

VELOCITY

CONNECT + ACCELERATE + INNOVATE

25-27 March 2019 | Orlando, Florida



Visual Discovery with Halo

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Human Perception & Data Visualization



70%



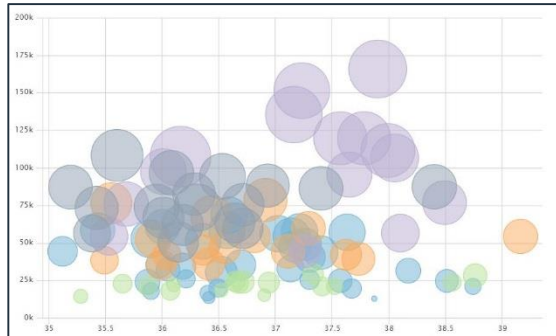
30%

Data Visualization: An effort to help people understand the significance of **data** by placing it in a visual context.



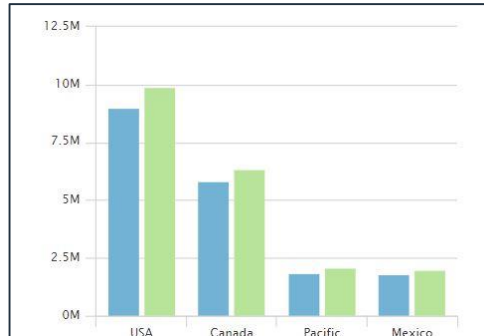
What Story do you Want to Tell?

Good charts highlight relationships between data which can tell a powerful story.



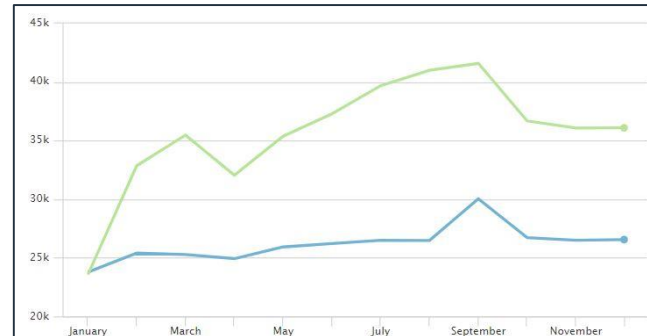
Outliers

Highlight deviations from the norm



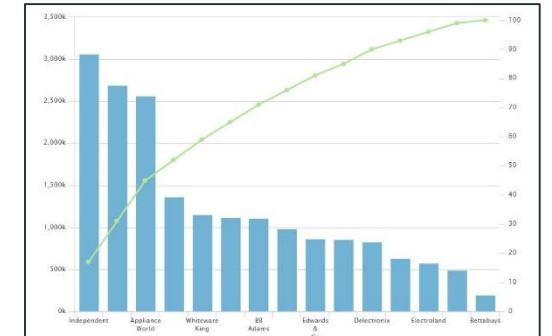
Patterns

Show repeated characteristics



Trends

Indicate changes over time



Correlations

Relationships between two or more variables



Choosing the Right Chart for Your Story





Comparison Charts

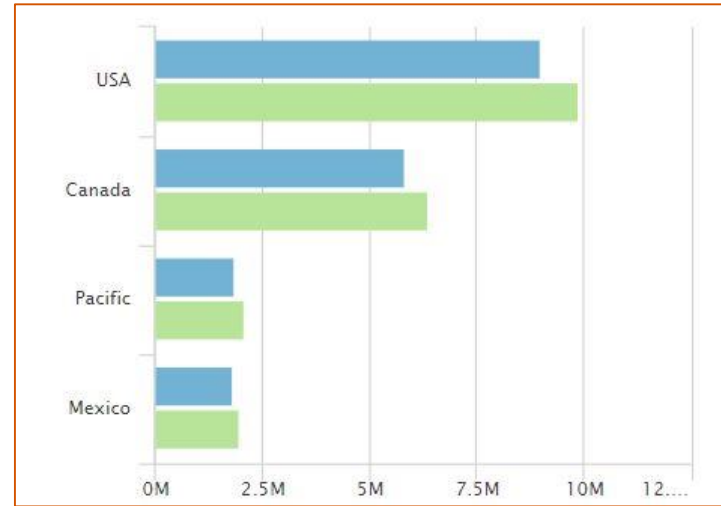
Usage:

- Identifying the highest and lowest values
- Seeing current versus older values

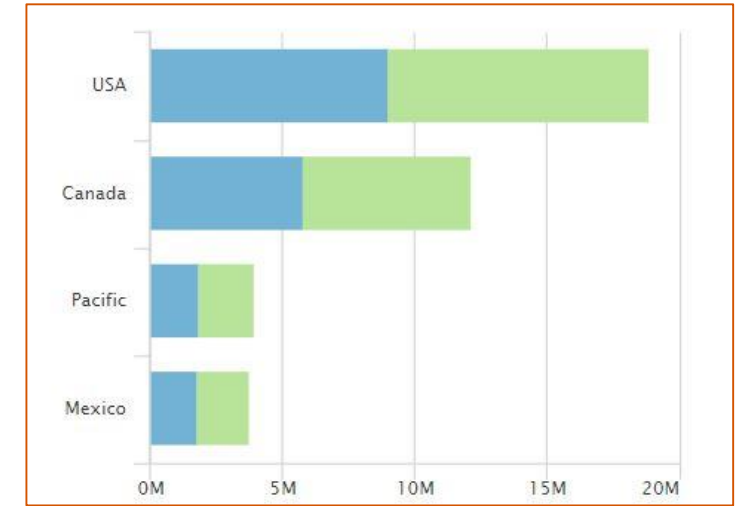
What could they answer:

- Which products sell best?
- How are our sales compared to last year?

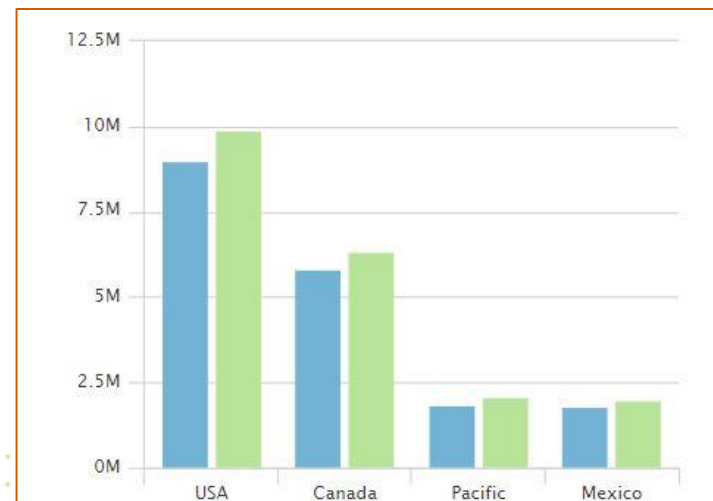
Bar



Stacked Bar



Column



Stacked Column





Composition Charts

Usage:

- Identifying the relative difference between parts of a whole

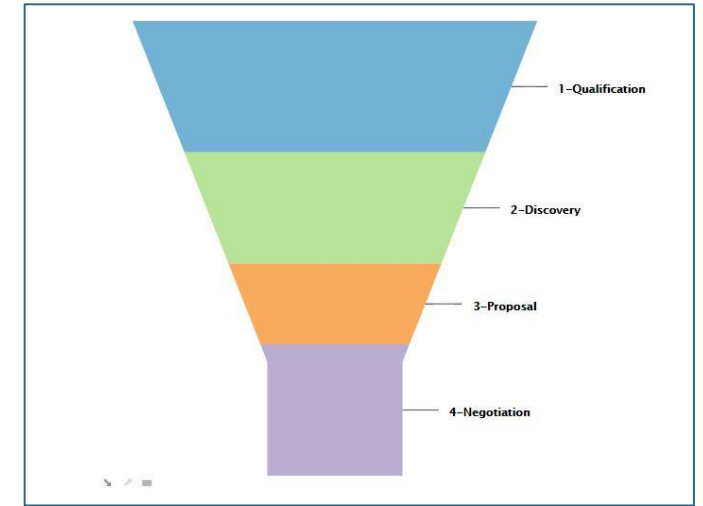
What could they answer:

- What percentage of the budget is going toward x, y, and z?

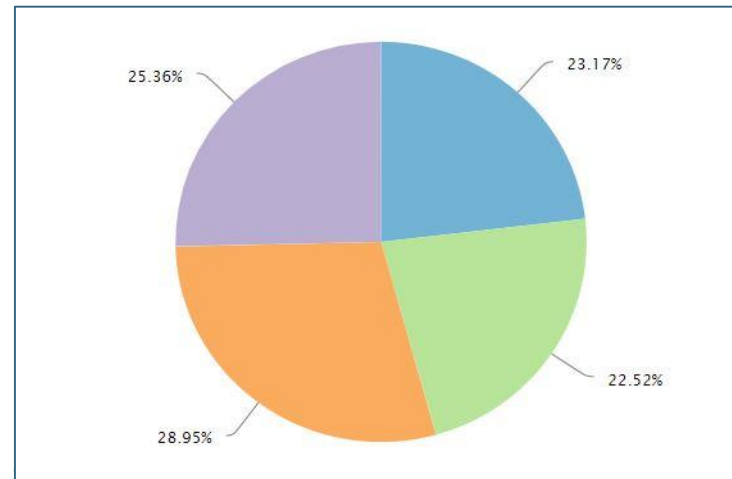
Waterfall



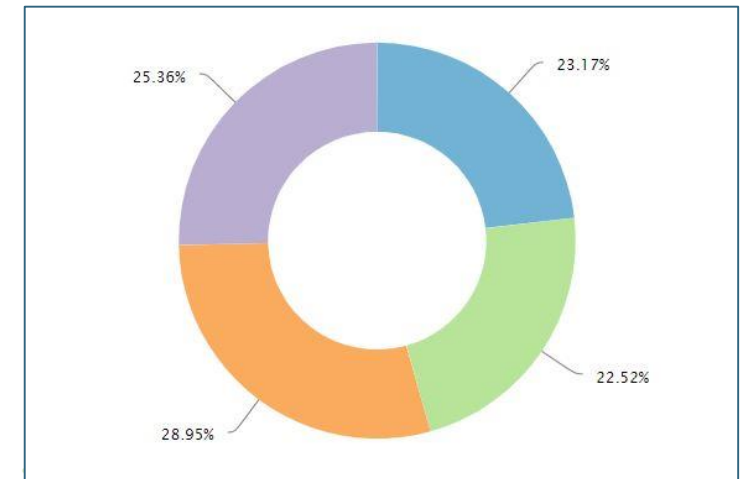
Funnel



Pie



Donut





Trend Charts

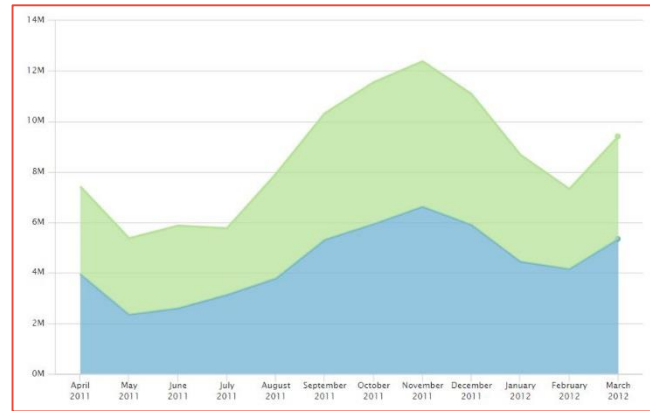
Usage:

- Seeing the relationship between data points that change over time

What could they answer:

- How big is our market share?

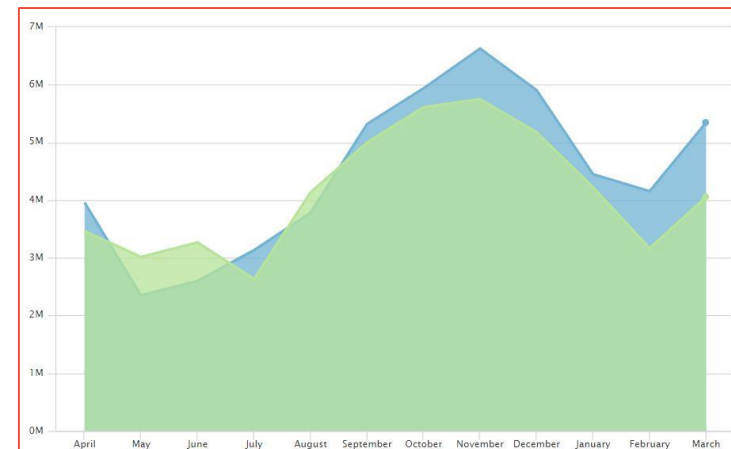
Area



Trend Line



Stacked Area





Distribution Charts

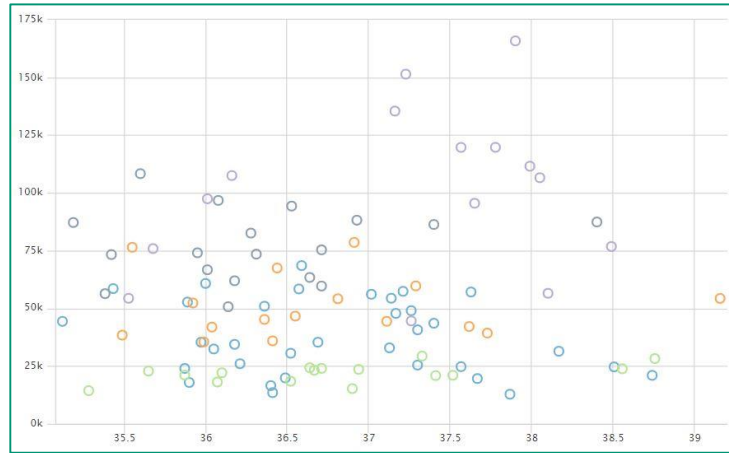
Usage:

- Showing correlations and clusters
- Identifying outliers

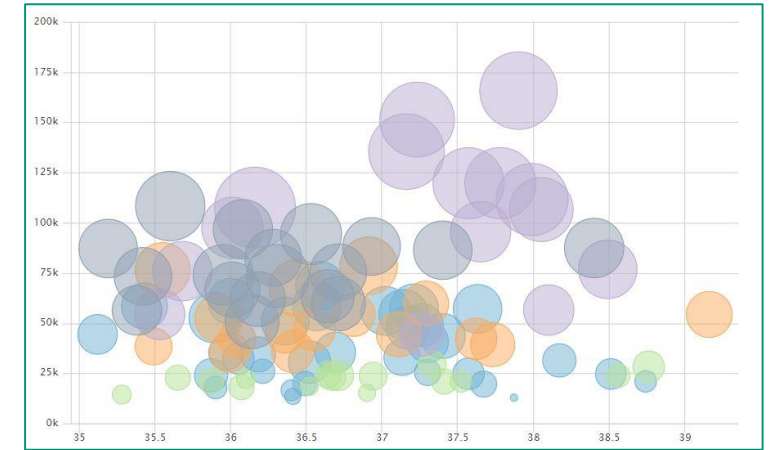
What could they answer:

- Is there a correlation between advertising spend and sales?
- What's the variation between expenses and revenue across regions?

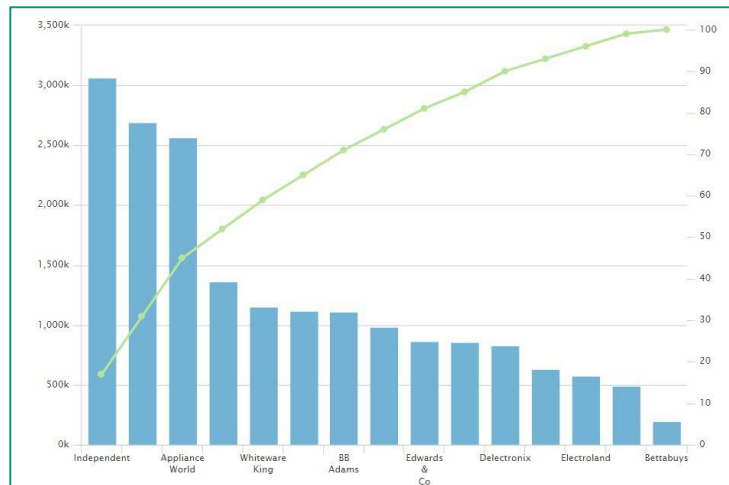
Scatter



Bubble



Pareto



Spider Web (Radar)



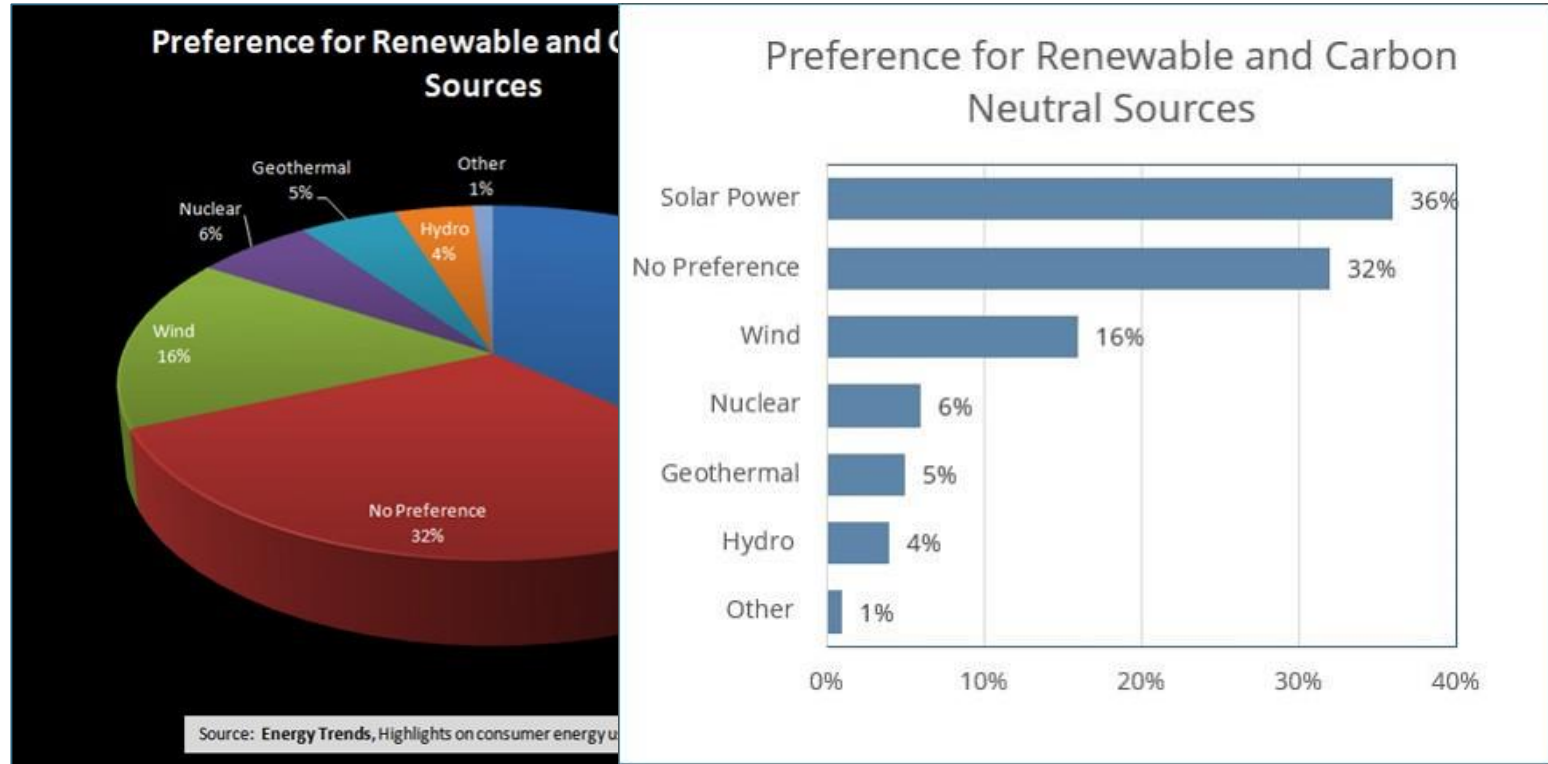


4 Tips to Ensure Great Halo dashboards



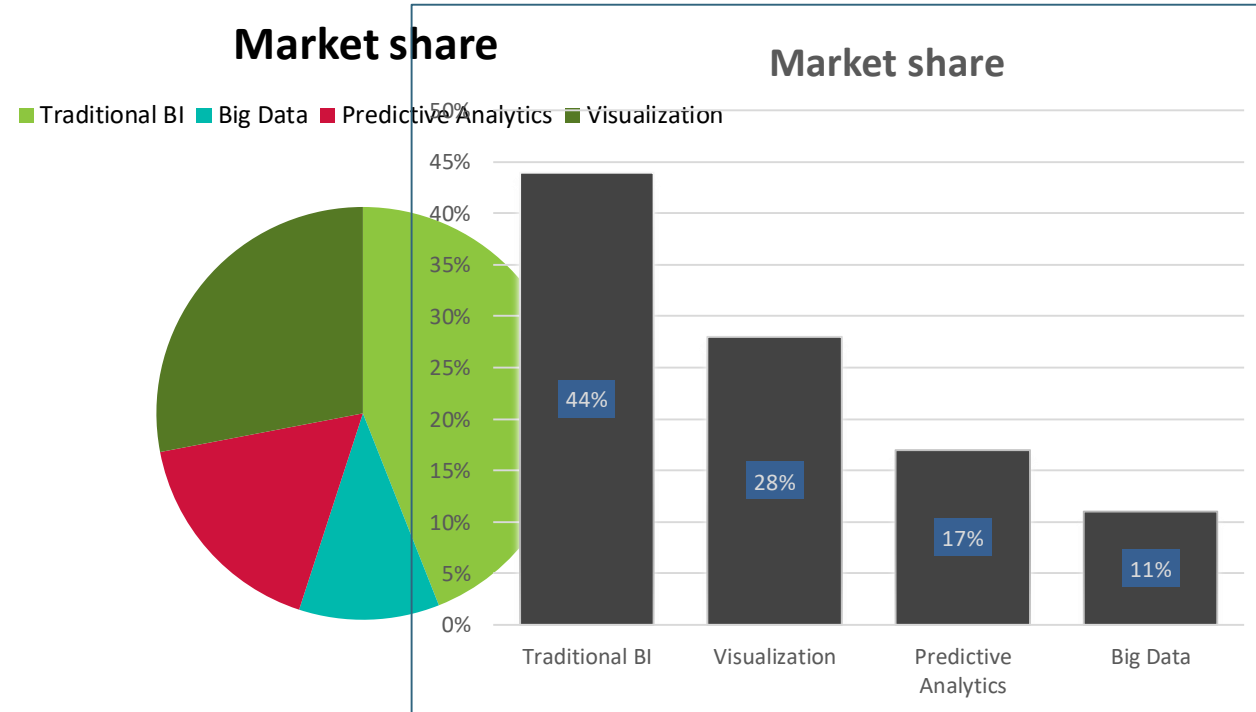


1. Using Color and Selecting Chart Types





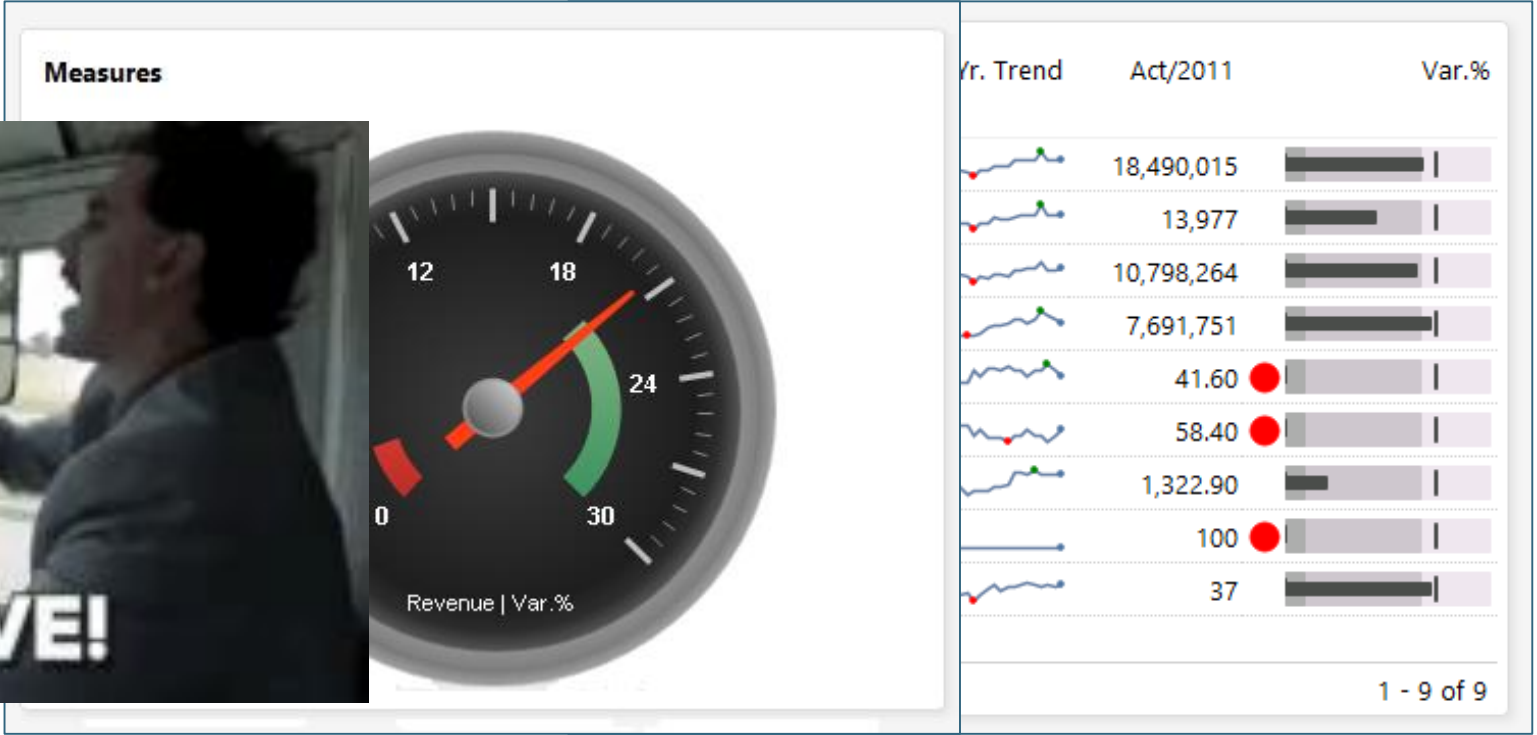
2. Be Clear



Above all else, **show the data.**



3. Make Best Use of Real Estate





Good data, bad story

Halo | Home | Sales Summary - Plain | Sales Summary | Clean Slate | Period: October 2017

Sales Items	2017	2016	Net Sales vs. Foreca	2017	2017	Sales vs. Budget & Forecast	2017 Sales \$	2017 Budget \$	2017 Forecast \$
YoY Snapshot			Sales Team	Net Sales	FcstAmt	March 2017	\$6,401,246.25	\$7,771,897	7,194,600
Net Sales	C	C	FIELDS	\$7,921,267.38	\$6,750,446.40	April 2017	\$7,364,892.16	\$7,977,661	7,337,656
ASP	C	C	SANDERS	\$1,215,789.02	\$1,050,286.51	May 2017	\$8,320,252.53	\$9,781,415	9,028,502
ActCost	4,195,328	2,601,798	DAVIS	\$465,590.05	\$402,165.40	June 2017	\$11,026,468.16	\$11,782,507	10,682,037
Margin	C	C	All	\$9,602,646.45	\$8,202,898.31	July 2017	\$10,373,376.22	\$10,889,108	9,780,074
ActMargin%	5631.07%	5864.08%				August 2017	\$9,066,758.65	\$8,236,378	7,607,310
Quantity	395,118	260,937				September 2017	\$6,074,018.19	\$7,504,354	6,953,780
BackOrderAmt						October 2017	\$9,602,646.45	\$8,663,716	8,202,898
BackOrderQty						November 2017	\$0.00	\$7,476,431	9,020,588
BillingsAmt	8,202,898	7,390,883				December 2017	\$0.00	\$8,523,156	9,156,328
BillingsCost	3,578,209	3,063,115				January 2018	\$0.00	\$8,554,646	8,496,739
BillingsQty	338,053	307,523				2017	\$83,350,550.76	\$105,249,593	100,533,744
BudgetAmt	8,663,716								1 - 11 of 11

Sales by Customer Type	2016	Margin by Product Group	2016	2017
	Net Sales	YoY	Margin \$	Margin \$
RETAIL	\$3,925,368	GROUP E	\$187,490.00	\$289,421.00
WEB	\$1,776,950	GROUP D	\$55,362.00	\$81,812.00
WHOLESALE	\$588,410	GROUP A	\$17,484.00	\$23,003.00
All	\$6,290,728	All	\$260,937.00	\$395,118.00

Customers	2016	2017	2017	Margin %
	Net Sales	Net Sales	Forecast	
URUGUAY	\$858	\$5,189	\$2,545	75.9%
CHINA	\$784	\$1,362	\$1,564	33.2%
ITALY	\$471,494	\$783,367	\$660,006	31.5%
RUSSIA	\$550,132	\$913,942	\$769,940	33.1%
SPAIN	\$1,006,722	\$1,672,476	\$1,408,799	73.8%
NETHERLANDS	\$520,311	\$863,981	\$727,664	50.1%
JAPAN	\$610,663	\$1,012,364	\$853,140	54.3%
CHILE	\$1,028,765	\$1,580,118	\$1,373,904	72.4%
UNITED STATES	\$279,372	\$410,251	\$336,791	70.9%
KOREA	\$3,064	\$4,204	\$3,583	78.6%
FRANCE	\$420,030	\$556,265	\$479,911	56.9%
BRAZIL	\$368,962	\$487,856	\$419,450	36.6%
PARAGUAY	\$317,148	\$418,493	\$361,562	75.2%
All	\$6,290,728	\$9,602,646	\$8,202,898	56.3%



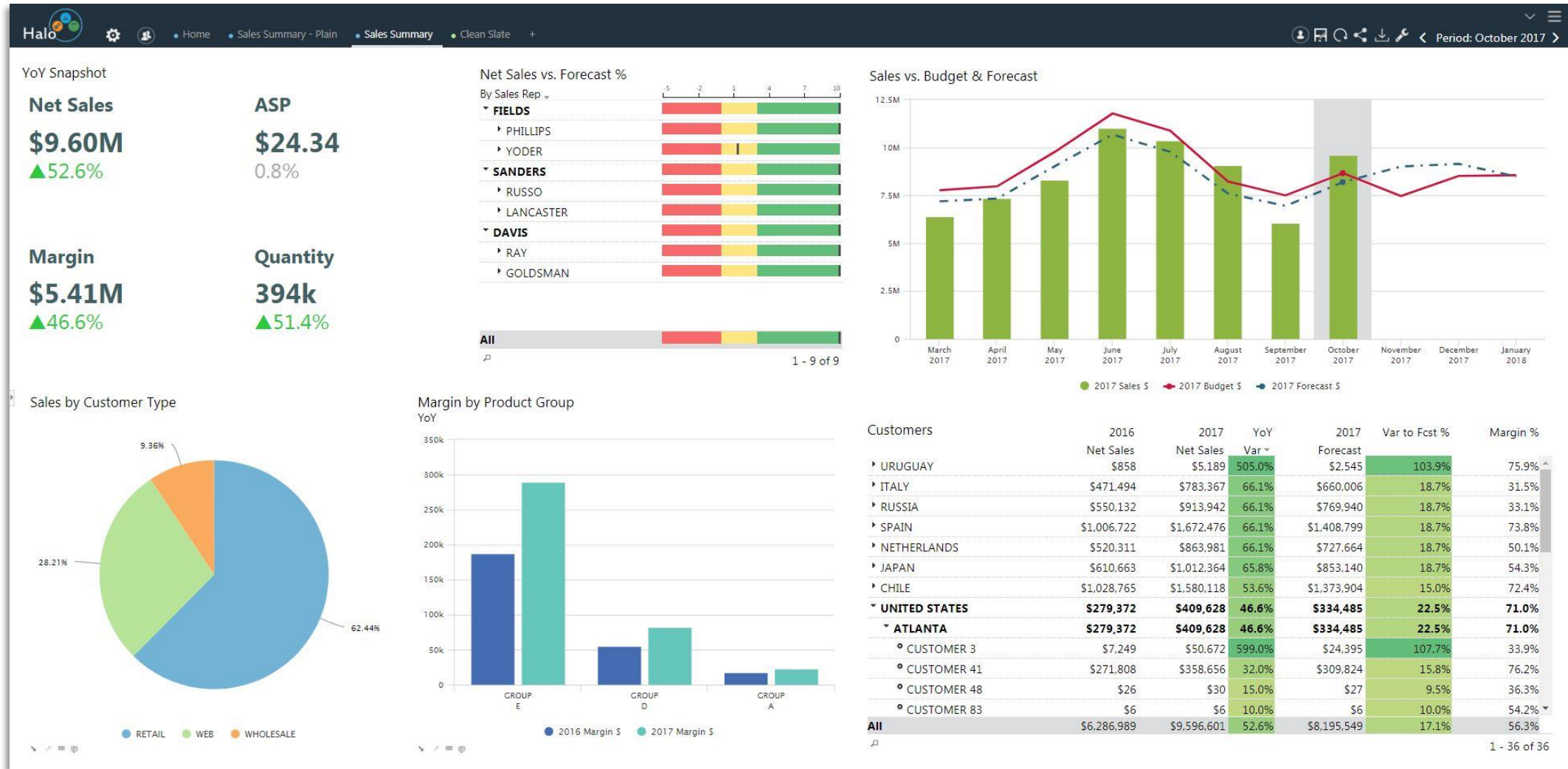


Let's Build a Halo Dashboard!





Same data, GREAT story





4. Keep Your Audience in Mind

- CEO
- Fast insights
- LOB Manager
- Root cause
- Analyst
- Row and column data



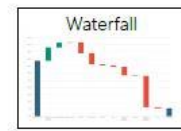
Halo Pro Tip
 Keep color consistency across your metrics.
 Ex: Sales = Green
 Forecast = Dark Blue



Halo Chart Guide



Column
Best Use:
Few items (Ex. Less than 5)
Example:
Sales by Product Category



Waterfall
Best Use:
Accumulation or Subtraction to Total
Example:
Used to show the cumulative effects of introducing positive & negative values (ie. Cash Position)



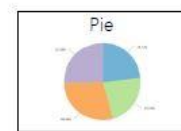
Stacked Column
Best Use:
Combine related values atop one another
Example:
This year & last year combined



Funnel
Best Use:
Used to represent the stages in a process.
Example:
CRM / Pipeline Stages



Bar
Best Use:
Many items (Ex. 5 - 15)
Example:
Top 10 Customers



Pie
Best Use:
Simple Share of Total
Example:
Budget by Department



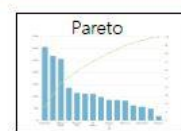
Stacked Bar
Best Use:
Combine related values atop one another.
Example:
This Year and Last Year combined



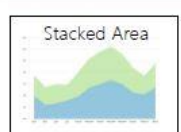
Donut
Best Use:
As an alternative to a pie chart.
Example:
Product category % of total



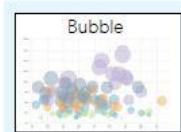
Area
Best Use:
Similar to Line Chart but solid fill.
Example:
When you want to emphasize the difference between two series



Pareto
Best Use:
Cumulative Total
Example:
Bar Chart with a cumulative total Line Graph



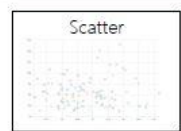
Stacked Area
Best Use:
Cumulative totals over time
Example:
This year & last year combined



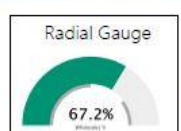
Bubble
Best Use:
Three Variables
Example:
Like a Scatter Chart but with a 3rd variable for the bubble size



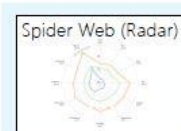
Trend Line
Best Use:
Trend in data over time
Example:
This Year vs. Last Year trend



Scatter
Best Use:
Two Variables
Example:
Which customers give us the best revenue AND highest margins?



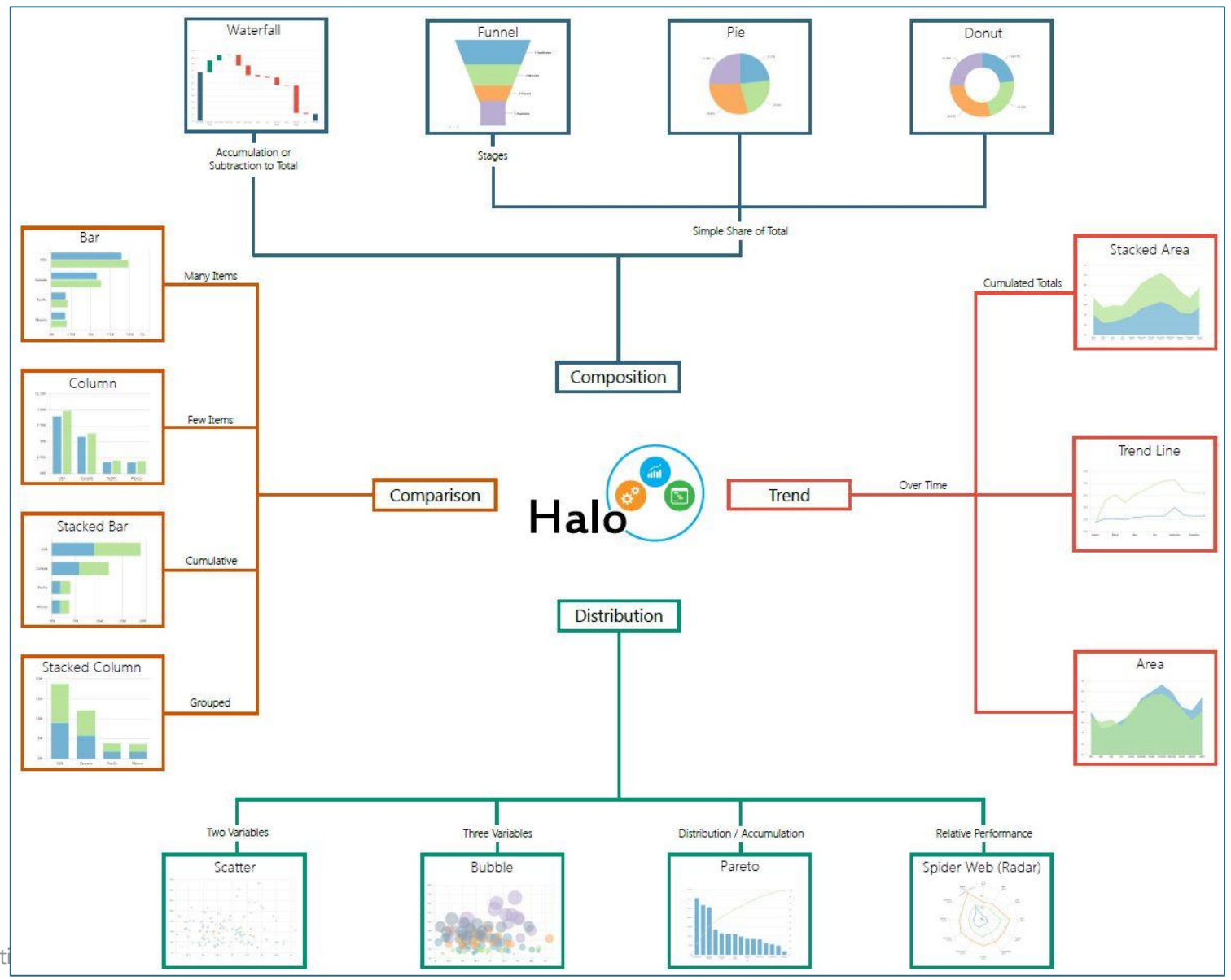
Radial Gauge
Best Use:
As an alternative to KPI widgets
Example:
Performance to goal at a glance



Spider Web (Radar)
Best Use:
To show relative performance or distribution.
Example:
Strengths & weaknesses in product categories



Halo Chart Guide





**Learn
More**

Find Me:

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Slack: danielb

Reach out to your Technical Account Manager (TAM)

Eric Ervin - Mid West, South East

Lars Renteria - Beverage, West, North East

Olly Smith - APAC



QUESTIONS?

THANK YOU