DATA
FOR EXECS®

ULTIMATE GUIDE

Real-world
Before & After
examples

BETTER CHARTS
Fast Fixes for the Big Meeting

BETTER DASHBOARDS
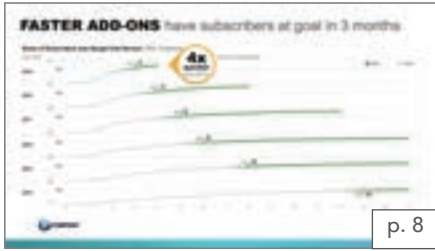### This New Way Changes Everything

BETTER STORYTELLING
How to Win Big with the CEO

+ More Secrets & Surprises!

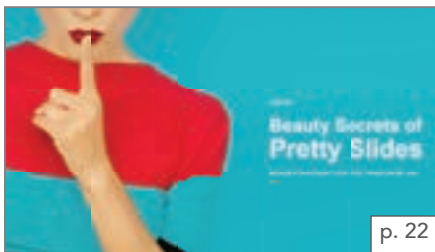Collecting highlights from Issues 1-4 of Data for Execs® magazine

dataforexecs.com

BETTER
CHARTS

All images: Adobe Stock

BETTER
DASHBOARDS

BETTER
STORYTELLING

+ SECRETS
& SURPRISES

So Many (Helpful) Voices in My Head

Let's talk data at linkedin.com/in/christauber

I had to stop everything I was doing. There I was at my desk, too late into the night and too deep into the data. And when I say deep, I mean as granular as you can go without accidentally slipping into the quantum realm. I found myself examining the second-by-second details of one specific store on one specific day doing one specific behavior. How was I going to calculate that, then visualize it, then show the story, then help someone make a decision? I was losing it in every sense. That's when I stopped.

And then I heard the voices. The good voices. The helpful ones. I could hear the director saying, "Just show me what's working and what's not, and let me drill down if I have questions." The exec chimed in, "I need to see if we're on track to hit our goal." And all the book authors I've read and all the LinkedIn experts I follow were in there too, telling me to see the big picture (thanks, Steve Wexler), avoid the data pitfalls (I hear you, Ben Jones), and pursue killer visual strategies (thanks, Amy Balliett).

The next morning, I started fresh. Listening to those voices sparked

a whole new approach that I had never tried before. The resulting visualizations showed the data clearly at a high level, but there was an intuitive path to dive deep, even down to each store and each second — without getting lost.

That experience inspired much of this guide, which includes so many expert voices. The feature "What's Missing From Your Presentation?" alone has 28 data gurus sharing their best advice on how to present data to executives. That's yet another example of the spirit of collaboration in the data community. We can all learn from each other and get better together. And then you'll see new ways to make persuasive data stories that lead to real change in your business.

You can hear the voices too. Follow these experts on social media, read their books, watch their webcasts. Even better, interact with them. Ask questions. Join the conversations. Add your voice. I can't wait to hear what you have to say.

Chris Tauber
Editor, Data for Execs

In defense of stock photos

Cheese factor is an issue when using stock photography with data. That's why this cover at left didn't make the cut for Issue 4, though I really loved the emotion. I carefully sprinkle images throughout presentations to literally put a face on the data. If a stock photo fits your story and makes the communication clearer, use it — it it's not too cheesy.

Fix Data in a Flash

TIPS FOR THAT BIG MEETING WHEN TIME IS VERY, VERY SHORT

The phone call and the charts both came at 10 a.m. "The CEO wants to see findings on this initiative," the executive told me, "but these charts aren't telling the story."

I glanced at the visuals — slide after slide jam-packed with bars, pies, legends, colors, labels and numbers. A data team had put in a serious amount of effort gathering material but didn't distill it into a high-level view. "Wow, that's a lot of information," I said. "I'll dive in. When's the CEO meeting?"

"11 a.m."

I was lucky I had finished my morning coffee for two reasons: 1) A caffeine rush was already racing through me, and 2) I didn't do a spit take.

Yes, that's a stressful deadline. And yes, there's hope. Whether you have a turnaround of one hour or one minute, you can draw out the story from dense data. The key is knowing what to prioritize in the time between right now and the start of the meeting, then having techniques that you've accelerated through repetition and repetition.

You're about to see three data slides that need fast help, each based on a real-world example. For each slide, I go through advice on what you can fix if you have just one minute (or so), one hour or one day before an executive needs to see it. Little changes can make a big impact, and a little more time can uncover the true story.

Use all the time you can, but move fast. That 11 a.m. CEO meeting? With my heart racing, I finished at 10:59 a.m. The response: "Wow, that's a good story." Then I got another coffee.

THE PROBLEM: "I'm going to get flattened in the meeting like this bar chart."

Consistent Store Sales Growth
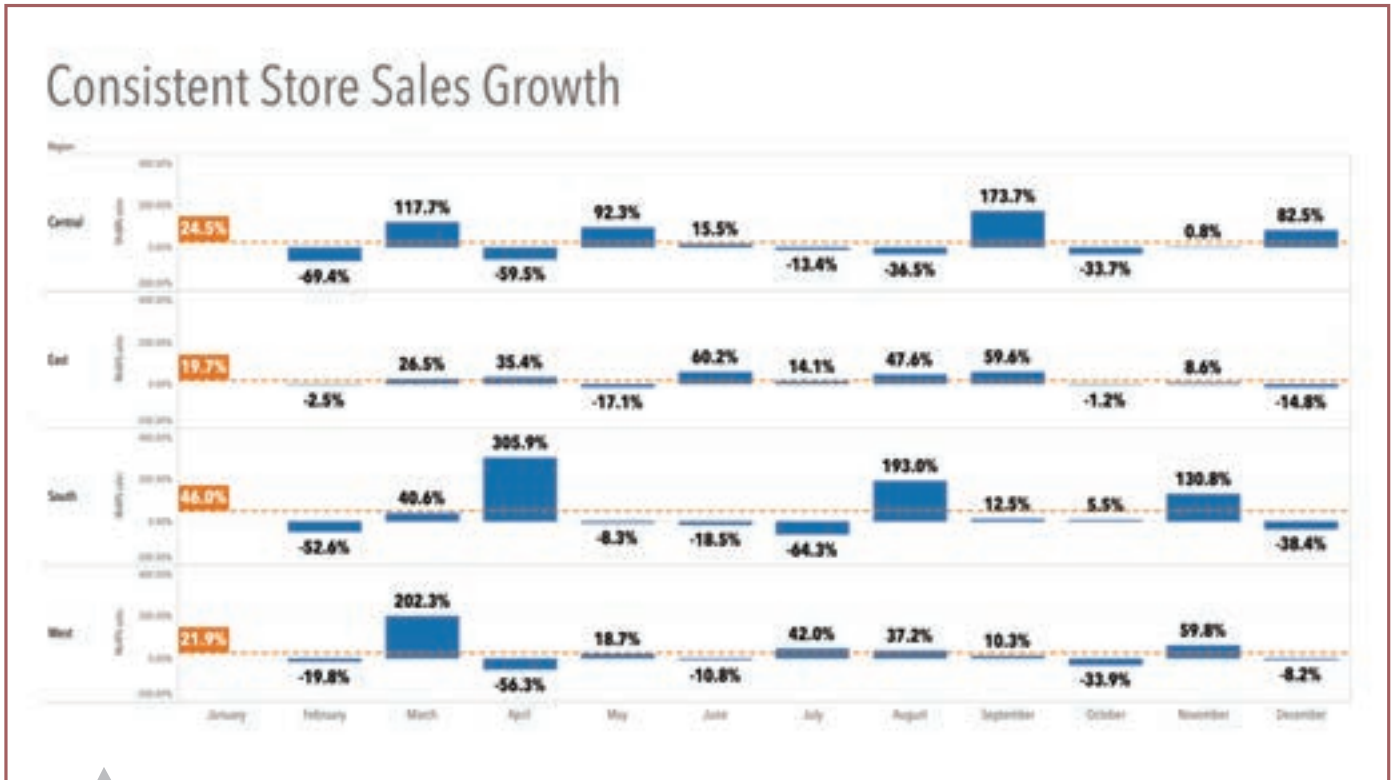
BEFORE

Too many numbers, too wide to tell differences, too much to fix in too little time! Don't panic. First, figure out which number is most significant. In this case, it seems to be that average figure for the South. It's the biggest by far of the regions, so start there.

1 MINUTE

In a very tight turnaround, at least highlight what's most important visually, then rewrite the headline to match. In Tableau, you can click the row, then export as PowerPoint for the view shown below. Or in PowerPoint, use semi-transparent white boxes.

South Region Leads in Average Monthly Sales Growth

South Leads in Average Sales Growth Fueled by April Spike

SALES Month-over-Month

South | Central | West | East

46.0% | **24.5%** | **21.9%** | **19.7%**
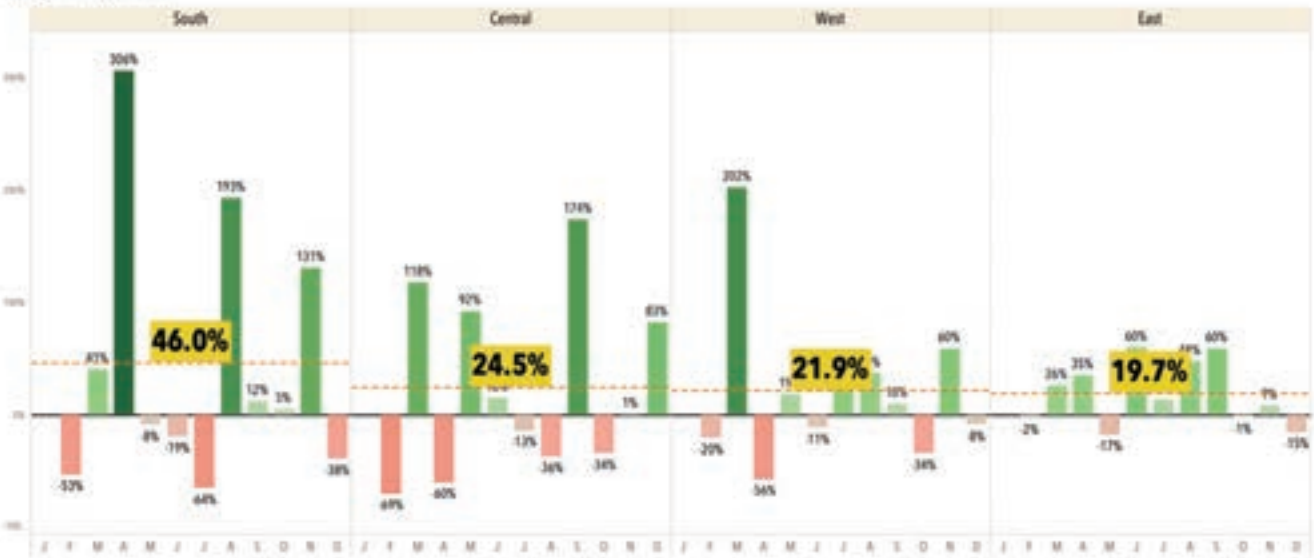
| **1 HOUR** | With a bit more time, switch wide rows to tall columns, like this revision above. That makes highs higher and lows lower. Then change the colors to a standard palette of green "good," red "bad" and yellow for key highlights. Keep evolving that headline. |

| **1 DAY** | One day can make a huge difference. You can make a more meaningful fix to problematic visualizations. In this case, a more complete story was hiding in the data. Switching from year-over-year percentages to actual differences reveals a better insight. |

West Region Drives Our Growth with Best Year-over-Year Gains

SALES Monthly

West | Central | East | South

SALES Annual

West | Central | East | South

THE SOLUTION: "Great seeing all that green!"

West Region Drives Our Growth with

SALES Monthly   ▢ 2018   ■ 2019

West	Central	East

$40K
$31K
$35K
$20K
$22K
$10K
$10K
$5K
$5K
$2K
$0K

$20K
$19K
$16K
$14K
$10K
YoY
$0K
-$7K
-$10K
-$14K
-$15K
-$15K
-$20K

J F M A M J J A S O N D   J F M A M J J A S O N D   J F M A M J J A S O N D   J F M A M
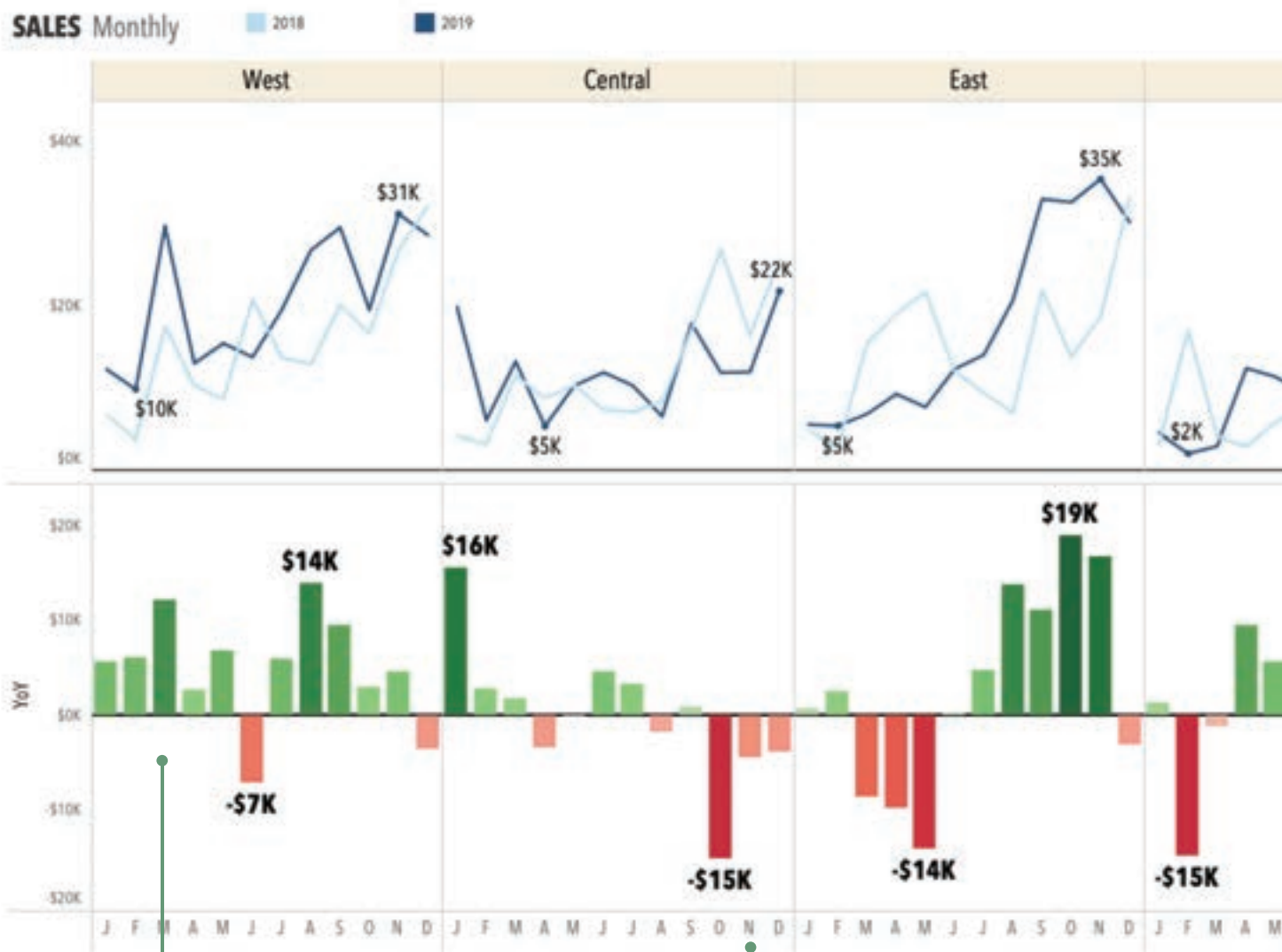
DETAILS

Show the values and differences whenever you can

Here the line charts show the values, the bar chart shows the differences. That way, you see the volume driving the business and the biggest gaps that need attention.

Do the bare minimum in axis tick marks

Keep the focus on the content. With months, for example, the first letter is enough to know what you're looking at. An axis should simply frame the content.

Best Year-over-Year Gains

SALES Annual   2018   2019

| South | West | Central | East | South |

West: $190K (2018), $249K (2019)
Central: $147K (2018), $147K (2019)
East: $180K (2018), $213K (2019)
South: $94K (2018), $121K (2019)

$250K
$200K
$150K
$100K
$50K
$0K

$100K
YoY
$50K
$0K
-$50K
-$100K

West: 31% $59K
Central: 0% $0K
East: 18% $33K
South: 29% $27K
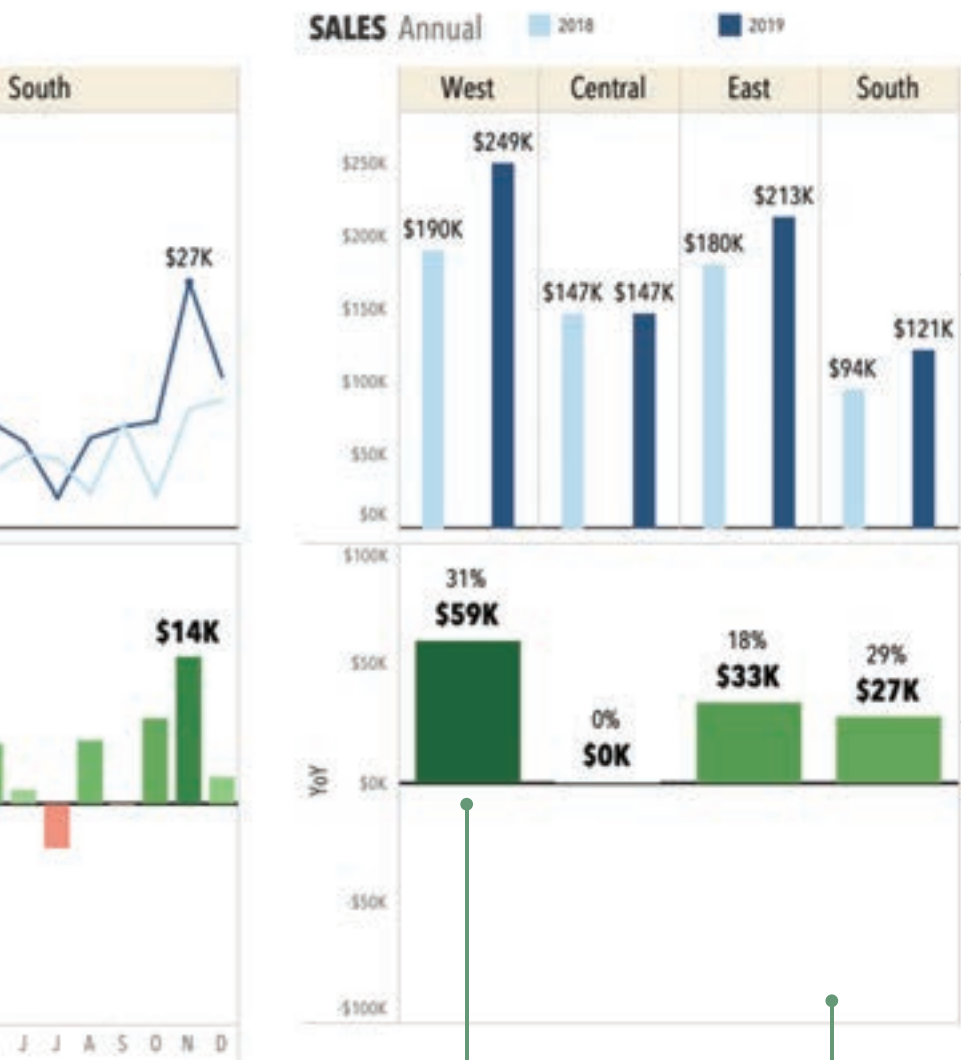
Work on the headline until the last minute

This is the story distilled to its essence, and it may be what's remembered most from the meeting. Keep fine-tuning it.

Make sure charts are tall enough to show differences

Going wide and short is a bad look for bar charts (and line charts). Carve out as much vertical space as you can.

Bold what's most important and remember green is good

When executives glance at the chart, these bold numbers and the biggest green/red differences should jump out.

Total up the data for a conclusion to the story

A structure that often works is having the trends shown on the left, then what they literally amounted to on the right. Here, the approach reveals the bigger story.

Remember white space is important too

Yes, it gives breathing room to the charts to help the focus. But here, the white space is also essential to show that none of these regions was negative. Big news.

THE PROBLEM: "The discussion is going to go like this chart — sideways."
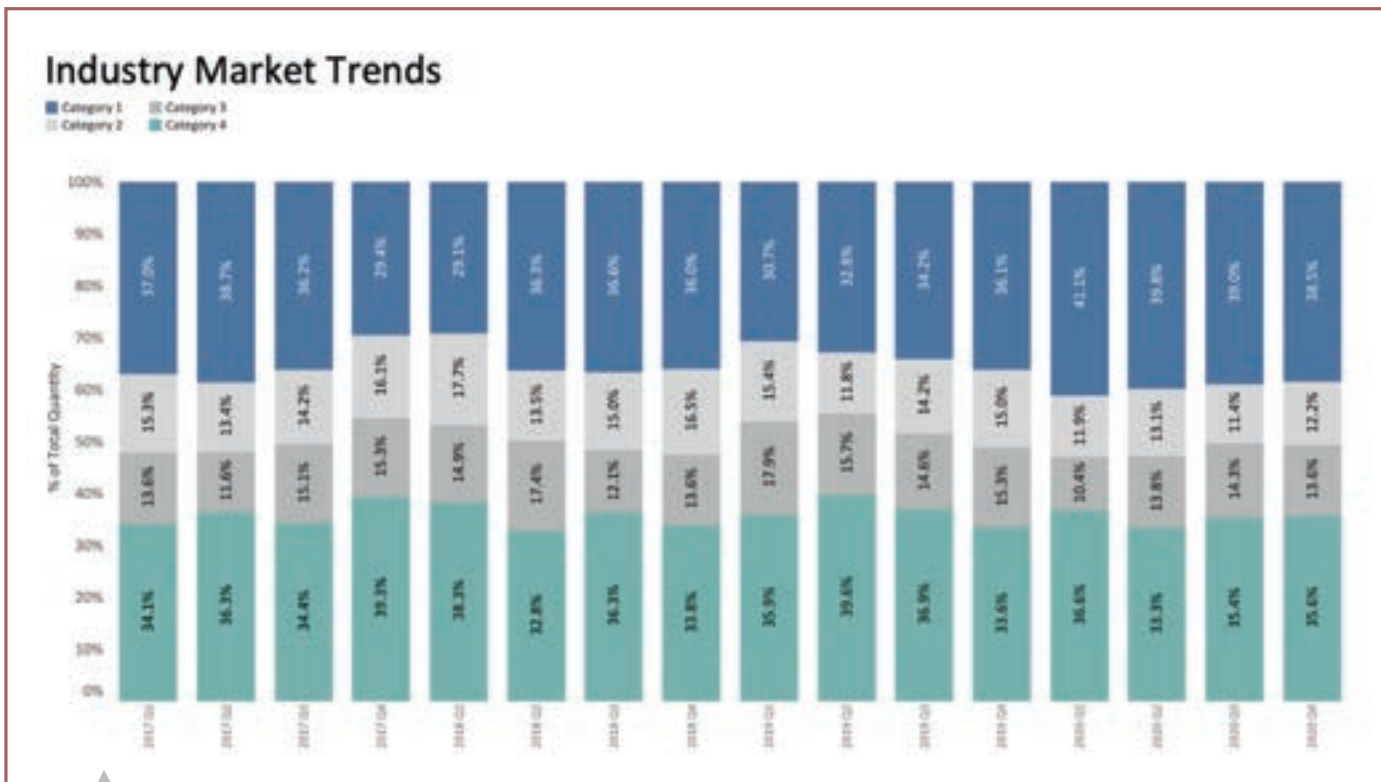
BEFORE

So many bars, so many numbers, so many sideways! All of that and the non-descriptive headline on this slide will make a whole meeting go sideways. This is a classic case of default settings for chart labels and for a chart type. Let's get this turned around.

1 MINUTE

At the very least, highlight the most important categories to start drawing the executives' attention to what matters. Then if there's a setting to "rotate label," click it until as many numbers as possible are right-side up. Type in an actual headline.
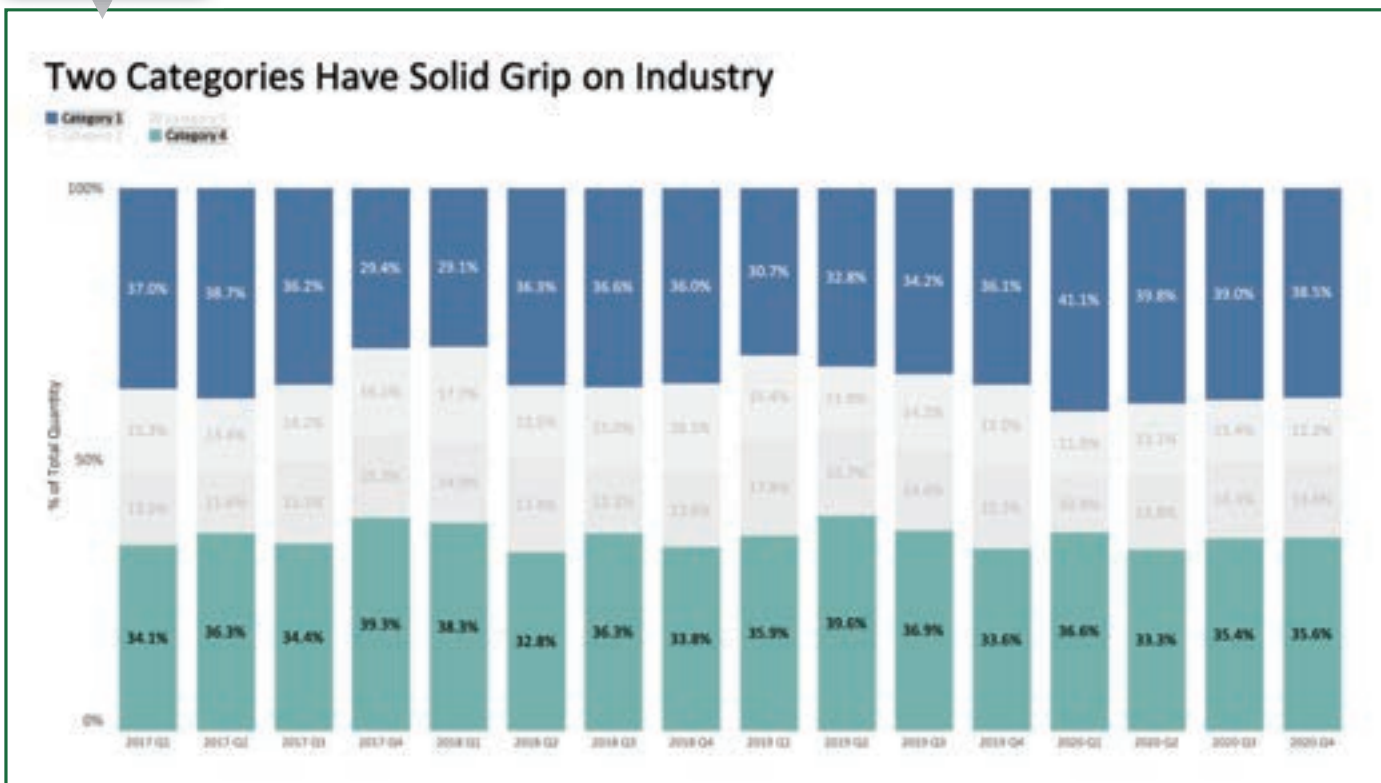
Two Categories Maintaining Solid Grip on Industry Amid Uptick in Sales Mix

Sales Mix by Quarter

Start
Category 3 13.6%
Category 2 15.3%
Category 4 34.1%
Category 1 37.0%
2017 Q1

Recent
Category 2 12.2%
Category 3 13.6%
Category 4 35.6%
Category 1 38.5%
2020 Q4
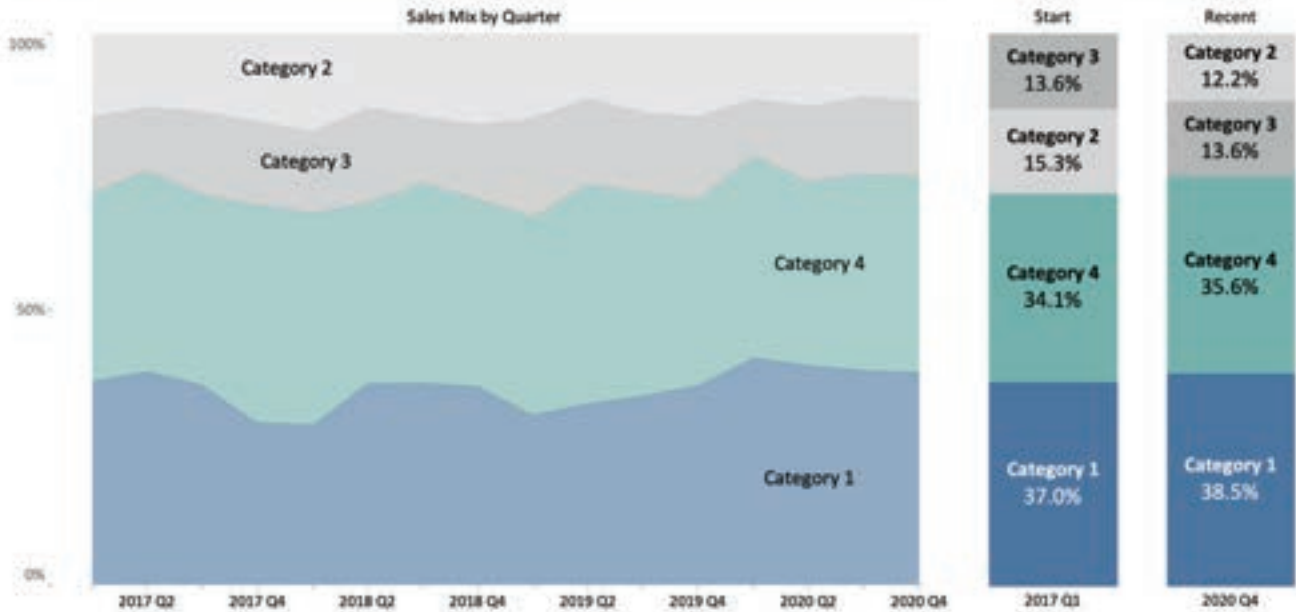
1 HOUR One fast way to distill an overloaded bar chart is to turn it into an area chart. That's especially true in this case, where the overall trends are the story, not each bar segment's percentage value. Instead, show the percentages at the start and the end.

1 DAY With a little more time, take a step back and question whether the share percentages are the story or whether it's the overall volume. In this example, if you only have one slide, the volume shows what's really happening. A visual key helps, too.

Category 1 at +46% Year-over-Year is Driving Industry Growth

Industry Sales by Quarter

Biggest jump in 2020

$7.58B
Category 2 $1.13B
Category 3 $1.08B
Category 4 $2.77B
Category 1 $2.60B
2017

$7.98B
Category 2 $1.25B 10.4%
Category 3 $1.13B 4.2%
Category 4 $2.78B 0.3%
Category 1 $2.82B 8.7%
2018

$9.84B
Category 2 $1.39B 11.6%
Category 3 $1.53B 35.6%
Category 4 $3.56B 27.9%
Category 1 $3.36B 19.0%
2019

$12.48B
Category 2 $1.51B 8.8%
Category 3 $1.67B 9.0%
Category 4 $4.40B 23.5%
Category 1 $4.90B 45.9%
2020

Category 1 — Services and subscriptions
Category 2 — Food and drink
Category 3 — Household goods
Category 4 — Office equipment

THE SOLUTION: "Now I see what's going on. Let's talk about what to do."

Category 1 at +46% Year-over-Year is D

Industry Sales by Quarter

$7.58B
Category 2
$1.13B
Category 3
$1.08B
Category 4
$2.77B
Category 1
$2.60B
2017

$7.98B
Category 2
$1.25B 10.4%
Category 3
$1.13B 4.2%
Category 4
$2.78B 0.3%
Category 1
$2.82B 8.7%
2018

$9.84B
Category 2
$1.39B 11.
Category 3
$1.53B 35.
Category 4
$3.56B 27.
Category 1
$3.36B 19.
2019

Category 1
Services and subscriptions

Category 2
Food and drink

Categor
Househo

Use reference lines to show how everything adds up

Here, the category breakdown is the key. But executives will want to do the math to see what the total is. Do it for them in this subtle reference line.

Add visual elements if they help explain the story

No, that doesn't mean clip art of two hands shaking or of a bar chart with an arrow going up, up, up. Usually images of customers or products are the best bet.

Include the "Wow!" data point in the headline

Remember the original headline for this slide? No one will. But this one makes executives take notice and sparks an action plan on how to capitalize.

The chart and the story should both build to the climax

If the news is that a top metric has climbed to a new high, make sure that's very clear in the visualization. Here, the big bar at the end is the big news.
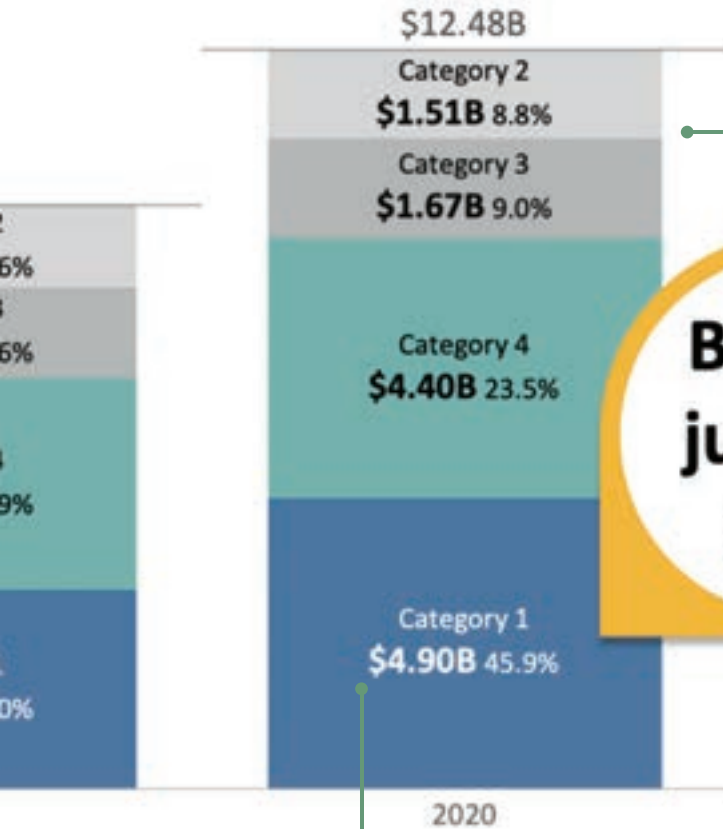
Point to the data that's most important

This is especially helpful in a chart like this where there are still a lot of data labels. Many executives really want to "see the numbers." But a visual takeaway like this helps tell the story and ties the headline to the chart.

Give thought to how you're labeling the data

This label is more than a just a number. You can often eliminate a color legend by adding a name here. Sneak in a year-over-year %, too. It helps to make the most important number bigger and bolder.

If you have the time, keep honing the story

As Lorne Michaels said about *Saturday Night Live*, "The show doesn't go on because it's ready; it goes on because it's 11:30." Same with a last-minute rush before a meeting. But do all you can.

THE PROBLEM: "Oh no, the leadership team hates rainbows and bubbles."

Higher Profits from Our Products
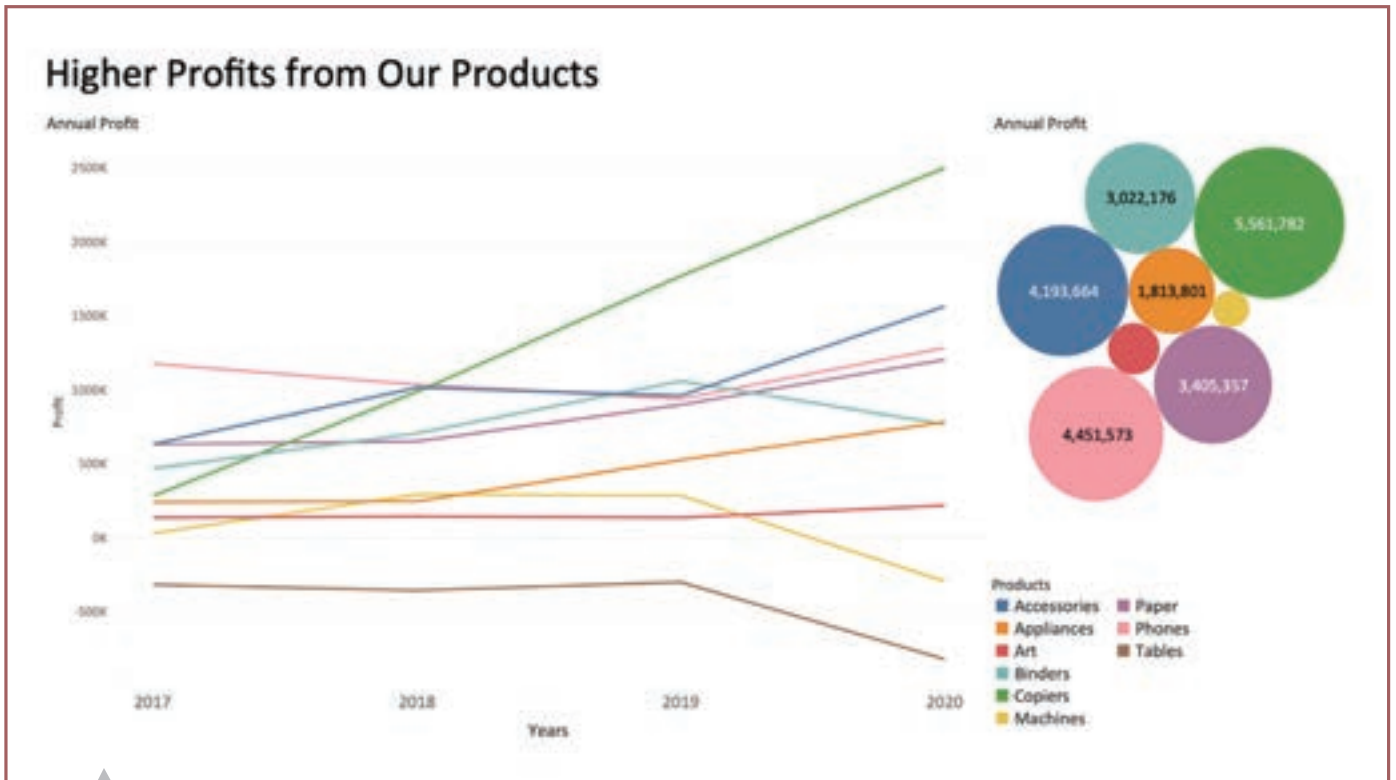
BEFORE

Whoever sets the default color palettes in Tableau, Excel and the like must be a cheery soul. But all the colors are usually color for color's sake and not to clarify what's good for business, what's bad, and what's background context. Bubbles?! Too cheery.

1 MINUTE

The advice is the same here as earlier examples: quickly highlight a couple key points and make the rest of the charts fade into the background. Then write a headline that grabs attention and supports what you highlighted. Be cheery only if the story is.

Copiers Lead in Profitability Due to Steady Climb in Recent Years

Copiers Are Driving Profits as Tables & Machines See Major Drop

Annual Profits by Product Category *(2020 totals noted)*

Copiers $2.50M
Accessories $1.57M
Phones $1.28M
Paper $1.20M
Appliances $0.79M
Binders $0.77M
Art $0.22M
Machines -$0.20M
Tables -$0.81M

2017   2018   2019   2020

4-Year Profit Totals

Category	Total
Copiers	$5.56M
Phones	$4.45M
Accessories	$4.19M
Paper	$3.41M
Binders	$3.02M
Appliances	$1.81M
Art	$0.65M
Machines	$0.34M
Tables	-$1.77M

---

1 HOUR — Changing a rainbow palette to a default business palette of red/green/gray/black is worth this chunk of time. Then change those bubbles to bars so that people can compare the sizes better. Bubbles and pie charts have that same problem so avoid them.

1 DAY — An effective tip that takes more time is grouping. In this case, maybe you can stop at the red/green approach above. But start grouping all those categories, and the story is distilled to its essence: Amid flat sales, there's one huge star and two dogs.

Profitability Threatened by Tables & Machines Even as Copiers Soar

Annual Profits with Key Categories

$3.33M $4.77M $6.32M $7.25M

-40% net drop

Totals

$1.43M $1.55M $0.93M

Year-over-Year

2017   2018   2019   2020

Profit per Unit

Copiers $943
Other $8
Tables -$21
Machines -$24

2017   2018   2019   2020
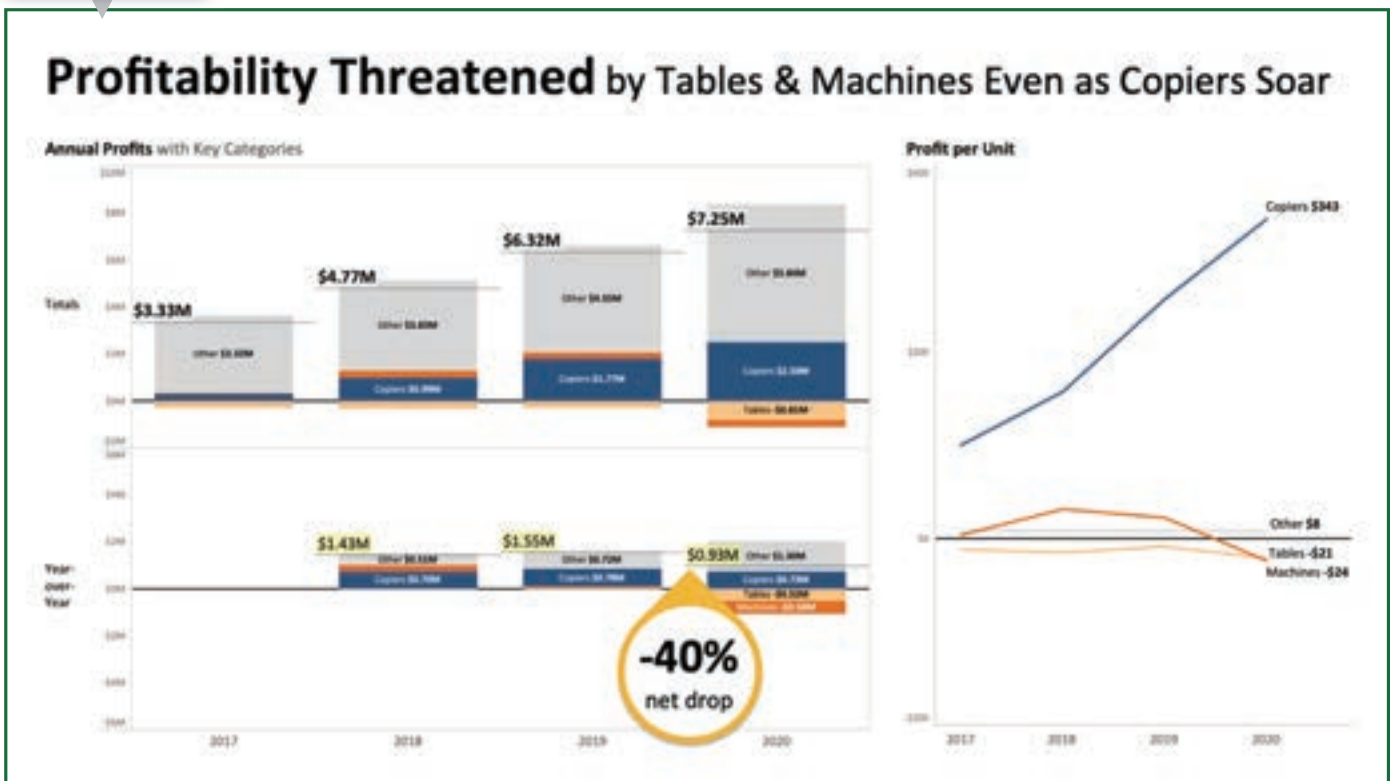
THE SOLUTION: "OK, let's scale that success and stop that bleeding."

Profitability Threatened by Tables & M

Annual Profits with Key Categories

Totals

- $3.33M — Other $3.32M
- $4.77M — Other $3.83M, Copiers $0.99M
- $6.32M — Other $4.55M, Copiers $1.77M
- $7.25M — Other $5.84M, Copiers $2.50M, Tables -$0.81M

Year-over-Year

- $1.43M — Other $0.51M, Copiers $0.70M
- $1.55M — Other $0.72M, Copiers $0.78M
- $0.93M — Other $1.30M, Copiers $0.73M, Tables -$0.52M, Machines -$0.58M

-40% net drop

2017   2018   2019   2020
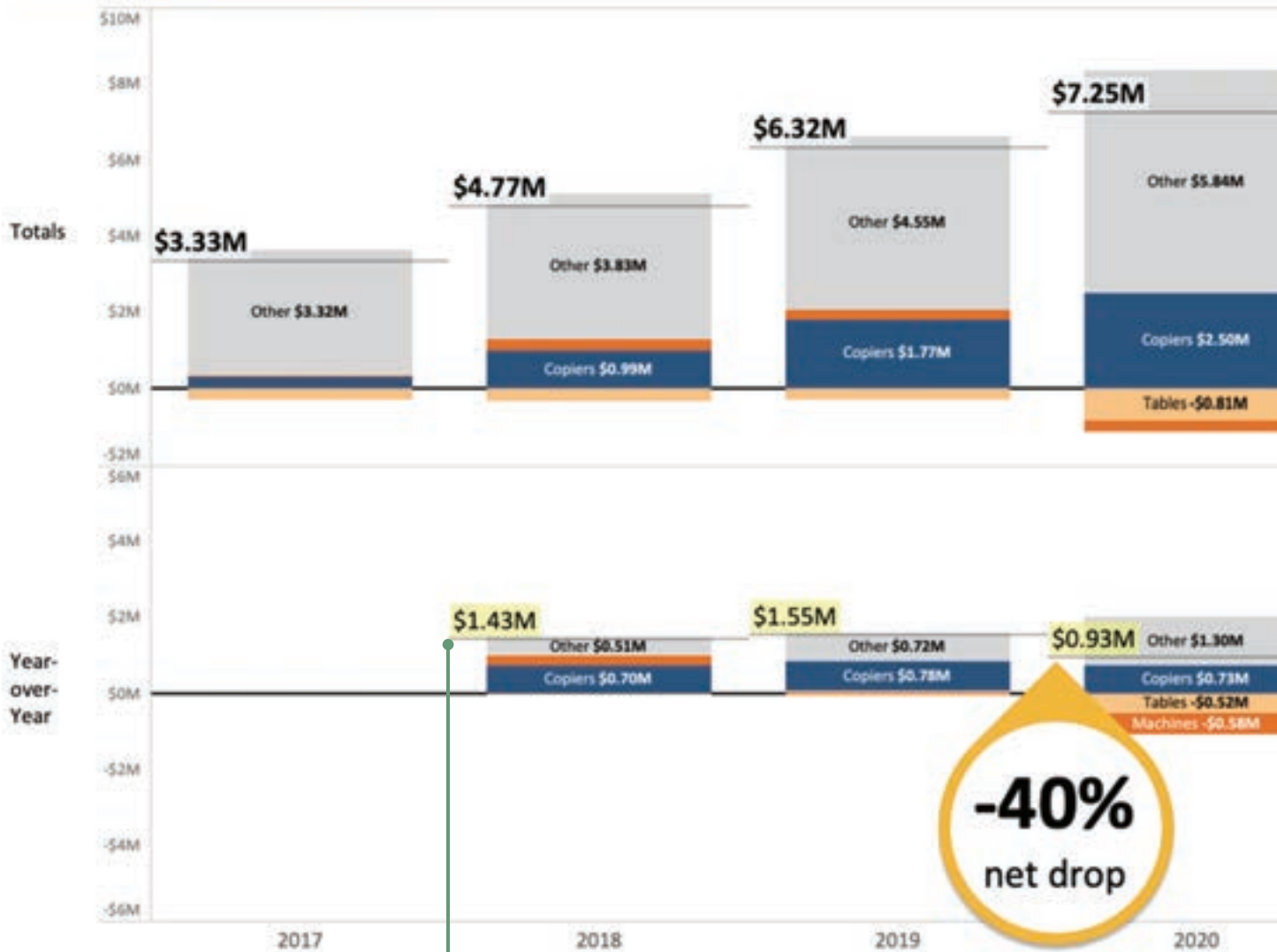
DETAILS

Use a yellow highlight only if you absolutely must

Even here, maybe it's too much. If this wasn't such a fast fix and there was one more day, there should be less bold and less yellow so only the critical data pops.

Point to what's important to the executives

This is an immense help in focusing attention and limiting distractions rather than having a business leader's eyes start roaming the chart on their own.

Machines Even as Copiers Soar

Profit per Unit

Copiers $343

Other $8

Tables -$21

Machines -$24

$400

$200

$0

-$200

2017   2018   2019   2020
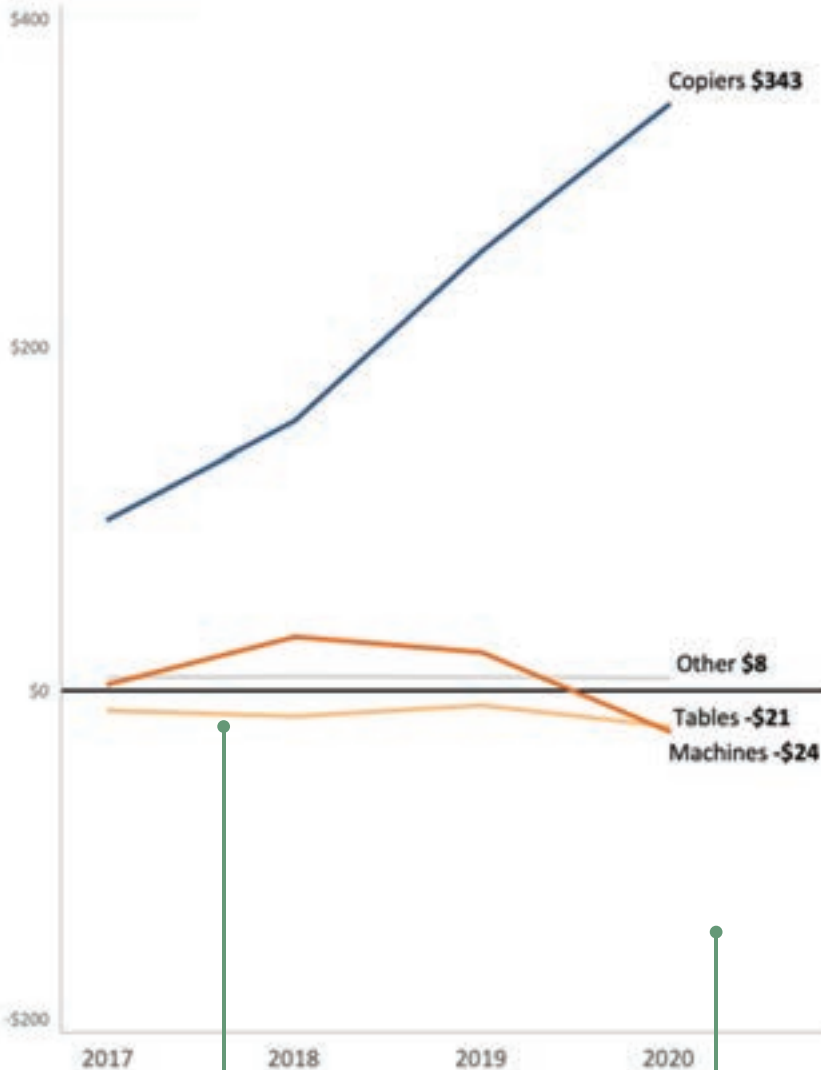
If we have something to fear besides fear itself...

Be honest and trigger emotion. Sure, celebrate the good news, but bad news will spark fast — and needed — action.

If one category is soaring above all others, let it

This visual is a clear story, so give it room to breathe. Strip away whatever you can, group together and make gray what's not important, then stand back and let the data speak for itself.

If one category is plummeting below all others, let it

In terms of the chart, of course. Once you see that plummet on the chart and make it obvious, the executives will have to take action. That's especially true in this case when it's eroding the soaring success.

Don't start with a rainbow; start with gray and add

The crazy color palette can overwhelm data and an audience. So when you have the time, strip away all the color and add back in only what shows the story you need to tell.

Let the negative space contribute to the story

Besides showing how high the star is flying, the area below the $0 line isolates what's falling behind and, thankfully, shows most categories have avoided this terrible fate.

Make the Key Insights Jump Out

"Fix Data in a Flash" was the most popular feature in Issue 3, so here, we're launching an ongoing "Fast Fixes" column. Why was it so popular? Likely because everyone can relate to the pressure of having charts and slides that aren't quite ready for primetime, yet that big meeting is only 1 day, 1 hour or 1 minute away. With the adrenaline pumping and fingers flying over the keyboard, here are more ideas on what you can do quickly to make the story at least better, if not perfect. And yes, these again are based on real-world examples, drawn from actual extreme time crunches. Let's get going…

BEFORE

Thankfully, this slide already has a great story: The project worked in lifting the KPI across markets. Well done! The chart just needs a little more work to showcase that achievement. Right now, that "target" is easy to miss and the launch date is missing.
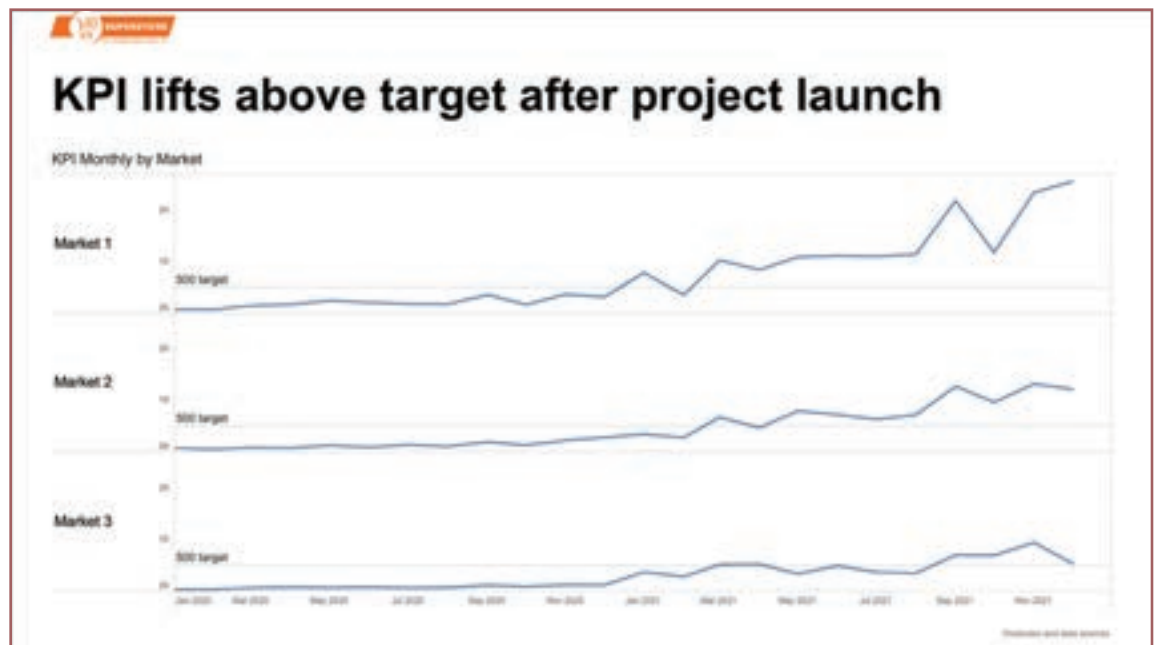
1 MINUTE

If you know a few tricks, you can make these two changes in 60ish seconds. First, add a reference line for the launch date to clarify the before and after time frames. Then drop on a red-green diverging color and set the center to be the target value. Boom.
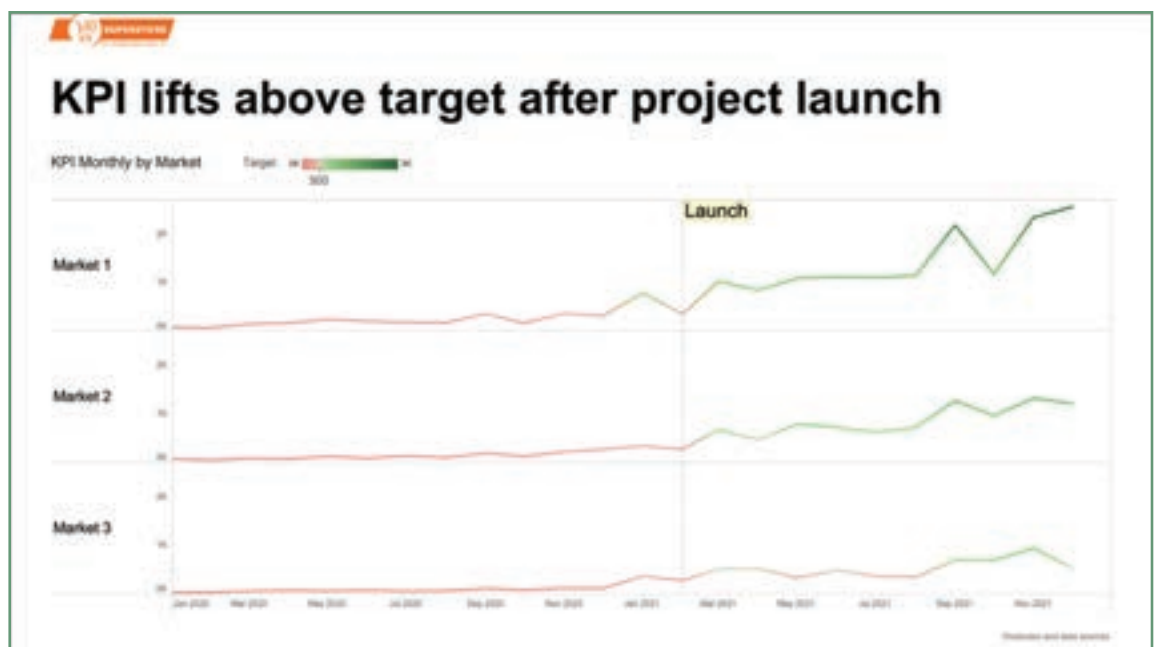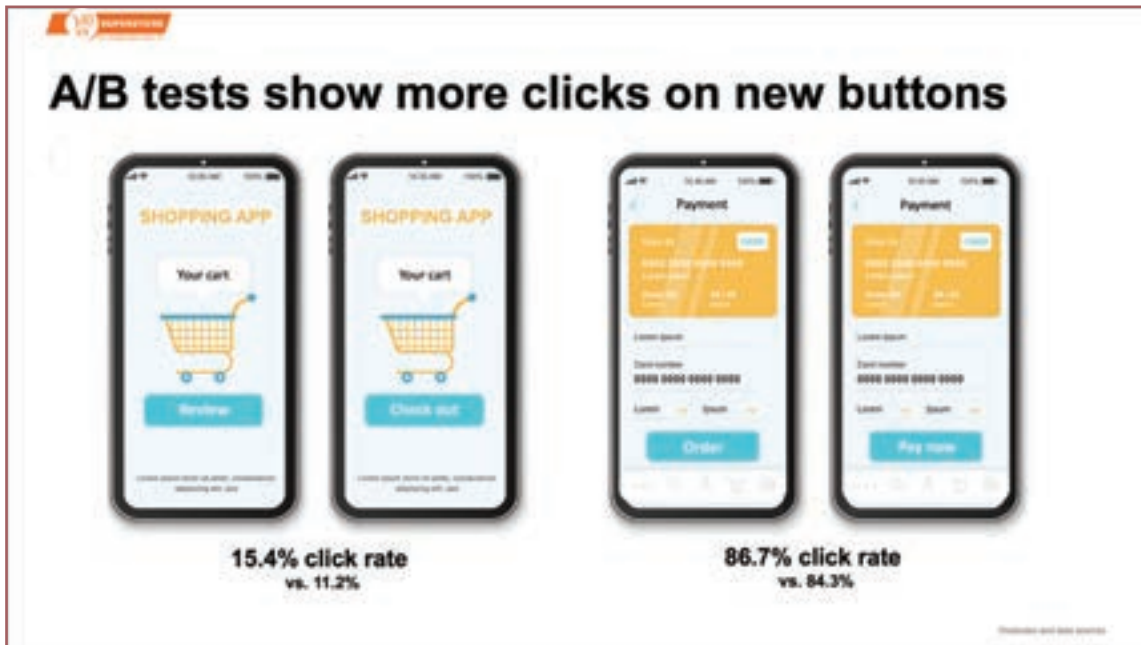
This slide already does a decent job of showing test results. The content is distilled to the user experience and the primary objectives. But an executive audience still has to work to zero in on what was the change and which won.

1 HOUR

For a final polish, always try to make the story even clearer at a glance. In this case, still show what changed in context of the overall UX, but make the actual change pop out. Add clearer labels. And don't be afraid to use a ribbon for winners.
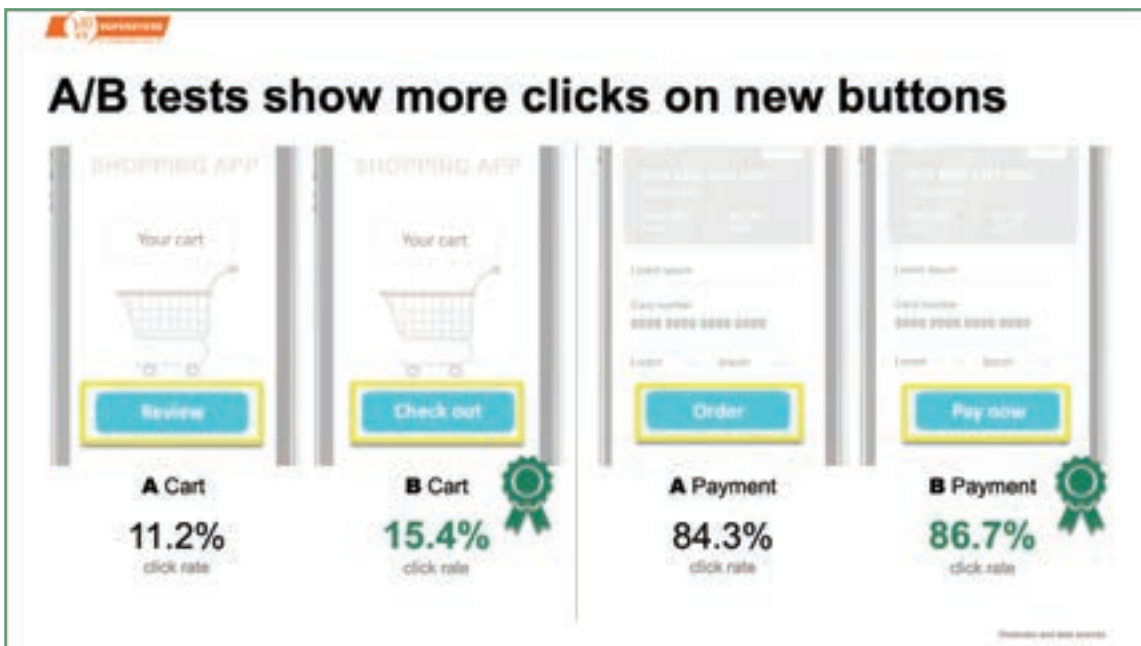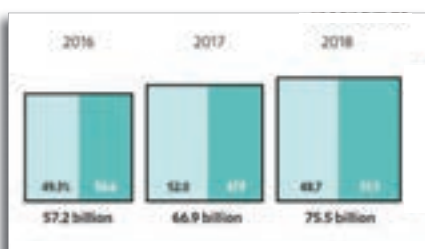

WHAT THE VIZ?!

If a pie chart and a bar chart had a baby …

The struggle is real to show both mix and volume in one data visualization. The admirable team at *The Wall Street Journal* recently presented this solution. The mix is noted by the "%" label and the colors, while the growing volume is shown by the growing bars. Does it work? It may still be a struggle.

Rev Up Your Dashboards

IF EXECS AREN'T FULLY UP TO SPEED, IT'S TIME FOR AN OVERHAUL

Dashboards are often built from the data up, but that leads to a lot of clunkers in a junkyard of abandoned dashes. They're full of dense data tables and cumbersome filters. They run slow and then just stall out. But what if we could build a dashboard the right way?

What if we instead built dashboards not from the data up, but from the CEO down? CEOs don't care about your fancy data blending and your complex filtering with parameters. They want to know if the business is going to meet its target. And if it is, who gets the call to exceed the target? If it's not, who is getting the call to get back on track right now?

The CEO calls a director (or a C-level exec or a VP), who then needs to see how his or her department goals are tiering up to the CEO's target. Whatever is working, let's scale it. Whatever isn't, let's fix t right now.

The director then goes to the analyst to look deeper into specific etrics. The analyst needs a lot of flex bility to peer into the data for insights. But when they're found, those insights need to zoom back up to the director, then the CEO.

That CEO approach can require a full overhaul. But the result is a dashboard hierarchy that leverages data to truly drive the business.

You'll fi d an example of that hierarchy in the following pages, plus ideas (based on real-world dashboards) on how to take your dash to the shop for quick fi es and rebuilds. Tuning up your dashboards is key to turbocharging your business.

Is it a dashboard or is it just a fancier spreadsheet?

Performance Dashboard

Week (All)   **Region** (All)   **Metrics** (Multiple values)

Week of Order D...	Central			East			South			West		
	Orders	Quantity	Sales	Orders	Quantity	Sales	Orders	Quantity	Sales	Orders	Quantity	Sales
12/27/2020	10	26	679	10	44	785	6	15	1,879	14	49	2,120
12/20/2020	25	102	5,745	29	96	3,816	27	98	4,865	20	71	7,209
12/13/2020	15	57	1,992	20	80	5,640	6	28	2,932	39	143	2,649
12/6/2020	31	108	5,911	31	96	3,651	19	66	3,875	35	134	9,301
11/29/2020	23	81	4,654	51	202	10,302	16	57	4,562	52	237	8,399
11/22/2020	33	120	6,981	29	147	10,483	16	76	3,595	19	84	2,336
11/15/2020	23	86	4,366	34	133	18,746	22	95	3,362	36	132	6,627
11/8/2020	25	95	2,471	28	119	7,497	10	43	2,947	43	166	8,423
11/1/2020	24	99	1,239	30	106	4,799	30	101	15,910	40	171	11,530
10/25/2020	16	40	1,051	12	49	908	12	51	1,155	17	65	3,977
10/18/2020	22	76	5,475	30	116	17,233	15	46	3,546	14	43	1,440
10/11/2020	10	48	1,678	16	69	4,622	8	35	3,917	22	87	8,577
10/4/2020	9	32	1,679	19	57	7,238	6	22	1,038	23	87	3,343
9/27/2020	15	63	2,625	20	67	3,320	12	40	2,736	38	155	5,264
9/20/2020	21	90	3,330	36	132	16,713	22	74	2,792	30	105	4,480
9/13/2020	15	52	2,440	38	130	6,835	17	67	3,174	40	149	8,209
9/6/2020	30	123	5,729	33	116	4,345	15	56	1,946	35	133	6,932
8/30/2020	20	89	6,097	29	97	3,509	10	34	2,924	41	141	8,533
8/23/2020	10	44	368	13	67	3,921	12	44	4,890	14	53	4,519
8/16/2020	12	42	462	20	74	11,597	6	21	1,184	34	141	13,715
8/9/2020	9	51	2,079	7	28	3,960	9	43	2,881	16	65	2,338
8/2/2020	11	46	1,133	7	40	1,281	4	11	255	17	49	3,290
7/26/2020	12	36	2,846	10	43	1,999	7	24	660	17	59	4,379
7/19/2020	21	80	3,747	18	60	1,431	7	29	952	10	45	4,493
7/12/2020	3	6	377	23	89	5,100	5	13	1,316	17	57	4,062
7/5/2020	12	66	1,628	23	81	3,128	3	7	300	19	72	3,161
6/28/2020	17	53	4,551	13	59	3,760	5	11	365	16	64	8,340
6/21/2020	10	34	1,944	22	88	4,143	3	12	325	13	73	3,428
6/14/2020	16	55	1,049	17	73	5,760	17	57	5,014	16	54	3,031
6/7/2020	14	52	2,219	9	32	1,091	8	33	2,148	28	95	4,638
5/31/2020	11	46	5,053	10	35	1,071	16	56	1,427	9	44	1,397
5/24/2020	14	43	1,588	9	37	1,136	13	35	1,506	14	49	1,719

Yes, it's filterable and sortable but...

This dashboard is really just a data table. It's an extreme example above, but you'll see this in the real world. Interactivity on a wall of numbers may have value for analysts and execs. But this approach isn't digestible, accessible, shareable, relatable or translatable for quick insights.

Maybe sales are on track, maybe they aren't

Some people's brains work where they can simply see this sales column and understand the trends. Most people, though, need this visualized as a line graph or bar chart to actually see what's happening. Again, this data table may be OK for analysts, but not for executives.

Long scrolling reinforces that this is just raw data

The rows keep coming, but the insights don't. If this is going to be considered a dashboard, it should be clearly marked as material for analysts to refine further. Otherwise, this is too much like Excel from the late 1900s. It has potential, but it needs to be distilled and visualized.

AFTER Visualize highlights and have a data table for deeper analysis

Make it "pretty" with meaningful visualizations

Charts aren't just for show. They're an accessible entry to the data, a quick read to know if this is good or bad for business. In one second, any business person can see the East is soaring and Central is lagging. That would take so much more time with a data table.

Draw attention to the biggest variances

Sure, there are very smart people who can glance at the table on the left hand page and see in their mind's eye what's doing well and what isn't. The rest of us need these helpful red and green bars. These variances are likely the story for the business and the key to success.

Keep a data table if you must, but don't make it the hero

Many business leaders will use a dashboard like this to see the big picture of what's going on, but then they'll want to dig into the numbers for ad-hoc analysis. That's great. Let them have the best of both worlds with the visuals up top, the data table below as a resource.

BEFORE — Which KPI is most important and how do they tie together?

COMPANY KPI DASH	Filter (All) ▾ Filter (All) ▾	Filter (All) ▾ Filter (All) ▾
Revenue	**Discount**	**Units**
75,521,171 ▲ 20.36%	38.88% ▲ 29.45%	1,796,544 ▲ 26.83%
Price	**Cancellations**	**Customers**
42.04 ▼ -5.10%	289 ▲ 46.70%	6,932,772 ▲ 8.62%
Margin	**Markets**	**Conversion**
12.74% ▼ -5.09%	436 ▲ 9.55%	9.70% ▲ 0.90%

You *can* go overboard with big KPI numbers

In the must-read *The Big Book of Dashboards* by Andy Cotgreave, Jeffrey Shaffer and Steve Wexler, the authors talk about the use of BANs (Big Ass Numbers). Often, they're effective in drawing attention to the top KPIs. Also often, people go too big, too much.

Who knows where this trend is heading next

Limiting a KPI to a big number and an up-or-down arrow is fine for a snapshot view, one moment in time. But executives need to prep for what's coming. Are we about to roll over a huge sales spike from last year? Do we face headwinds from seasonality? One arrow doesn't capture it.

The grid gives everything importance … and nothing

Variations of this KPI grid do exist at business right now. And while some executives may like it, the grid places equal weight on each KPI when that's not how the business works. Certain KPIs are most important, others are secondary drivers, not primary metrics.

AFTER — Clarify the KPI hierarchy and the drivers for each key metric

Put the KPIs in order of what's most important

Reading a dashboard is like reading a book. The natural eye flow is left to right and top to bottom. Structure a dash in that flow. If revenue is the top KPI, put it at the top. Clarify the hierarchy so that, at a glance, anyone can differentiate actual KPIs from their respective drivers.

Show the trends alongside the KPIs

Snapshot views are fine, especially for year-to-date status. But seeing the KPIs plotted in a line chart across a wider time frame vs. prior year or a target completes the picture. It's simple to plot, and it's universal to understand. Then an exec sees not just that a KPI is up, but why.

Highlight key details in the visuals

Labeling the most recent data point with the value and the year-over-year percent is an effective default. Make sure each point in the line chart has more info when hovering over it. With this dash overhaul, we've used the same space to tell the big story, just with medium-ass numbers.

BEFORE

These dashes are better, but will execs use them?

The filters might not be touched

Executives are so pressed for time that they may not have the chance to explore a self-service dashboard, even one like this with a low number of filters and visualizations. They often just want to look quickly and see the story.
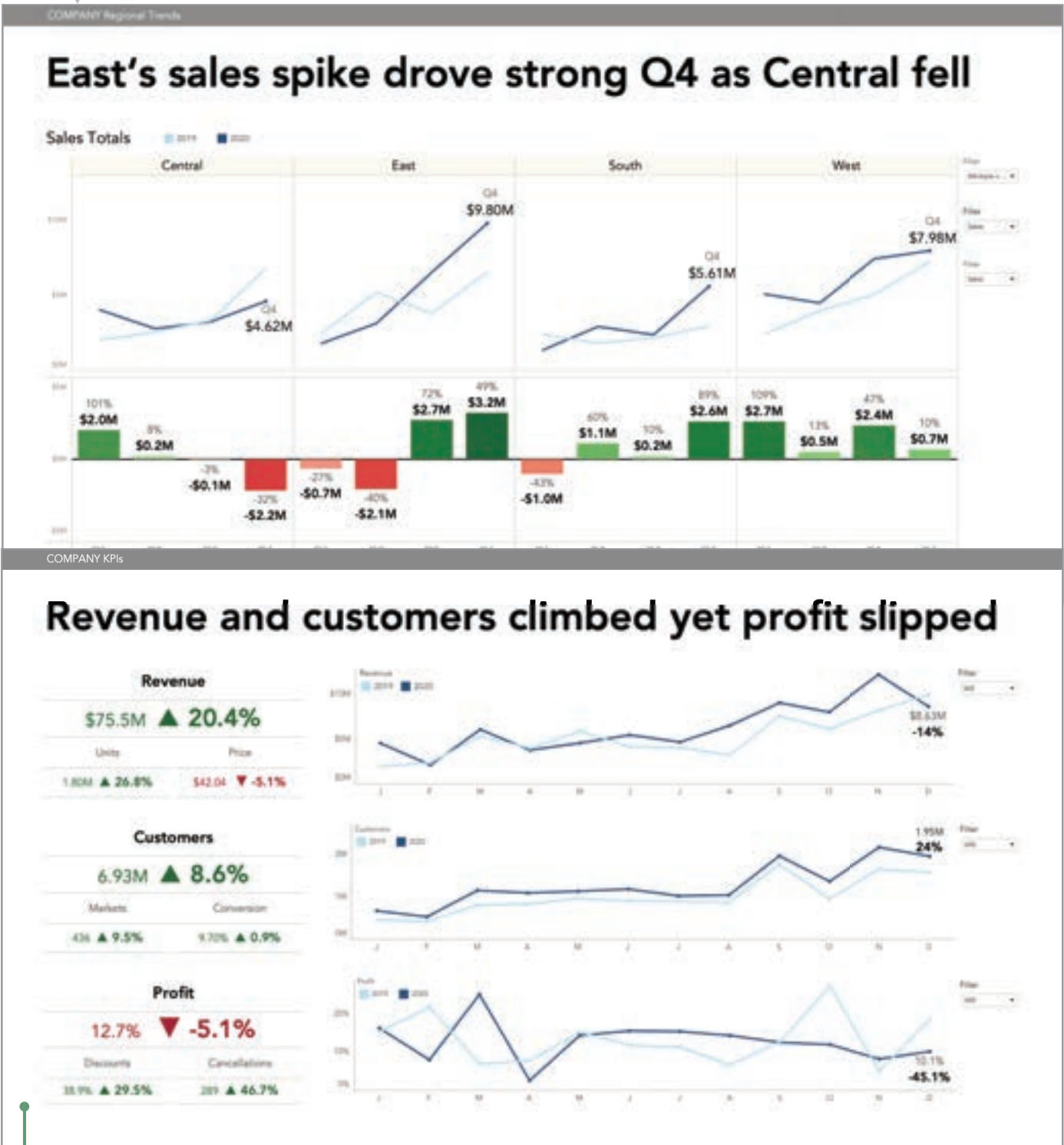
Awkward dashboard sizes make it hard to present

The language of executives is still often in PowerPoint. But so many dashboards aren't widescreen size. That's fine when scrolling through them at your desk, not so easy when showing data to leaders.

AFTER   Is this a PowerPoint slide or is it a dashboard? Yes

COMPANY Regional Trends

East's sales spike drove strong Q4 as Central fell

Sales Totals

COMPANY KPIs

Revenue and customers climbed yet profit slipped

Create an interactive hybrid
of a dash that looks like a slide

This can be a secret weapon. It has all the features of a dash — the filters, the info pop-ups, even the animations. Yet it's designed like a widescreen slide, so it's easy to understand, easy to present, easy to share. Not every dashboard needs this approach. But C-level, VPs and directors will love it because it speaks in their language.

So many dashboards, so ready to be organized

It's easier to create dashes than it is to fit them together

The proliferation of dashboard tools has led to a proliferation of dashboards. That can be hard for business leaders to navigate. What's happening with the business? Where do I go for specific questions about performance? If I see a red flag or a success story, what happens next? When those questions become overwhelming, it may be time for a top-down major dashboard overhaul. The good news is, those dashboard tools are making it easier and easier to rebuild dashboards so they're all in strategic alignment.

AFTER

Dashboards can be structured like the company org chart

DASHBOARD STRATEGIC MATRIX

EXECUTIVES	**CEO** Dash				**Alerts**
Top KPI:	**Net income** year-over-year				Sent at actionable thresholds
Drivers:	Revenue, costs, customers				

	Sales Main Dash	Finance Main Dash	Marketing Main Dash	Research Main Dash	Alerts
DIRECTORS					
Top KPI:	Revenue YoY	Costs YoY	Customers YoY	Market share YoY	Sent at actionable thresholds
Drivers:	Transactions, avg. order value, revenue per channel	Margin, budget, costs per channel	Acquisition, churn, value per customer	Competitors' share, Net Promoter Score	

	Sales Deep-Dive Dashes	Finance Deep-Dive Dashes	Marketing Deep-Dive Dashes	Research Deep-Dive Dashes	Alerts
ANALYSTS					
Details:	Revenue trends, forecasts and targets by multiple filters, product categories and customer segments	Costs and expenses, actual and projected by multiple filters and time frames, profit centers and cost centers	Campaign spend and customer conversions by filters, campaign reach, engagement and targeting	Competitor and industry comparisons and trends by direct and emerging competitors and brand awareness	Sent at actionable thresholds

|	
DATA TABLES	Included in analyst dashboards for ad-hoc analysis as needed
DATABASES	Connected to dashboards and available for custom queries

Start with the business, then overlay the dashboard needs

Here's how a top-down dashboard structure can look. The key is building it off the company's org chart, with the CEO at top. One last car metaphor: Think of this like the chassis. It's the underlying framework for how your business moves. The purpose of dashboards is to help that business run faster and better. What is the CEO's top KPI? How does department leaders support that KPI? What metrics drive each department? This approach clarifies and prioritizes success metrics. Now, rebuild the dashboards.

Should you give an exec a pie chart?

Should I use a pie chart?

Yes
1%

No
99%

Should I use a pie chart in 3D?

Yes
0.01%

No
99.99%
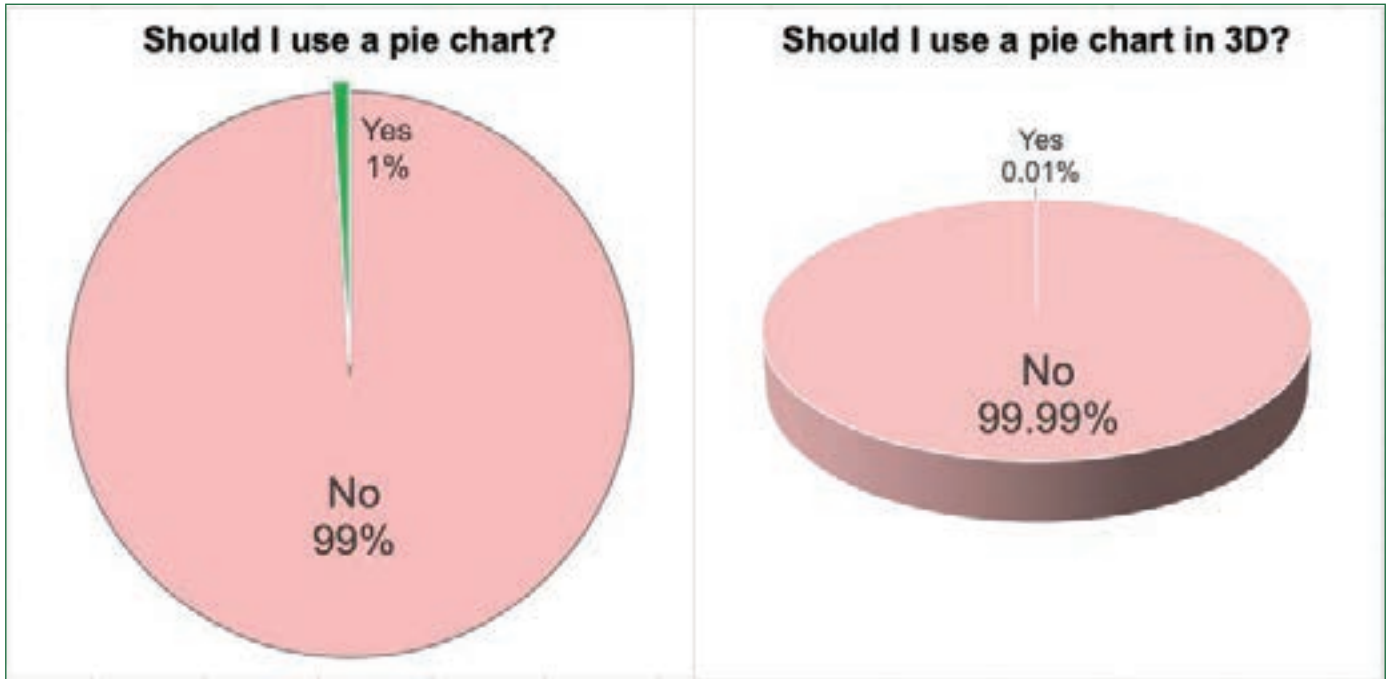
First, dashboard guru Nick Desbarats posted a chart on LinkedIn about when to use a pie chart. I replied with my smart-aleck "Yes, 1%" pie. Then not a day later, I saw a client deck loaded with not just pie charts, but 3-D pie charts. So I made the even more smart-aleck chart you see above, then showed it to the client in (I hope) a helpful way and posted it on LinkedIn. The responses were fantastic. Highlights:

"I'll suggest better ways of presenting the data. Maybe they asked for a pie chart because they didn't know other options."
— *Jennifer Chien, analyst at Cigna*

"There are situations where a pie chart is a better way of displaying quantitative information than a bar chart and we have to respect that. For example, to compare if the sum of two category values (wedges) is more than 50% of the total. It is easier to spot that kind of an answer on a pie chart."
— *Hrvoje Smolic, founder at Graphite Note*

"Friends don't let friends use pie charts."
— *Jason Krantz, CEO of Strategy Titan*

"If the audience wants it, then give it. They may appreciate a more visual presentation. However, there are caveats."
— *Irene Beatty,*
education director of Life Choices

"Agreed on never. I've yet to see a good reason to ever use one without an alternative approach. I've also conditioned my children to hate them as well."
— *Aaron Simmons,*
senior associate at Data Meaning

"Does an executive want a pie or want to see sales broken down by product type? The choice of visual is a data professional's job."
— *Andrew Mason,*
data warehouse and BI manager

"You could get the response (which I have had in the past): 'Look, I'm the executive and I just want a pie chart.'"
— *Carl Shovlin,*
co-founder of Itology Technical Solutions

"I'm quite partial to exploding pie charts. Shhhh, it's my dark side."
— *Dr. Leslie Wasson,*
director at Samuel Meritt University

"In my experience, the more impressive the chart, the less impressive the story."
— *Kate Bruce,*
content creator for Tech Futures Lab

Hope you enjoyed this edition! Share feedback, join the conversation and follow Data for Execs on LinkedIn. **DATA**
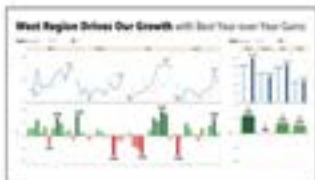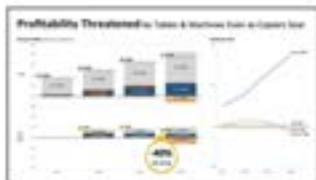
Executive Presentations

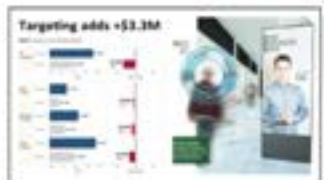Powerful decks that tell the story of the data

Slide Emergencies

Fast fixes for big meetings happening now

Deck Redesigns

Revamp your content to give it big impact

Business Stories

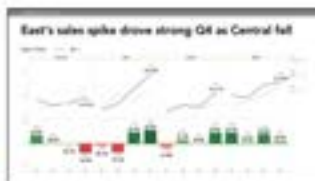Creating any deck from a clean slate

Innovative Dashboards

You've seen dashes in Tableau, but not like this

Dash Enhancements

Improvements to your existing dashboards

Dash Overhauls

All-new Tableau builds for clearer insights

Dashboard Matrix

Strategic overhaul to change your business

Data Storytelling

Leading the way and showing your team how to follow

Story Revisions

Reworking your existing content

All-New Stories

Translating your data into amazing stories

Story Workshops

Teaching your team the story technique