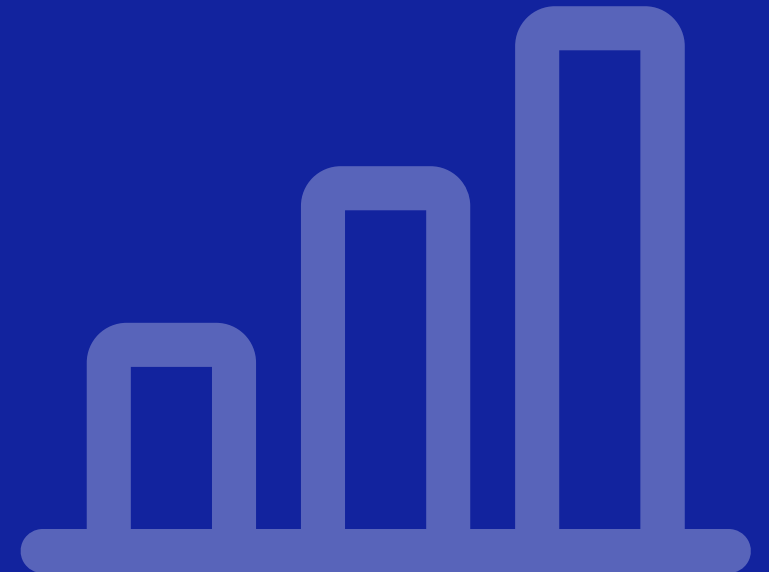


Storytelling & Power BI

Creating reports that connect with different audiences

Valerie Junk



A big thank you to our amazing partners

sogeti
Part of Capgemini

webdashboard

plainwater
de kracht van heldere data

iq̄bs

**KASPAROV
FINANCE & BI**

Kimura

S Sifters

creates.

valcon

Tabular Editor

**GET
RESPONSIVE**

**9Δ nine
altitudes**

**ONE
PORTAL**

ilionx
experts in eenvoud

DATAKINGDOM

**POWERBI WHITE LABEL
.COM**

**DE DATA
GENERATIE**

**THE
DATA
COOKS**

mountdata
guide to impact

sopra steria

Boom Insights
DATA-DRIVEN DECISION MAKING

dexs

dashData
power to your people

raedt-BI

easydash

MINOVA
Management Information Consulting

SIGNON
ICT TRAININGEN +

**ANOTHER
DIMENSION**
YOUR PORTAL TO DATA CLARITY

Fabri Code </>

**Azurro
Finance**

**Power BI
Connector** by DAVISTA

Quanto
collective analytics

Thanks

Storytelling & Power BI

Creating reports that connect with
different audiences

Dashboard

Delivery

Disappointment

**SPENT HOURS
BUILDING AN
AWESOME
REPORT**



**NO ONE
USES IT**





Valerie Junk

PorcuBI

- Data Visualization & Storytelling
- Change Management
- Trainer

in valeriejunk

 porcubi



Storytelling Benefits



Easy to follow and understand

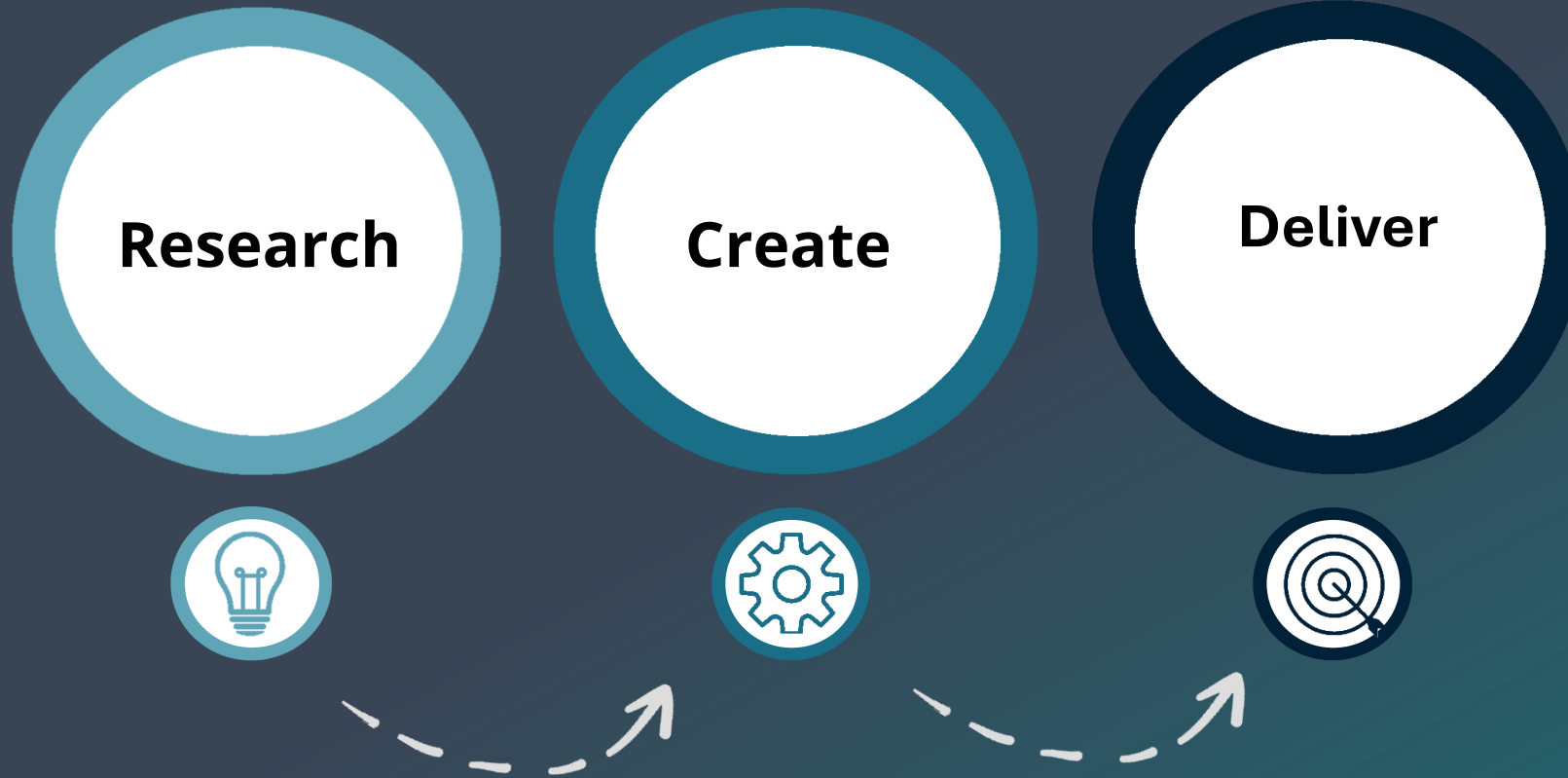


Engaging



Time-saving

3 Steps



Research

Audience, content & key message

The audience

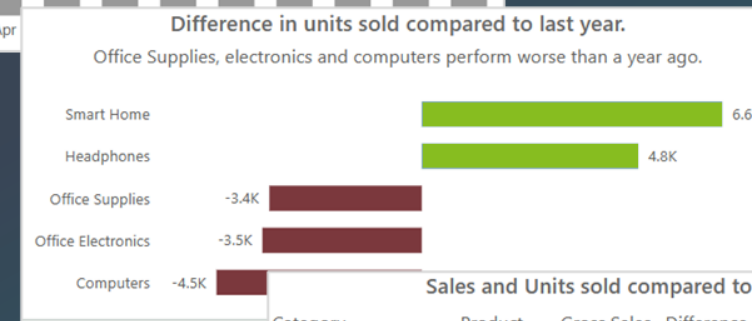
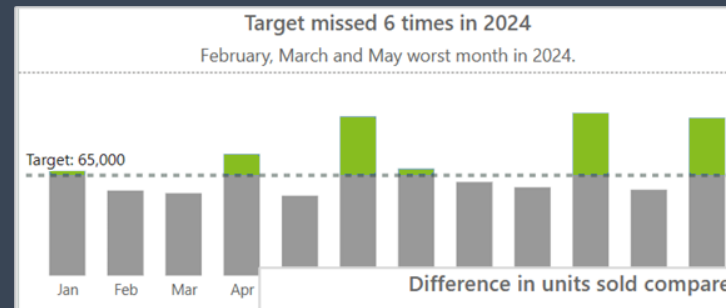
- **Who** is the audience?
- What is the **experience** level?
- What **actions** do they want to take and why?
- What's the **process**?
- How is the report **used**?



Why actions?

When you know the actions and processes, you can provide context and supporting information.

Adding meaning to the visuals.



Sales and Units sold compared to last year

Category	Product	Gross Sales	Difference LY	Units Sold	Difference LY
Office Supplies	Product 1	1,207,950		4,353	
Computers	Product 5	25,932		2,161	
Office Electronics	Product 4	92,538		5,207	
	Product 2	1,782,414		3,763	
	Product 6	991,636		6,071	

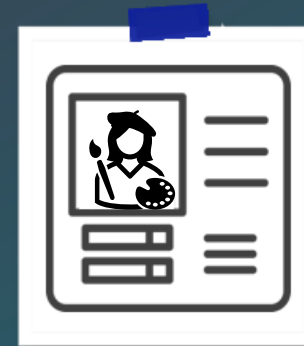
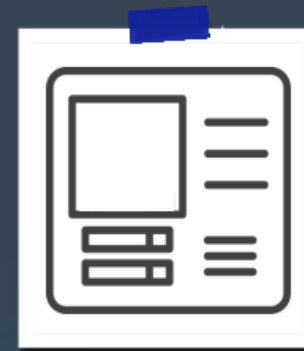
Creating Personas

Who is the audience?

What is the experience level?

What information do they need?

Actions to take



What's the message?

1 key message (sentence)



CONTEXT



INFORMATION



ACTIONS TO TAKE



Not a Key Message

1 key message (sentence)



CONTEXT
SALES





INFORMATION
ALL



ACTIONS
TBD



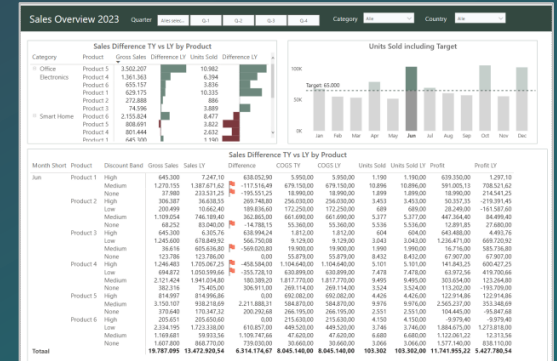
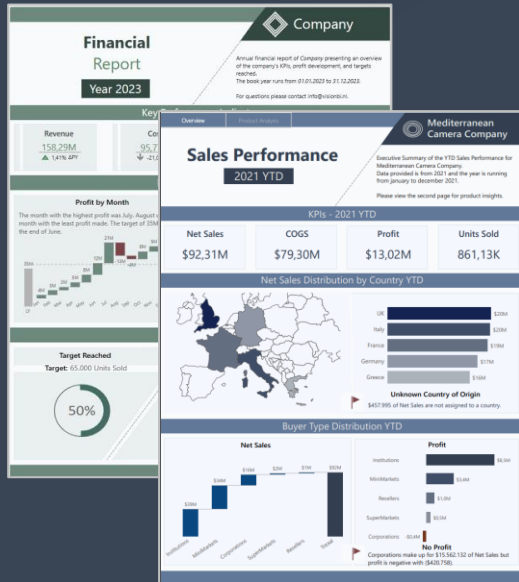
3 Examples

- 
- Each **year** we share **information** with the **whole company** what our **key** sales results are (profit, costs, margin, difference LY).
 - As **MT** we **evaluate monthly** the **key** sales results, the **performance** of our account managers (€ vs target) and the **best/worst products**.
 - Our **data analysts** daily dig through **all the data** to **investigate** hidden **trends** and **anomaly's**.
- 

Different Message
=
Different Design



Message = Design



Create

Storyboard, Templates & Visuals

Storyboards & Mock-ups

Gather all the information

- Sticky Notes (easy to rearrange)

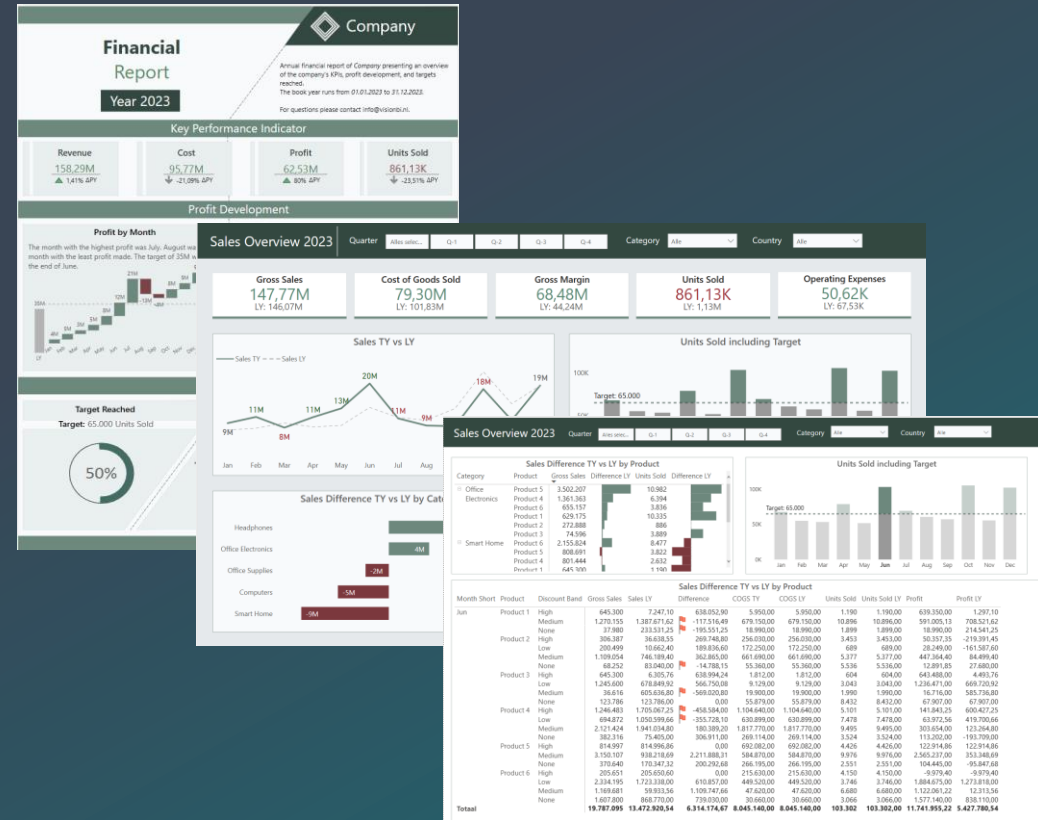
Translate pieces to design

- Each piece tells a part of the story
- Check your story



Using a “Template”

- Uniformity
- User knows what to expect
- Focus on the data, not on handling the tool.



Using a Grid

Organized

Create it in Power BI

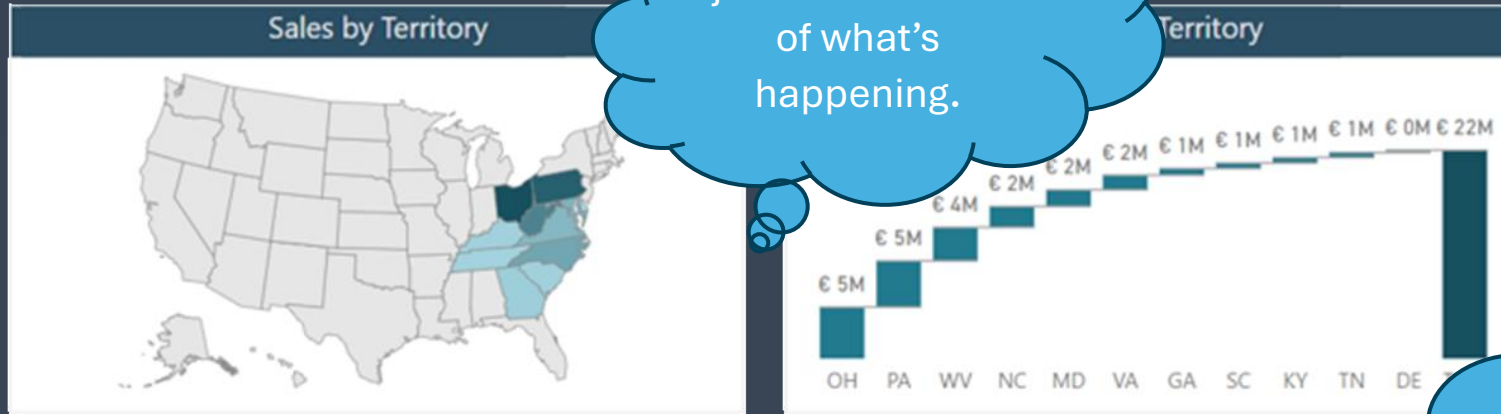
(or Figma or Power Point...)

Can help with discussing layout

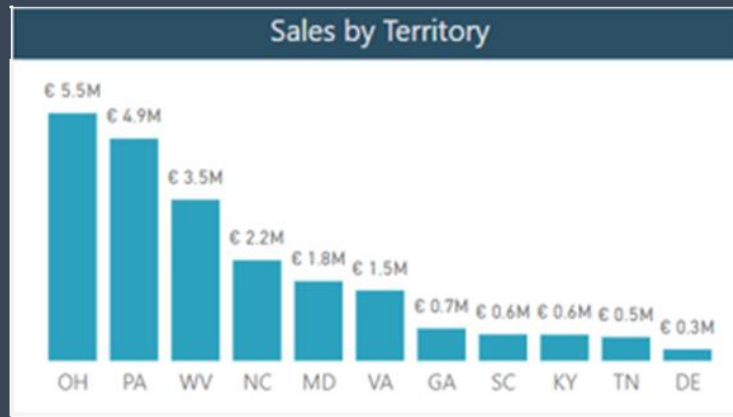


The perfect visual

I just want an idea of what's happening.



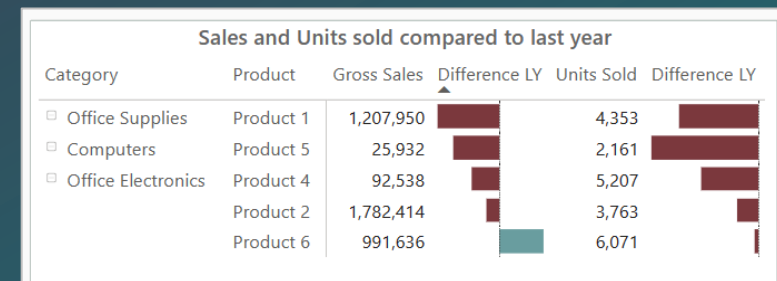
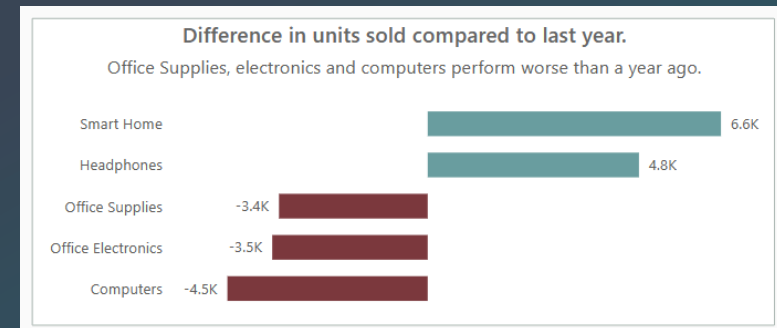
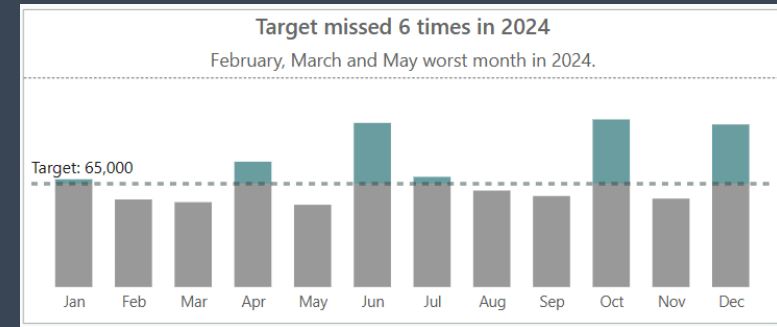
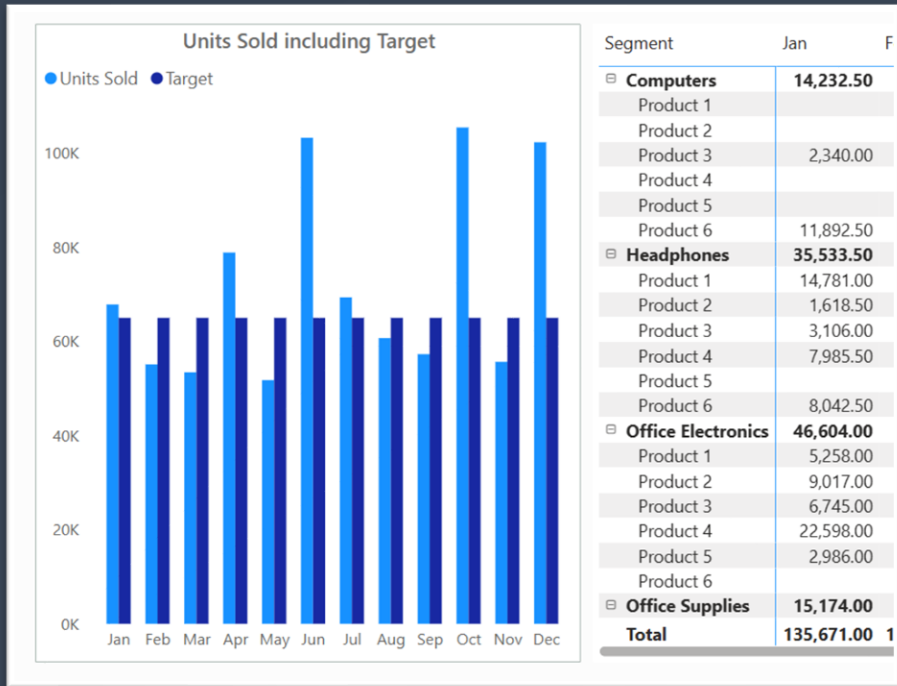
I like tables but my coworker prefers visuals.



This table provides a detailed view of the sales data, including a 'bar' column with small horizontal bars representing the sales values. The table includes a 'Total' row at the bottom.

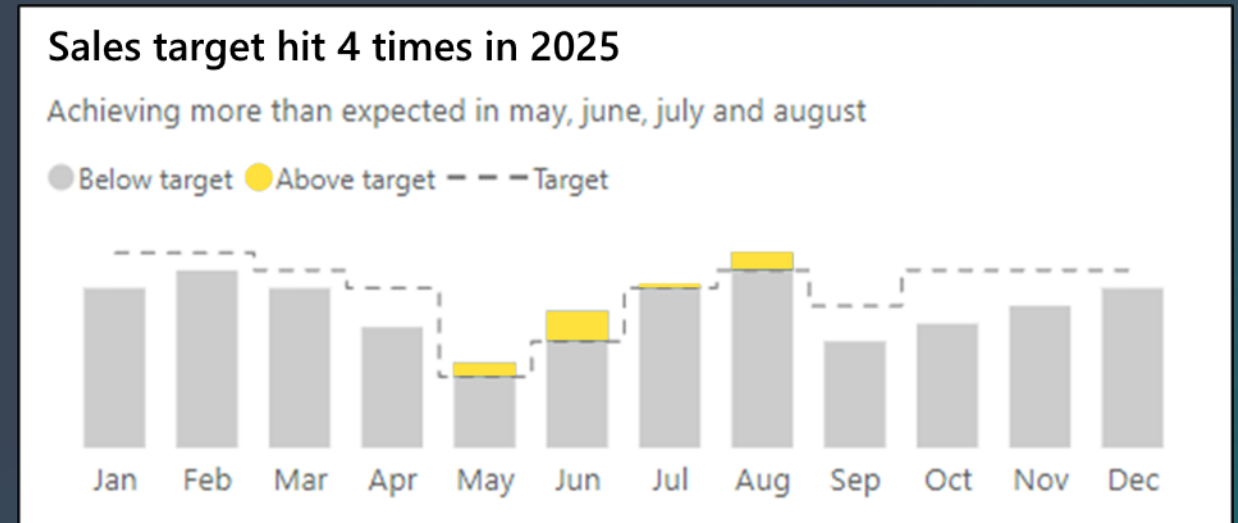
Territory	This Year Sales	bar
OH	€ 5,451,045	
PA	€ 4,891,246	
WV	€ 3,546,443	
NC	€ 2,214,548	
MD	€ 1,753,042	
VA	€ 1,549,656	
Total	€ 22,051,952	€ 22,051,952

Tell the story with visuals

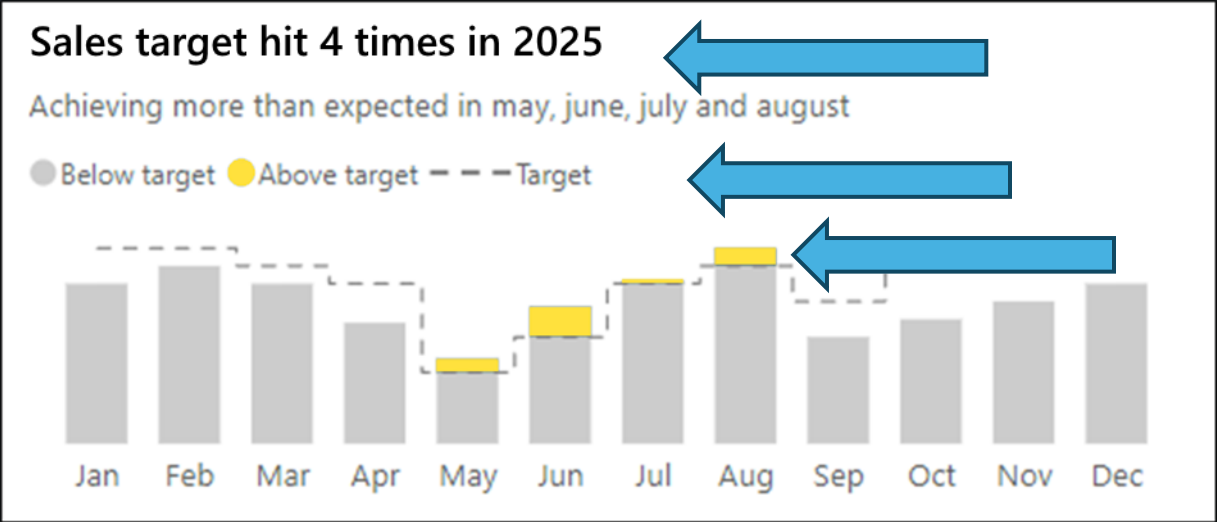


Meaningful (Sub)titles

- Provide context
- Guide the end-user
- Audience does not need to analyze data



Adding Context



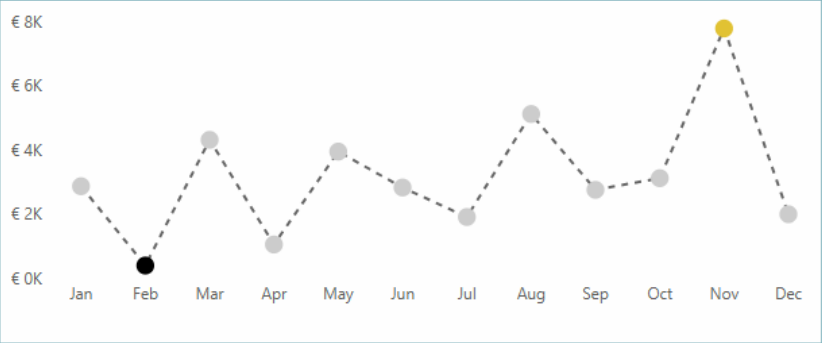
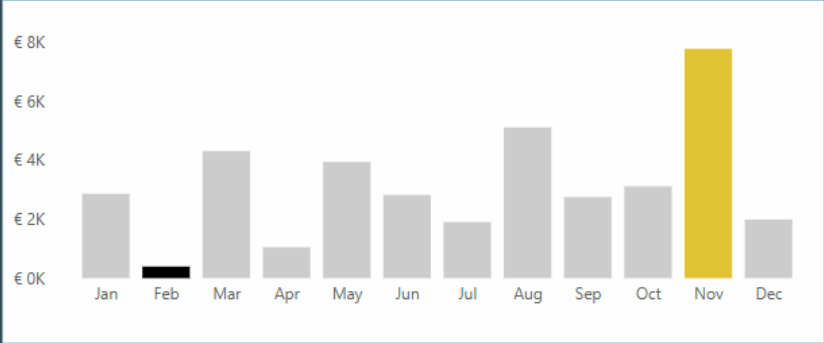
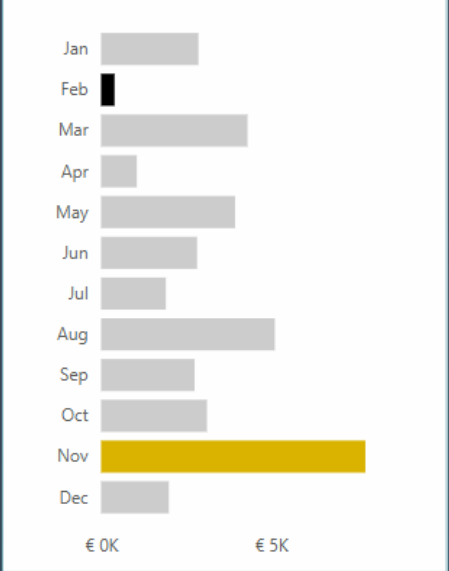
What's important?

2025 Sales Report

Month	Sales TY	Sales LY
Jan	€ 2,867.46	€ 3,073.44
Feb	☆ € 395.70	€ 10,455.49
Mar	€ 4,312.97	€ 602.10
Apr	€ 1,051.91	€ 727.15
May	€ 3,946.97	€ 3,611.28
Jun	€ 2,827.69	€ 1,569.62
Jul	€ 1,908.18	€ 3,763.09
Aug	€ 5,119.11	€ 1,134.45
Sep	€ 2,754.67	€ 4,722.37
Oct	€ 3,118.06	€ 4,539.13
Nov	★ € 7,786.46	€ 1,778.50
Dec	€ 1,994.75	€ 3,970.27

2025 Sales Report

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Nov	€ 7,786.46	€ 1,778.50
Dec	€ 1,994.75	€ 3,970.27



Deliver

Evaluate & Test



IT'S PERFECT!

Continuous process

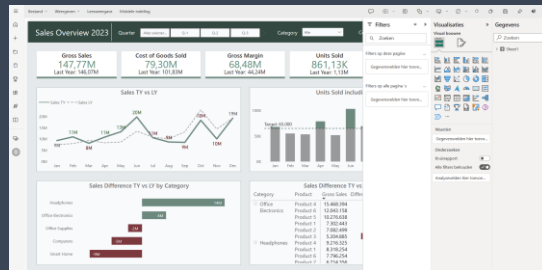
- **Involve the audience early on**
- **Don't stop directly after implementation**
- **Evaluate with the actual audience**



Usage



App



Workspace

Microsoft Power BI

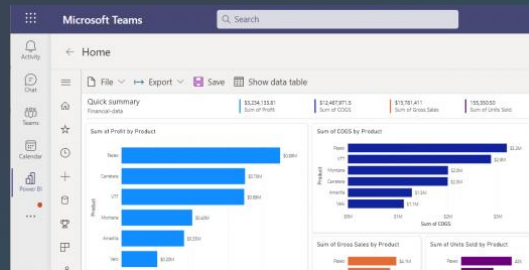
Wekelijks Overzicht Exact

Hallo,
Hierbij het KPI dashboard voor afgelopen week.

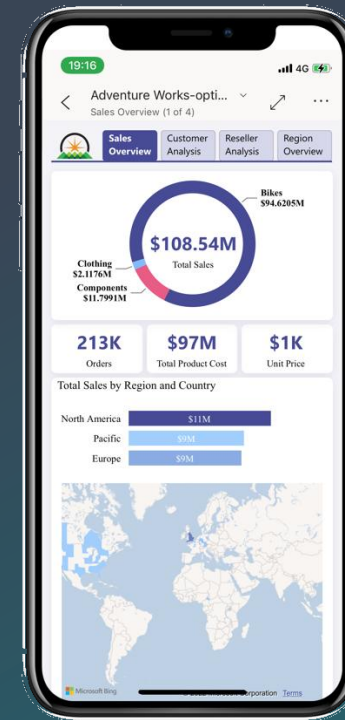
You're receiving this email because you subscribed to the 'KPI 1: Factuureerbaarheid' page of the 'KPI_New' report. The image above was generated at March 3, 2023 18:35 UTC.

[Manage subscription >](#)

Mail (PDF)



Teams



Phone

What if it doesn't work?




Avoid adding unnecessary data, filters, or options.

Stick to the story -> but also be open for improvement

Provide guidance.

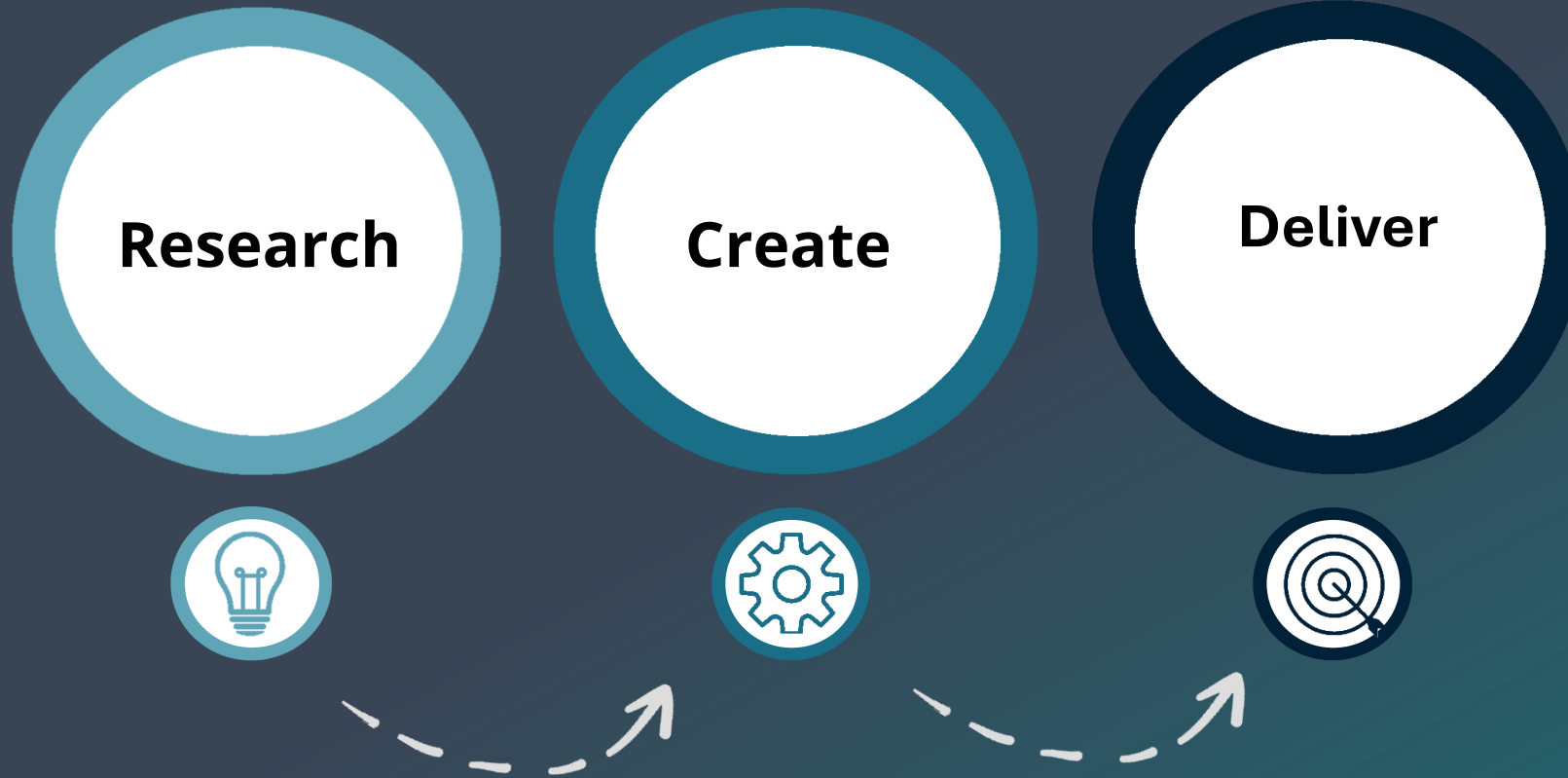
Category	Product	Gross Sales	Difference LY
Office Electronics	Product 4	15,468,394	-583,396.53
	Product 6	12,043,158	1,804,151.16
	Product 5	10,276,638	5,093,043.05

Category	Product	Gross Sales	Difference LY
Office Electronics	Product 4	15,468,394	▼
	Product 6	12,043,158	▲
	Product 5	10,276,638	▲

Category	Product	Gross Sales	Difference LY
Office Electronics	Product 4	15,468,394	
	Product 6	12,043,158	
	Product 5	10,276,638	

Category	Product	Gross Sales	MinMax
Office Electronics	Product 4	15,468,394	
	Product 6	12,043,158	
	Product 5	10,276,638	★
	Product 1	7,302,443	
	Product 2	7,082,499	
	Product 3	5,204,885	☆

Takeaway – It's a process



Valerie Junk

PorcuBI



Please rate this session!

