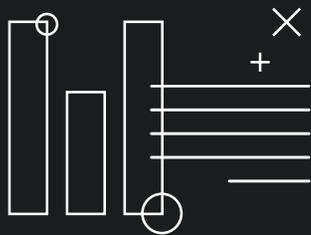
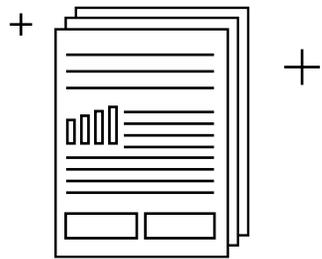


CHEAT SHEET

3 Steps for Better Data Storytelling With Your BI Tools



Best Practices for Effective Data
Storytelling in an Enterprise Setting,
Regardless of Which BI Tools You're Using



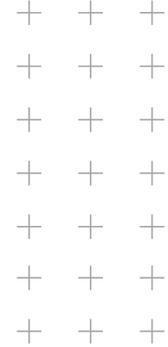
This “cheat sheet” outlines three best practices for effective data storytelling in an enterprise setting, regardless of which BI tool(s) you’re using. Simply put, you can take these tips and immediately apply them to whatever tool you might be using right now.

The demand for accurate, real-time data storytelling has never been greater.

In fact, many individuals and teams within your organization now likely require greater access to business intelligence (BI) tools in order to keep up with the constant demand for accurate, actionable, and near real-time data insights.

Luckily, tools like Tableau, Qlik, Looker, Dundace, PowerBI, and countless others are designed specifically to help teams—especially those operating inside of large organizations—better manage the flow and presentation of data. Even better, each of these tools is well-equipped to do exactly that.

Still, teams often inevitably run into issues because they haven’t taken the methodical steps necessary to set up the right processes, governance standards, and visualization practices needed in order to extract maximum value from these tools.

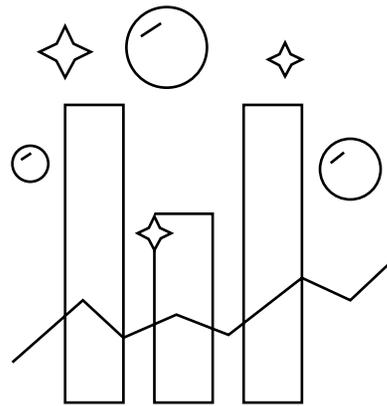




Messy or unclean data can ruin the integrity of any reports that you produce with your BI tools. So, make sure you're setting up standardization processes and regularly revisiting those practices to make sure that they're up-to-date and effective. Taking the time to set this foundation will be an upfront time investment, but it's going to make the organization so much more effective down the line.

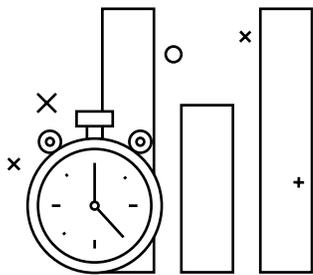
*Courtney Ulrich Smith
Director, Design Strategy
RevUnit*

First Things First!



Data cleanliness is arguably the most critical factor.

Make sure that you're starting with clean data; doing so is arguably the most important variable when working with any BI tool. Any compromised or unclean data set can instantly ruin the integrity of the output from your BI tools. So, take the time necessary to ensure that you're working with accurate, real-time data. Simply, be intentional, patient, and don't cut corners.



Remember: You are the best steward of your own data; it's imperative that you're able to trust the integrity of the data you and your teams are working with on a daily basis. When you're no longer questioning the accuracy of your data, you're then ready to move on to the other three tips listed here in this cheat sheet.

What Can You Do

Make it a priority to set up proper data governance practices from the start.

If there are codified governance practices in place, ensure your team is compliant. If there isn't an organizational governance practice in place, start first by creating or implementing key data governance mechanisms within your own team(s).

Address some of the basics: for instance, where is the data coming from? Can I trust the accuracy of this data? Are there standards in place that govern the labeling and storage of critical data? Are there methods of normalizing the data so that the right people, system, and tools can easily access the data? Answering these questions (and others like them) should help you identify common and/or necessary data sources, uses, patterns, and queries.

Step 01



Sometimes the biggest data challenges aren't actually about the data itself. It's more about just the internal politics at play. It's really just about taking the time to build relationships and understand who the stakeholders are. Typically, when you're working on these large data initiatives, like establishing consistent data structures across the board, there are a lot of different teams involved, and those teams have their own expectations and accountabilities. A little bit of empathy goes a long way in this process.

*Joe Payne
VP Design & Data Team Lead
RevUnit*

Set Up Data & Tool Structures Properly

What to Consider When Setting Up Data and Tool Structures

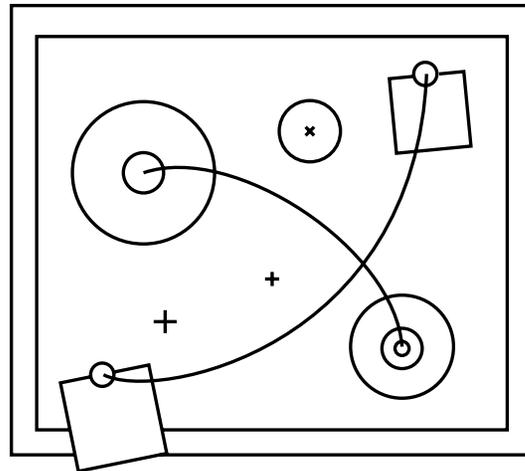
- 01_ Create and/or keep all tool-related documentation
- 02_ Clearly outline all necessary roles and responsibilities
- 03_ Identify and catalog existing reports in circulation
- 04_ Create an intuitive system for new requests



PRO TIP 01:

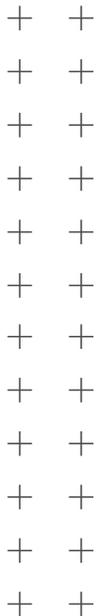
Take the Time to Accurately Catalog Existing Requests & Reports

Make sure that you know which reports are already in circulation and who is using them. Take the time to map requests and reports to the individuals or teams who are on the receiving end of the information. Frankly, failure to “take inventory” of what already exists can often lead to confusion, redundancy of effort, and even a lack of trust in the data itself.



Common Problem(s) Among Large Teams and Organizations

It's common for teams to find multiple, if not very similar reports in circulation at any given point in time, all of which attempt to answer the same questions and/or tell a similar story. Still, since these reports are often created and managed by different team members, they all look slightly different, show similar-yet-different results, and often tell conflicting stories using the same data sets. As a result, this kind of confusion can call the accuracy of the data into question while also creating communication problems between various teams within the organization.



Step 02

Identify the Narrative You Want To Communicate



Datasets, on their own, are like standalone plot points. It's a part of the story, but they don't tell the entire story. So, you need to weave those together into a more cohesive narrative. You want to end up with a story that delivers the right insights in a way to ensure that they can be extracted and understood really quickly and easily.

Joe Payne
VP Design & Data Team Lead
RevUnit

What to Consider When Identifying the Narrative You Want to Communicate

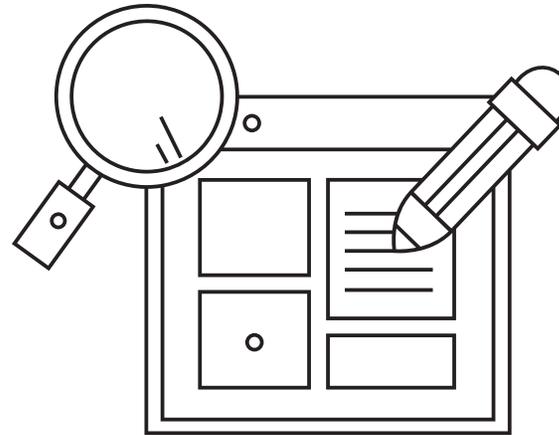
- 01** _ Make sure you understand your objective(s) and desired outcome(s)
- 02** _ Clearly outline each of the most important questions you'll need to answer
- 03** _ Add additional context if and when it's additive to your narrative



PRO TIP 02:

Make Sure That You're Clear About Your Objectives & Desired Outcomes

Routinely revisit your stated objectives as the lens through which you build your dashboards, reports, or other visualizations. If you don't clearly understand your top-level objectives, you'll end up making incorrect assumptions about what the business is actually trying to analyze, learn, or understand. Lastly, if your objectives and/or expected outcomes are not abundantly clear from the start, do what's necessary to make it so — even if that means temporarily hitting the “pause” button until you've resolved any confusion.



Common Problem(s) Among Large Teams and Organizations

All Fortune 1000s generate more data each day than they're capable of handling efficiently. Yet, most are collecting all of this data in some form or fashion. Often times, simply having access to this wealth of data can lead individuals and teams to include data points in their reports that either detract or distract from the primary focus of the primary narrative. As a result, many of these reports then become more difficult to interpret. In the worst cases, the inclusion of such information can radically—and often unknowingly—alter the very story you're trying to tell.

Step 03

Choose the Right Visualization for Your Narrative



It can be easy to fall into the trap of wanting to deliver something that is just really, really visually compelling and exciting — or something a ‘wow’ factor. That’s not the point of data visualization. Visualization’s sole purpose is to make the data easier to understand. What you’re really after is clarity of communication.

Joe Payne
VP Design & Data Team Lead
RevUnit

What to Consider When Choosing the Right Visualization for Your Narrative

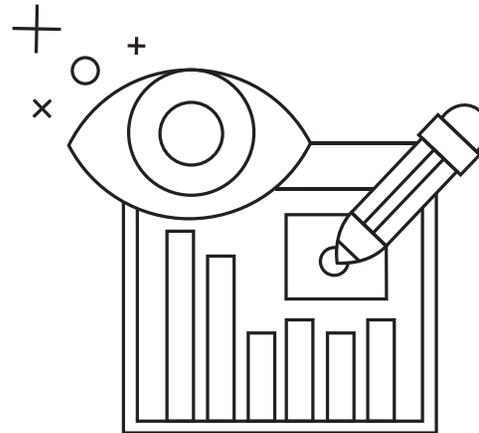
- 01_ Choose the visualization formats that best communicate your narrative
- 02_ Use qualitative data when appropriate to compliment numbers and statistics
- 03_ Make it a point to provide data visualization training for your team
- 04_ Seek feedback to assess whether your narrative is understood



PRO TIP 03:

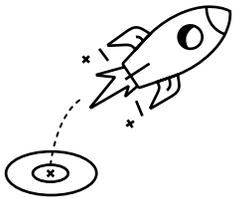
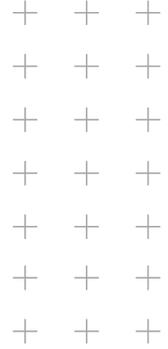
Invest in Data Visualization Training

Data visualization is hard. It's also a difficult skill to learn, but it's something that requires constant, ongoing learning. Any leader who is involved in the decision-making or buying end of BI tools will know how expensive those investments can be. So, you want to think of those tools (and all that they are capable of producing) as investments, not expenses. Thus, in order for you to get the most ROI from said tools, your team must be fully equipped to understand how to master the most critical principles, practices, and functions.



Common Problem(s) Among Large Teams and Organizations

One of the most common challenges enterprise teams face right now is a lack of solid data visualization expertise. What's more, there aren't typically any kind of agreed-upon data visualization principles or standards that govern how individuals and teams are expected to present critical data. Additionally, many of the individuals who are now tasked with making key data visualization decisions (creating dashboards, reports, and other influential deliverables), but lack any sort of modern data visualization training, which can often lead to the misrepresentation of data and/or misunderstanding of the narrative itself.



This “cheat sheet” is simply a starting point to help you get the most value out of your existing BI tools. Clearly, there’s a lot more to consider beyond what we’ve listed here. So, we’ve listed a few additional resources below where you can find more detailed information to help you use your existing BI tools for more effective data storytelling.

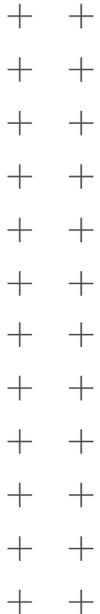
Wrapping Up

What to Take Away From This Cheat Sheet

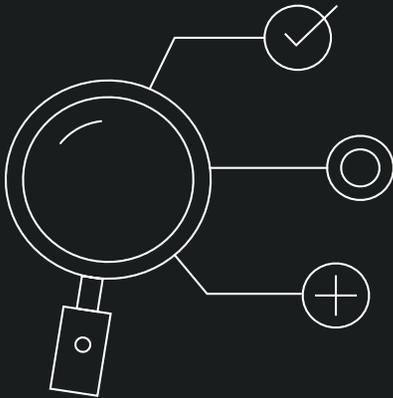
Set up data and tool structures properly

Identify the narrative you wish to communicate

Choose the right visualization for your narrative



Additional Resources



RevUnit is a data technology studio.

We help enterprise teams create change with their data, faster, by applying agile product principles to their data systems.

[Learn more →](#)



WEBINAR

Using Your BI Tools for More Effective Data Storytelling →

Visit the link above to watch the full-length recording from our most recent webinar and get even more info about each of the tips and recommendations listed in this cheat sheet.



QUICK-START GUIDE

Creating a More Data-Driven Organization →

Visit the link above to view the latest in our “quick-start” series. Learn more about the five things every enterprise leader should be thinking about right now in order to make the critical transition into an even more competitive, data-driven environment.



OFFERING

Data Visualization Audit →

Are your data visualizations making the right impact on your business? Get a pricing sheet today.