

# Taking Data Visualization Home

# Let's Recap

- Visualizations are cool, interactive ones are cooler
- They help us explore and analyze data
- They help us present insights and spur conversations
- Visualizations work best when:
  - They draw on high-quality data
  - They are produced as part of an analysis project commissioned by leadership
  - They are designed to be self-evident
  - They inform internal conversations, and drive toward decisions
  - They are shared with the public thoughtfully

# What We're Focusing On

In the previous session we described a three-step process:

1. Get your data management right
2. Visualize responsibly
3. Communicate and build momentum toward decision

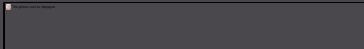
In this session, we're focusing on step 2 (and a little bit of 3)

# Handout!

Please fill out “*Step 1: Data Management*”



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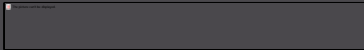


# Handout!

Please fill out “*Step 2:  
Visualization*”



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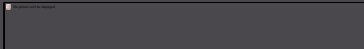


# Handout!

Please fill out “*Step 3:  
Conversations Using Data*”



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# Thoughts On Choosing a Tool

- “The best tool to use. . .”
- Process matters, start by assessing internal needs
  - IT systems
  - Use cases
- Decision criteria are specific to your organization
- Having said all that, here’s are some great options. . .

# Tableau

- Data sources: many (SQL, Oracle, AWS, Azure, Excel, CSV, JSON, XML, R)
- Sharing: web publish, web embed, publish to internal server, email read-only
- Data management: many functions for data and text manipulation
- Visualization: many types of charts and graphs
  - Highly customizable presentations, (think “dashboards”)
- Pricing: varies for personal and enterprise
- Support: Robust community including training and network



# Power BI

- Data sources: many (Excel, Access, Sharepoint, Exchange, Salesforce, SQL, CSV, SAP, Azure, XML, JSON, Oracle. . . )
- Sharing: embed or publish using URL, need paid version to make private
- Data management: includes many functions (filtering, renaming, de-duplicating, splitting text, appending tables)
- Visualization: includes many types of charts, but not as nimble as Tableau
- Pricing: Free limited version, paid enterprise version
- Support: Robust community including training and network

# Google Data Studio

- Data sources: limited. Integrates with other Google tools (adwords, google sheets google drive, etc.) and some basic SQL
- Sharing: edit or read, for collaboration or publishing
- Data management: limited functions, cannot append or join; does better with clean data
- Visualization: simple and intuitive
- Pricing: free
- Support: simple to set up and use, but limited support

## Other notes:

- Web-only
- Real-time collaboration

# Excel

- Create visualizations in workbooks using “slicers”
- View underlying pivot tables
- Sharing via workbooks
- You already have it

# One Last Thing

## Let's Get It In Gear



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