



Data Storytelling with Tableau

Course ID #: 0360-756-ZZ-W

Hours: 16

Course Content

Course Description:

This Storytelling with Tableau course teaches participants how to effectively navigate data to ask the right questions and define the right metrics, with a focus on context, design, communication, and automation using Tableau. Class will include time for workshoping with your own data to make improvements and create more impactful data-driven narratives.

Course Objectives:

All students will learn to:

- Understand the difference between exploratory and explanatory analysis
- Distinguish between data visualization and data storytelling
- Learn the data storytelling process
- Learn which charts to use to appropriately analyze data for insights
- Build advanced charts for immediate insights
- Ask the right questions to impact business decisions
- Determine which metrics are important and how to analyze, visualize them appropriately
- Choose the appropriate story type for the data story
- Construct the data story
- Identify common pitfalls of data analysis and visualization
- Apply best practices of data visualization and storytelling
- Communicate insights in a clear, simple way that tells a story to drive action

Prerequisites:

An introductory Tableau course and at least 2 months creating charts in Tableau.

Topics:

Set Up/Context:

- Understanding the difference between data visualization and data storytelling
- The data storytelling process overview
 - Question/problem statement/ obtain context
 - Analysis
 - Exploratory to get to Explanatory
 - Select your data story type
 - Sketch
 - Communicate
 - Which story book (the different ways to

communicate your data story) should you use

Starting in Tableau

- Simple Data Connections and the Data Connection Interface
- The Main Tableau Interface and Navigation Menu
- Building Simple Visualizations
- Saving Options



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Tableau Piece:

- Dimensions vs. Measures and How They Affect a Viz
 - What if We Wanted to Convert a Measure to a Dimension? How Would the Viz Change?
- Continuous vs. Discrete Variables
- Basic Dates
 - Setting the Fiscal Year
- Basic Aggregations

Storytelling Piece:

- Context and Logistics
 - Obtaining context
 - Focus on the why (why -> root cause)
 - Challenging assumptions
 - Identifying key metrics
 - Logistics
 - Does the data exist for what's being asked?
 - Do you need permission to access the data set?

Analysis:

Tableau piece:

- 1 – Distributions of Data, Rankings, Part-to-Whole
 - The Standard Bar Chart
 - The Side-by-Side Bar
 - Pie Charts with Percent of Total
 - Bar Chart with Max Color Calculated Field
- 2 – Relationships between variables
 - Using Measure Names and Measure Values to Build a Data Table
 - Totals and Subtotals
 - Highlight Tables
 - Scatterplots
 - Creating Dual Axis Charts and Combo Charts
 - Actual vs. Target
- 3 – Trends and patterns over time
 - Advanced Time Series Analytics
 - Line Chart with Year over Year Growth
 - Running Total Charts
- 4 – Geographical and spatial relationships

- Filled Map
- Symbol Map
- Dual Axis Map
- 5 – Outlier Analysis
 - Box Plots

Secondary characters that help the protagonist (the analysis):

- Advanced Tooltips
- Annotations
- Dynamic titles
- Sets/Combined Sets
- Conditional Filter (if needed)
- Top/Bottom N Filter (if needed)

Select Your Data Story:

Data Storytelling Piece:

There are seven types of data stories

- Narrate Change over Time.
- Start Big and Drill Down.
- Start Small and Zoom Out.
- Highlight Contrasts.
- Explore the Intersection.
- Dissect the Factors.
- Profile the Outliers.

Tableau/data secondary characters:

- Using KPIs and BANS
- KPI Indicators with YTD vs. Prev YTD (or similar types of time periods)

Sketch:

Data Storytelling piece:

- Review the purpose of the story (aka the plot)
- Review who the audience is for the story
- Story Mountain, translated for data
 - Setting it up
 - Rising Action (your analysis)
 - Climax/Peak: (Your insights)
 - Conclusion/Ending: What's the call to action for your audience?
- How will this be visually represented? (Sketch it out)



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Tableau Piece:

- Walk through how to build first dashboard, elements, etc

Communicate:

Data Storytelling piece:

- Communicating through story “books”
- Dashboard
 - Advanced Formatting & Dashboard Best Practices
 - Layout Containers
 - Floating Elements
 - When to Use Which
 - Effective Dashboard Layouts
 - Layout Best Practices
 - Titles and Labeling
 - Color Choices
 - Dos & Don'ts

- Slide deck/Story Points

Tableau Piece:

- Build dashboard
- Dashboard filters for end user use
- Labeling, Annotations, Tooltips and Data Highlighting
 - Axis Labels
 - Annotations
 - Tooltips
- Storypoints

Choose your own Adventure Stories (for more advanced Tableau users):

- Using Actions to Create Interactive Dashboards
 - Filter Actions
 - Highlight Actions
 - URL Actions

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NASBA Information

Level: Intermediate

Attendance Requirement: To be awarded the full credit hours, you must sign in and attend the entire course.

Fields: Computer Software & Applications

CPEs: 16

Policies: Course Registration, Cancellation, Refund and Complaint Resolution

For more information regarding administrative policies such as complaint and refund, please contact our offices at 800-639-3535 or visit us at: www.tcworkshop.com

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