



PERSONAL EFFECTIVENESS SERIES

Using Data Visualization in Storytelling

*Page 1 of 2***COURSE LENGTH**

Two 2-Hour Virtual Sessions or
One Half-Day In Person

DESCRIPTION

In this course for finance professionals, you will learn how to create and present impactful data visualizations. You will learn to highlight insights, drive actions, and apply proven tactics to all your visuals. The course covers fundamental principles and frameworks that make complex information easier to understand. You'll delve into how people see visual data and use that to tell compelling stories. You will master a design process that keeps your visuals clear and engaging, as well as strategies to tailor visuals to your audience. Case studies will help you apply what you've learned, ensuring you can create compelling visualizations that improve decision making. The principles and skills you learn are universal so that you can use them with any visualization tool.

LEARNING OBJECTIVES

- Understand the basics of data visualization, including key goals and important considerations like context, strengths, and constraints.

- Develop skills in telling compelling stories with data using principles of visual perception and effective storytelling frameworks.
- Master the visualization design process, including selecting appropriate visual displays, eliminating clutter, and focusing attention.
- Apply knowledge through real-world case studies, creating interactive and practical visualizations that enhance decision-making in FP&A.

AGENDA

Data Visualization Foundations

- Data visualization defined
- Goals of data visualization
 - Exploratory visualizations
 - Explanatory visualizations
- Understanding context
- Other important considerations
 - Assess your data visualization strengths and supplement as necessary
 - Constraints – time, money, audience requirements
 - Interactivity – self-service capabilities, user skills



PERSONAL EFFECTIVENESS SERIES

Using Data Visualization in Storytelling

Page 2 of 2

Telling Stories with Your Visuals

- 6 gestalt principles of visual perception
- Storytelling frameworks
- Key tactics to ensure clarity
 - Visual logic
 - Reverse storyboarding
 - Feedback loops

The Visualization Design Process

- Choose an appropriate visual display
 - Basic spreadsheets and tables
 - Graphs - The different types and the four questions
 - Dashboards
- Design Principles
 - Eliminate clutter
 - Focus attention where you want it
 - Think like a designer
 - Tell a story
 - Interactivity
 - The devil is in the details: increasing clarity

Case Studies: Putting it All Together

- Specific cases TBD