

5 STEPS TO REPLACING POWERPOINT **With Tableau**

INNOVATIVE. CREATIVE. EFFECTIVE.



INTRO

All companies have data that needs to be presented at some point. It could be survey data, operational data or sales data that will need to be presented to a client, end-user, or executive in some sort of meeting. The 'go-to' presentation software has always been PowerPoint, which is great but very, very limited. The presentation is nice to look at but you are stuck with whatever you created the night before.

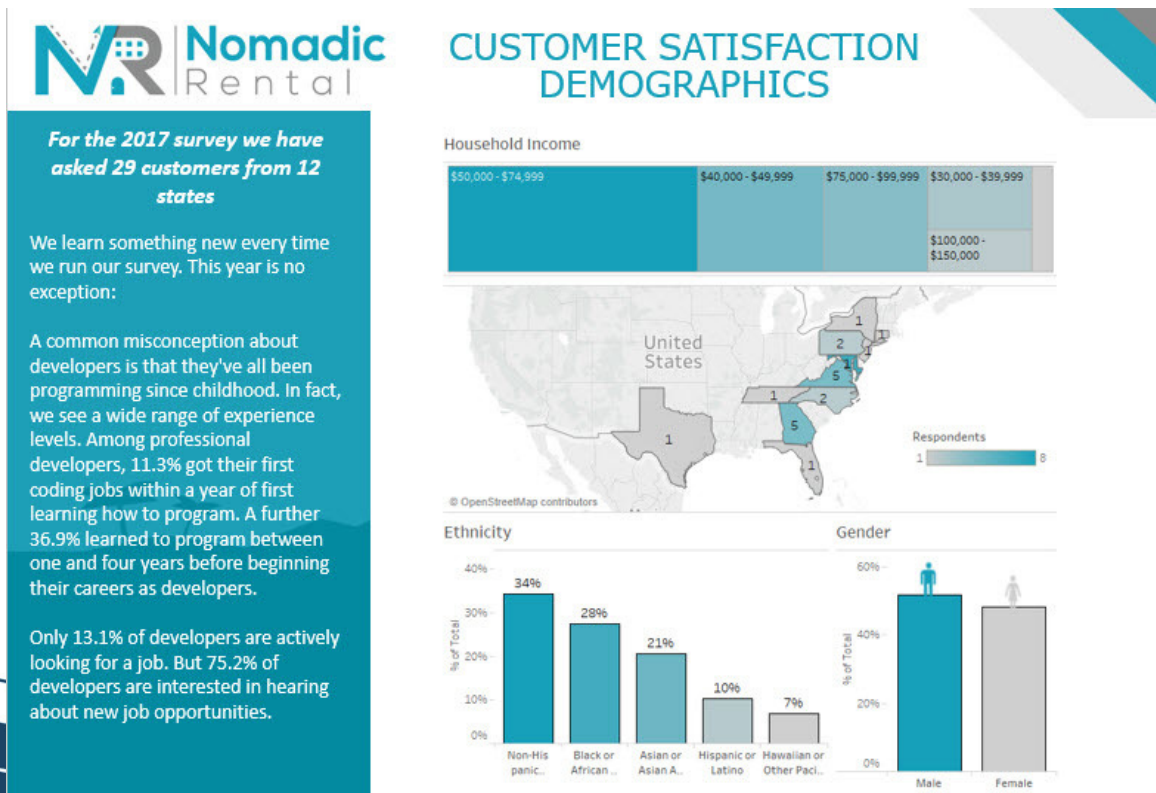
Wouldn't it be nice to do calculations or an analysis on the fly in your presentation without having to open an Excel file? Its usually never a good idea to try an answer a *what if* question during a meeting, you feel rushed and pressured which could lead to a user error. This was the cause until Tableau came along.

Tableau allows you to create an interactive presentation that will increase meeting engagement and really wow your attendees. Learn the 5 steps needed to convert your PPT presentation into a interactive Tableau presentation.

WHY PRESENTATIONS ARE BETTER IN TABLEAU

1. INTERACT VS. LECTURE

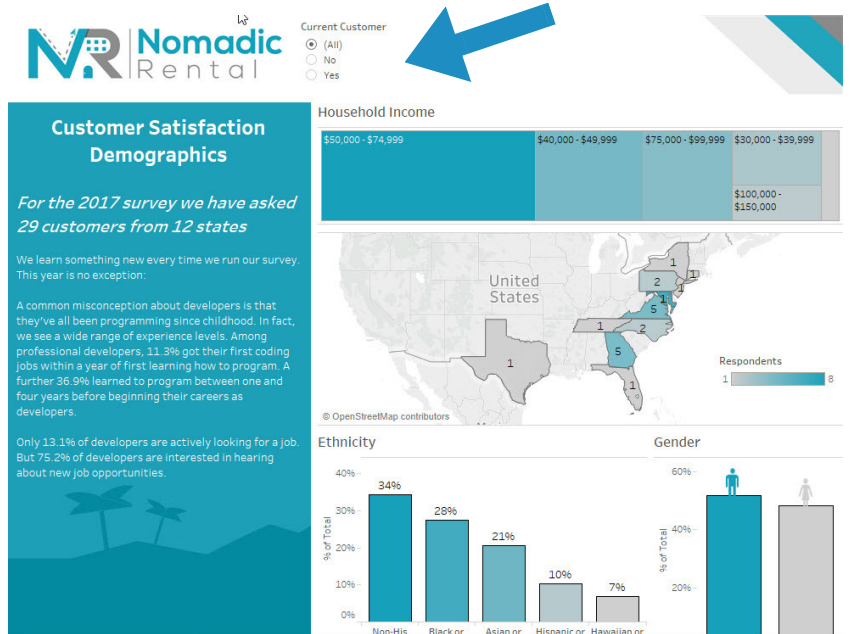
The ability to be interactive during the presentation rather than just lecturing the audience is a clear benefit between the two presentation types. In a PowerPoint presentation, the speaker simply has the information in the slides and speaks as they flip through them until all the information has been presented. It's very unlikely that they will digest all the information during this type of meeting. It's difficult to listen, read and make sense of information all at the same time! Instead use Tableau to increase interactivity and keep your attendees awake!



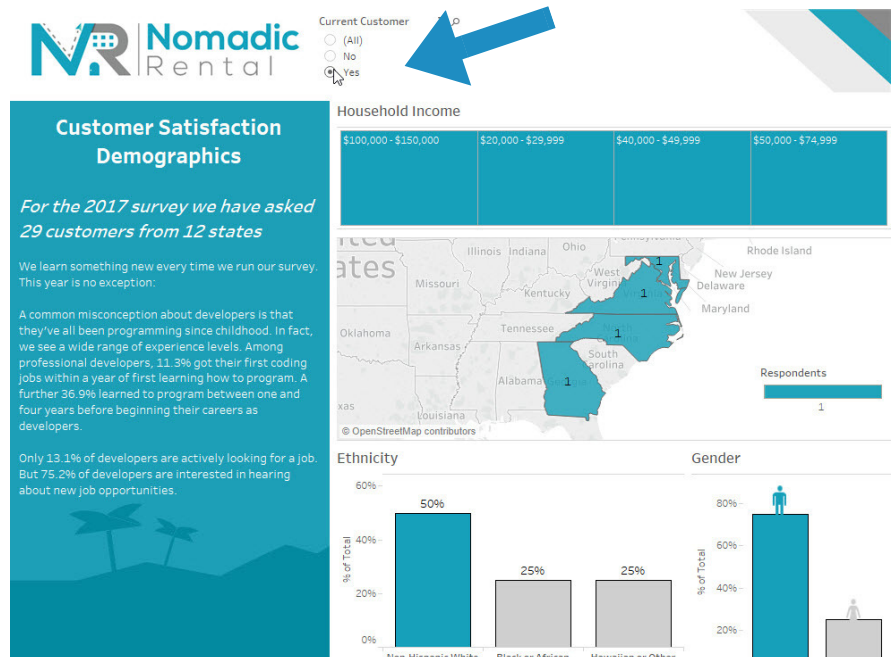
You can give the same presentation in Tableau and it will be just as visually appealing. Furthermore you can interact with the presentation which will increase the amount of engagement you will have with your audience. In the same screen you can filter down and cross tabulate the data on the fly. This will also allow you to go a step further and create a story based on how you would like to filter the data and present the information during the meeting. In this example, you may say...

“Starting off, looking at all of our customers, this is how the data looks. Now looking at just our current customers, this is how the data looks”.

All Customers



Current Customers



2. CAN ANSWER 'WHAT IF' QUESTIONS

This is an example of where a presentation using Tableau has a clear advantage over PowerPoint. If someone in the audience was to ask a data question, it is nearly impossible to give them an answer with confidence on the spot if you are using PowerPoint. For example, if they were to ask “What if we look at recommended products by gender?” You would need to open a separate Excel file and attempt to extract this information on the spot. Several things could go wrong at this point. You could deliver incorrect information if you are trying to go too quick or it can greatly lengthen the meeting time. With Tableau you can easily add this flexibility to your presentation.

PowerPoint



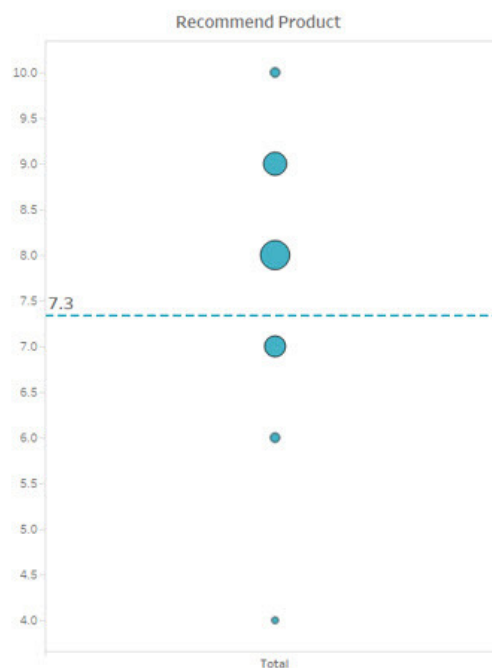
For the 2017 survey we have asked 29 customers from 12 states

We learn something new every time we run our survey. This year is no exception:

A common misconception about developers is that they've all been programming since childhood. In fact, we see a wide range of experience levels. Among professional developers, 11.3% got their first coding jobs within a year of first learning how to program. A further 36.9% learned to program between one and four years before beginning their careers as developers.

Only 13.1% of developers are actively looking for a job. But 75.2% of developers are interested in hearing about new job opportunities.

Recommending Nomadic Rental Product



By adding a parameter in Tableau it is just a matter of selecting gender from the list of dimensions. Tableau will allow you to update the dashboard on the fly with ease and deliver all the correct information! This chart shows the same information as the chart in the PowerPoint, but you can split the chart by any dimension you want and answer any question that comes your way.

Tableau



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3. IMPROVE MEETING ENGAGEMENT AND END USER PERCEPTION

PowerPoint has always been a great presentation software but there is nothing special about it, it is expected. All PowerPoint presentations are more or less the same except for the graphics and information being delivered. Tableau doesn't have the same restrictions and has many interactive options within it that will allow much more engagement and creativity. Things such as URL actions, hover actions, filters and cross tabulations are all at your disposal in Tableau. You can offer everything PowerPoint has plus more!

Tableau



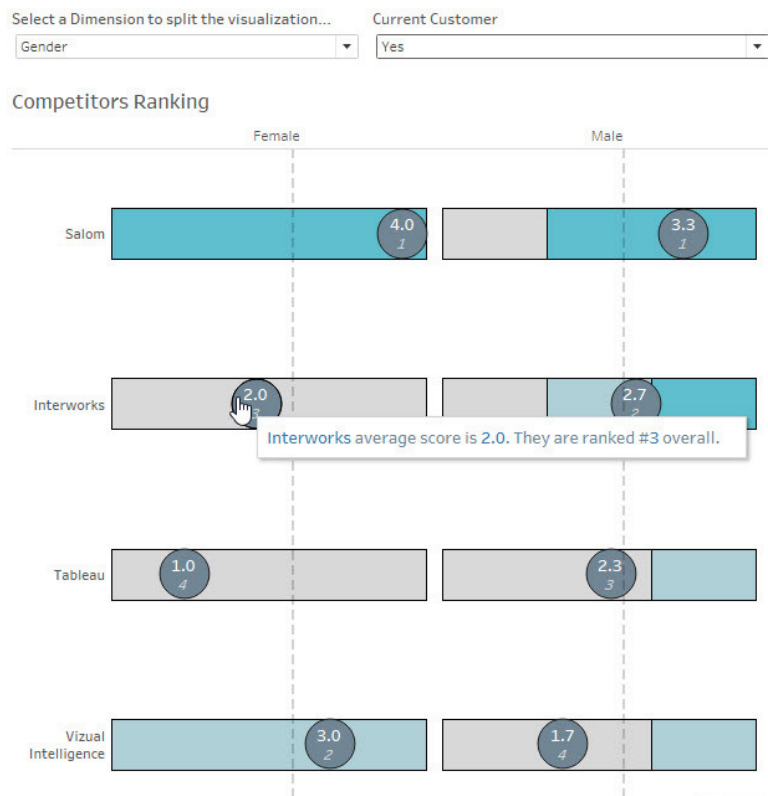
Competitor Analysis

For 2017 Nomadic Rental was the 2nd best rental company

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HOW TO REPLACE PPT WITH TABLEAU?

Below is are links to a PPT presentation and then a link to that same presentation in Tableau. Open both up and compare the 2, which would you rather have in a meeting with your client or executive team?



So which one did you like better? Yeah, I would choose Tableau any day! Here are the 5 Steps on how to convert your PPT to an interactive Tableau Presentation!

1. CREATE YOUR GRAPHICS

The first step is to create your graphics the same way you would for a PowerPoint. Having graphics that will “wow” the audience is a key component to creating a great presentation! You can do this yourself by using programs such as Canva or PowerPoint or any other graphic design tools.



However, maybe you aren't proficient with graphic programs or creating designs isn't your strong point. Don't worry, you can always purchase designs from graphic designers on sites such as Upwork.com or market.Envato.com. Alternatively, if you already have graphics from a PowerPoint, you can always use those as well!

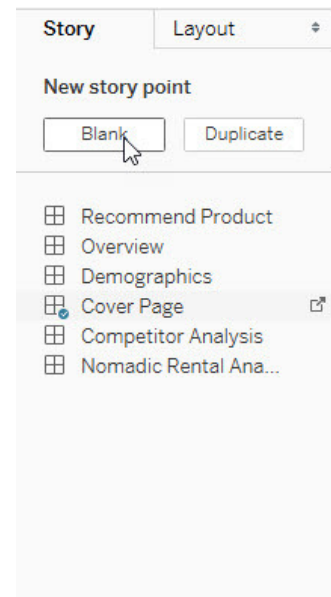
2. CREATE STORY OUTLINE

Now you will need to draft up a story outline for the presentation. You will probably want to do this in Microsoft Word. This is where you will want to decide how you plan on interacting with your audience and how the meeting will flow. It also means you will decide on what filters you will want to include, how you want the visualizations to interact, and if you want any type of cross tabulations. A strong, written outline will make the next step that much easier.



3. CREATE STORY DASHBOARDS

After you have created your worksheets, but before you create a story, you must create a dashboard for each story point that you wrote down in your previous step. For example, in this story I have 6 different dashboards, one of each slide.



Within your dashboard you will need to add some text, a logo and the charts with filters, parameters and possibly actions that you would like to use in the presentation.



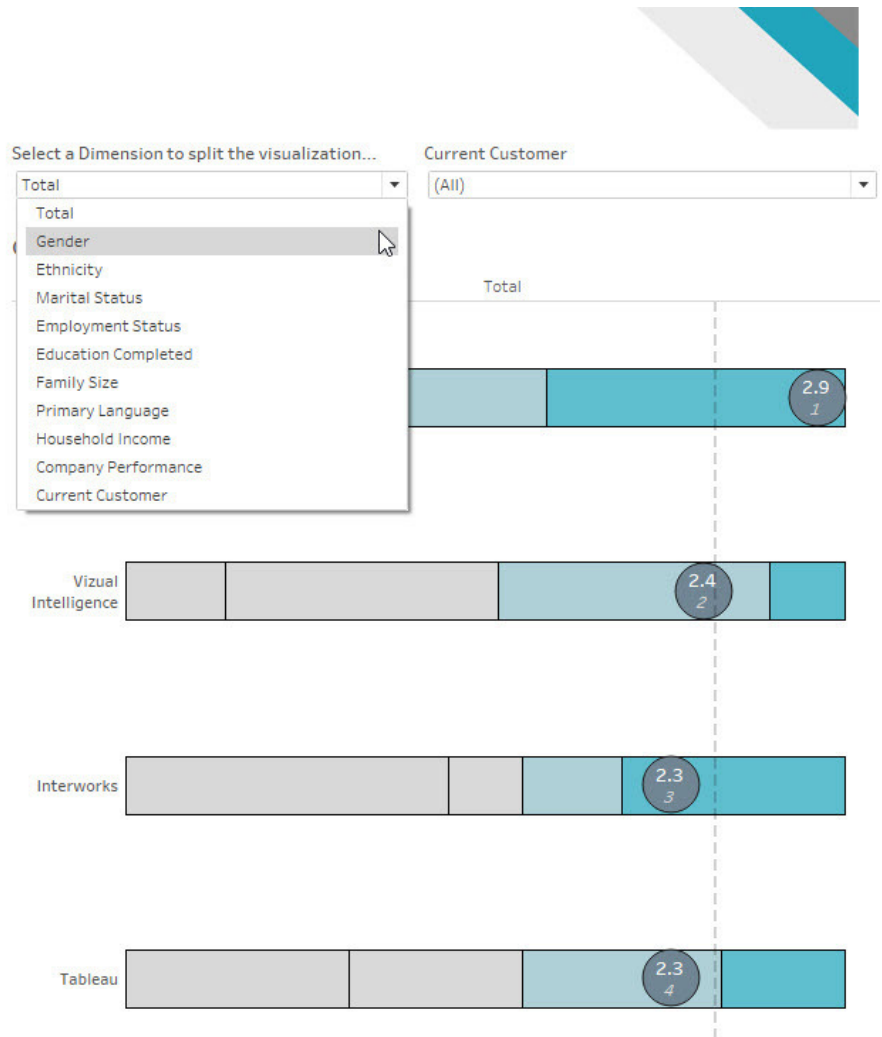
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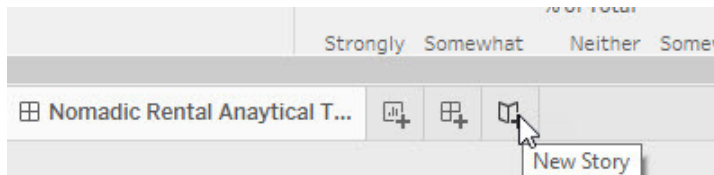
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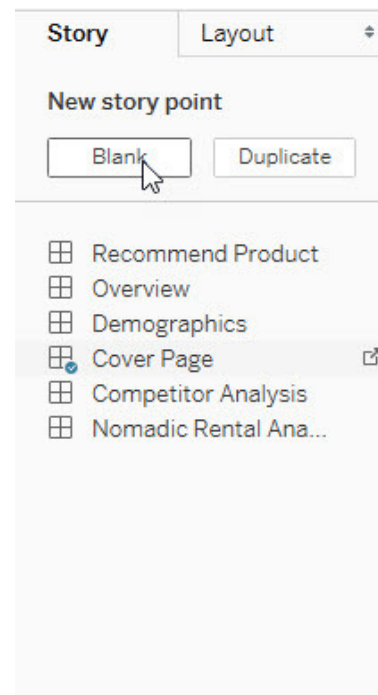
4. ADDING DASHBOARDS TO STORY

After you have created all the dashboards that you would like to use, you simply drag them into the story in the order that you would like them to be seen. To create a new story click the icon at the bottom that looks like a book.



Then it is just a matter of dragging each dashboard into the page! So the first page would be the cover page. Then to add a page for the next dashboard simply click blank.

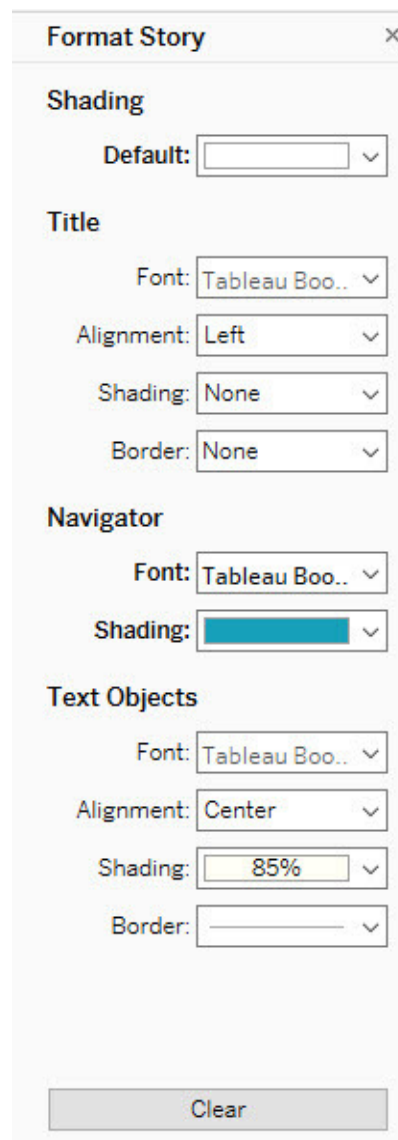
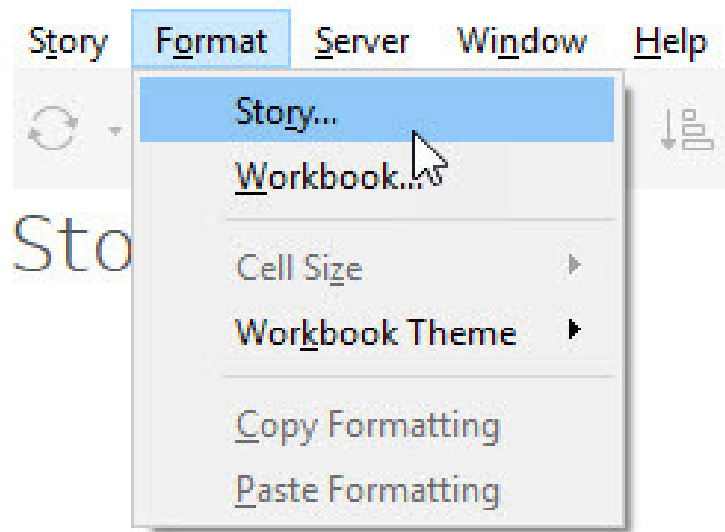
Tableau will give you a fresh page for the next next dashboard in your story. You repeat these steps until you have inserted all of your dashboards into the story.



5. FORMAT THE STORY

Now that all of your dashboards are in the story, its time to format the story! This is where you will change the shading, font color etc.

It is always a good practice to try to have it similar to company colors and the font that the company uses. There should definitely be similarities with how you format the story and how the dashboards were formatted. The same practices that you would use when creating a dashboard can be applied to the story!





CONCLUSION

The final product in Tableau is just as visually appealing as PowerPoint, if not more. It allows you to interact with the presentation which creates a better user perception of you or your company and your presentation.

You can engage the end user by filtering, cross tabulating and interacting with the presentation by answering any questions they may have within your presentation rather than having to go outside of your presentation and risk giving inaccurate information or telling them that you will have to get back to them.

Overall, using Tableau is a much better way of giving a presentation! It may be a little bit more work to create, but the end result offers far more benefit to both you and the audience. By offering this 'wow' factor you are giving them something that not many people or companies are able to do in a presentation.