Preface

This workbook is written for business analysts who wish to increase their skills in improving data visuals and creating compelling presentations used to support business decisions. It is a qualitative lab to develop the power of visualization and discrimination. It does not require the reader to modify charts but to analyze and describe what would improve those charts. In a set of guided exercises, the reader is taken through the eighteen elements of the six dimensions of analyzing and improving charts and visuals used to communicate business points.

An analyst, or anyone analyzing data, would typically create visuals of the analysis results as the analysis goes along. These are graphs of data for analysis; they are rough with no thought given to making them compelling at the point of analysis. Probably no one other than the analyst will ever see those rough analysis charts. These graphs may even accumulate in an electronic research notebook (typically a PowerPoint document) with slides as containers for the analysis charts. At the end of the analysis, these graphs and numerical summaries of results are used to draw conclusions and answer questions.

Then comes time to communicate. Often, analysts are not given a lot of time to present their findings. This is where the work of neurobiologist John Medina comes in to play. He advises us to use no more than ten minutes to make our case, lest we bore our audience to inattention. In any event, we must present our findings with as few slides as possible. The analyst looks over the rough graphs produced in analysis, looks at the conclusions, and then asks: "which of these are the most powerful visuals to make the point and underscore conclusions most compellingly?" There are probably no more than three or four such visuals that have to be created. Not created because they are there from the analysis, but recreated or enhanced, to make them more readable to new eyes.

The next step is to create those compelling visuals that tell the story. That's what these exercises help you do: refine your skills in turning a rough graph into a compelling visual. One way to do that is to refine your "seeing eye." Can you see what is wrong with a rough chart? What must be done to make it better? How do you improve a chart to make it more compelling? Many issues are very subtle, so it takes work to develop a trained sense of sight. Do the exercises in this book often, and the process will become second nature. As you work through these exercises, you will internalize the observe-analyze-refine process to improve your visuals.

On the Companion Files

The exercises require the analyst to have access to the case study slides and the analysis worksheet template, both of which are contained on the companion disc. These files, as well as video tutorials, for each chapter are also available for download from the publisher by writing to info@merclearning.com. As you learn about the principles explained in the book, you will be prompted to analyze charts created for a business purpose: the promotion of raising the US minimum wage by a government entity. Each principle presented in each of the chapters has a short companion video you may use to understand the ideas further. The video lessons may be found on the disc or by writing to the publisher. If you wish to stream the video rather than download it, there is a document in the companion files with links to all the companion videos to be found on a streaming service. The companion files also include a copy of the slides set used in the exercises and a copy of the analysis checklist used in the book.

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