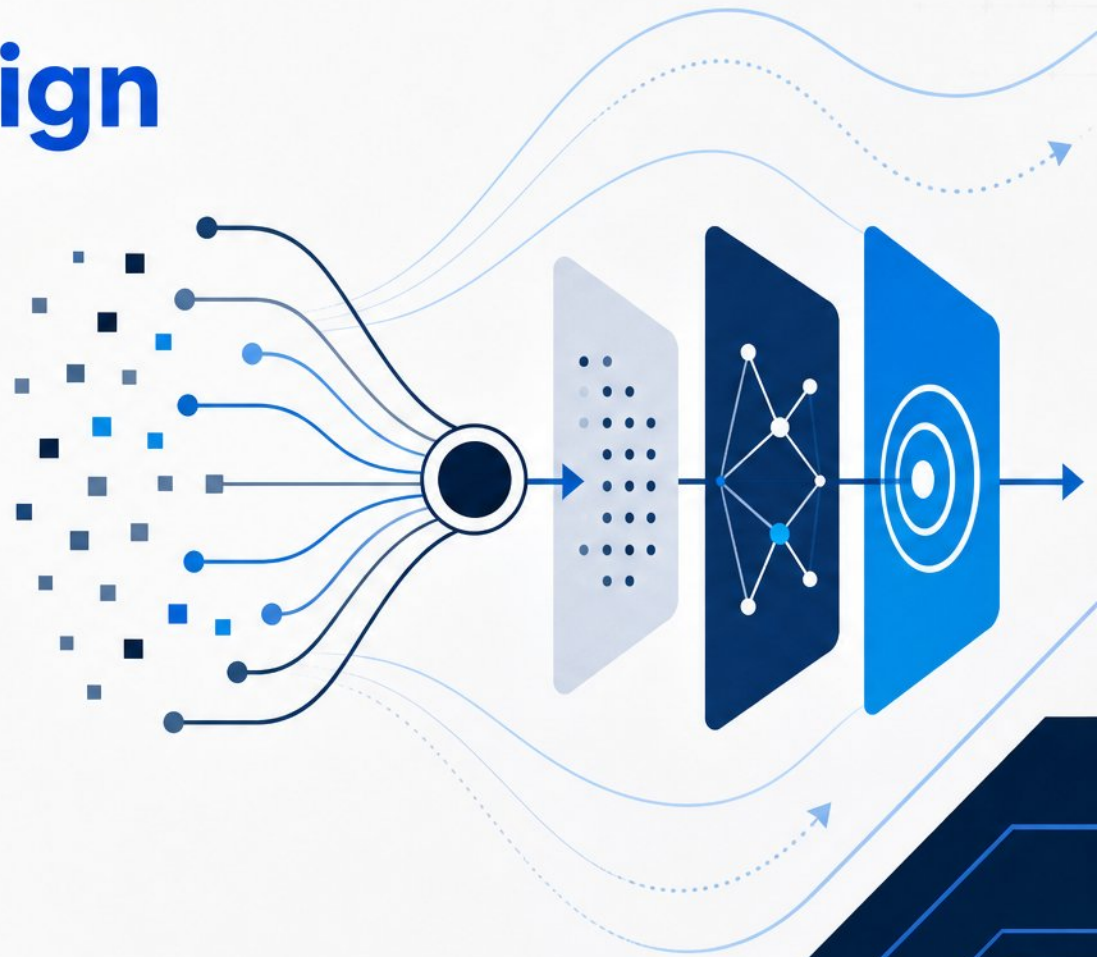


Data Storytelling Tools: Selection and Workflow Design

- Tool choice is a strategic decision, not just a software purchase
- Course connects tool categories to an end-to-end storytelling workflow
- Learn to evaluate options and map workflows to audience needs
- Move from raw data to actionable decisions with the right stack
- Build a repeatable selection framework for analytics teams



The Core Problem: From Raw Data to Decisions

- Data dumps and dashboard sprawl overwhelm audiences
- Analysis often fails to drive organizational decisions
- Gap between producing insights and taking action
- Process matters more than the charting software
- Well-chosen tools support better storytelling workflows



Defining Data Storytelling vs. Dashboards and Reports



- Dashboards monitor; reports inform; data stories explain and persuade.



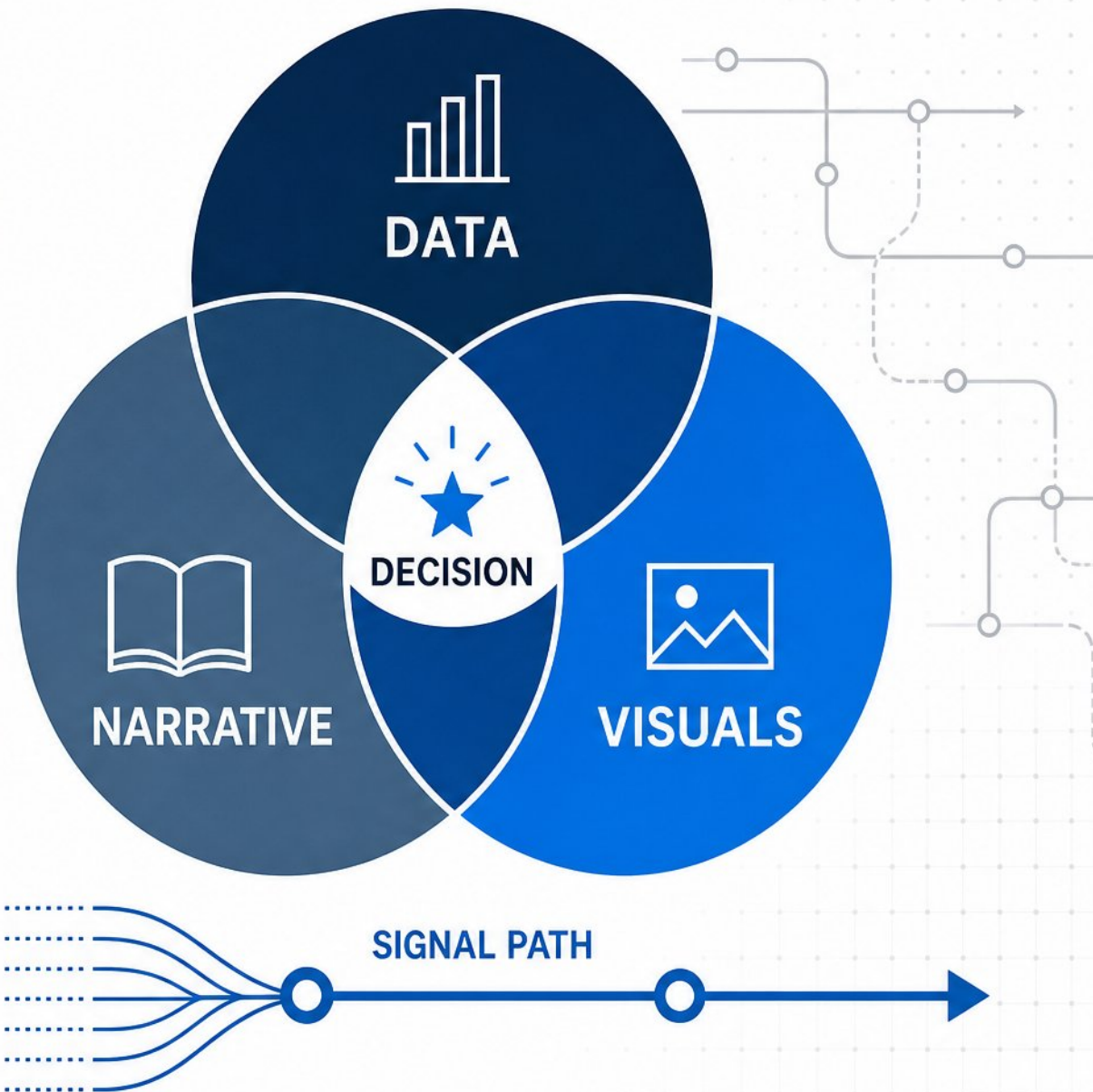
- A data story combines data, narrative, and visuals aimed at a decision.



- Data Story Spine: Context, Turn, Ask as a repeatable structure.

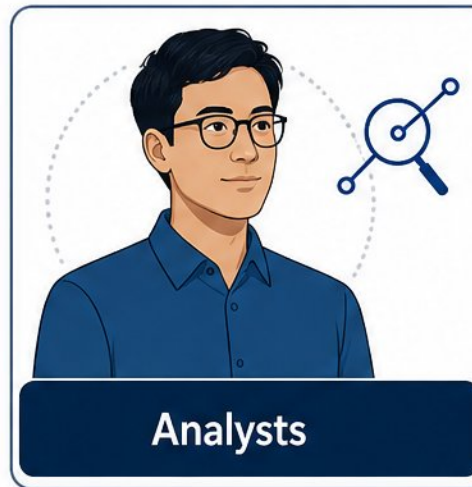


- Dashboards answer "what"; stories answer "so what" and "now what."

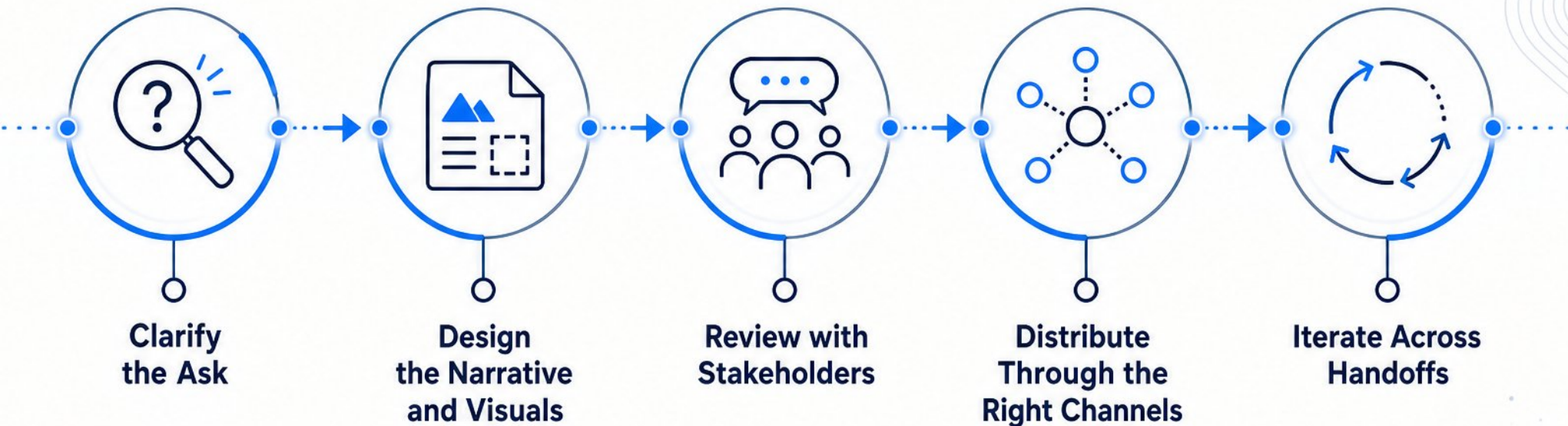


Mapping Audiences and Use Cases

- Segment audiences: executives, managers, analysts, external stakeholders
- Use cases: exploratory analysis, operational monitoring, strategic narrative, public reporting
- Match tools to data literacy and consumption format
- Clarify who consumes the story and how they will act

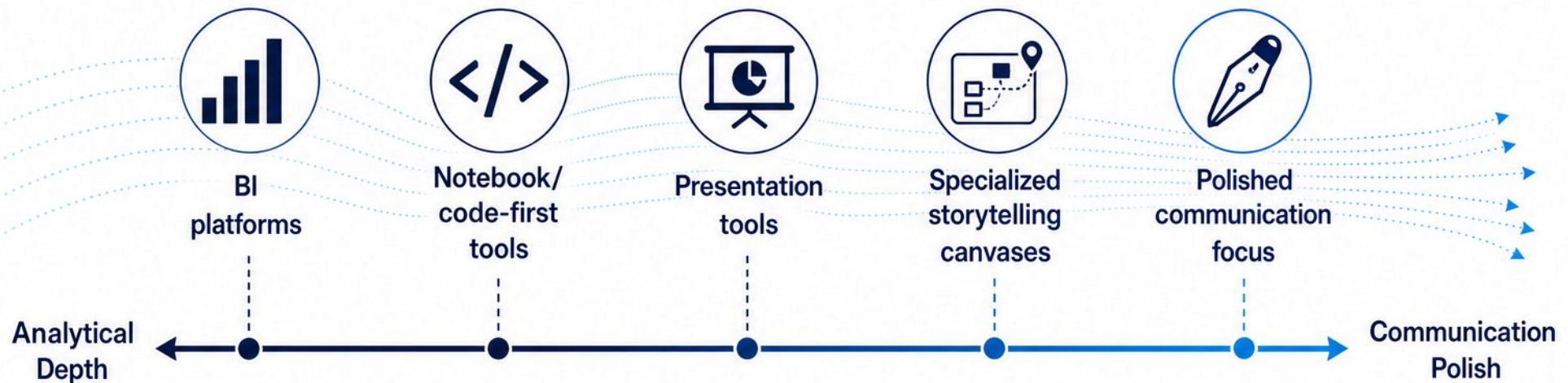


The Data Storytelling Workflow



- Clarify the ask, then map data access and exploration
- Design narrative and visuals before building the deliverable
- Review with stakeholders, then distribute through the right channels
- Iterate across data prep, analysis, and communication handoffs
- Use low-fidelity storyboards before opening any BI tool

Tool Categories for Data Storytelling



- BI platforms: governed dashboards and scalable operational reporting
- Notebook/code-first tools: full analytical depth and reproducibility
- Presentation tools: polished narratives for executive and external audiences
- Specialized storytelling canvases: interactive, annotated, web-native stories
- Most teams need a multi-tool workflow across these categories

Evaluation Criteria That Matter



- Data connectivity, semantic layer, interactivity, collaboration, governance, scalability



- Hidden costs: three-year TCO, including training and compute



- Weight fit to actual team skills and workflow



- Avoid feature-checkbox selection

Evaluating Leading BI Platforms

Power BI



Key Fit Considerations

 Data connectivity

 Team skills alignment

 Enterprise integration

Tableau



Key Fit Considerations

 Data connectivity

 Team skills alignment

 Enterprise integration

Looker



Key Fit Considerations

 Data connectivity

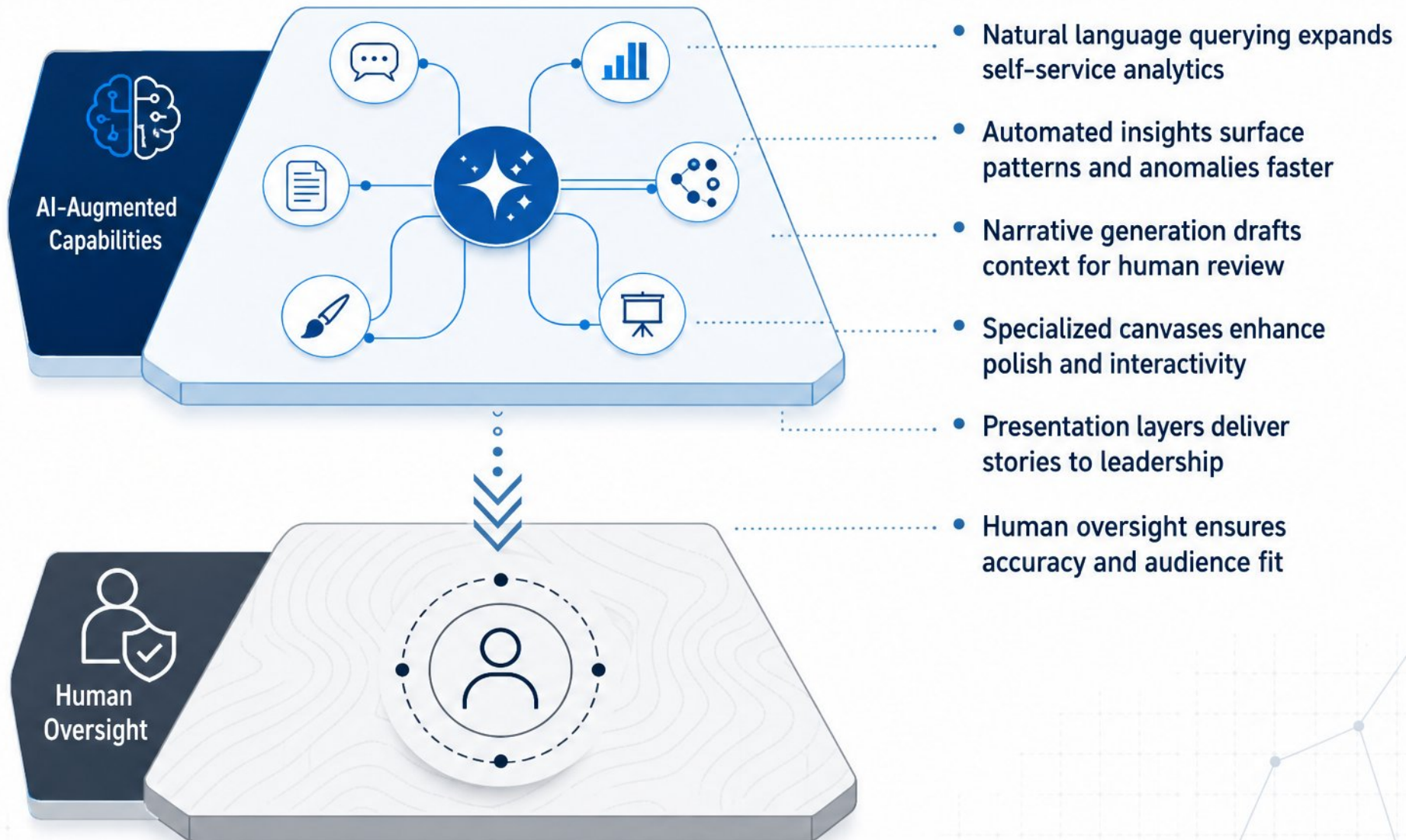
 Team skills alignment

 Enterprise integration

- - Power BI, Tableau, Looker: fit varies by data stack and team skills
- - Qlik, Domo, Looker Studio, and Metabase for specific needs
- - Analyst workbenches like Mode bridge SQL and storytelling
- - Compare strengths, limitations, and enterprise integration effort
- - Best choice depends on existing workflows, not features alone

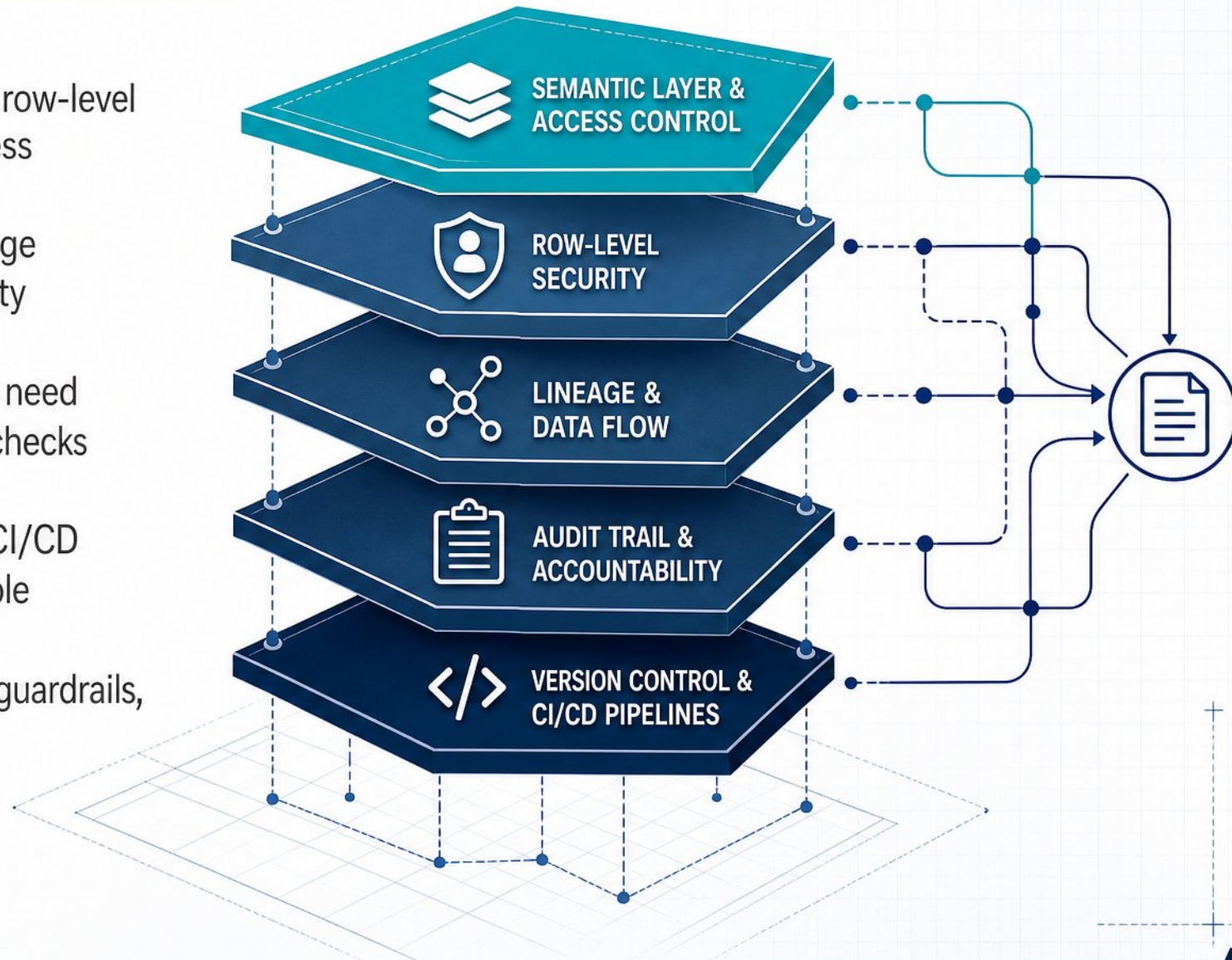


AI-Augmented and Specialized Storytelling Tools



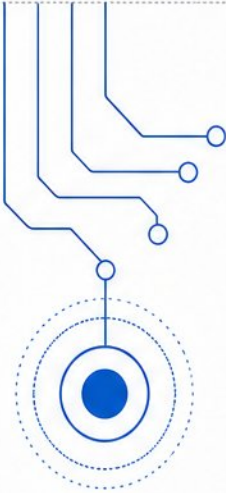
Governance, Security, and Scalability

- Semantic layers and row-level security control access
- Audit trails and lineage provide accountability
- Regulated industries need stricter compliance checks
- Version control and CI/CD keep analytics scalable
- Self-service requires guardrails, not chaos



Building a Repeatable Selection Framework



- 
- ✓ --- Define scope, gather requirements, run vendor demos, conduct a POC
 - ✓ --- Use a 30-day POC with weighted scoring criteria
 - ✓ --- Involve technical users and non-technical stakeholders
 - ✓ --- Validate fit against actual team skills and workflow
 - ✓ --- Document the decision for repeatable future evaluations



Implementation Planning and Adoption



- Define roles, ownership, and service-level expectations for the workflow



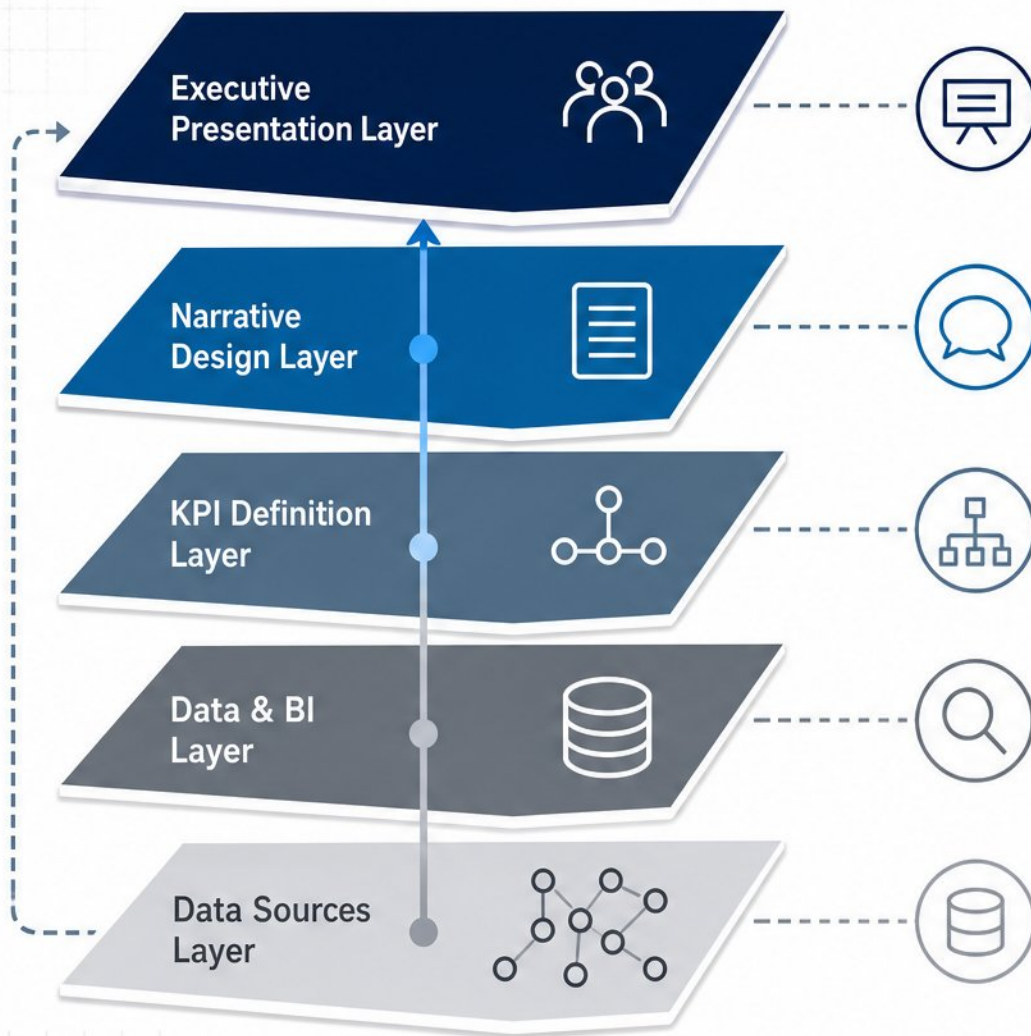
- Document workflows for onboarding, consistency, and auditability



- Build change management, training, and feedback loops after rollout



Real-World Scenario: Executive KPI Reporting



- **Goal:** weekly executive KPI narrative for a mid-market company
- **Workflow:** clarify the ask, define KPIs, design narrative, choose distribution
- **Dashboard tools** support drill-down; presentation layers drive decisions
- **Evaluation:** Power BI vs. Tableau for data depth and interactivity
- **Fit:** BI platform plus executive presentation layer for leadership consumption



Applying the Framework: Hands-On Exercise



- Map an analyst-driven exploratory use case to a selected tool set



- Draft the Data Story Spine: Context, Turn, Ask



- Evaluate a sample tool against your organization's constraints



- Document key decision points and required handoffs



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