Becoming an Analysis Ninja

This one-day course will teach users how to think both more strategically about their company as well as help them shift from reporting to analyzing. Tableau will be used both for demonstration and application. The same principles can apply to other data analysis software, including Excel, but the primary focus will be on Tableau. A variety of examples will be shown and discussed as a group.

At the end of the class, participants will have a checklist they can use for future projects, plus a PDF of the examples used, and the KPI Framework.

Optional additional days of training will be specific to how to do this in Tableau – set up the calculations, use specific functions and features, apply these principles to existing reports, etc.

Reporting vs. Analysis

- What's the difference?
- Why does this matter to your boss or your company?
- How will this help you?
- The mindset of someone who reports vs. analyzes
    - But I'm not that technical or "math-y". Is this course still for me? (Yes. Come and find out why!)

Ninja Analyst Skills

Setting Yourself Up for Success:

- Learning how to ask the right questions and focus on business decisions
- Understanding the key metrics that drive your business and keep your boss awake at night
- Establishing a line of sight from your analysis back to the key business metrics that have measurable results
    - Understanding and utilizing the KPI Framework

Getting to the Root Cause:

- Utilizing effective segmentation to drill deeper
- Benchmarking
    - How to create or find useful benchmarks
- Getting beyond the top 10 and focusing on "what's changed"
- Using averages, percentages, ratios, and compound metrics wisely
    - Ensuring key insights don't get hidden
    - Communicating context
    - Looking at and interpreting distributions
- Detecting signal vs. noise
    - Understanding statistical significance and how to check for it
    - Understanding how to communicate it

- - Identifying if what you are seeing is a "trend" or something to be concerned about or just the normal ups and downs of a business
- Pruning the weeds
  - Keeping it current and focused on what the business needs now
  - Eliminating report bloat and saving time

Communicating Insights:

- Including insights (in words)
- Including impacts and recommended actions
  - Learning how to quantify impacts of recommended actions
- Designing visuals that pass the 5 second test
- Using guided analytics to communicate insights or a thought process
  - Provide details as needed; Don't overwhelm them up front
- Telling a story with data

Reviewing the Analysis Checklist and Q&A

- The Analysis Checklist is essentially this course condensed into a quick reference guide with a series of questions to ensure you are providing the most insight possible