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MICROSTRATEGY WORLD 2018

1.15.18 - 1.17.18

THE COSMOPOLITAN | LAS VEGAS, NEVADA
Finance Dossiers: Design dossiers based on IBCS with visualizations best suited for finance data

Stefan Sockel
Agenda

• Challenges of visualizing financial data

• IBCS and Simplification

• Demonstration of a clean and simple Finance Dossier

• Finance Dossiers

• Outside the box with D3
Challenges of visualizing financial data
Challenges of Financial Reporting

From spreadsheets to easy-to-read graphs

What do they mean by that? - Speak common language

Many dashboards dedicated to different users - One central reporting solution

Pie graphs and colorful funnels - Graphs dedicated to financial data

Complex Key Performance Indicators - Simple visualizations
IBCS and Simplification
Data Visualization seeks to remove [...] complexity by presenting information in a consumable, graphical ways.
International Business Communication Standards (IBCS)

- **practical** methodology proposal for the conceptual and visual design of **comprehensible** reports and presentations

- standards for management reports, annual reports, and presentations

- **SUCCESS® formula** transports complex business content as **simple and clear** as possible to the report consumer

SUCCESS® Formula
Key Messages

- **SAY**: Deliver messages
- **UNIFY**: Standardize content
- **CONDENSE**: Concentrate information
- **CHECK**: Ensure quality
- **ENABLE**: Implement Concept
- **SIMPLIFY**: Avoid Complication
- **STRUCTURE**: Group Content
Choose the correct visualization

- **Line graphs**
- **Vertical bar graphs**
- **Horizontal bar graphs**
- **Time series**
- **Ranking**
- **Deviation**
- **Comparison**
- **Part of whole %**
Common pitfalls
Spaghetti graph

**AVOID**

2004 Revenue by Region (USD)

- West
- East
- South
- North

Q1 Q2 Q3 Q4

**USE instead**

A. Linear chart
B. Area chart
C. Stacked bar chart
D. Line chart with markers
Common pitfalls
Multi Comparison

AVOID

USE instead
Common pitfalls
Scatterplot and trends

AVOID

USE instead
Common pitfalls

Pie Charts

AVOID

How many books did you read last year?
Book readers in Poland in 2015

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>No books</td>
<td>58.3%</td>
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<tr>
<td>1 - 6 books</td>
<td>28.7%</td>
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<tr>
<td>&gt; 7 books</td>
<td>11.3%</td>
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</table>

USE instead

How many books did you read last year?
Book readers in Poland in 2015

<table>
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<th>Category</th>
<th>Percentage</th>
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<td>No books</td>
<td>68.3%</td>
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<tr>
<td>1 - 6 books</td>
<td>28.7%</td>
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<tr>
<td>&gt; 7 books</td>
<td>11.3%</td>
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</table>

58.3% of Polish people did not read any book in 2015, while only 11.3% read more than 7 and 28.7% 1 to 6 books.
Financial graph „with issues“:

- Cluttered visualization
- Data does not stand out
- Lack of visual hierarchy
- Irrelevant information

Makeover
From a chaotic visualization to IBCS standard
Makeover
From a chaotic visualization to IBCS standard

Step 1:

- Adding meaningful title
- Reducing title weight
- Removing background color
- Removing outer border
Step 2:

- Removing axis labels
- Removing legend
- Removing shape labels
Step 3:
- Removing grid lines
- Adding meaningful colors
- Removing bar borders
Makeover
From a chaotic visualization to IBCS standard
• Demonstration of a clean and simple Finance Dossiers
Finance Dossiers Demo

Lucky Casinos

Finance Executives
Finance Dossier Features

Library – Easier way to find your reports
Finance Dossier Features
Certification and Trust
Finance Dossier Features
Real Time Collaboration

Collaborate feature - Let’s people talk about the data right alongside the data
Finance Dossier Features

Table of Contents

- Side navigation, top or bottom tabs
- Dossier specific cover images
- Tell a story with your data using chapters and pages
- Group dashboards by address, department, or business unit
- Integrate Dossiers with existing Reports and Report Service Documents
Outside the box with D3
Professional Services Created D3 Financial Graphs
Publicly Available D3 Financial Graphs

Ready to be used within MicroStrategy Dossier

Flights Cancelled

11776
### Commercial D3 Financial Graphs

For example, VitaraCharts Microchart

#### Sales Analysis by Region and Sub Category

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<thead>
<tr>
<th>Region</th>
<th>Product SubCategory</th>
<th>Sales</th>
<th>Profit</th>
<th>Product Base Margin</th>
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#### Region Wise Analysis

- **Northwest Territories**
  - Sales: $202.35
  - Profit: $38.79

- **Ontario**
  - Sales: $337.91
  - Profit: $892.40

- **Quebec**
  - Sales: $396.18
  - Profit: $1,005.26

- **Yukon**
  - Sales: $278.79
  - Profit: $51.34