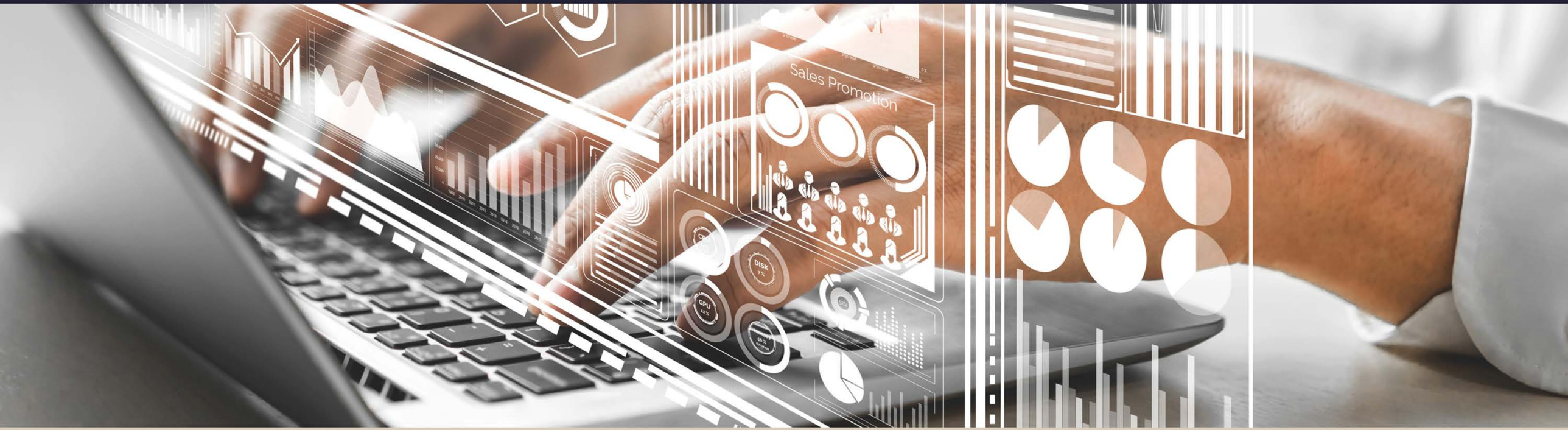
Master Reporting

How to win the audience “Everytime”?,

The effective reporting recipes.



คำถาม?

- คุณต้องทำรายงานไหม ?
- ส่งให้ใคร ?
- ส่งอะไร ?
- ส่งเมื่อใด ?
- ได้ Feedback อะไร ?
- คุณคิดว่าอะไรสำคัญที่สุด ?
- Report vs. Presentation ?

Introduction to Reporting

What is report?

A report is a document created to communicate essential information.

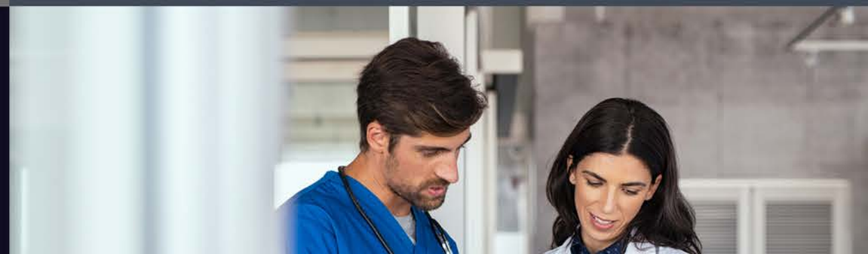
Type of report

- Transactional
- Operational
- Analytical
- Strategic
- Quality
- Customer Experience
- Productivity
- Incident and Resolution

Accuracy and Timing is everything

Inaccurate or Outdated report is **worthless!!!**

"A good way to have credibility with your colleagues is not to have lied to them last week."
— Edward Tufte



Understanding the audience

Who will read your report?

What are they expecting to see in your reports?

What and How do you want tell them?

Report what your audience expects to see. Depending on their roles.

- Executives
- Managers
- Clients
- General

Report represents data

Data Collection

Where is you data and How to get them?

- Data from your systems
- Data received from external
- Other Sources (Manual Input, Paper, etc)

Preparation

businesses that offer different products or services and compete for the same market.

- Understanding the Process
- Understanding the Definition
- Data Cleaning and Pre-Process

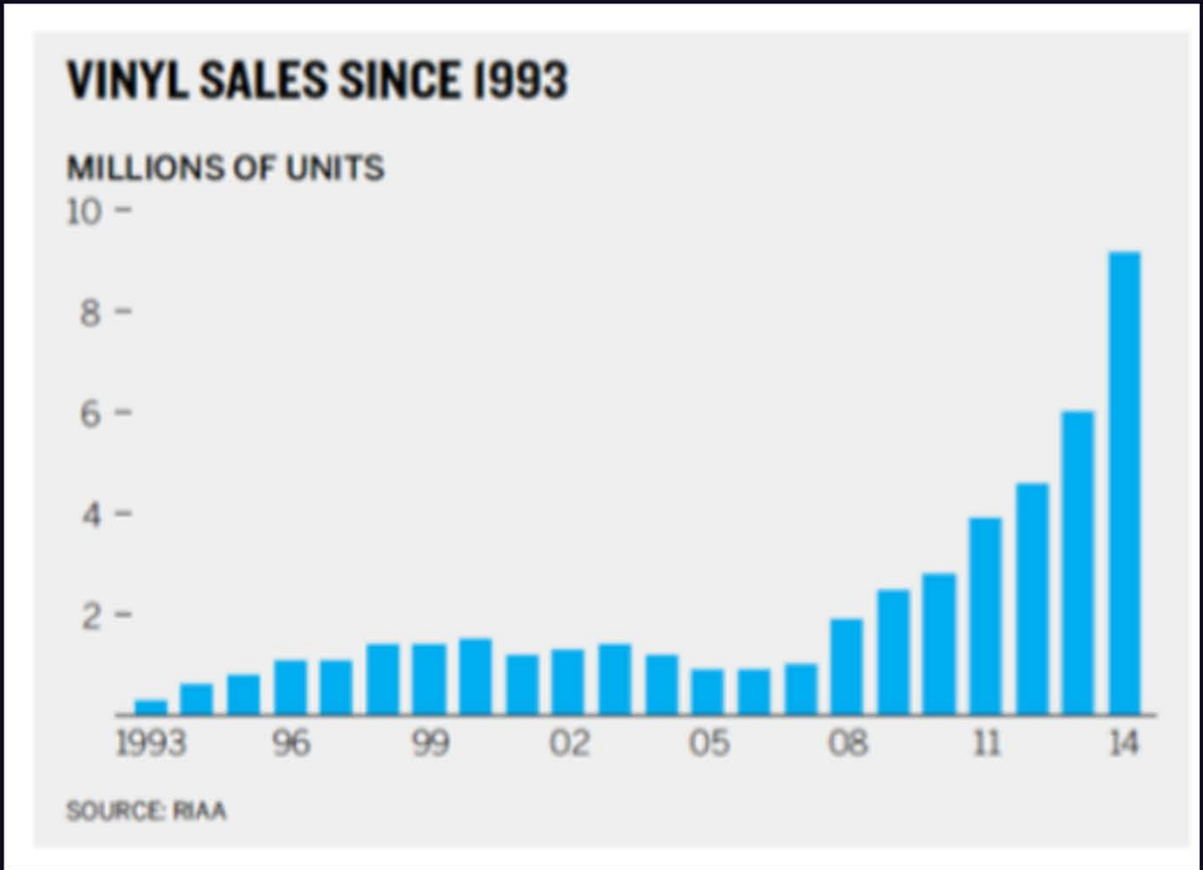
Data Visualization

?

Exit this room. **Turn right** and **walk 10 feet** to the end of the hallway, where you'll be facing a large conference room. **Turn left** and **walk another 12 feet** until you come to the end of that hallway. To your left is a fire alarm, near the elevator. To your right at the end of the hall is a stairwell. Do not go to the elevator. **Turn right** and **walk another 12 feet** to the end of the hall, **turn left and enter the stairwell**. **Go down two flights of stairs** and **exit the building** at the door at the bottom of the stairs.

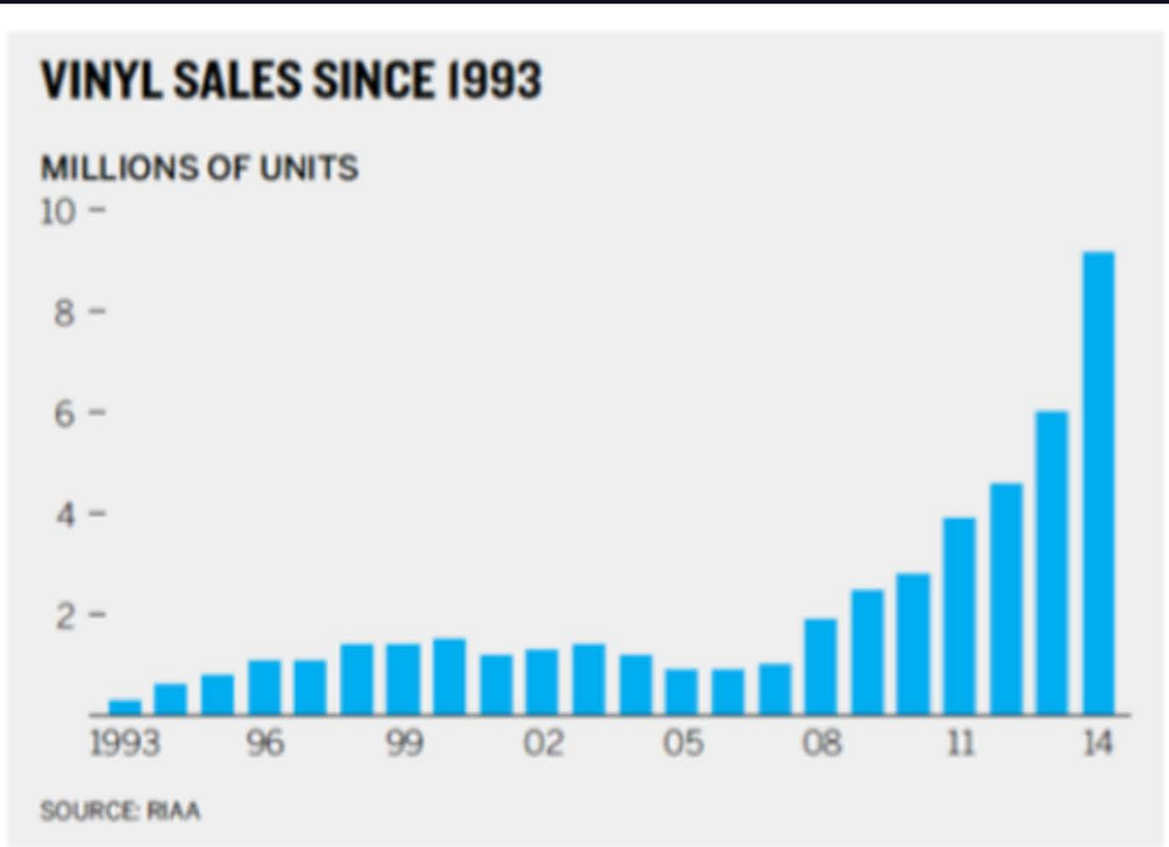
FIRE ESCAPE PLAN

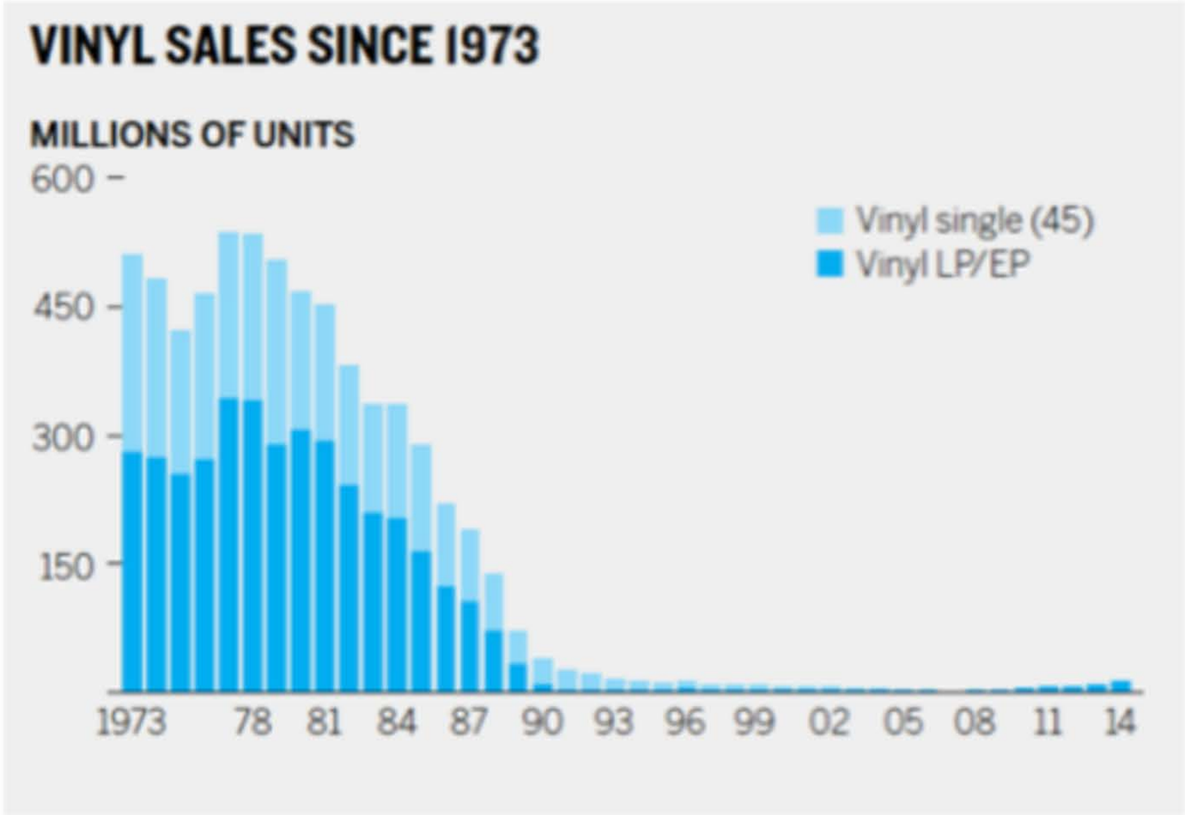
ยอดขายแผ่นเสียงกำลังโต ?



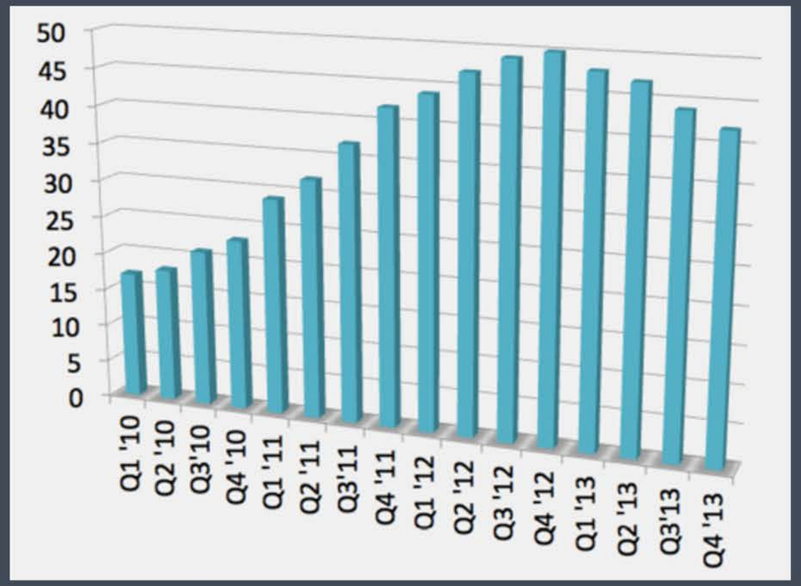
Misleading Graph ?

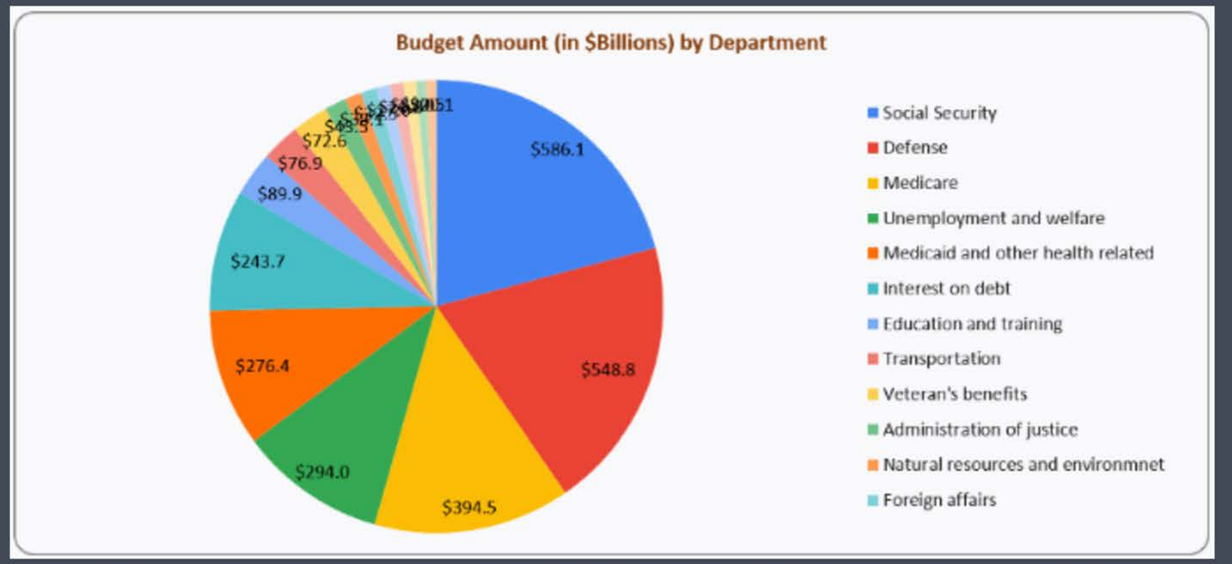
ยอดขายแผ่นเสียงกำลังโต ?

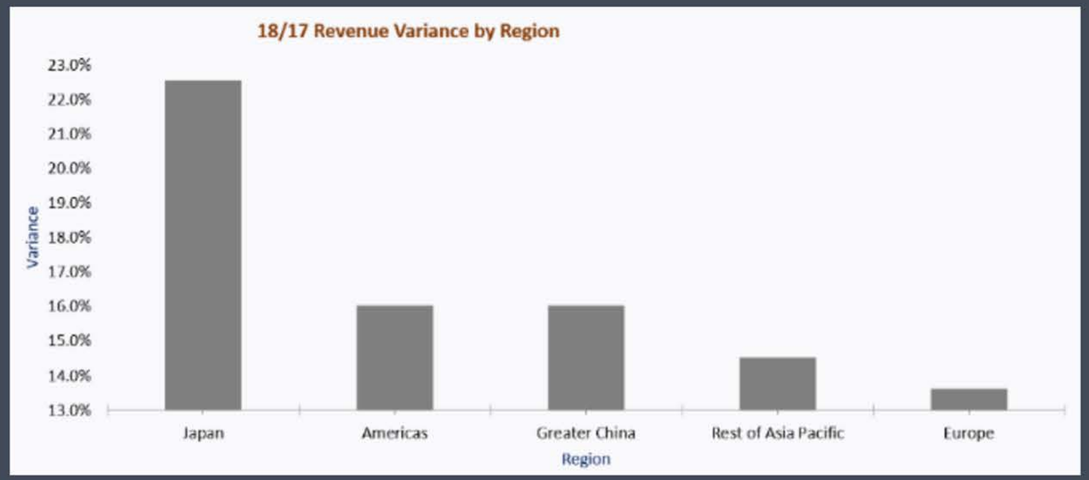


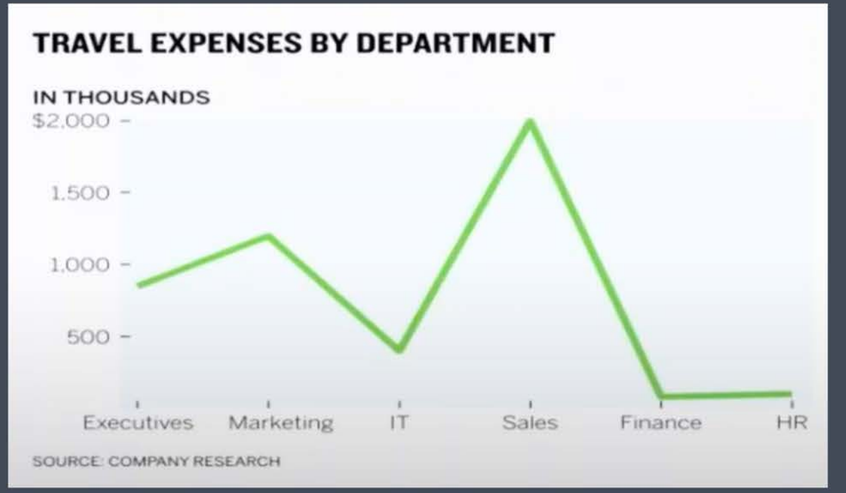


Seen this?


50
45
40
35
30
25
20
15
10
5
0
Q1 '10
Q2 '10
Q3'10
Q4 '10
Q1 '11
Q2 '11
Q3'11
Q4 '11
Q1 '12
Q2 '12
Q3 '12
Q4 '12
Q1 '13
Q2 '13
Q3'13
Q4 '13

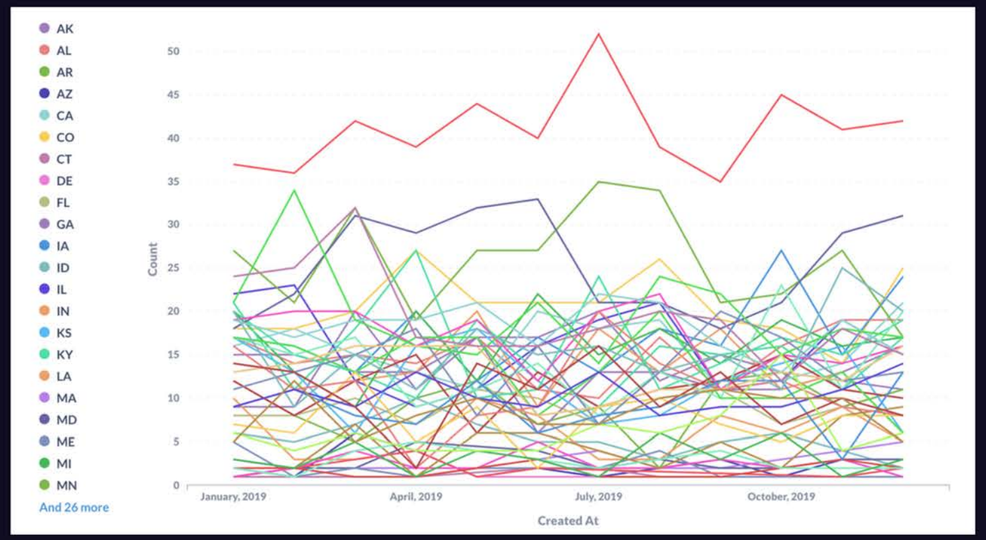

Budget Amount (in $Billions) by Department
$586.1
$548.8
$394.5
$294.0
$276.4
$243.7
$89.9
$76.9
$72.6
Social Security
Defense
Medicare
Unemployment and welfare
Medicaid and other health related
Interest on debt
Education and training
Transportation
Veteran's benefits
Administration of justice
Natural resources and environmnet
Foreign affairs


18/17 Revenue Variance by Region
23.0%
22.0%
21.0%
20.0%
19.0%
18.0%
17.0%
16.0%
15.0%
14.0%
13.0%
Variance
Japan
Americas
Greater China
Rest of Asia Pacific
Europe
Region


TRAVEL EXPENSES BY DEPARTMENT
IN THOUSANDS
$2,000
1,500
1,000
500
Executives
Marketing
IT
Sales
Finance
HR
SOURCE: COMPANY RESEARCH

And this ?

- Too much information in one visual
- Select the wrong visualization type (Pie / Line Chart with too many categories)
- Wrong scaling (Axis or Size)
- Improper extraction
- Improper color
- 3D Graph



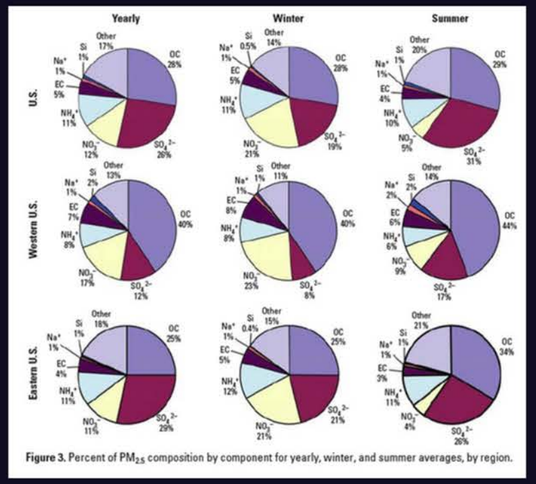
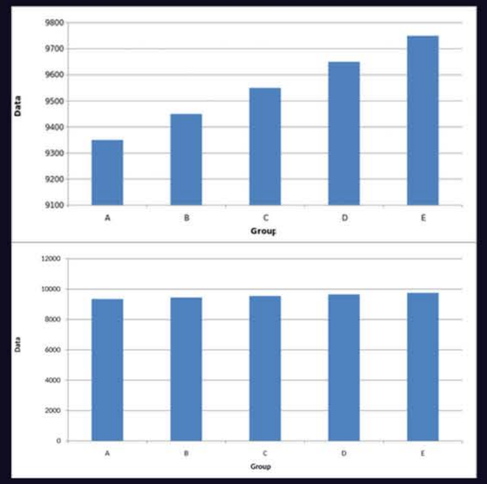
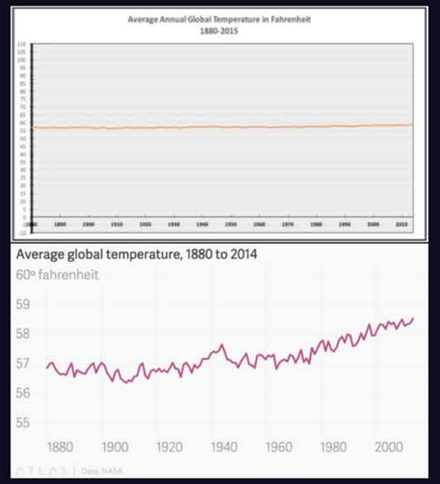
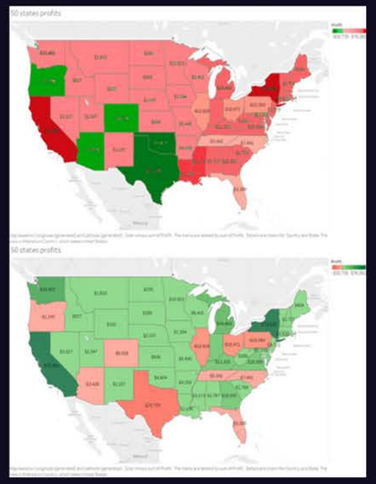


Figure 3. Percent of $PM_{2.5}$ composition by component for yearly, winter, and summer averages, by region.







Data Visualization can make a big difference.

Data Visualization Principles

- Clean
- Accuracy
- Simplicity
- Focus

Choosing the Right Chart Types

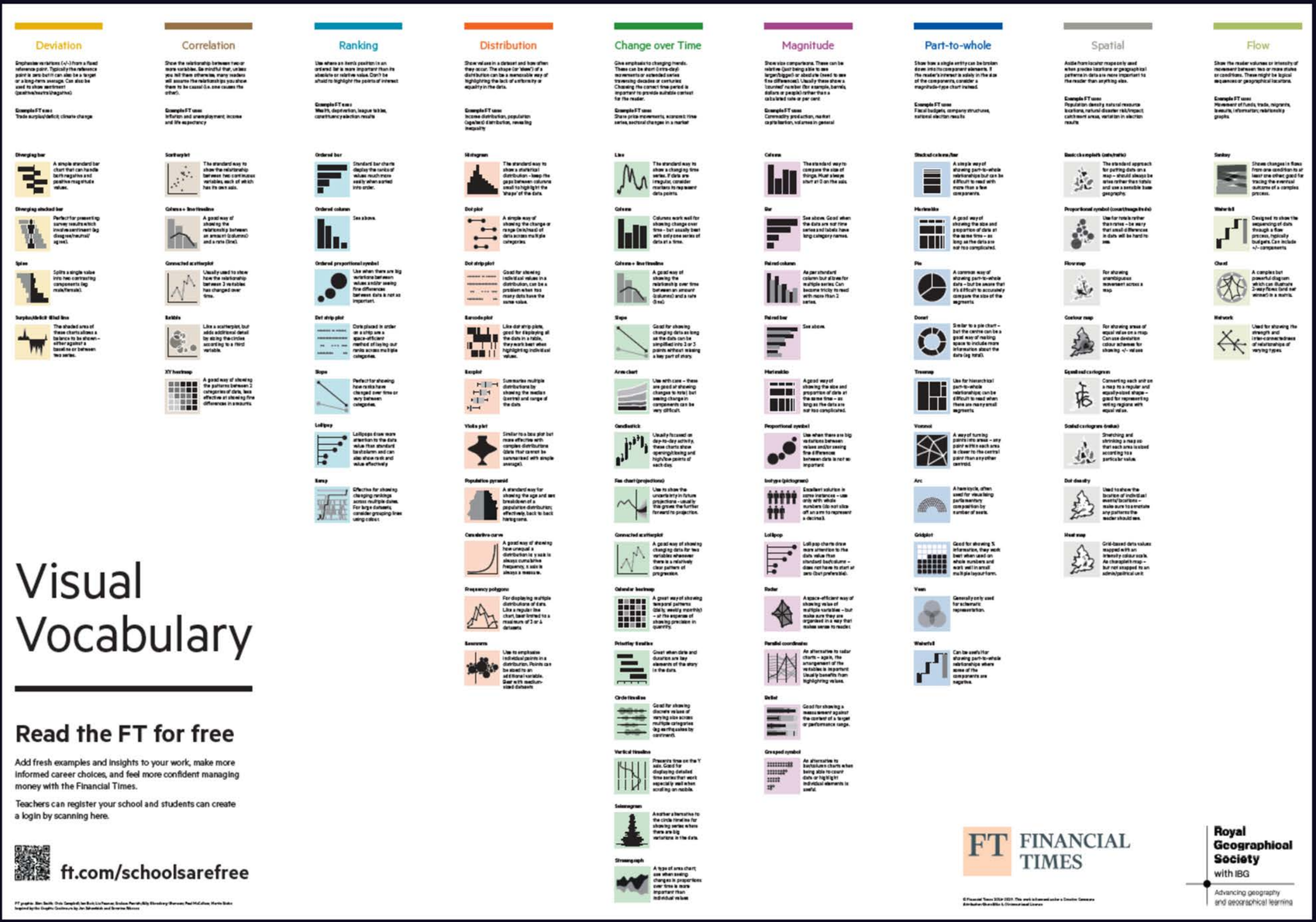
- Bar
- Column
- Line
- Pie
- Heat Map
- Hybrid
- Infographic

Tools for Data Visualization

- Excel
- Power BI
- Tableau
- Google Looker Studio
- Python

“Above all else, show the data.” - *Edward R. Tufte*

Refer to this charts guide



https://github.com/Financial-Times/chart-doctor/blob/main/visual-vocabulary/FT4schools_RGS.pdf

Design your report

Design and Structure

It is a story telling activity

Master the art of storytelling through data-driven reports.

Components of a report

Title, summary, body, conclusions, and appendices.
Matching with the Time.

Choose the right format and layout

Discuss different formats and how to choose the right one.

Writing Effective Summaries and Insights

- Focus on key points or key findings
- Be concise, use bullet points
- Data-driven, avoid subjective interpretation
- Provide summary of activity, happenings
- Root cause analysis, PDCA cycles, and actions to be taken
- Use clear language for communication clarity.
- Recap findings
- Highlight implications
- Analyze data accurately to ensure precision and reliability.
- Prioritize actions

Things to remember

Without Accuracy and Timing, the Report is nothing.

Who is your Audience

Knowing what your audiences want to see, will guide you to produce valid and effective reports. Plan your structure.

Know your data

Study your data and understand every bit of it.

Be concise

Get to the point. Communicate your thought.

Data visualization

Human process picture faster than word. Visualize your data.

Tell your story

Use storytelling techniques to explain your story(report).

Summary and Insights

Will help you to recapture important point and provide valuable information.

THANK YOU