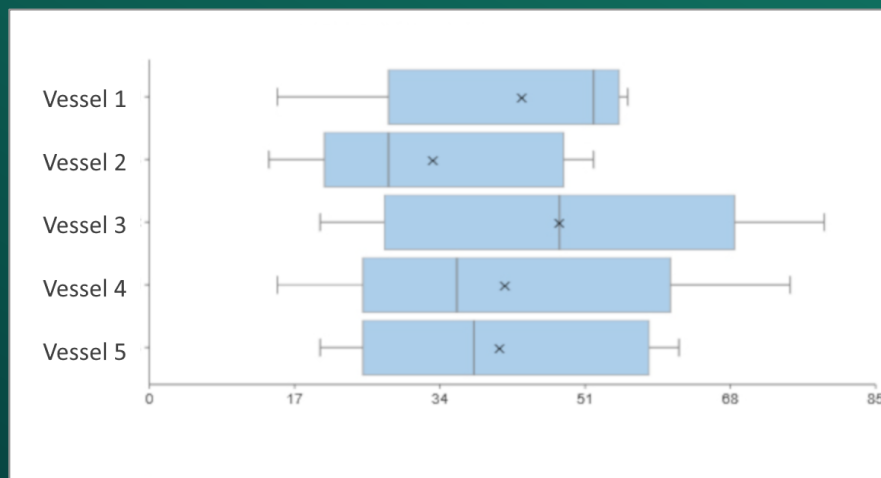
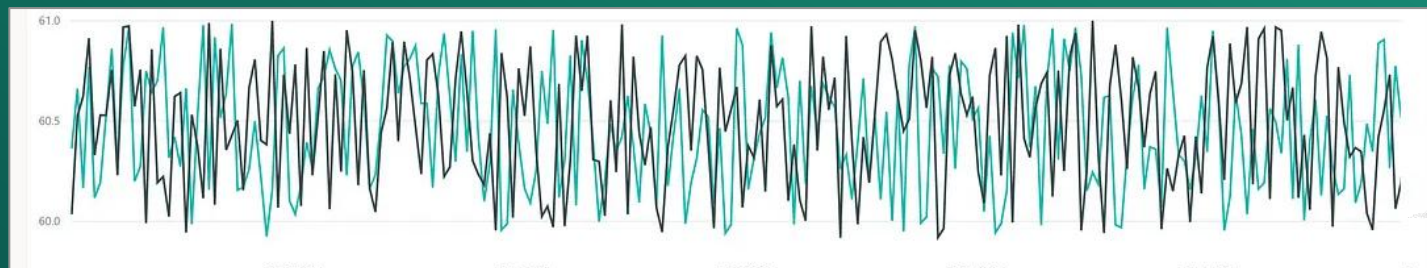
- Guiding the user
- Relevance
- Usability

You don't need everything!



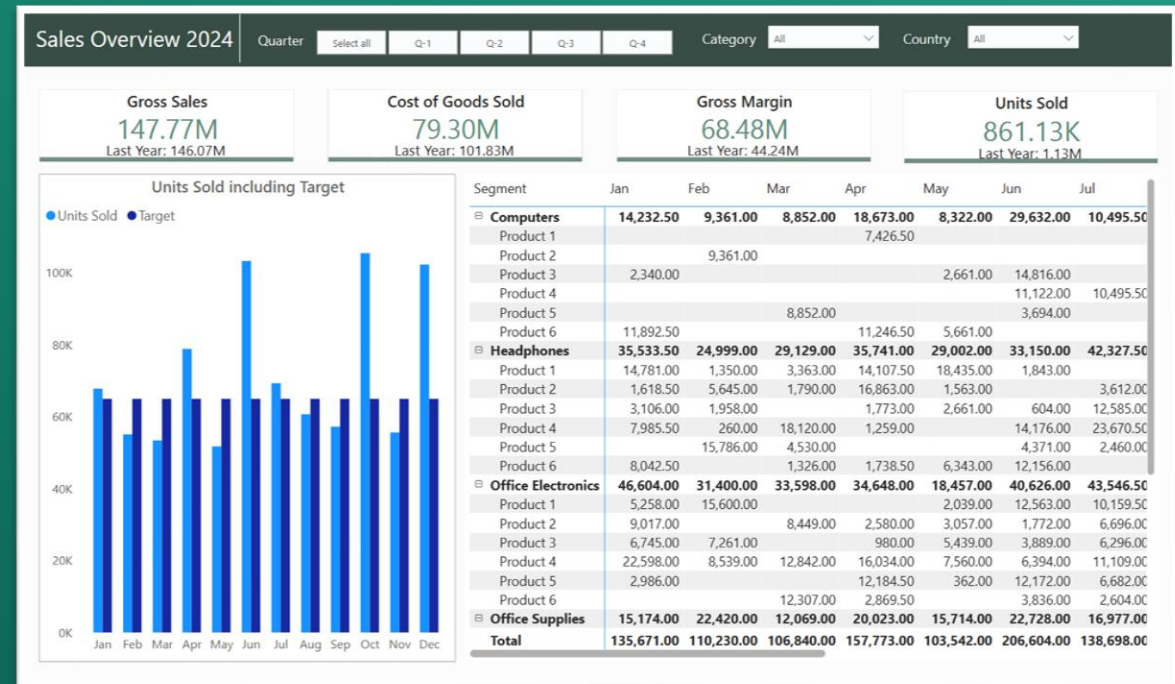
WHY SHOULD WE CARE?

Is this good??



TREASURE HUNT

- The answer is in there (somewhere...)
- “Everybody knows this, right?”



A vertical bar on the left side of the slide, composed of six colored rectangular segments: pink, orange, yellow, light blue, teal, and dark blue.

Create reports
THAT LEAD TO ACTION

Tailor insights
TO YOUR AUDIENCE

Present data
TO MAKE IT MATTER



Part 1

THE PROBLEM



” If you do not know how to ask the right question, you discover nothing.”

- W. Edward Deming



Achieving clarity:

WHO IS THE AUDIENCE?



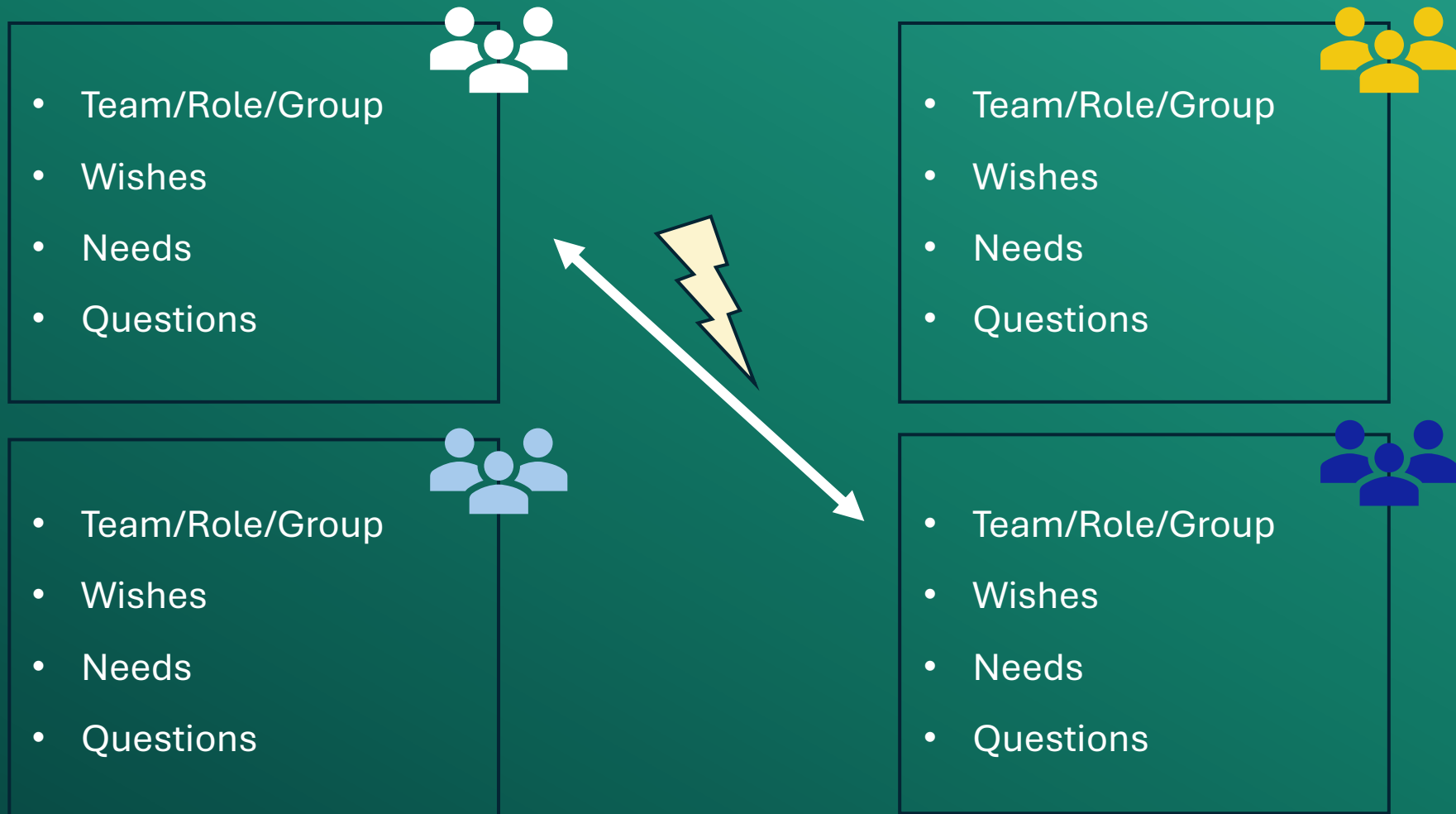
ONE person

SPECIFIC people

A TEAM

The **WHOLE** organization

GROUPING





ACTIONS to take

WHY do you look at this report
in the morning?



ACTIONS to take

HOW is the report supporting
you/others?



What is the **PROCESS**?

You looked at the report,

WHAT is going to happen next?



What is the **PROCESS**?

WHEN do you open the report?

A vertical decorative bar on the left side of the slide, composed of six horizontal segments in the following colors from top to bottom: magenta, orange, yellow, light blue, teal, and dark blue.

Knowing the **AUDIENCE** and
the **ACTIONS** and processes
helps you to add **MEANING** to
the visuals.

What is the PURPOSE?

Value vs Target by month

Target and Current Value by Month Name Short

● Target ● Current Value



Monthly sales overview

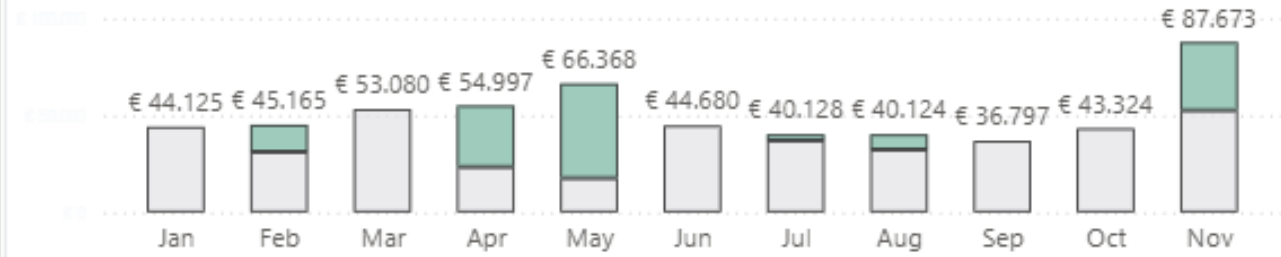
To view the full table select a month and click on the button.

Month Name	Sales TY	Sales LY	Sales YoY	Quantity TY	Quantity LY	Quantity YoY
January						
Office Supplies	€ 1.396,35	€ 1.396,35	0,00%	9	9	0,00
February						
Furniture	€ 227,96	€ 227,96	0,00%	2	2	0,00
Office Supplies	€ 1.366,04	€ 1.366,04	0,00%	10	10	0,00
March						
Office Supplies	€ 273,22			12		
Technology	€ 2.999,95			5		
April						
Office Supplies	€ 32,09			8		
May						
Furniture	€ 1.628,82			9		
Office Supplies	€ 482,57			11		
Technology	€ 445,77			7		
June						
Furniture	€ 1.293,49	€ 1.293,49	0,00%	7	7	0,00
Office Supplies	€ 1.305,60			4		
Technology	€ 375,92	€ 135,95	176,51%	4	1	3,00
July						
Furniture	€ 25,71	€ 25,71	0,00%	3	3	0,00
September						
Furniture	€ 97,18			2		
Office Supplies	€ 44,98	€ 31,83	41,31%	9	6	0,50
October						
Furniture	€ 354,57	€ 354,57	0,00%	12	12	0,00

In which months did we hit our sales target?

In the months February, April, May, July, August, November, December we hit our target.

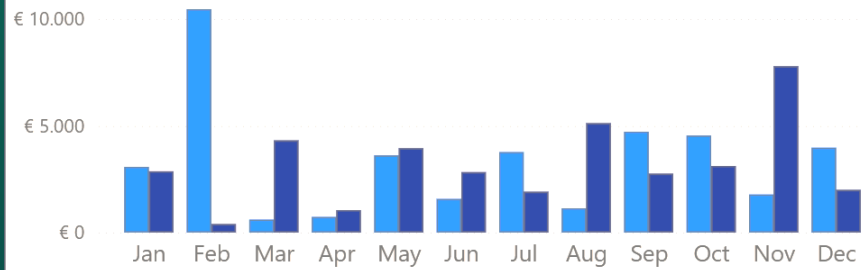
○ Below target ● Above target



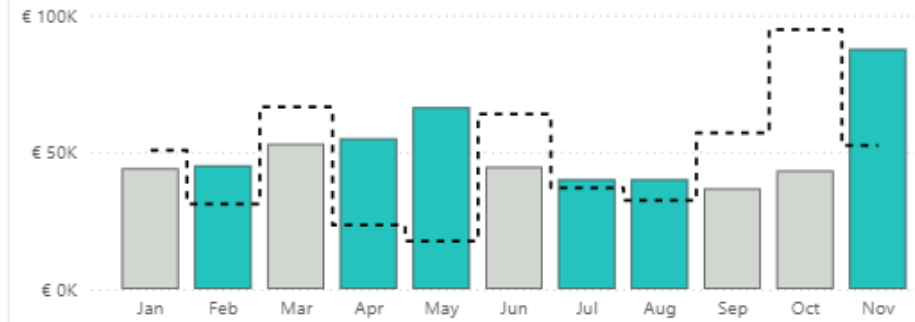
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Target and Current Value by Month Name Short

● Target ● Current Value

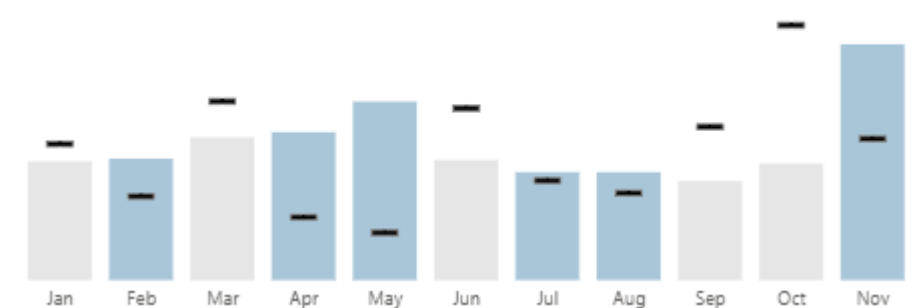


2025 Sales Report



Value vs Target by month

Lines are targets



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Difference in sales compared to last year

Category Office Supplies performed better than last year.

Office Supplies

Furniture

Technology

-20%

-10%

0%

10%



Sales Overview by Category and Store

month and click on the button.

Category	Store	Sales LY	Sales YoY
Office Supplies	Anaheim	€ 561,91	€ 1.965,64
	Atlanta	€ 2.807,76	€ 658,11
	Belleville	€ 1.186,07	€ 160,00
	Boynton Beach	€ 37,43	€ 42,46
Technology	Anaheim	€ 422,34	€ 3.445,72
	Atlanta	€ 635,93	€ 3.445,72
	Belleville	€ 239,97	€ 239,97

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	Belleville	€ 239,97	€ 239,97

FROM: Showing a table and a visual of everything → **USER SEARCHES**

TO: Showing the user information to take **ACTION** and/or **UNDERSTAND** the past and the future.



Solve the **ACTUAL PROBLEM**

don't create **NEW ONES**



Part 2

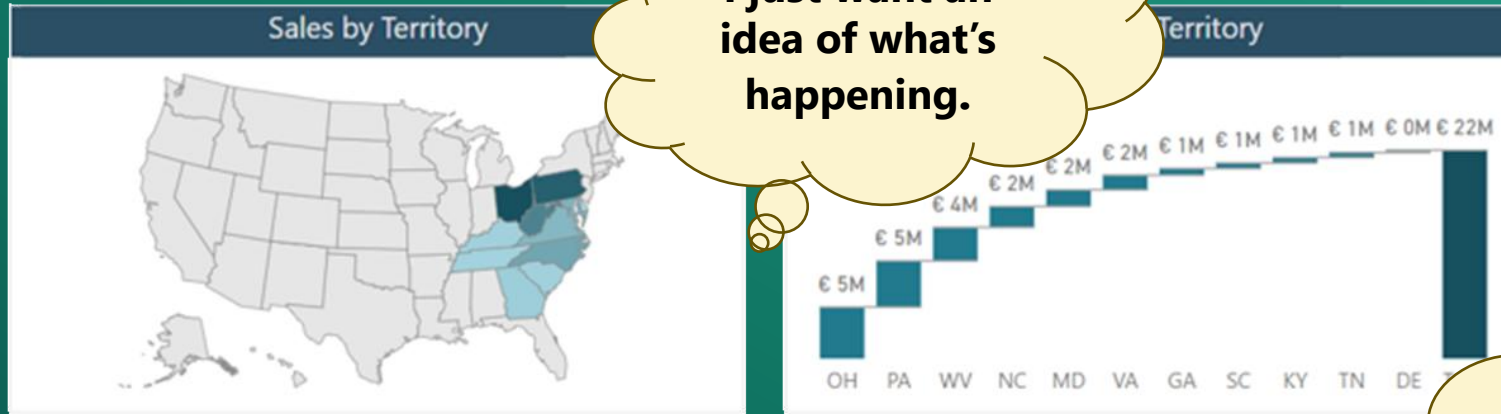
MAKING IT SHINE



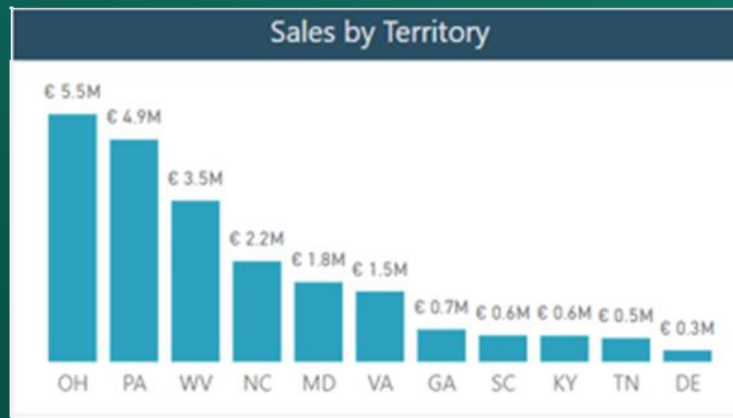
VISUALIZING FOR THE USER

PERFECT VISUAL?

I just want an idea of what's happening.



I like tables but my coworker prefers visuals.



A table showing sales by territory with a column for 'This Year Sales' and a small bar chart for each row. The total sales are € 22,051,952.

Territory	This Year Sales	bar
OH	€ 5,451,045	
PA	€ 4,891,246	
WV	€ 3,546,443	
NC	€ 2,214,548	
MD	€ 1,753,042	
VA	€ 1,549,656	
Total	€ 22,051,952	€ 22,051,952

SMALL CHANGES – BIG IMPACT

Sales Difference TY vs LY by Product				
Category	Gross Sales	Difference LY	Units Sold	Difference LY
Office Electronics				
Product 4	€ 15,468,394	-583,396.53	88,790	-31,303.00
Product 6	€ 12,043,158	1,804,151.16	40,983	-15,084.50
Product 5	€ 10,276,638	5,093,043.05	51,091	-2,640.50
Product 1	€ 7,302,443	-502,078.43	47,291	-8,067.50
Product 2	€ 7,082,499	-313,509.85	30,822	-10,722.00
Product 3	€ 5,204,885	-1,438,575.67	33,837	-16,389.00
Headphones				

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Headphones				



Problem:

I CAN'T FIND WHAT I NEED!

CORE INFORMATION

Profit & Loss													
Category	Account	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Revenue	Product Sales	19,605 €	12,892 €	19,552 €	5,064 €	10,258 €	10,892 €	18,067 €	19,434 €	15,882 €	9,488 €	10,116 €	8,242 €
	Service Revenue	18,103 €	11,863 €	9,859 €	13,006 €	10,618 €	8,561 €	8,104 €	7,731 €	8,840 €	5,206 €	17,383 €	9,636 €
	Other Income	16,534 €	12,916 €	11,331 €	7,568 €	11,736 €	15,470 €	12,215 €	19,183 €	6,028 €	10,134 €	11,019 €	6,059 €
	Total	54,242 €	37,671 €	40,742 €	25,638 €	32,612 €	34,923 €	38,386 €	46,348 €	30,750 €	24,828 €	38,518 €	23,937 €
COGS	Materials	5,551 €	1,337 €	1,379 €	6,463 €	1,391 €	7,184 €	5,598 €	3,773 €	1,502 €	6,977 €	2,757 €	7,668 €
	Direct Labor	4,798 €	1,878 €	1,492 €	6,248 €	6,794 €	4,099 €	3,454 €	2,570 €	7,910 €	2,484 €	7,628 €	6,279 €
	Packaging	2,275 €	2,076 €	6,276 €	3,027 €	5,514 €	7,278 €	4,645 €	6,056 €	5,493 €	1,863 €	7,374 €	2,722 €
	Total	12,624 €	5,291 €	9,147 €	15,738 €	13,699 €	18,561 €	13,697 €	12,399 €	14,905 €	11,324 €	17,759 €	16,669 €
Gross Profit		41,618 €	32,380 €	31,595 €	9,900 €	18,913 €	16,362 €	24,689 €	33,949 €	15,845 €	13,504 €	20,759 €	7,268 €
Gross Profit %		76.7%	86.0%	77.5%	38.6%	58.0%	46.9%	64.3%	73.2%	51.5%	54.4%	53.9%	30.4%
General Expenses	Marketing	2,016 €	5,887 €	3,062 €	3,695 €	7,432 €	1,200 €	6,847 €	7,756 €	1,870 €	3,790 €	7,892 €	4,314 €
	Office Rent	7,439 €	4,993 €	4,884 €	2,495 €	5,474 €	6,959 €	1,804 €	6,581 €	7,938 €	1,563 €	2,678 €	4,157 €
	Total	9,455 €	10,880 €	7,946 €	6,190 €	12,906 €	8,159 €	8,651 €	14,337 €	9,808 €	5,353 €	10,570 €	8,471 €
Net Profit		32,163 €	21,500 €	23,649 €	3,710 €	6,007 €	8,203 €	16,038 €	19,612 €	6,037 €	8,151 €	10,189 €	-1,203 €

CHECK THE PAST



ACT NOW




Problem:
**I DON'T KNOW WHERE
TO LOOK!**

DETAILED:

Revenue 428.595 € Last Year: 423.307 € (↑ 5,288 €)	COGS 161.813 € Last Year: 160.905 € (↑ 908 €)	Gross Profit % 62,2% Last Year: 62,0% (↑ 0.26%)	General Expenses 112.726 € Last Year: 103.244 € (↑ 9,482 €)	Net Profit 154.056 € Last Year: 159.158 € (↓ -5,102 €)
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ALERTS

Finance 7	Marketing 9	Operations 9	Sales 8	Total 33	% Completed 45%
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Problem:
**I CAN'T FIND MY
INFORMATION!**

SHOW WHAT MATTERS

Open Actions Overview

Welcome bob@porcubi.nl

Finance

7

Marketing

9

Operations

9

Sales

8

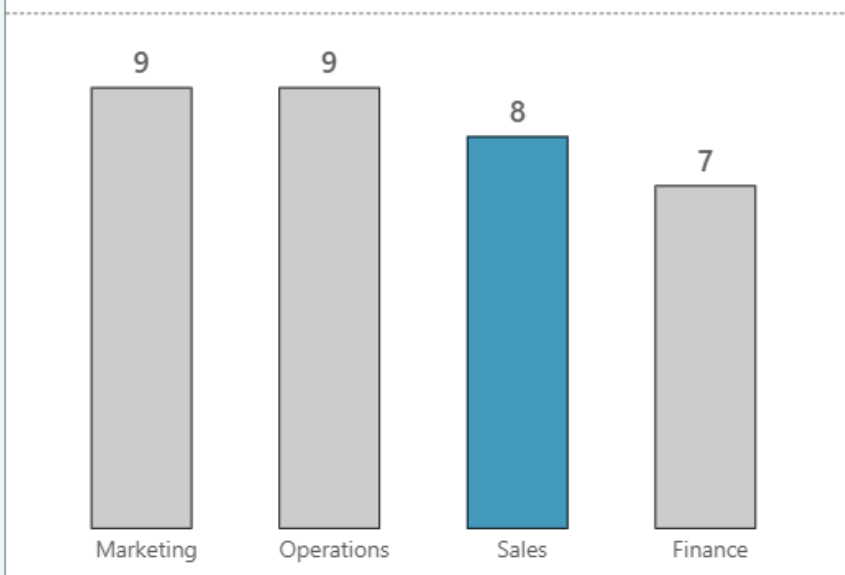
Total

33

% Completed

45%

Actions open by Team



Actions Open by Region and Team

Region	Name	Finance	Marketing	Operations	Sales
East	Alice	1		4	1
	Bob			4	
	Jane				1
	John	1			
North	Alice	1	3	3	2
	Bob			3	
	Jane				2
	John	1			
South	Alice	4	2	1	5
	Bob			1	
	Jane				5
	John	4			
West	Alice	1	4	1	
	Jane			1	
	John	1			
Total		7	9	9	8

Do not:

**USE COOL DESIGN FOR THE
SAKE OF COOL DESIGN**

Do:

**MAKE IT
ACCESSIBLE AND USABLE**

Do not:

**BLINDLY FOLLOW ALL
“BEST PRACTICES”**

Do:

**CONSIDER BEST PRACTICES
AND APPLY COMMON SENSE**



Part 3
**SELLING
THE STORY**

A vertical decorative bar on the left side of the slide, composed of six horizontal segments in the following colors from top to bottom: magenta, orange, yellow, light blue, teal, and dark blue.

Knowing the **AUDIENCE** and
the **ACTIONS** and processes
helps you to add **MEANING** to
the visuals.

WHAT ARE THEY LOOKING FOR?



CONTEXT



INFORMATION



ACTIONS TO
TAKE

KE

E EXAMPLES

Each

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Y).

(profit, costs,

Company

Financial Report

Year 2023

Annual financial report of Company presenting an overview of the company's KPIs, profit development, and targets reached. The book year runs from 01.01.2023 to 31.12.2023.

For questions please contact info@company.com

Key Performance Indicator

Revenue 158,29M ▲ 1,41% ΔPY	Cost 95,77M ▼ -21,09% ΔPY	Profit 62,53M ▲ 80% ΔPY
--	--	--------------------------------------

Profit Development

Profit by Month

The month with the highest profit was July. August was the month with the least profit made. The target of 35M was hit at the end of June.

% Profit Increase Category

- Office Supplies
- Headphones
- Office Electronics

% Profit Decrease Category

- Smart Home -3%
- Computers -47%

Target

Target Reached

Target: 65.000 Units Sold

50%

Units Sold & Target by

Overview | Product Analysis

Sales Performance

2021 YTD

Executive Summary of the YTD Sales Performance for Mediterranean Camera Company. Data provided is from 2021 and the year is running from January to December 2021.

Please view the second page for product insights.

KPIs - 2021 YTD

Net Sales \$92,31M	COGS \$79,30M	Profit \$13,02M	Units Sold 861,13K
------------------------------	-------------------------	---------------------------	------------------------------

Net Sales Distribution by Country YTD

UK	\$20M
Italy	\$20M
France	\$19M
Germany	\$17M
Greece	\$16M

Unknown Country of Origin
\$457.995 of Net Sales are not assigned to a country.

Buyer Type Distribution YTD

Net Sales

Profit

Institutions	\$8,5M
MiniMarkets	\$3,4M
Resellers	\$1,0M
SuperMarkets	\$0,5M
Corporations	-\$0,4M

No Profit
Corporations make up for \$15.562.132 of Net Sales but profit is negative with (\$420.758).

KEY MESSAGE EXAMPLES

As MT
F

SALES
f

Sales Overview 2023
Quarter: Alles selec... Q-1 Q-2 Q-3 Q-4
Category: Alle
Country: Alle

Gross Sales
147,77M
LY: 146,07M

Cost of Goods Sold
79,30M
LY: 101,83M

Gross Margin
68,48M
LY: 44,24M

Units Sold
861,13K
LY: 1,13M

Operating Expenses
50,62K
LY: 67,53K

Sales TY vs LY

Month	Sales TY	Sales LY
Jan	11M	9M
Feb	11M	8M
Mar	11M	8M
Apr	13M	11M
May	20M	13M
Jun	11M	11M
Jul	9M	11M
Aug	9M	9M
Sep	9M	11M
Oct	18M	11M
Nov	10M	11M
Dec	19M	11M

Units Sold including Target

Month	Units Sold	Target
Jan	65,000	65,000
Feb	55,000	65,000
Mar	55,000	65,000
Apr	75,000	65,000
May	55,000	65,000
Jun	105,000	65,000
Jul	75,000	65,000
Aug	65,000	65,000
Sep	65,000	65,000
Oct	105,000	65,000
Nov	65,000	65,000
Dec	105,000	65,000

Sales Difference TY vs LY by Category

Category	Sales Difference
Headphones	14M
Office Electronics	4M
Office Supplies	-2M
Computers	-5M
Smart Home	-9M

Sales Difference TY vs LY by Product

Category	Product	Gross Sales	Difference LY	Units Sold	Difference LY
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Headphones	Product 1	7.302.443		47.291	
	Product 2	7.082.499		30.822	
	Product 3	5.204.885		33.837	
	Product 4	9.216.325		66.660	
	Product 1	8.318.254		40.526	
	Product 6	7.796.254		36.423	

DIFFERENT MESSAGE

=

DIFFERENT DESIGN





Do not:

**GO WITH A GENERAL
MESSAGE**

Do:

**MAKE SURE TO KNOW
YOUR AUDIENCE**



Part 4

MAKING IT STICK



“Data is only useful if people take action on it.”

- Cole Nussbaumer Knaflic

A vertical bar on the left side of the slide, composed of six colored rectangular segments: pink, orange, yellow, purple, teal, and blue.

EVALUATING



IT'S PERFECT!



DO YOU LIKE IT?

**DO YOU THINK YOU WILL
USE THIS?**



**CAN YOU EXPLAIN WHAT
THIS REPORT IS SHOWING?**



**WHICH PART OF THE REPORT
TOOK YOU THE LONGEST TO
UNDERSTAND?**



**WHAT WOULD YOU DO
DIFFERENTLY BASED ON
THIS REPORT?**



Nothing matters
BUT ACTION

Use tools
**BUT THIS IS STILL ALL
ABOUT PEOPLE**

The work is never done
IT IS CONTINUOUS

Valerie Junk



in valeriejunk

▶ porcubi



Feedback

