PERICOPE
Business Process Analysis

Data Storytelling Essentials

Effective communication skills for the data driven business leader.

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"Without data, you're just another person with an opinion."

W. Edwards Deming

About Me

- Business Analyst
- Communications Professional
- Certified Administrator of Volunteer Services (CAVS)

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DATA STORYTELLING ESSENTIALS

A Practical Guide to Data Visualization

Effective Communication Skills for the Data-Driven Business Leader

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Learning Objectives

- Become familiar with a three-step structured process for data visualization
- Identify the right tool to use to represent your data
- Apply design principles for effective communication of data

S-E-E

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S SELECT THE RIGHT TOOL

E ELIMINATE THE NOISE

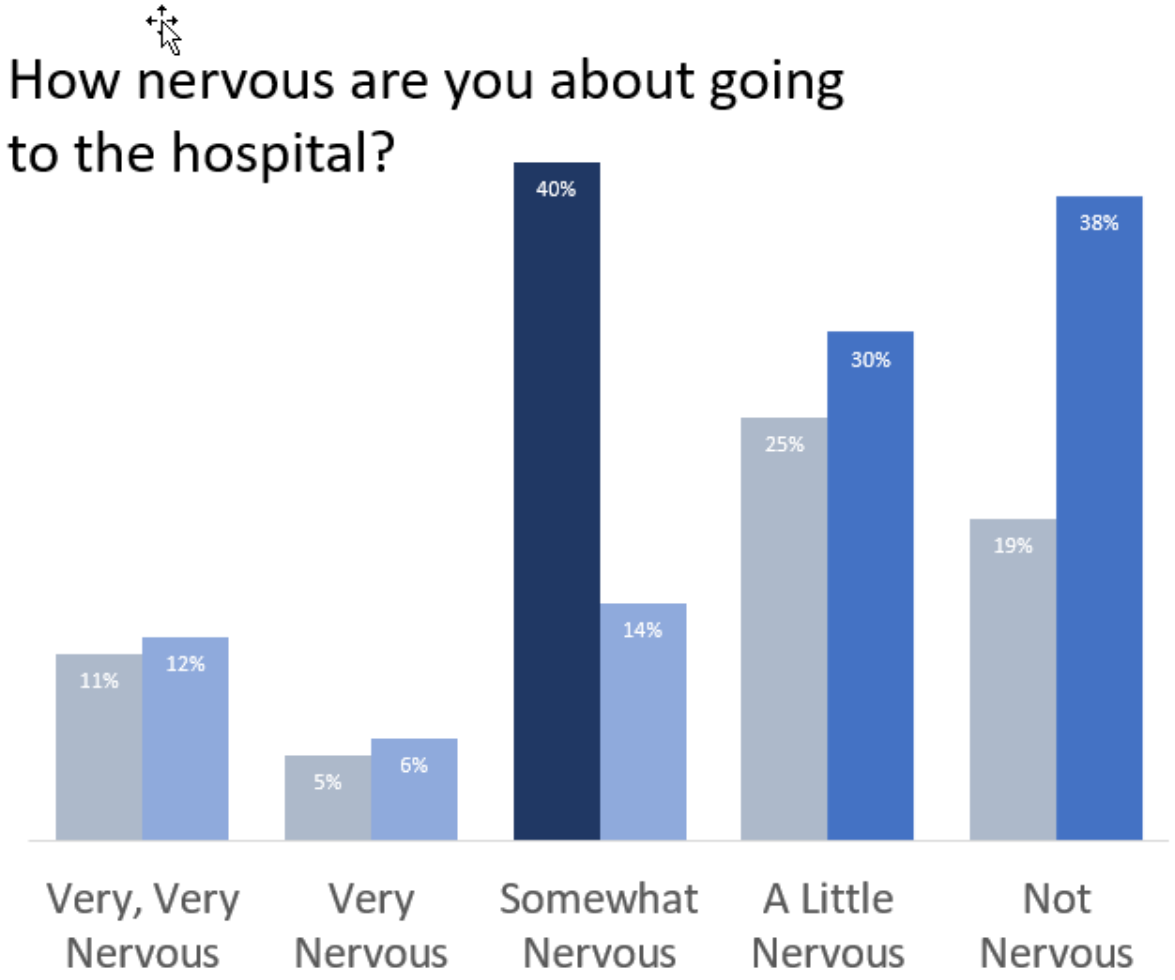
E EMPHASIZE THE KEY TAKEAWAY

Data Visualization Tools

Select the right tool

Vertical Bar Chart

- Best used to show a comparison between two or more categories of data



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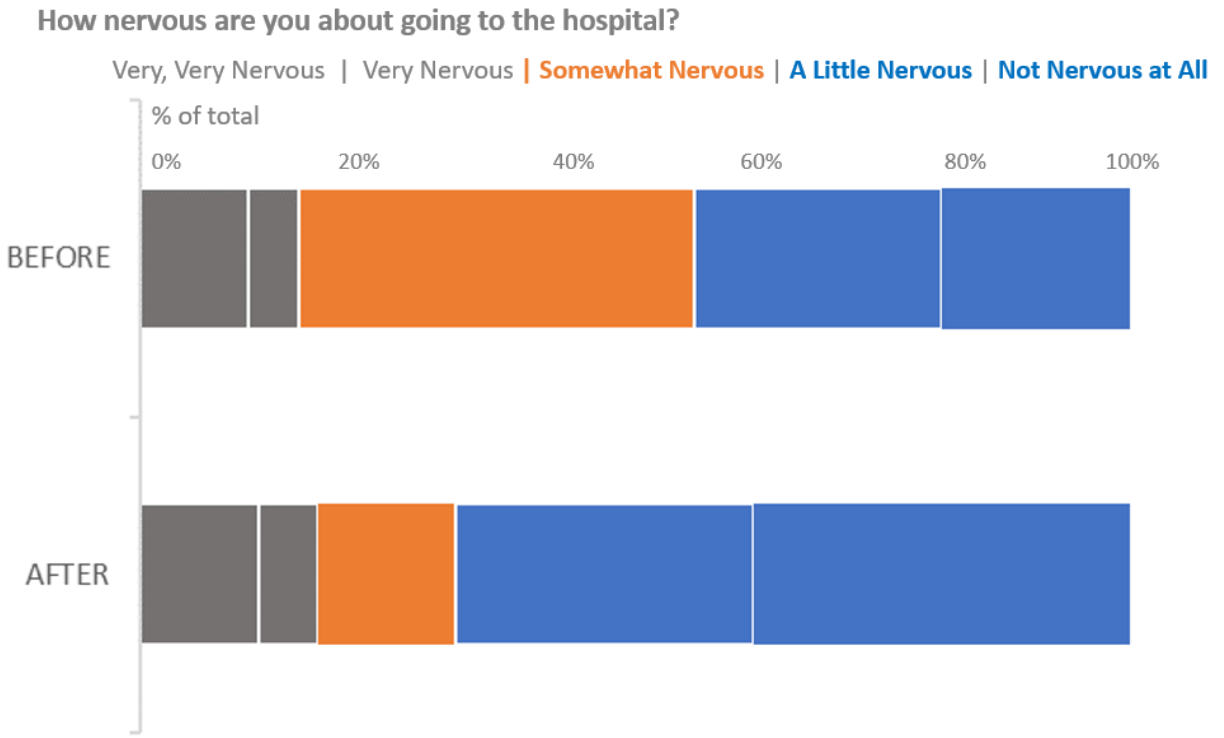
Stacked Horizontal Bar Chart

- Best used for showing totals across different categories where totals sum to 100%



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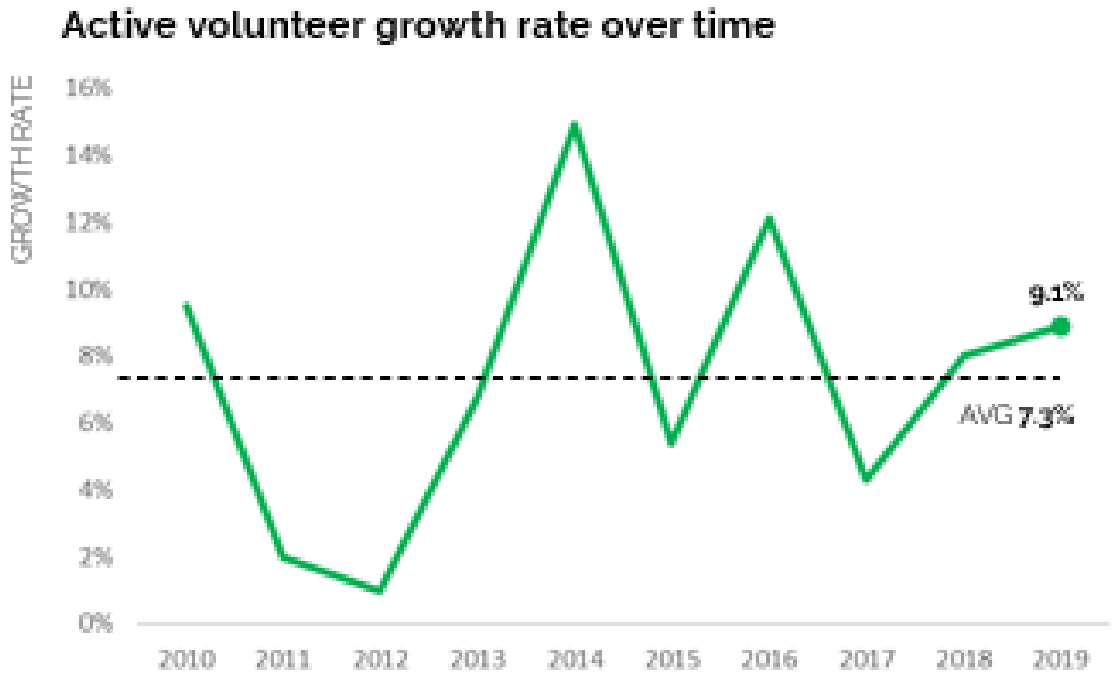
Line Graph

- Best used for graphing trends over time
- Can be used for single or multiple series



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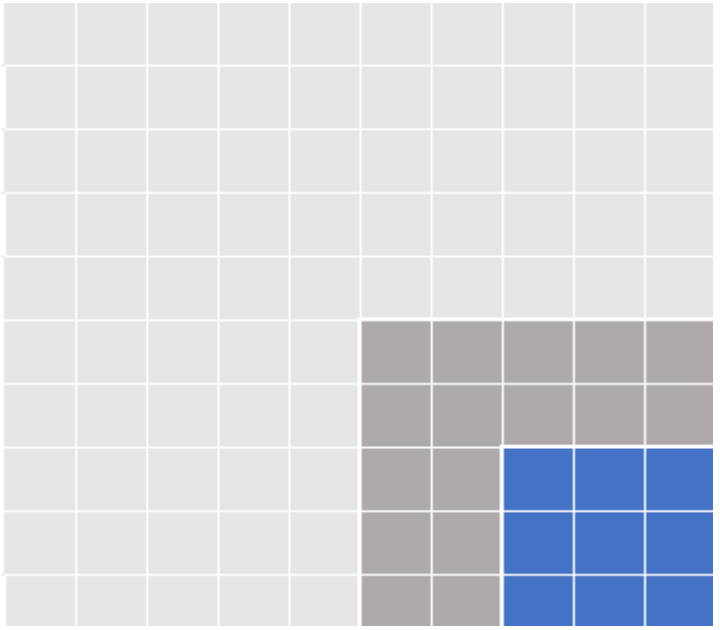
Area Graph

- Best used when needing to visualize numbers of vastly different magnitudes.

New volunteer placement breakdown



Out of every **100**

new volunteers

we start **25**

training in the emergency department

and

get 9 for the gift shop.

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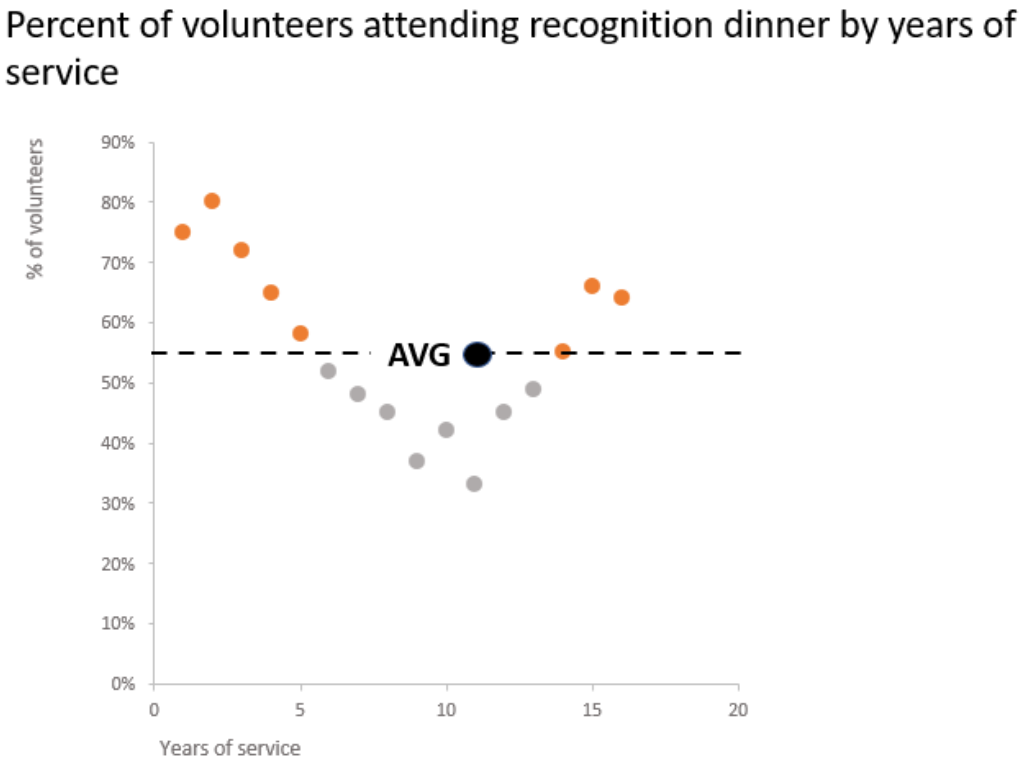
Scatterplot

- Best used for showing the relationship between two things
- Allows for data to be encoded simultaneously to visually see the relationship that exists



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Simple Text

- Best used when you have just a number or two to share

20%

of volunteers provided

annual financial support through Foundation campaigns in 2012, compared to 41% in 1970

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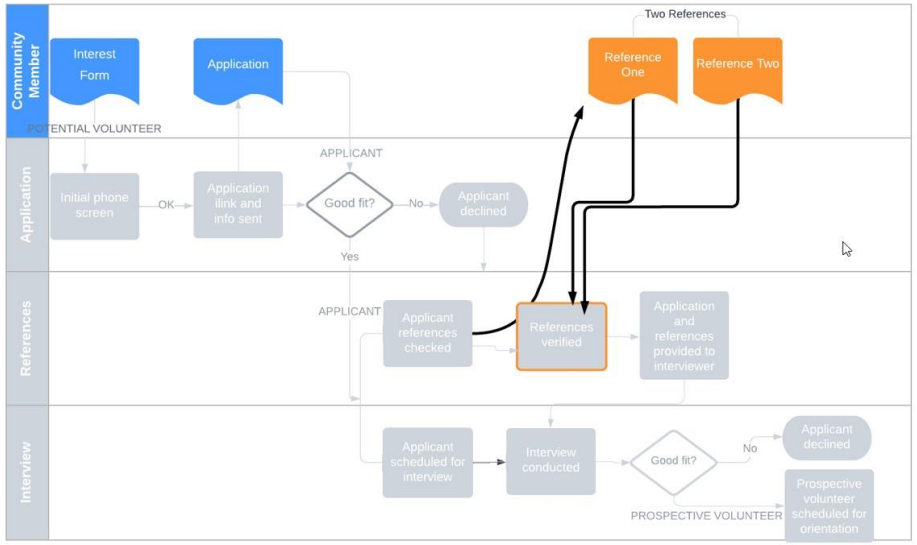
Process Maps

- Best used to visually diagram steps in a process
- Provides a method to visualize process steps for exploratory analysis and metric needs.

Volunteer intake process from potential to active

Intake process starts with external form submission.



Intake process is halted by external reference form submission.

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Accessible Software Tools

- Excel
- Powerpoint
- Tableau
- Qlik
- Lucid chart
- Draw.io
- yEd

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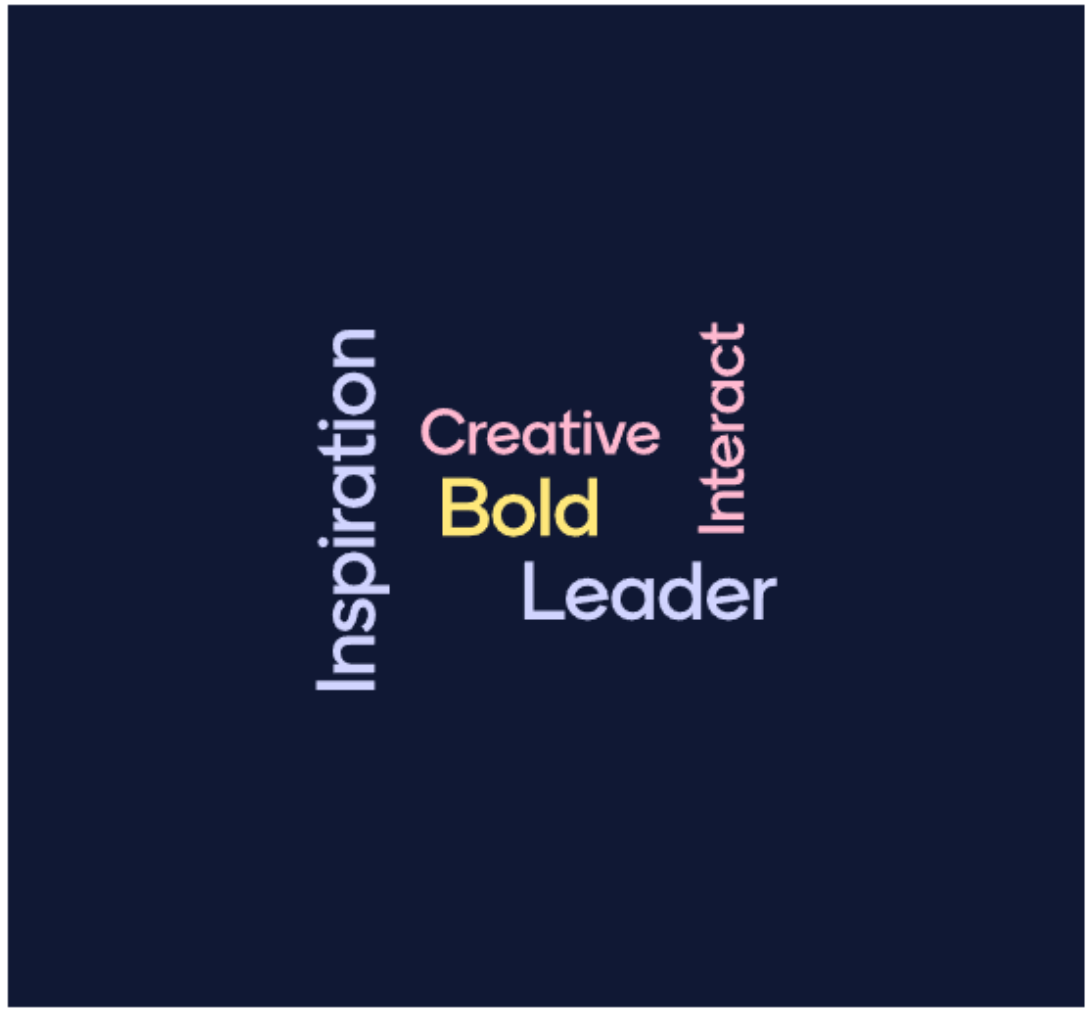


Mentimeter

Let's get started and set-up your Menti

Choose type

Multiple Choice | Word Cloud | Open Ended

Scales | Ranking

Quiz competition

Select Answer | Type Answer | Leaderboard

Do you miss the old add-in?

We are continuously adding more question types to our new PowerPoint add-in. You can still use the old add-in if you prefer.

Switch to the old add-in

RG

Account

Got feedback?

Data Visualization Design

Eliminate noise

Emphasize key takeaways

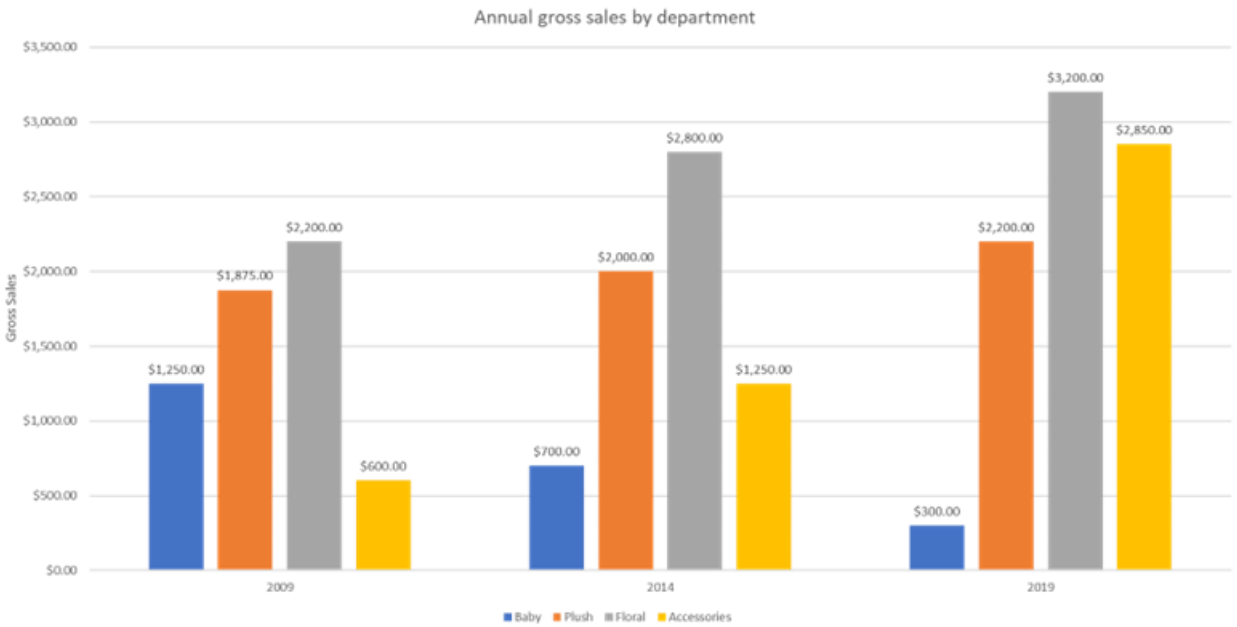
How many passes does the team in white make?

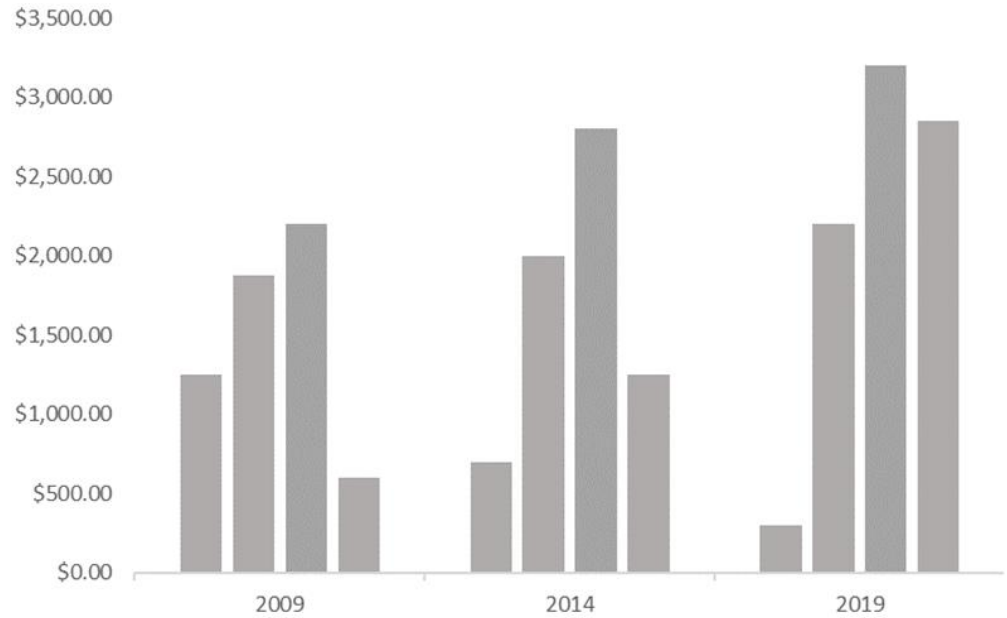
Eliminate noise

- Strip away the cluttering aspects of software generated graphs

- Convert chart elements to gray

- Remove
  - Axis titles
  - Chart title
  - Data labels
  - Legend
  - Gridlines





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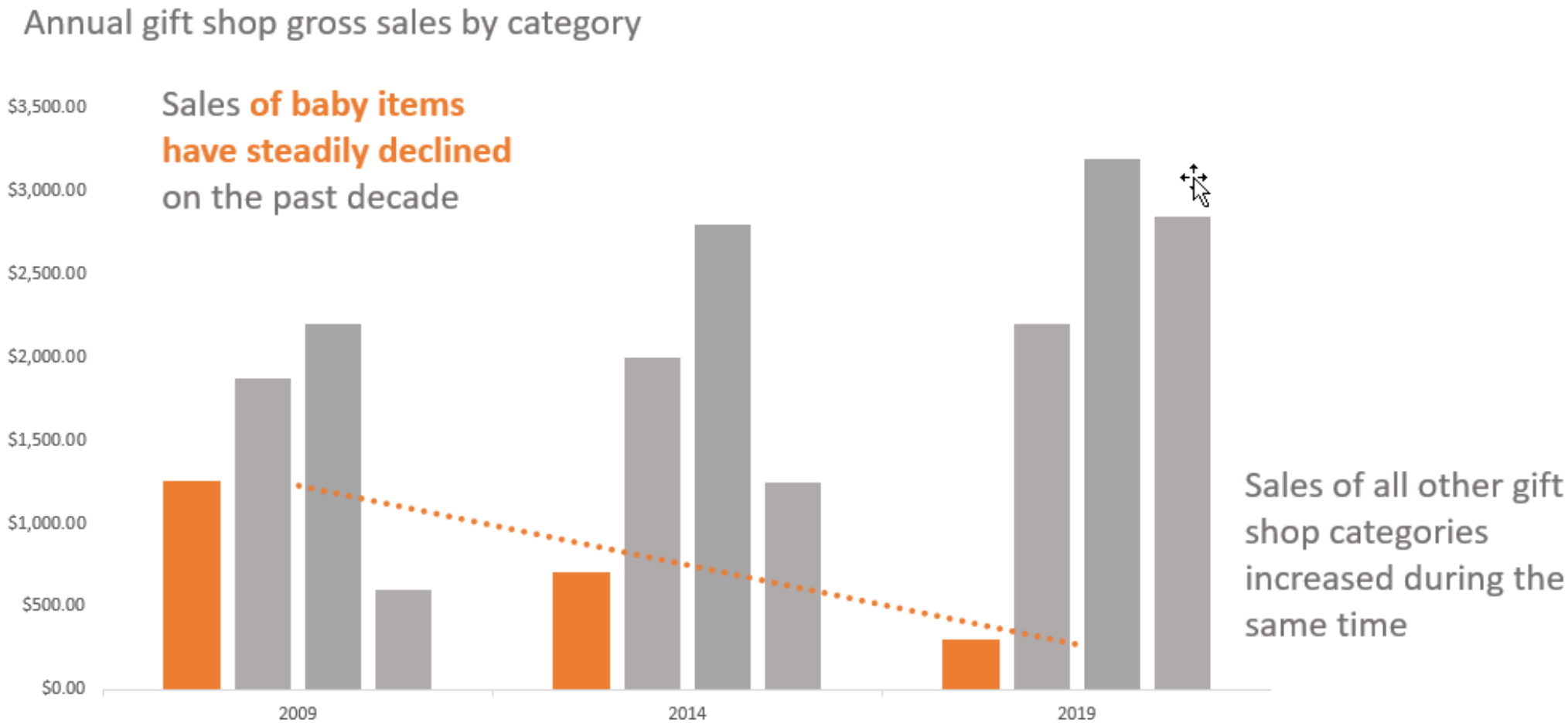
Emphasize key takeaways

Color

Bold

Text



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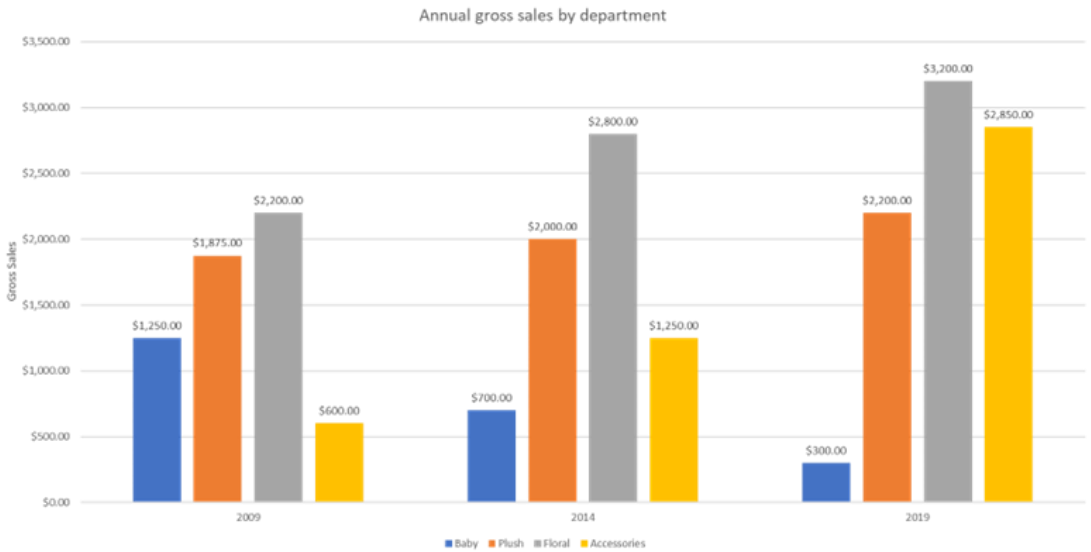

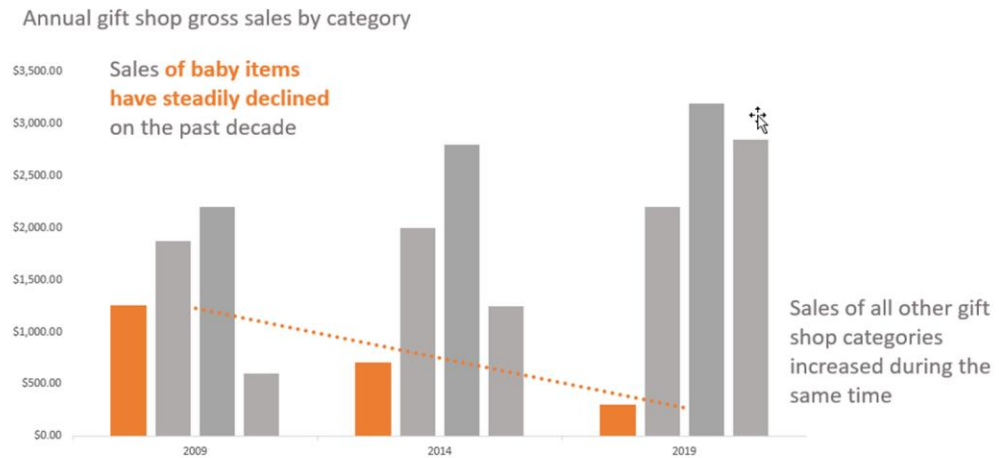

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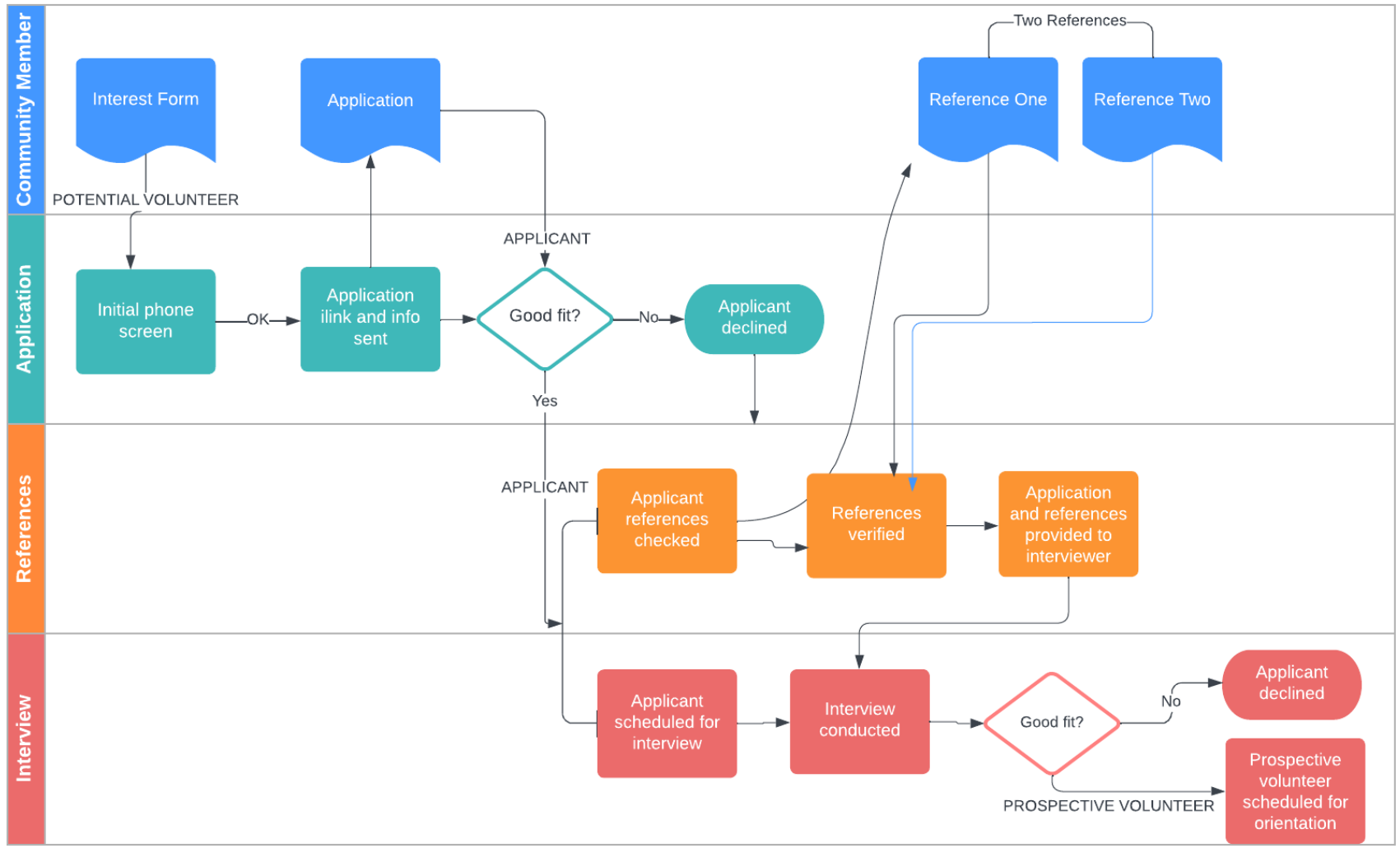
Data Story Scenarios

Scenario

- The onboarding process for volunteers slows down during the staff-initiated reference checks
- You decide to create a visualization in order to perform a process analysis

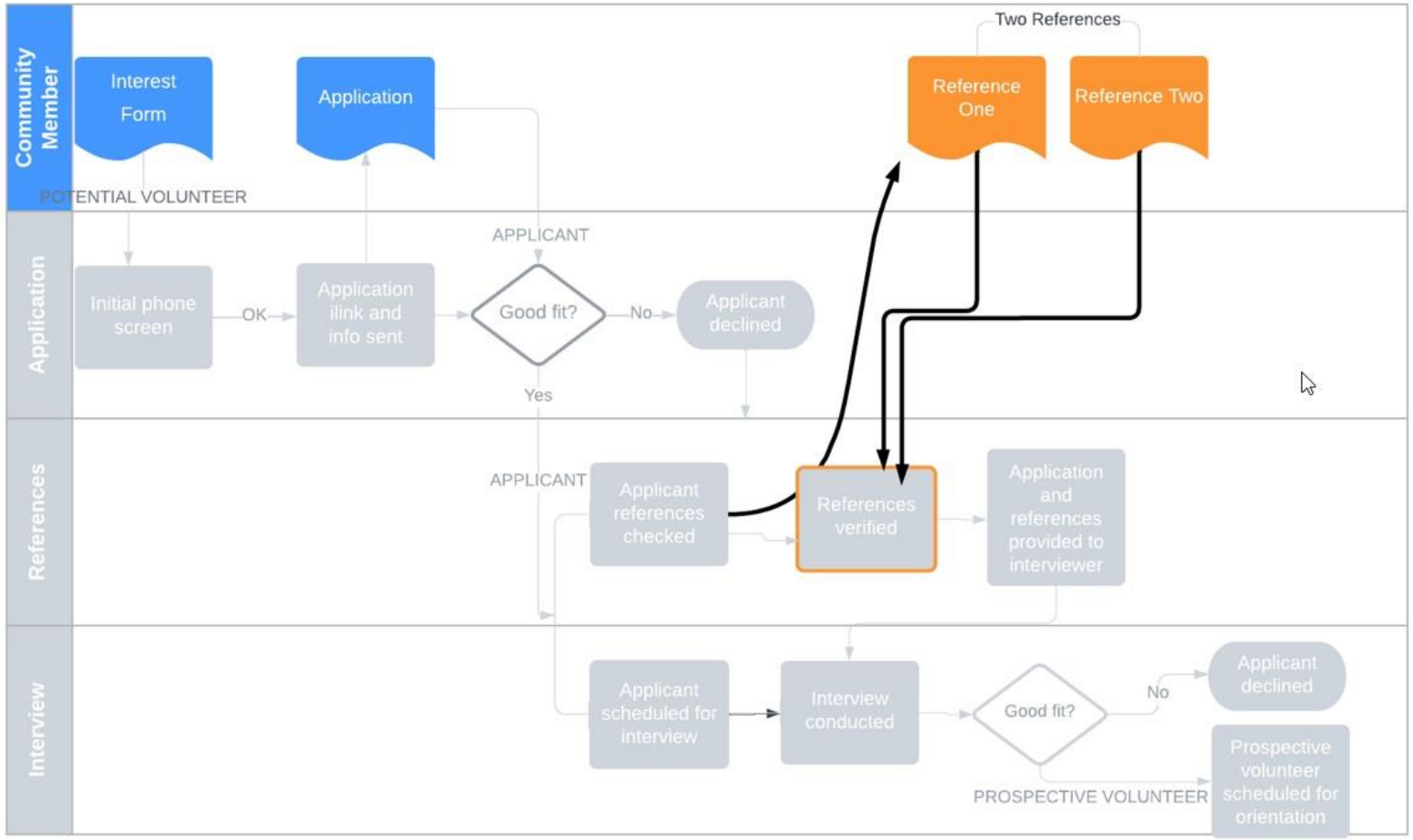
Volunteer Intake Process

Roseanna Galindo | March 2, 2023



Volunteer intake process from potential to active

Intake process starts with external form submission.



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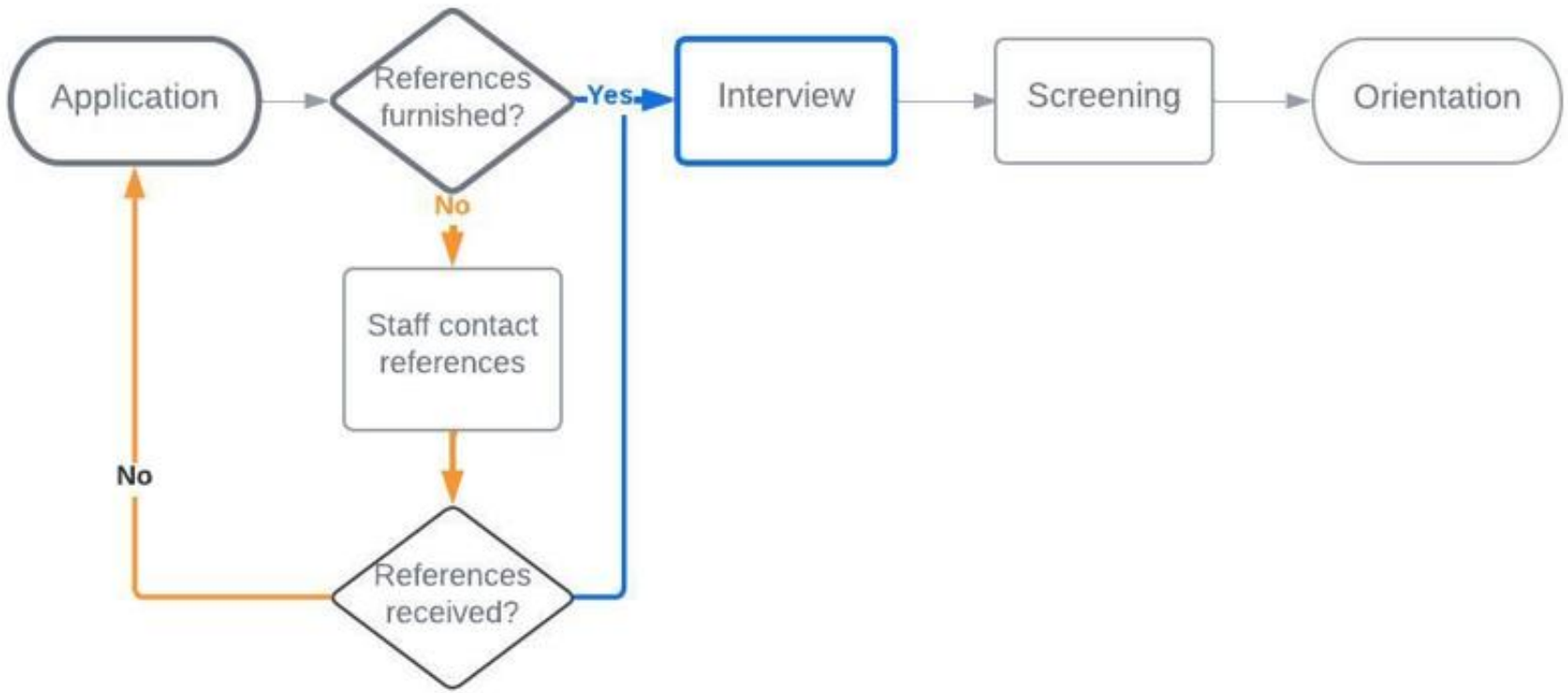
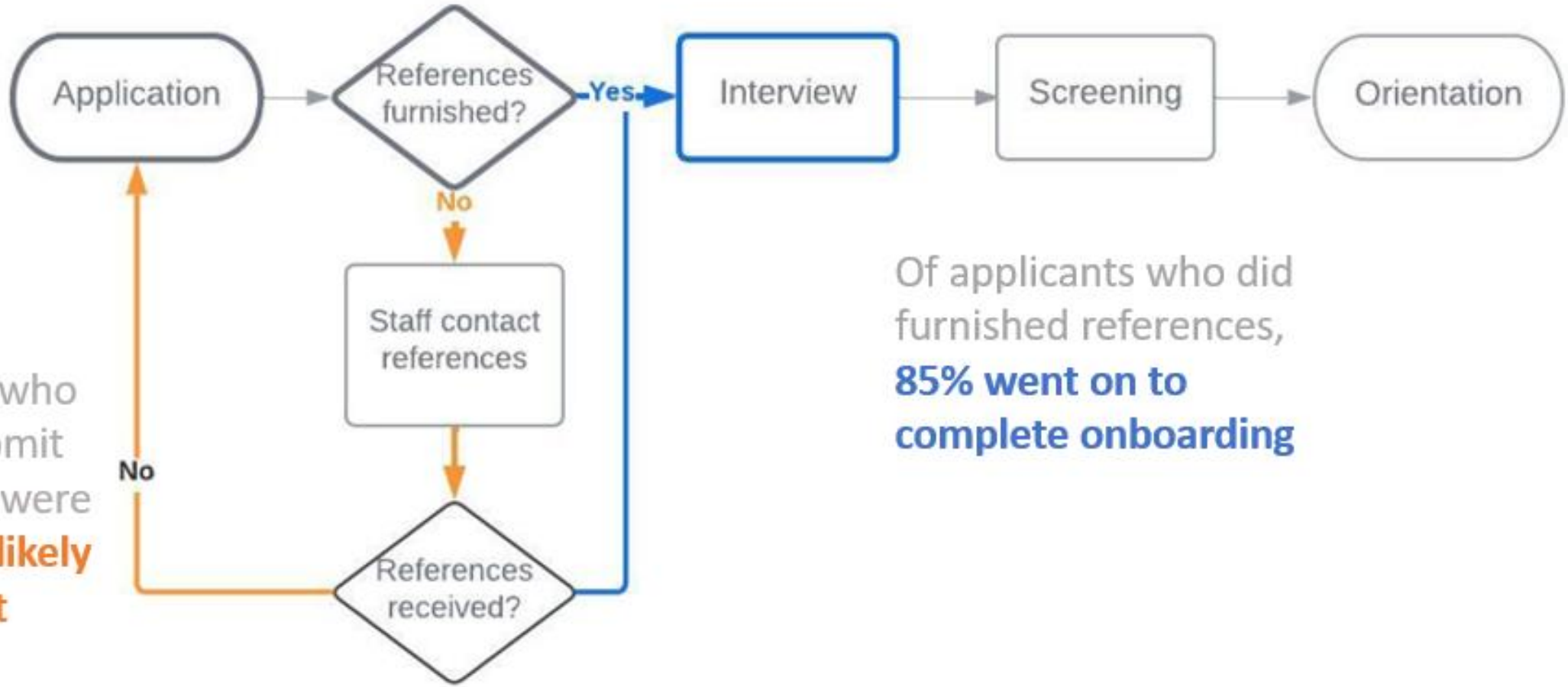

Application
References furnished?
Yes
Interview
Screening
Orientation
No
Staff contact references
No
References received?

Changing the process to have applicants furnish references at the time they submit their application increases onboarding rate



Applicants who did not submit references were **40% more likely to drop out**

Of applicants who did furnished references, **85% went on to complete onboarding**

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Scenario

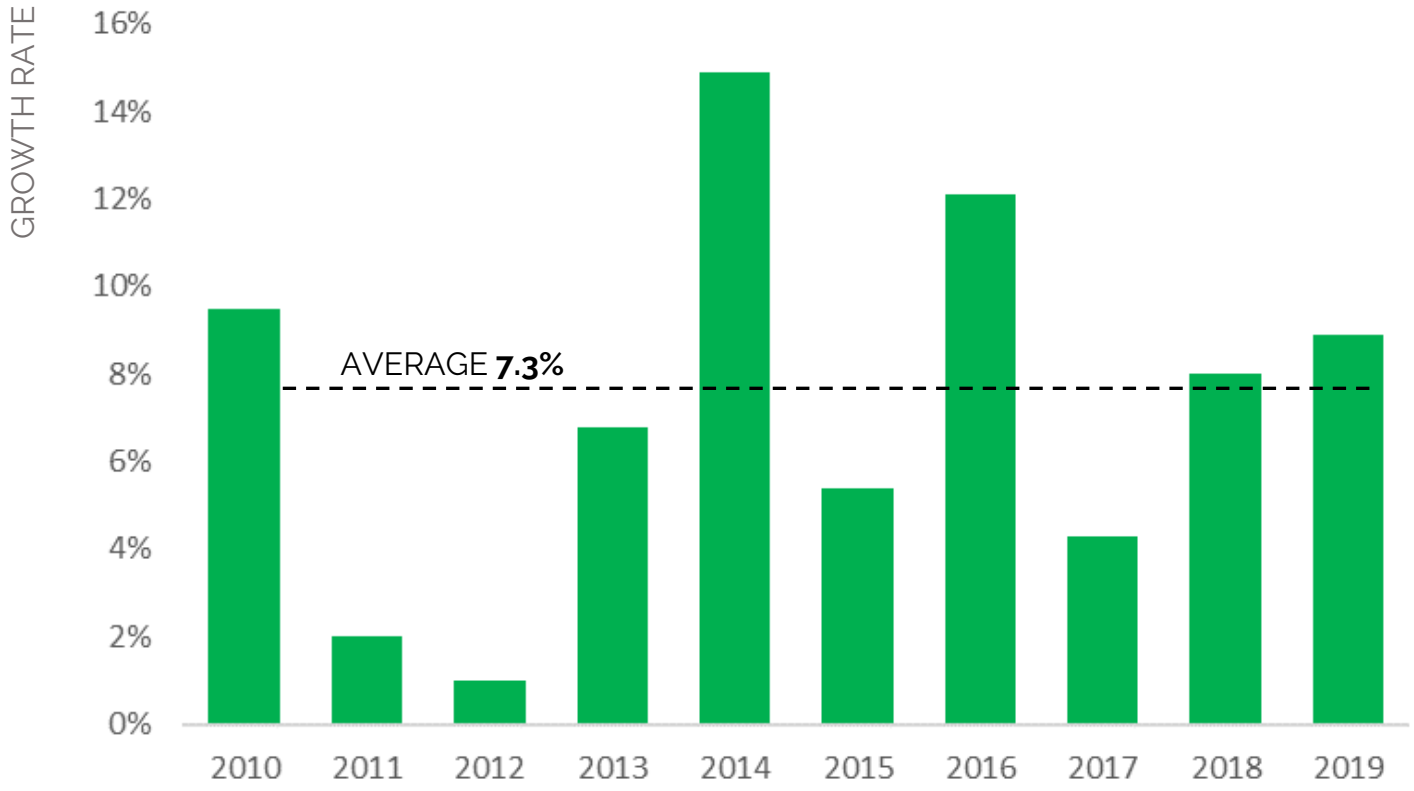
- You are a leader of volunteers in an organization.
- You've made come changes in recruitment approach in the past few years and feel like it is making a difference.
- You are interested in comparing recent program growth rate data with overall average for the past 1o years.

Year	Growth Rate
2019	8.9%
2018	8.0%
2017	4.3%
2016	12.1%
2015	5.4%
2014	14.9%
2013	6.8%
2012	1.0%
2011	2.0%
2010	9.5%
AVG	7.3%

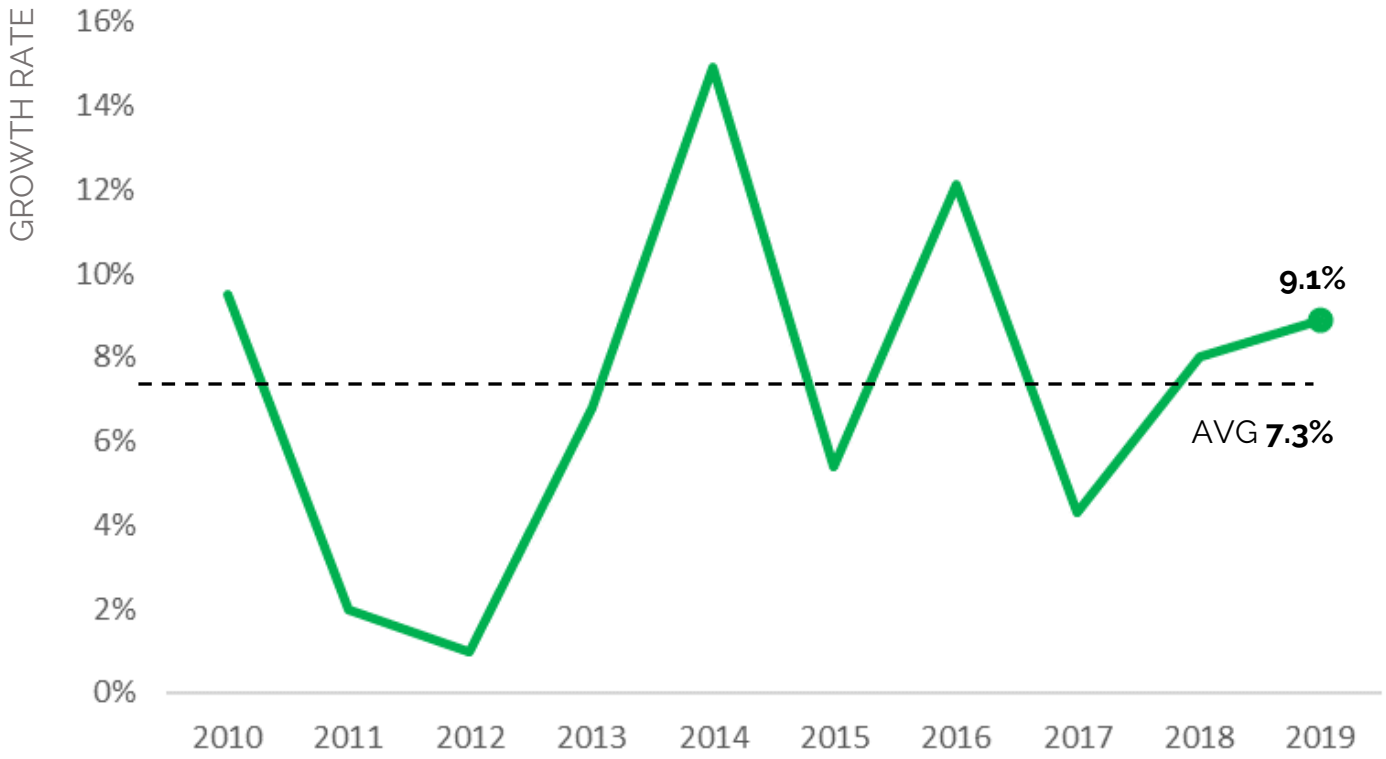
Year	Growth Rat
2019	9%
2018	8%
2017	4%
2016	12%
2015	5%
2014	15%
2013	7%
2012	1%
2011	2%
2010	10%

Active volunteer growth rate over time

Active volunteer growth rate over time



Active volunteer growth rate over time



The volunteer program experienced **an above average growth rate**

Since late 2017, the recruitment plan has been funded as an ongoing operational expense.

Consistent and ongoing recruitment efforts resulted in the **above average growth rate of 9.1%.**

The growth rate is expected to continue to **trend upward** if current funding is sustained.

Scenario

- A patient experience based visitation program you launched is having increasing impact in the past five years.
- You've been invited to a nursing leadership meeting to share about the program's growth in bedside visits

Nursing Unit						
Bedside Visits	**2013**	**2014**	**2015**	**2016**	**2017**	
1st Floor	35	77	77	185	200	574
2nd Floor	24	50	55	100	180	409
3rd Floor	55	78	88	200	448	869
4th Floor	60	150	269	500	775	1754
5th Floor	80	110	225	882	1307	2604
	254	465	714	1867	2910	

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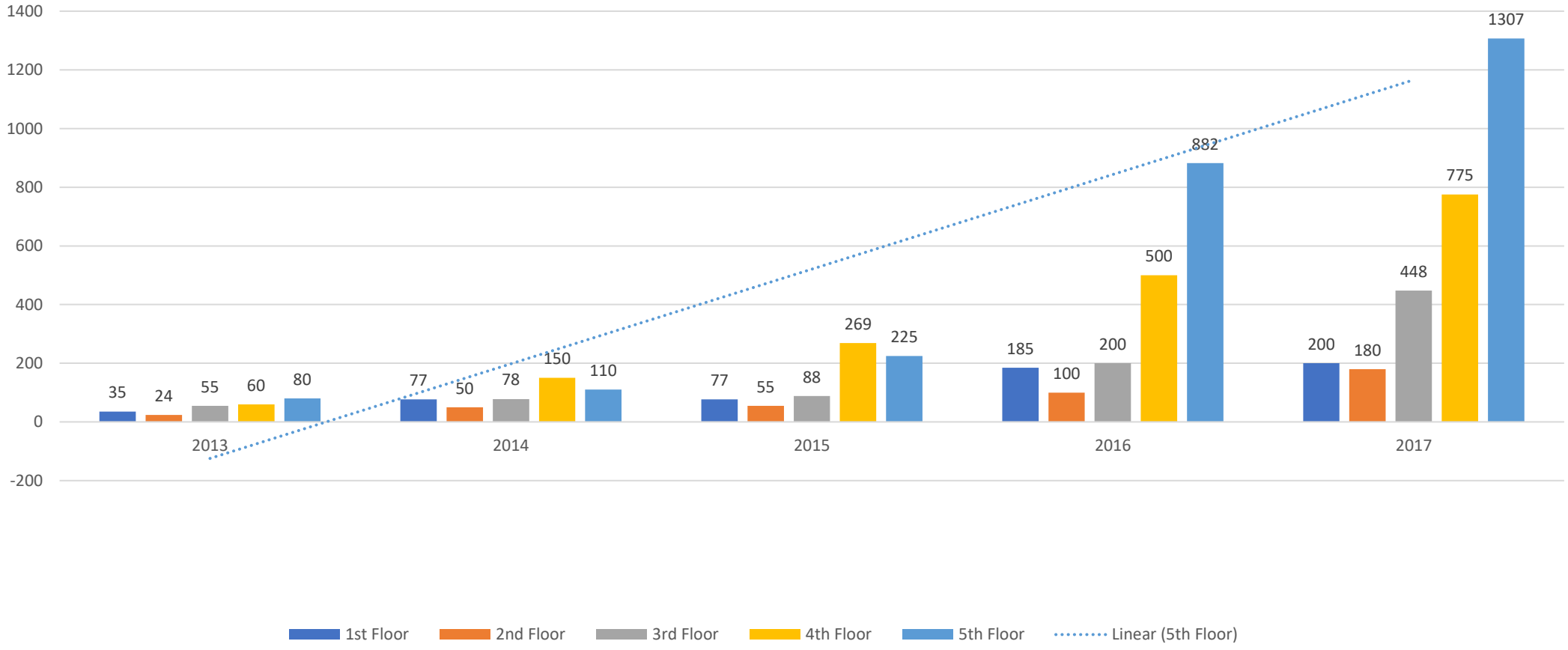
Number of patients receiving a volunteer visit by nursing floor



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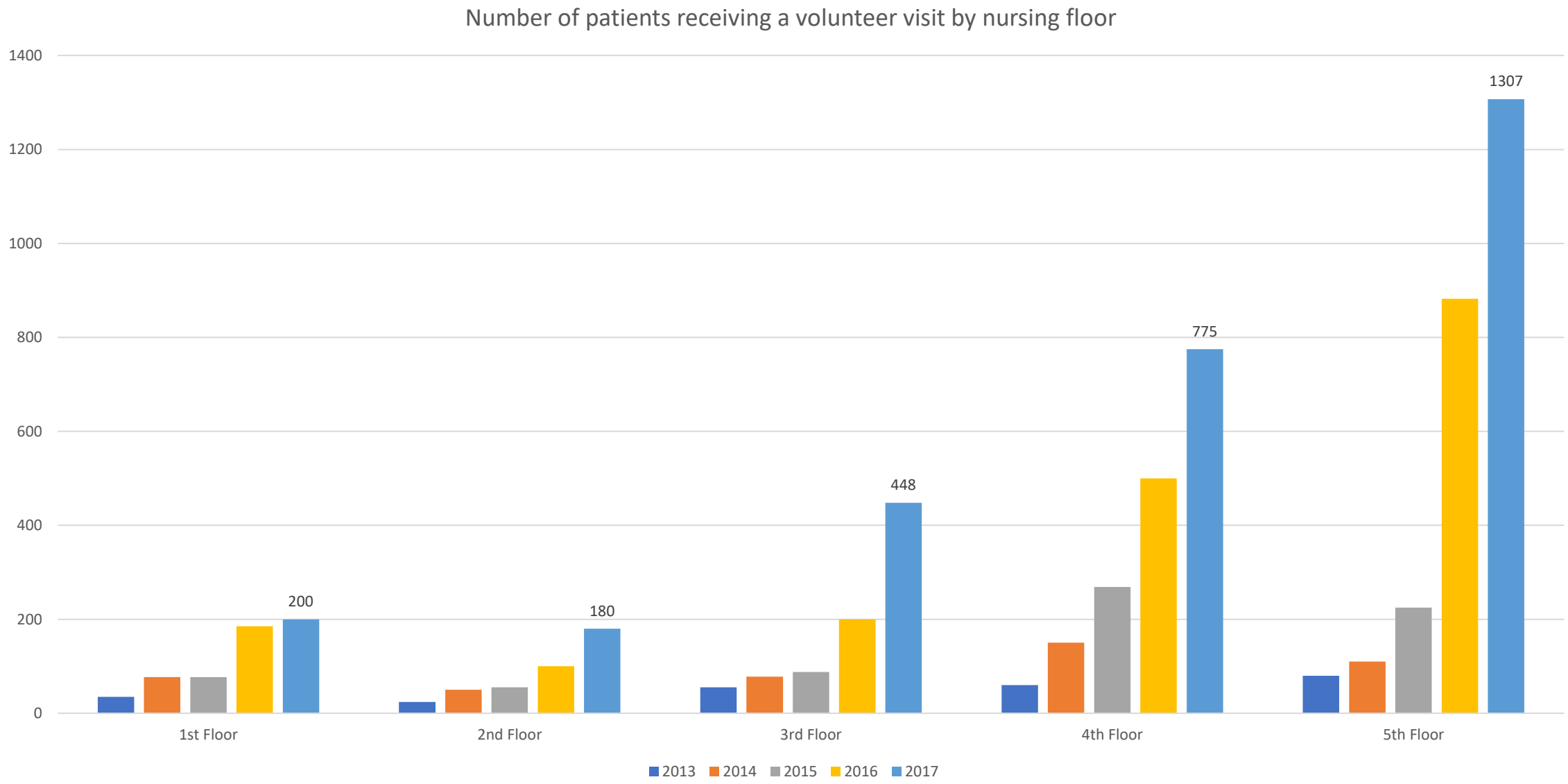

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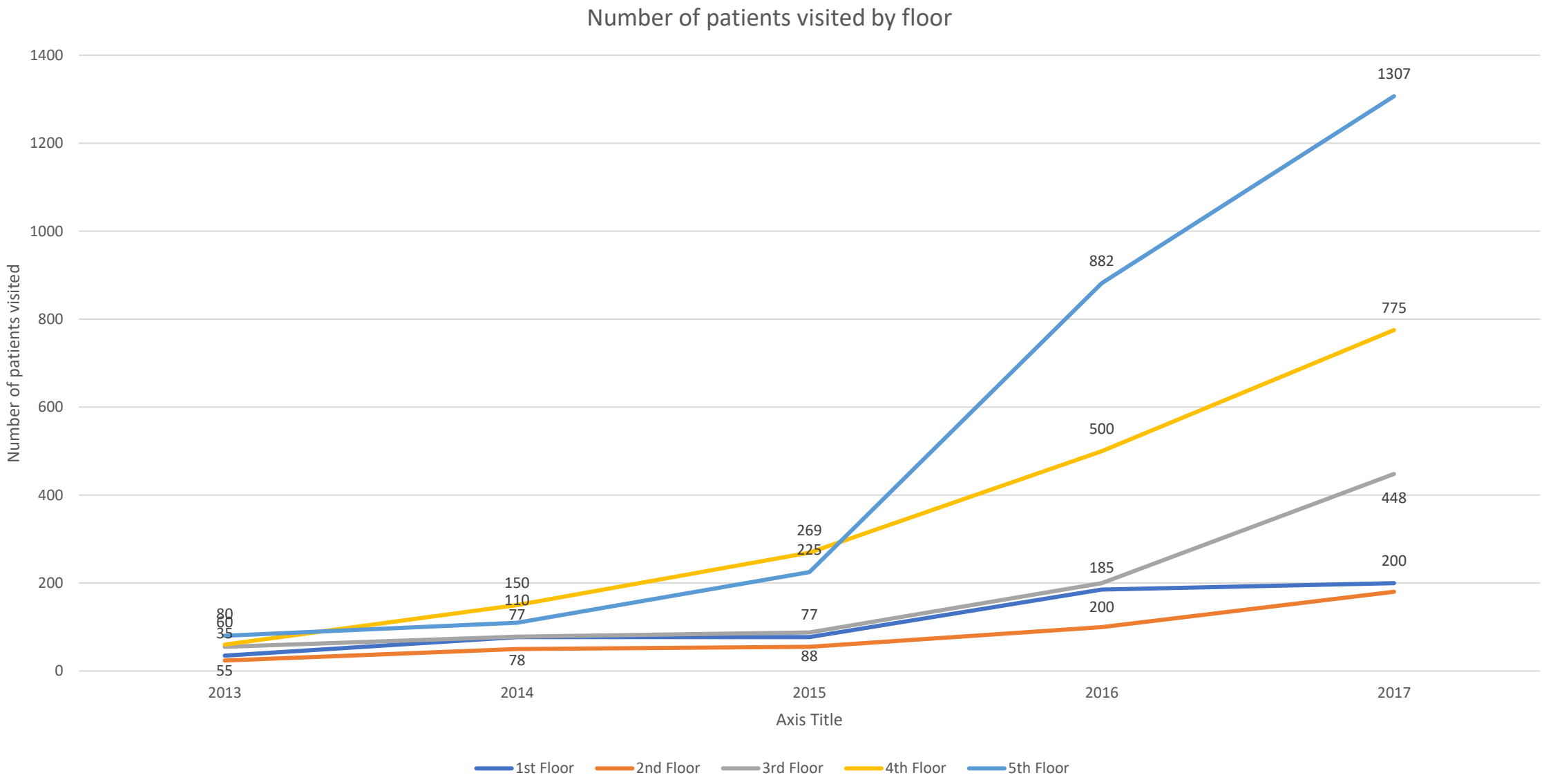

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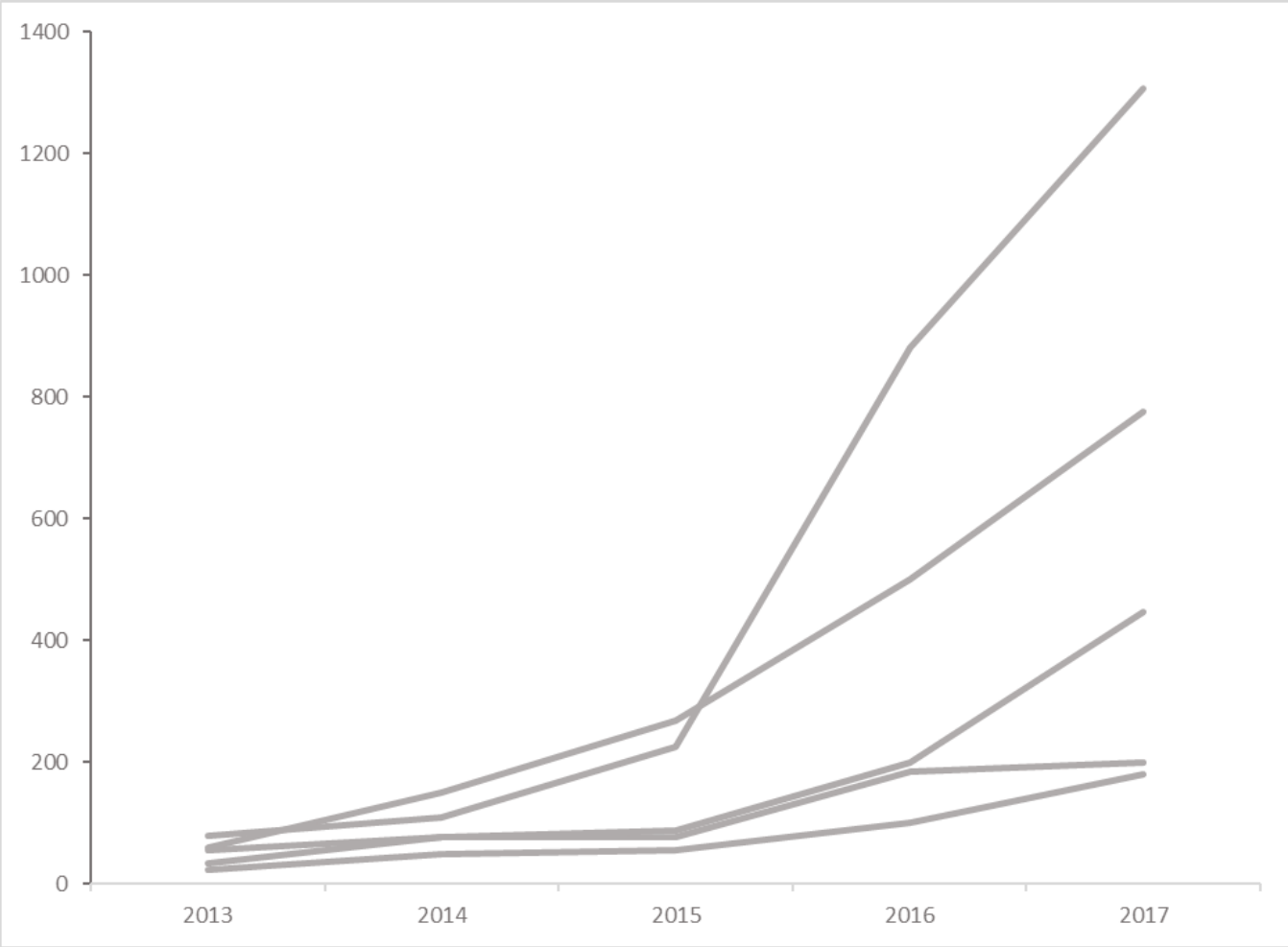

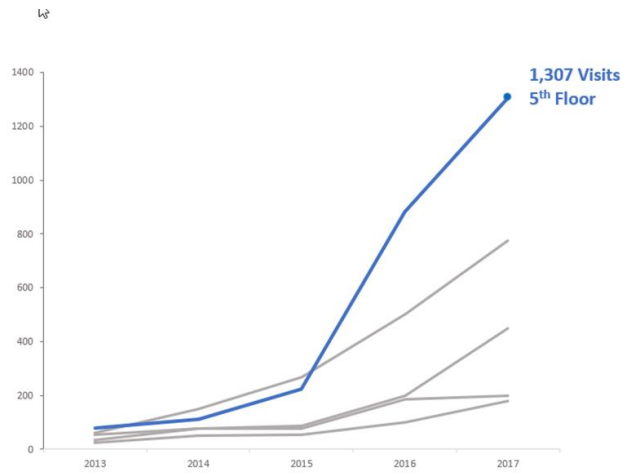

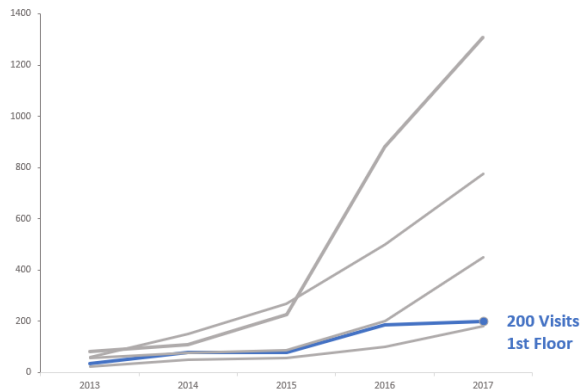

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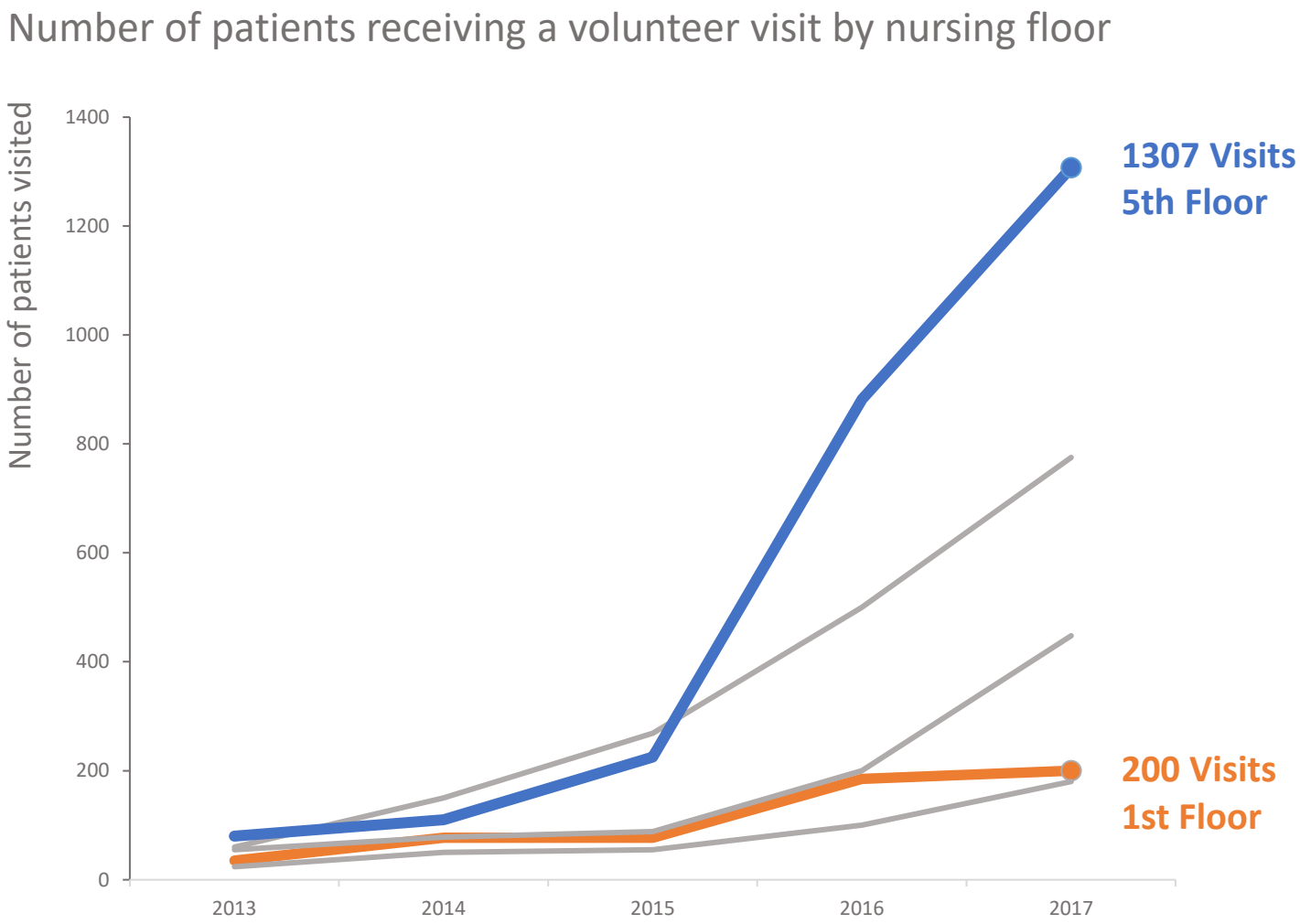

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Let's connect

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