Get Creative with Power BI

Make these core visuals shine!



Valerie Junk

wortell

- Data Visualization
- Storytelling
- Change Management

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SPENT HOURS BUILDING AN AWESOME REPORT



NO ONE USES IT



Business Intelligence Report 1

Sales

€ 38,084

Quantity

694

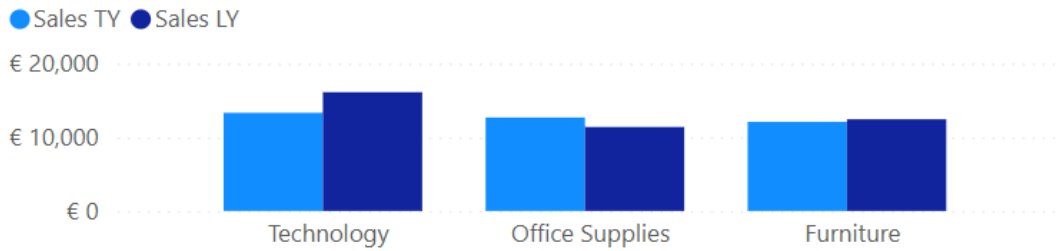
Sales LY

€ 39,947

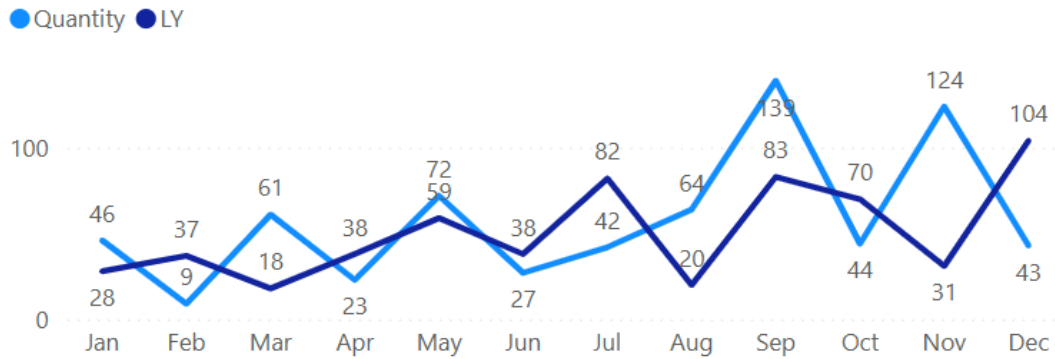
Sales Difference

-5%

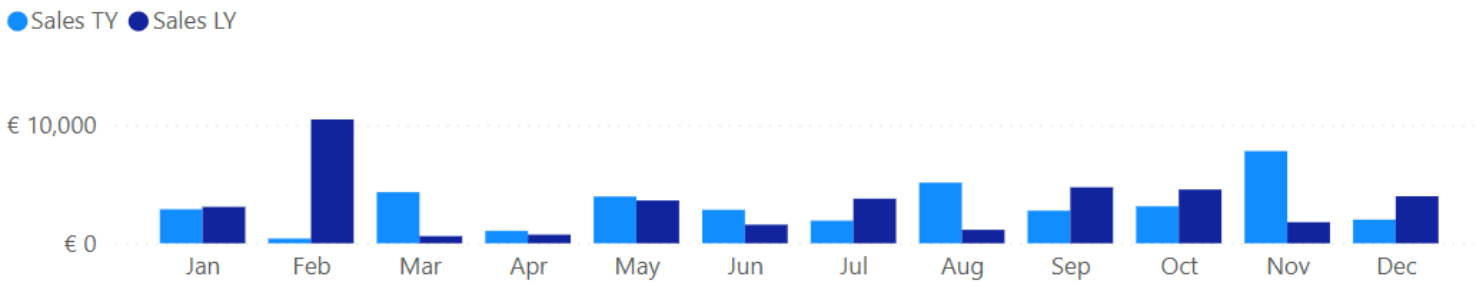
TY vs LY Sales by Category



TY vs LY Quantity by Month



Sales TY and Sales LY by Month Name Short



Sales, Quantity and Target by Month by Categ...

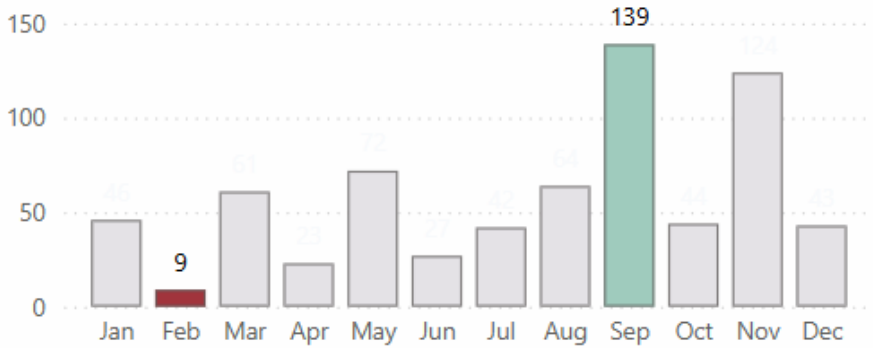
	Sales TY	Sales LY	Sales YoY	Quanti ty TY
Jan	**€ 2,867.46**	**€ 3,073.44**	**-6.70%**	**46**
Furniture	€ 69.38	€ 1,615.93	-95.71%	1
Office Supplies	€ 515.28	€ 1,457.51	-64.65%	24
Technology	€ 2,282.80			21
Feb	**€ 395.70**	**€ 10,455.49**	**-96.22%**	**9**
Furniture	€ 359.97	€ 246.65	45.94%	3
Office Supplies	€ 35.73	€ 1,458.89	-97.55%	6
Technology		€ 8,749.95	-100.00%	
Mar	**€ 4,312.97**	**€ 602.10**	**616.32%**	**61**
Furniture	€ 205.33	€ 354.90	-42.14%	2
Office Supplies	€ 744.01	€ 112.35	562.23%	40
Technology	€ 3,363.63	€ 134.85	2394.35%	19
Apr	**€ 1,051.91**	**€ 727.15**	**44.66%**	**23**
Furniture	€ 908.82			9
Office Supplies	€ 47.35	€ 692.03	-93.16%	11
Technology	€ 95.74	€ 35.12	172.61%	3
May	**€ 3,946.97**	**€ 3,611.28**	**9.30%**	**72**
Furniture	€ 2,418.83	€ 1,050.30	130.30%	17
Office Supplies	€ 992.40	€ 1,085.04	-8.54%	45
Technology	€ 535.74	€ 1,475.94	-63.70%	10
Jun	**€ 2,827.69**	**€ 1,569.62**	**80.15%**	**27**
Furniture		€ 1,306.03	-100.00%	
Office Supplies	€ 1,339.74	€ 59.06	2168.44%	12
Technology	€ 1,487.95	€ 204.53	627.50%	15
Total	**€ 38,083.93**	**€ 39,946.89**	**-4.66%**	**694**

2025 Sales

Sales	Quantity
€ 38.084	694
Last Year: € 39.947 (↑-5% YoY)	Last Year: 608 (↓14% YoY)

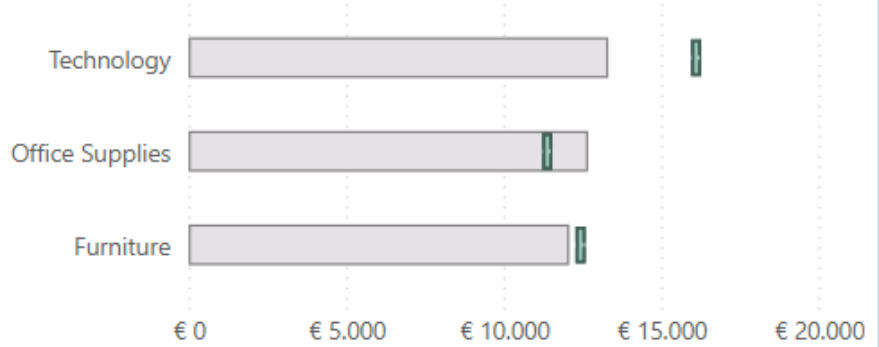
When did we sell the most and least products?

Most products sold in September, least products in February.



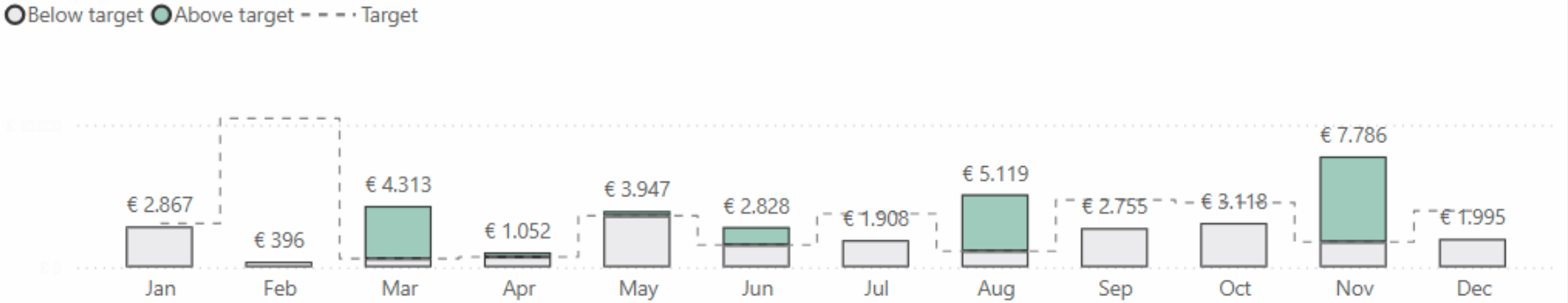
Which category reached the yearly target?

Category Office Supplies hit the sales target.



In which months dit we hit our sales target?

In the months March, April, May, June, August, November we hit our target.



Conditional Formatting | No Formatting

Monthly sales overview

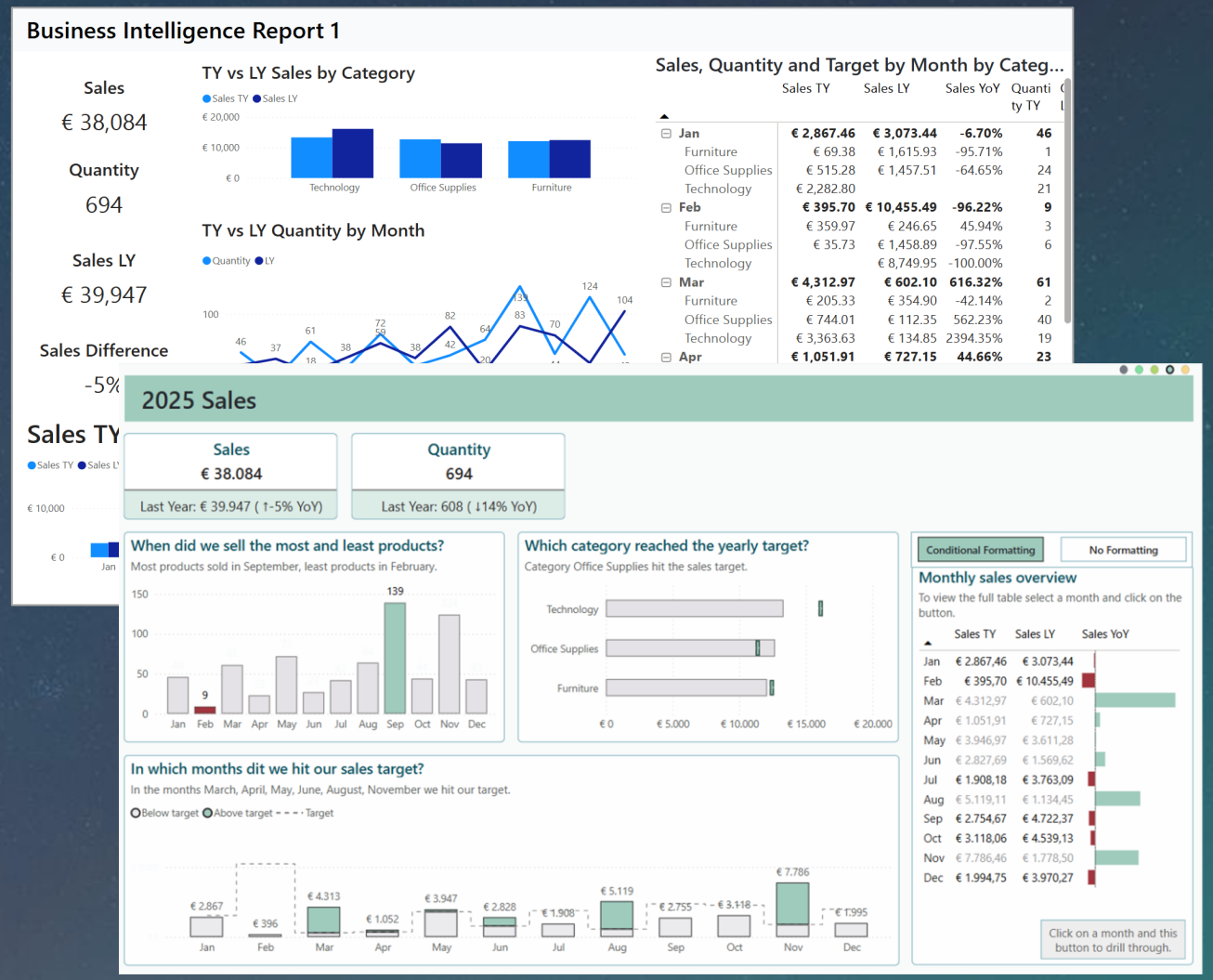
To view the full table select a month and click on the button.

	Sales TY	Sales LY	Sales YoY
Jan	€ 2.867,46	€ 3.073,44	
Feb	€ 395,70	€ 10.455,49	
Mar	€ 4.312,97	€ 602,10	
Apr	€ 1.051,91	€ 727,15	
May	€ 3.946,97	€ 3.611,28	
Jun	€ 2.827,69	€ 1.569,62	
Jul	€ 1.908,18	€ 3.763,09	
Aug	€ 5.119,11	€ 1.134,45	
Sep	€ 2.754,67	€ 4.722,37	
Oct	€ 3.118,06	€ 4.539,13	
Nov	€ 7.786,46	€ 1.778,50	
Dec	€ 1.994,75	€ 3.970,27	

Click on a month and this button to drill through.

Design

- Design requires **time**.
- It depends on the **audience**.
- There's a **thin line** between too much and too little.
- **Consistency** is key.

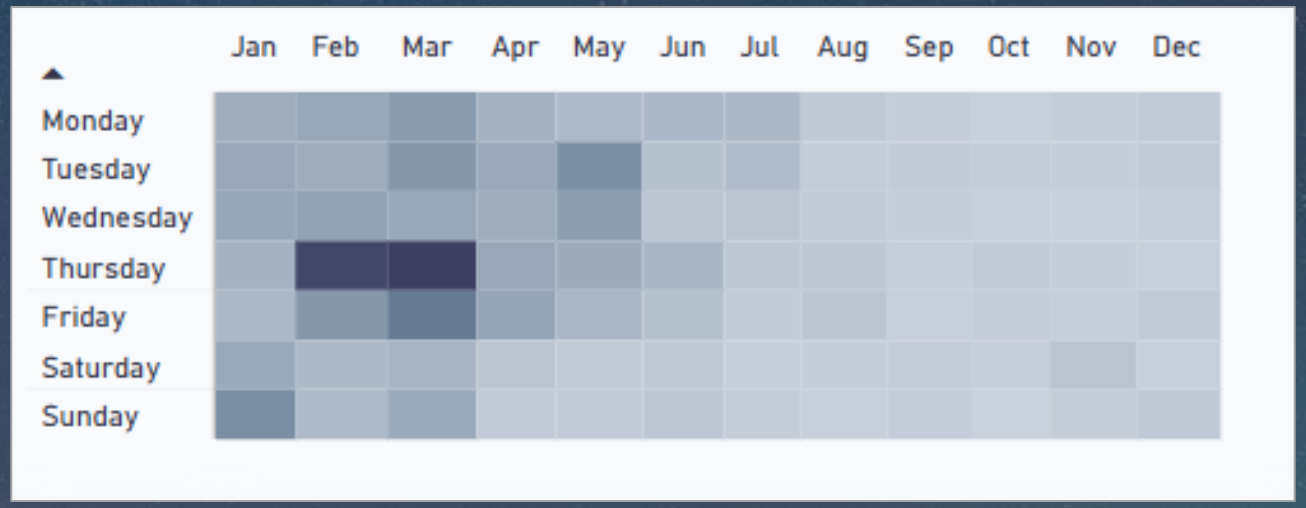


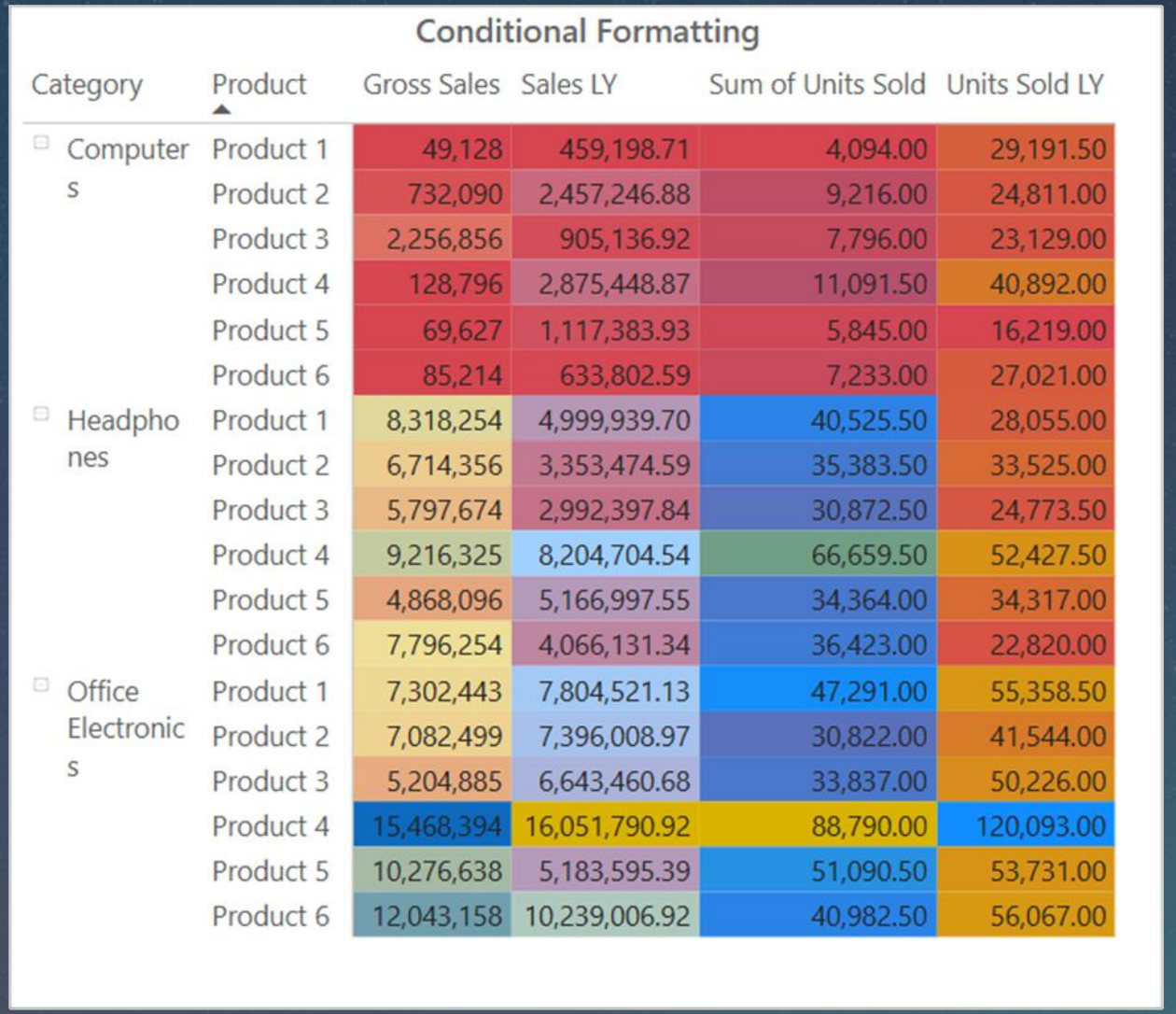


There is no innovation and creativity without failure.

Brene Brown

A heatmap example

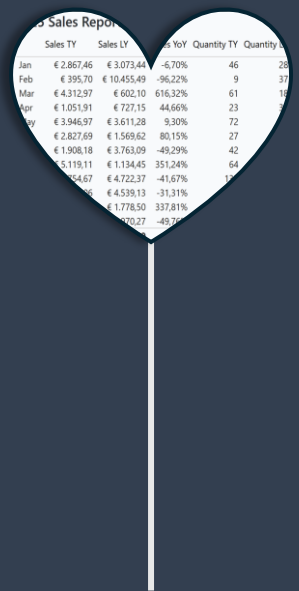


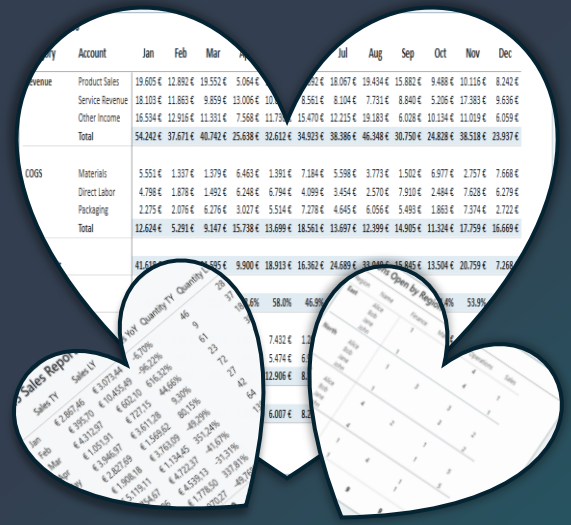

Conditional Formatting
Category
Product
Gross Sales
Sales LY
Sum of Units Sold
Units Sold LY
Computers
Product 1 49,128 459,198.71 4,094.00 29,191.50
Product 2 732,090 2,457,246.88 9,216.00 24,811.00
Product 3 2,256,856 905,136.92 7,796.00 23,129.00
Product 4 128,796 2,875,448.87 11,091.50 40,892.00
Product 5 69,627 1,117,383.93 5,845.00 16,219.00
Product 6 85,214 633,802.59 7,233.00 27,021.00
Headphones
Product 1 8,318,254 4,999,939.70 40,525.50 28,055.00
Product 2 6,714,356 3,353,474.59 35,383.50 33,525.00
Product 3 5,797,674 2,992,397.84 30,872.50 24,773.50
Product 4 9,216,325 8,204,704.54 66,659.50 52,427.50
Product 5 4,868,096 5,166,997.55 34,364.00 34,317.00
Product 6 7,796,254 4,066,131.34 36,423.00 22,820.00
Office Electronics
Product 1 7,302,443 7,804,521.13 47,291.00 55,358.50
Product 2 7,082,499 7,396,008.97 30,822.00 41,544.00
Product 3 5,204,885 6,643,460.68 33,837.00 50,226.00
Product 4 15,468,394 16,051,790.92 88,790.00 120,093.00
Product 5 10,276,638 5,183,595.39 51,090.50 53,731.00
Product 6 12,043,158 10,239,006.92 40,982.50 56,067.00

It is not about colouring..

- Who is the audience?
- What is the experience level?
- How much detail is needed?
- What actions do they want to take?

Matrix


Sales Report
Sales TY
Sales LY
YoY
Quantity TY
Jan € 2.867,46 € 3.073,44 -6,70% 46
Feb € 395,70 € 10.455,49 -96,22% 9
Mar € 4.312,97 € 602,10 616,32% 61
Apr € 1.051,91 € 727,15 44,66% 23
May € 3.946,97 € 3.611,28 9,30% 72
€ 2.827,69 € 1.569,62 80,15% 27
€ 1.908,18 € 3.763,09 -49,29% 42
€ 5.119,11 € 1.134,45 351,24% 64
€ 4.722,37 -41,67%
€ 4.539,13 -31,31%
€ 1.778,50 337,81%


Account
Jan Feb Mar Jul Aug Sep Oct Nov Dec
Revenue
Product Sales 19.605 € 12.892 € 19.552 € 5.064 € 18.067 € 19.434 € 15.882 € 9.488 € 10.116 € 8.242 €
Service Revenue 18.103 € 11.863 € 9.859 € 13.006 € 8.561 € 8.104 € 7.731 € 8.840 € 5.206 € 17.383 € 9.636 €
Other Income 16.534 € 12.916 € 11.381 € 7.568 € 15.470 € 12.215 € 19.183 € 6.028 € 10.134 € 11.019 € 6.059 €
Total 54.242 € 37.671 € 40.742 € 25.638 € 32.612 € 34.923 € 38.386 € 46.348 € 30.750 € 24.828 € 38.518 € 23.937 €
COGS
Materials 5.551 € 1.337 € 1.379 € 6.463 € 1.391 € 7.184 € 5.598 € 3.773 € 1.502 € 6.977 € 2.757 € 7.668 €
Direct Labor 4.798 € 1.878 € 1.492 € 6.248 € 6.794 € 4.099 € 3.454 € 2.570 € 7.910 € 2.484 € 7.628 € 6.279 €
Packaging 2.275 € 2.076 € 6.276 € 3.027 € 5.514 € 7.278 € 4.645 € 6.056 € 5.493 € 1.863 € 7.374 € 2.722 €
Total 12.624 € 5.291 € 9.147 € 15.738 € 13.689 € 18.561 € 13.697 € 12.399 € 14.905 € 11.324 € 17.759 € 16.669 €
9.900 € 18.913 € 16.362 € 24.689 € 13.504 € 20.759 €
58.0% 46.9%
7.432 €
5.474 €
12.906 €
6.007 €



Matrix – The basics

Category	Account	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Total		**218.473,64**	**194.258,66**	**209.662,73**	**144.398,51**	**218.841,72**	**157.409,50**	**182.195,61**	**238.416,77**	**157.759,51**	**157.325,58**	**163.443,51**	**190.809,59**	**2.232.988,62**
⊟ **Revenue**	**Total**	**82.762,00**	**72.928,00**	**76.860,00**	**57.420,00**	**80.409,00**	**62.844,00**	**69.864,00**	**86.160,00**	**62.916,00**	**61.035,00**	**65.167,00**	**73.537,00**	**851.902,00**
Revenue	Product Sales	31.875,00	24.157,00	35.663,00	15.375,00	28.293,00	25.890,00	24.595,00	29.827,00	28.395,00	15.263,00	22.671,00	26.232,00	**308.236,00**
Revenue	Service Revenue	23.963,00	17.329,00	23.181,00	23.057,00	26.714,00	13.750,00	24.498,00	23.358,00	16.452,00	22.412,00	25.456,00	29.373,00	**269.543,00**
Revenue	Other Income	26.924,00	31.442,00	18.016,00	18.988,00	25.402,00	23.204,00	20.771,00	32.975,00	18.069,00	23.360,00	17.040,00	17.932,00	**274.123,00**
⊟ **COGS**	**Total**	**29.813,00**	**24.526,00**	**20.918,00**	**27.862,00**	**22.386,00**	**31.123,00**	**27.397,00**	**20.064,00**	**30.989,00**	**25.780,00**	**32.058,00**	**29.802,00**	**322.718,00**
COGS	Materials	11.777,00	6.763,00	3.148,00	8.647,00	3.473,00	11.189,00	10.488,00	7.136,00	3.865,00	14.326,00	7.218,00	14.343,00	**102.373,00**
COGS	Direct Labor	10.989,00	8.456,00	4.883,00	11.803,00	10.352,00	9.757,00	5.100,00	5.631,00	15.145,00	6.636,00	11.241,00	7.440,00	**107.433,00**
COGS	Packaging	7.047,00	9.307,00	12.887,00	7.412,00	8.561,00								
⊟ **Gross Profit**	**Total**	**52.949,00**	**48.402,00**	**55.942,00**	**29.558,00**	**58.023,00**	**3**							
Gross Profit	Gross Profit	52.949,00	48.402,00	55.942,00	29.558,00	58.023,00								
⊟ **Gross Profit %**	**Total**	**64.0%**	**66.4%**	**72.8%**	**51.5%**	**72.2%**								
Gross Profit %	Gross Profit %	64.0%	66.4%	72.8%	51.5%	72.2%								
⊟ **General Expenses**	**Total**	**20.281,00**	**19.495,00**	**19.328,00**	**18.703,00**	**18.628,00**	**1**							
General Expenses	Marketing	6.108,00	10.331,00	11.011,00	8.812,00	11.179,00								
General Expenses	Office Rent	14.173,00	9.164,00	8.317,00	9.891,00	7.449,00								
⊟ **Net Profit**	**Total**	**32.668,00**	**28.907,00**	**36.614,00**	**10.855,00**	**39.395,00**	**1**							
Net Profit	Net Profit	32.668,00	28.907,00	36.614,00	10.855,00	39.395,00								

Profit & Loss

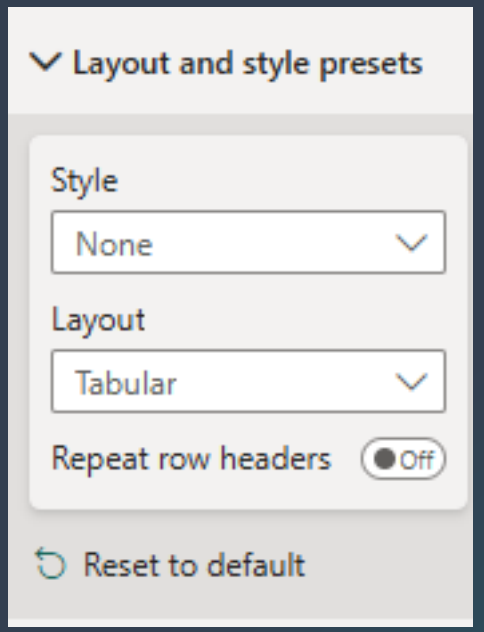
Category	Account	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Revenue	Product Sales	19.605 €	12.892 €	19.552 €	5.064 €	10.258 €	10.892 €	18.067 €	19.434 €	15.882 €	9.488 €	10.116 €	8.242 €
	Service Revenue	18.103 €	11.863 €	9.859 €	13.006 €	10.618 €	8.561 €	8.104 €	7.731 €	8.840 €	5.206 €	17.383 €	9.636 €
	Other Income	16.534 €	12.916 €	11.331 €	7.568 €	11.736 €	15.470 €	12.215 €	19.183 €	6.028 €	10.134 €	11.019 €	6.059 €
	Total	**54.242 €**	**37.671 €**	**40.742 €**	**25.638 €**	**32.612 €**	**34.923 €**	**38.386 €**	**46.348 €**	**30.750 €**	**24.828 €**	**38.518 €**	**23.937 €**
COGS	Materials	5.551 €	1.337 €	1.379 €	6.463 €	1.391 €	7.184 €	5.598 €	3.773 €	1.502 €	6.977 €	2.757 €	7.668 €
	Direct Labor	4.798 €	1.878 €	1.492 €	6.248 €	6.794 €	4.099 €	3.454 €	2.570 €	7.910 €	2.484 €	7.628 €	6.279 €
	Packaging	2.275 €	2.076 €	6.276 €	3.027 €	5.514 €	7.278 €	4.645 €	6.056 €	5.493 €	1.863 €	7.374 €	2.722 €
	Total	**12.624 €**	**5.291 €**	**9.147 €**	**15.738 €**	**13.699 €**	**18.561 €**	**13.697 €**	**12.399 €**	**14.905 €**	**11.324 €**	**17.759 €**	**16.669 €**
Gross Profit		**41.618 €**	**32.380 €**	**31.595 €**	**9.900 €**	**18.913 €**	**16.362 €**	**24.689 €**	**33.949 €**	**15.845 €**	**13.504 €**	**20.759 €**	**7.268 €**
Gross Profit %		**76.7%**	**86.0%**	**77.5%**	**38.6%**	**58.0%**	**46.9%**	**64.3%**	**73.2%**	**51.5%**	**54.4%**	**53.9%**	**30.4%**
General Expenses	Marketing	2.016 €	5.887 €	3.062 €	3.695 €	7.432 €	1.200 €	6.847 €	7.756 €	1.870 €	3.790 €	7.892 €	4.314 €
	Office Rent	7.439 €	4.993 €	4.884 €	2.495 €	5.474 €	6.959 €	1.804 €	6.581 €	7.938 €	1.563 €	2.678 €	4.157 €
	Total	**9.455 €**	**10.880 €**	**7.946 €**	**6.190 €**	**12.906 €**	**8.159 €**	**8.651 €**	**14.337 €**	**9.808 €**	**5.353 €**	**10.570 €**	**8.471 €**
Net Profit		**32.163 €**	**21.500 €**	**23.649 €**	**3.710 €**	**6.007 €**	**8.203 €**	**16.038 €**	**19.612 €**	**6.037 €**	**8.151 €**	**10.189 €**	**-1.203 €**

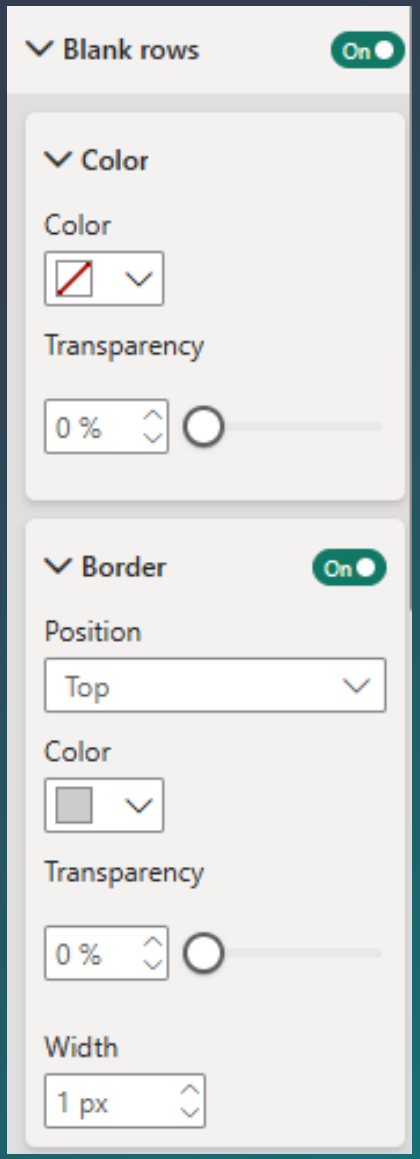
Row headers & Blank rows

Category	Account
Total	
Revenue	**Total**
Revenue	Product Sales
Revenue	Service Revenue
Revenue	Other Income
COGS	**Total**
COGS	Materials
COGS	Direct Labor
COGS	Packaging
Gross Profit	**Total**
Gross Profit	Gross Profit
Gross Profit %	**Total**
Gross Profit %	Gross Profit %
General Expenses	**Total**
General Expenses	Marketing
General Expenses	Office Rent
Net Profit	**Total**
Net Profit	Net Profit

Profit & Loss

Category	Account
Revenue	Product Sales
	Service Revenue
	Other Income
	Total
COGS	Materials
	Direct Labor
	Packaging
	Total
Gross Profit	
Gross Profit %	
General Expenses	Marketing
	Office Rent
	Total
Net Profit	

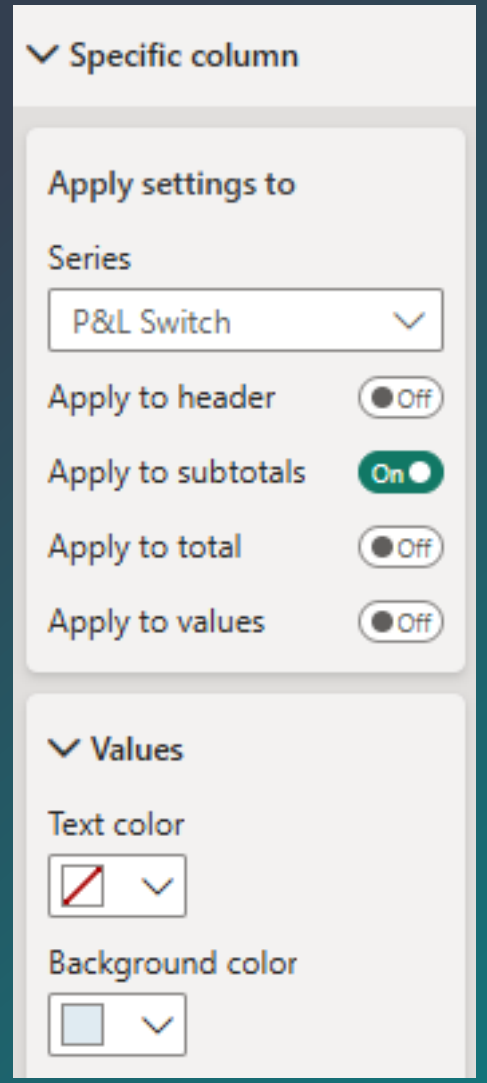




Specific column setting

29.813,00	**24.526,00**	**20.918,00**	**27.862,00**	**22.386,00**	**31.123,00**	**27.397,00**	**20.064,00**	**30.989,00**	**25.780,00**	**32.058,00**	**29.802,00**
11.777,00	6.763,00	3.148,00	8.647,00	3.473,00	11.189,00	10.488,00	7.136,00	3.865,00	14.326,00	7.218,00	14.343,00
10.989,00	8.456,00	4.883,00	11.803,00	10.352,00	9.757,00	5.100,00	5.631,00	15.145,00	6.636,00	11.241,00	7.440,00
7.047,00	9.307,00	12.887,00	7.412,00	8.561,00	10.177,00	11.809,00	7.297,00	11.979,00	4.818,00	13.599,00	8.019,00
52.949,00	**48.402,00**	**55.942,00**	**29.558,00**	**58.023,00**	**31.721,00**	**42.467,00**	**66.096,00**	**31.927,00**	**35.255,00**	**33.109,00**	**43.735,00**
52.949,00	48.402,00	55.942,00	29.558,00	58.023,00	31.721,00	42.467,00	66.096,00	31.927,00	35.255,00	33.109,00	43.735,00
64.0%	**66.4%**	**72.8%**	**51.5%**	**72.2%**	**50.5%**	**60.8%**	**76.7%**	**50.7%**	**57.8%**	**50.8%**	**59.5%**
64.0%	66.4%	72.8%	51.5%	72.2%	50.5%	60.8%	76.7%	50.7%	57.8%	50.8%	59.5%
20.281,00	**19.495,00**	**19.328,00**	**18.703,00**	**18.628,00**	**18.401,00**	**19.849,00**	**21.202,00**	**15.842,00**	**12.881,00**	**17.913,00**	**13.447,00**
6.108,00	10.331,00	11.011,00	8.812,00	11.179,00	3.467,00	10.735,00	10.797,00	4.348,00	6.375,00	12.735,00	7.295,00
14.173,00	9.164,00	8.317,00	9.891,00	7.449,00	14.934,00	9.114,00	10.405,00	11.494,00	6.506,00	5.178,00	6.152,00
32.668,00	**28.907,00**	**36.614,00**	**10.855,00**	**39.395,00**	**13.320,00**	**22.618,00**	**44.894,00**	**16.085,00**	**22.374,00**	**15.196,00**	**30.288,00**
32.668,00	28.907,00	36.614,00	10.855,00	39.395,00	13.320,00	22.618,00	44.894,00	16.085,00	22.374,00	15.196,00	30.288,00

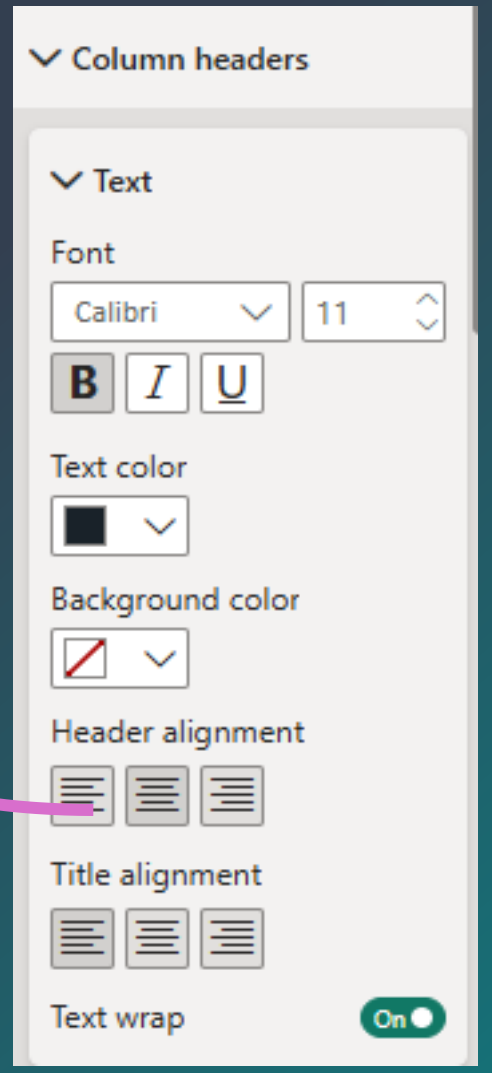
5.551 €	1.337 €	1.379 €	6.463 €	1.391 €	7.184 €	5.598 €	3.773 €	1.502 €	6.977 €	2.757 €	7.668 €
4.798 €	1.878 €	1.492 €	6.248 €	6.794 €	4.099 €	3.454 €	2.570 €	7.910 €	2.484 €	7.628 €	6.279 €
2.275 €	2.076 €	6.276 €	3.027 €	5.514 €	7.278 €	4.645 €	6.056 €	5.493 €	1.863 €	7.374 €	2.722 €
12.624 €	**5.291 €**	**9.147 €**	**15.738 €**	**13.699 €**	**18.561 €**	**13.697 €**	**12.399 €**	**14.905 €**	**11.324 €**	**17.759 €**	**16.669 €**
41.618 €	**32.380 €**	**31.595 €**	**9.900 €**	**18.913 €**	**16.362 €**	**24.689 €**	**33.949 €**	**15.845 €**	**13.504 €**	**20.759 €**	**7.268 €**
76.7%	**86.0%**	**77.5%**	**38.6%**	**58.0%**	**46.9%**	**64.3%**	**73.2%**	**51.5%**	**54.4%**	**53.9%**	**30.4%**
2.016 €	5.887 €	3.062 €	3.695 €	7.432 €	1.200 €	6.847 €	7.756 €	1.870 €	3.790 €	7.892 €	4.314 €
7.439 €	4.993 €	4.884 €	2.495 €	5.474 €	6.959 €	1.804 €	6.581 €	7.938 €	1.563 €	2.678 €	4.157 €
9.455 €	**10.880 €**	**7.946 €**	**6.190 €**	**12.906 €**	**8.159 €**	**8.651 €**	**14.337 €**	**9.808 €**	**5.353 €**	**10.570 €**	**8.471 €**
32.163 €	**21.500 €**	**23.649 €**	**3.710 €**	**6.007 €**	**8.203 €**	**16.038 €**	**19.612 €**	**6.037 €**	**8.151 €**	**10.189 €**	**-1.203 €**



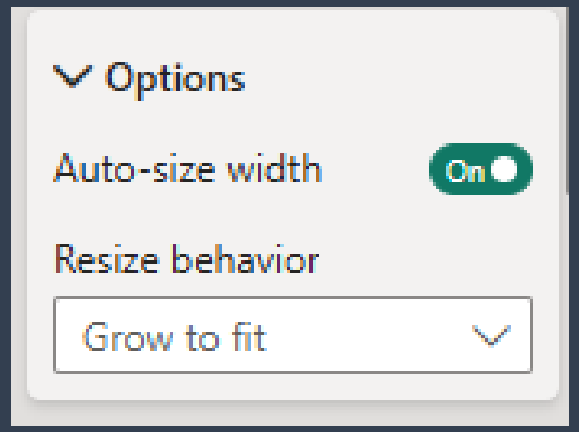
Column headers

Category	Account	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Total		**218.473,64**	**194.258,66**	**209.662,73**	**144.398,51**	**218.841,72**	**157.409,50**	**182.195,61**	**238.416,77**
Revenue	**Total**	**82.762,00**	**72.928,00**	**76.860,00**	**57.420,00**	**80.409,00**	**62.844,00**	**69.864,00**	**86.160,00**
Revenue	Product Sales	31.875,00	24.157,00	35.663,00	15.375,00	28.293,00	25.890,00	24.595,00	29.827,00
Revenue	Service Revenue	23.963,00	17.329,00	23.181,00	23.057,00	26.714,00	13.750,00	24.498,00	23.358,00
Revenue	Other Income	26.924,00	31.442,00	18.016,00	18.988,00	25.402,00	23.204,00	20.771,00	32.975,00

Category	Account	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Revenue	Product Sales	19.605 €	12.892 €	19.552 €	5.064 €	10.258 €	10.892 €	18.067 €	19.434 €
	Service Revenue	18.103 €	11.863 €	9.859 €	13.006 €	10.618 €	8.561 €	8.104 €	7.731 €
	Other Income	16.534 €	12.916 €	11.331 €	7.568 €	11.736 €	15.470 €	12.215 €	19.183 €
	Total	**54.242 €**	**37.671 €**	**40.742 €**	**25.638 €**	**32.612 €**	**34.923 €**	**38.386 €**	**46.348 €**



Column headers



YTD vs. LY

Category	Account	TY	LY	Delta
Revenue	Product Sales	308.236 €	148.744 €	159.492 €
	Service Revenue	269.543 €	140.633 €	128.910 €
	Other Income	274.123 €	133.930 €	140.193 €
	Total	**851.902 €**	**423.307 €**	**428.595 €**



YTD vs. LY

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	Service Revenue	269.543 €	140.633 €	128.910 €
	Other Income	274.123 €	133.930 €	140.193 €
	Total	**851.902 €**	**423.307 €**	**428.595 €**

2025 Sales Report

	Sales TY	Sales LY	Sales YoY	Quantity TY	Quantity LY	Difference
Jan	€ 2.867,46	€ 3.073,44	-6,70%	46	28	18
Feb	€ 395,70	€ 10.455,49	-96,22%	9	37	-28
Mar	€ 4.312,97	€ 602,10	616,32%	61	18	43
Apr	€ 1.051,91	€ 727,15	44,66%	23	38	-15
May	€ 3.946,97	€ 3.611,28	9,30%	72	59	13
Jun	€ 2.827,69	€ 1.569,62	80,15%	27	38	-11
Jul	€ 1.908,18	€ 3.763,09	-49,29%	42	82	-40
Aug	€ 5.119,11	€ 1.134,45	351,24%	64	20	44
Sep	€ 2.754,67	€ 4.722,37	-41,67%	139	83	56
Oct	€ 3.118,06	€ 4.539,13	-31,31%	44	70	-26
Nov	€ 7.786,46	€ 1.778,50	337,81%	124	31	93
Dec	€ 1.994,75	€ 3.970,27	-49,76%	43	104	-61
Total	**€ 38.083,93**	**€ 39.946,89**	**-4,66%**	**694**	**608**	**86**

Icons

- Improve readability.
- Guide attention.
- Support decision making.

2025 Sales Report

	Sales TY	Sales LY	Sales YoY	Quantity TY	Quantity LY
Jan	€ 2.867,46	€ 3.073,44	-6,70%	46	28
Feb	€ 395,70	€ 10.455,49	-96,22%	9	37
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Icons

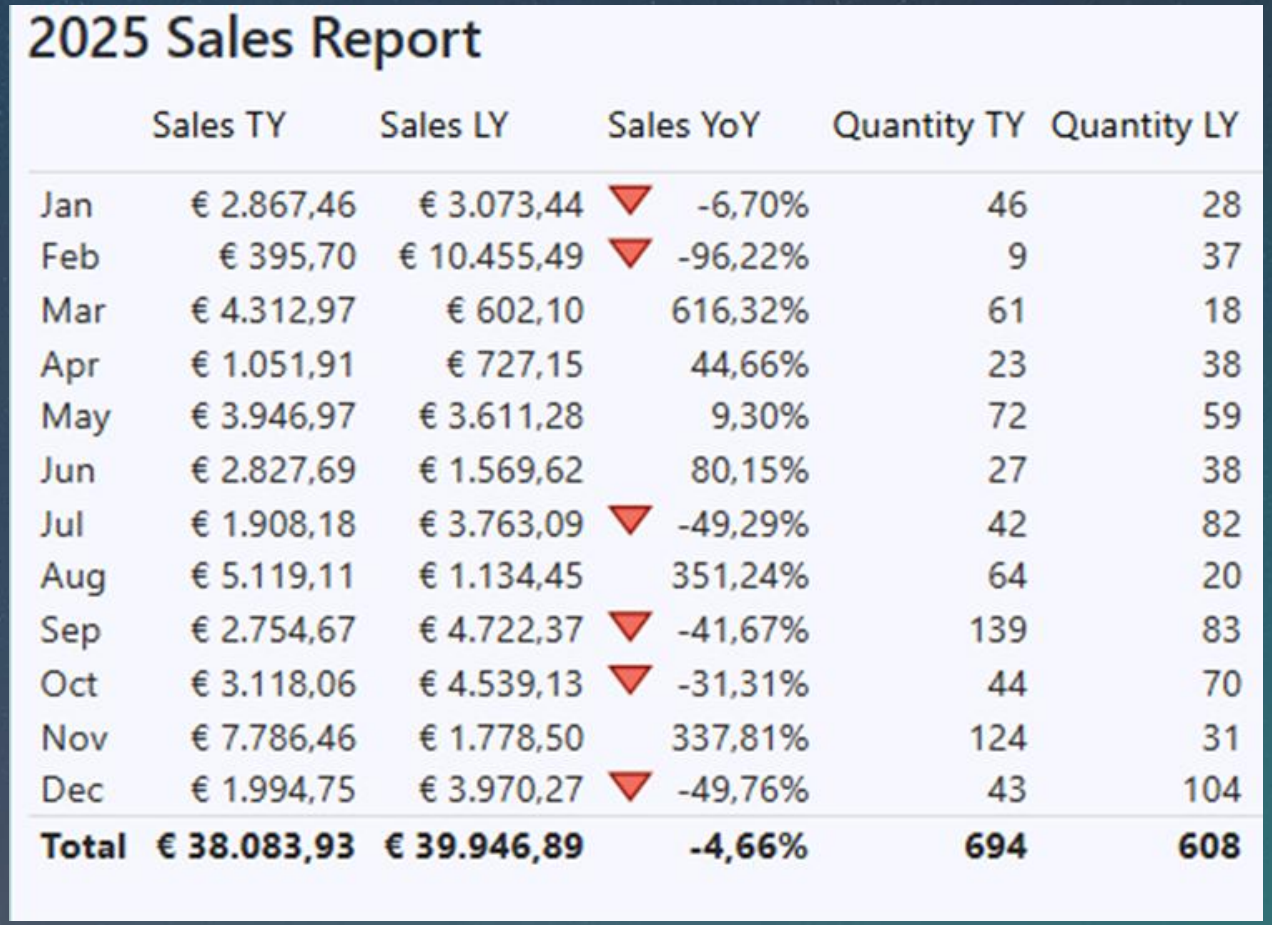
- Improve readability.
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Font color

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Font color

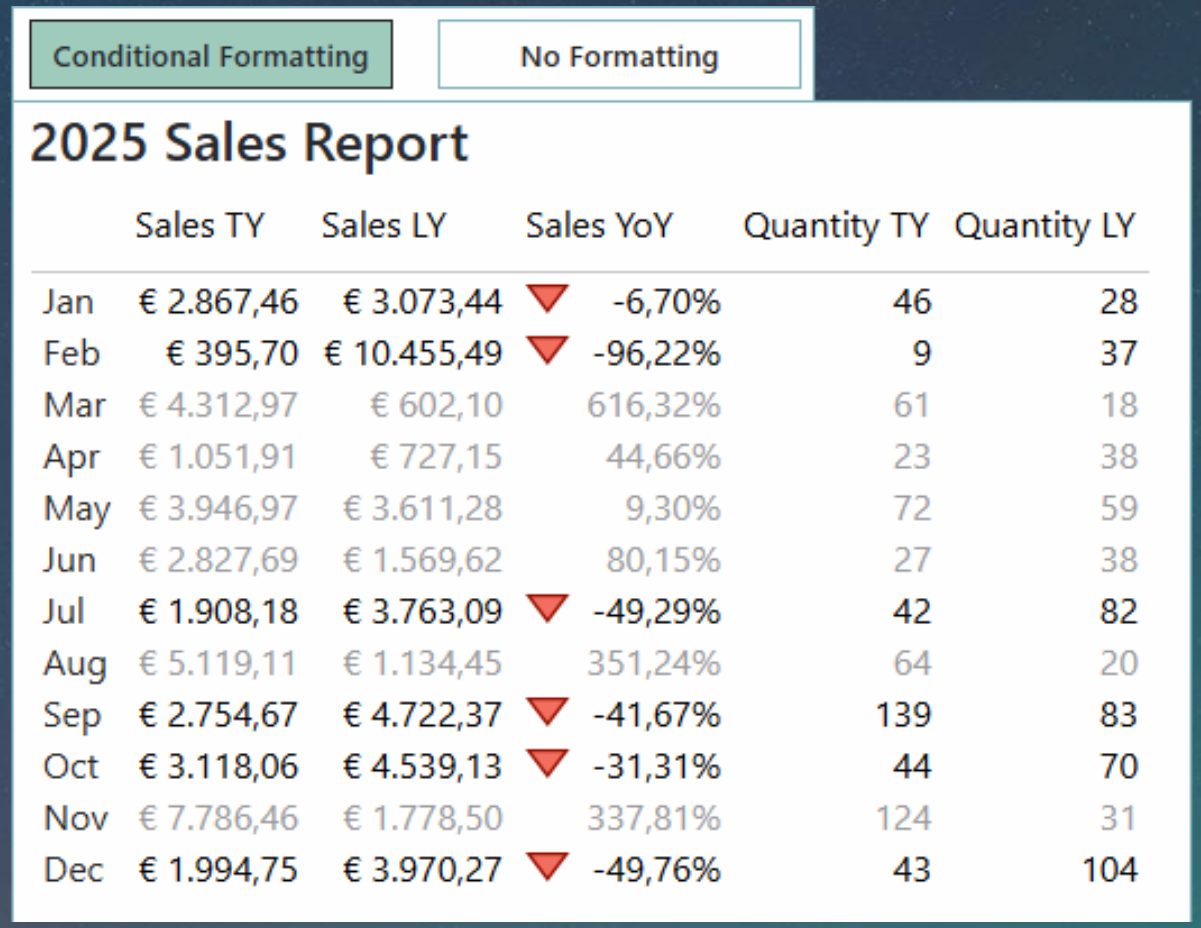
- One column or all?

2025 Sales Report

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Formatting – Options

- Provide options for your end-user.
- Large audience = diverse preferences.



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Button Slicer

Conditional Formatting | No Formatting

2025 Sales Report

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Button Slicer

- Create a table

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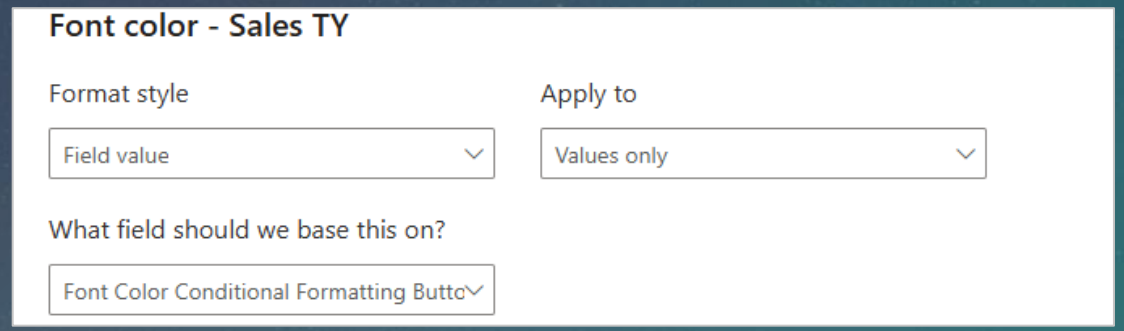
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- Create a measure

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- Conditional Formatting



Button Slicer

Conditional Formatting | No Formatting

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Conditional Formatting | No Formatting

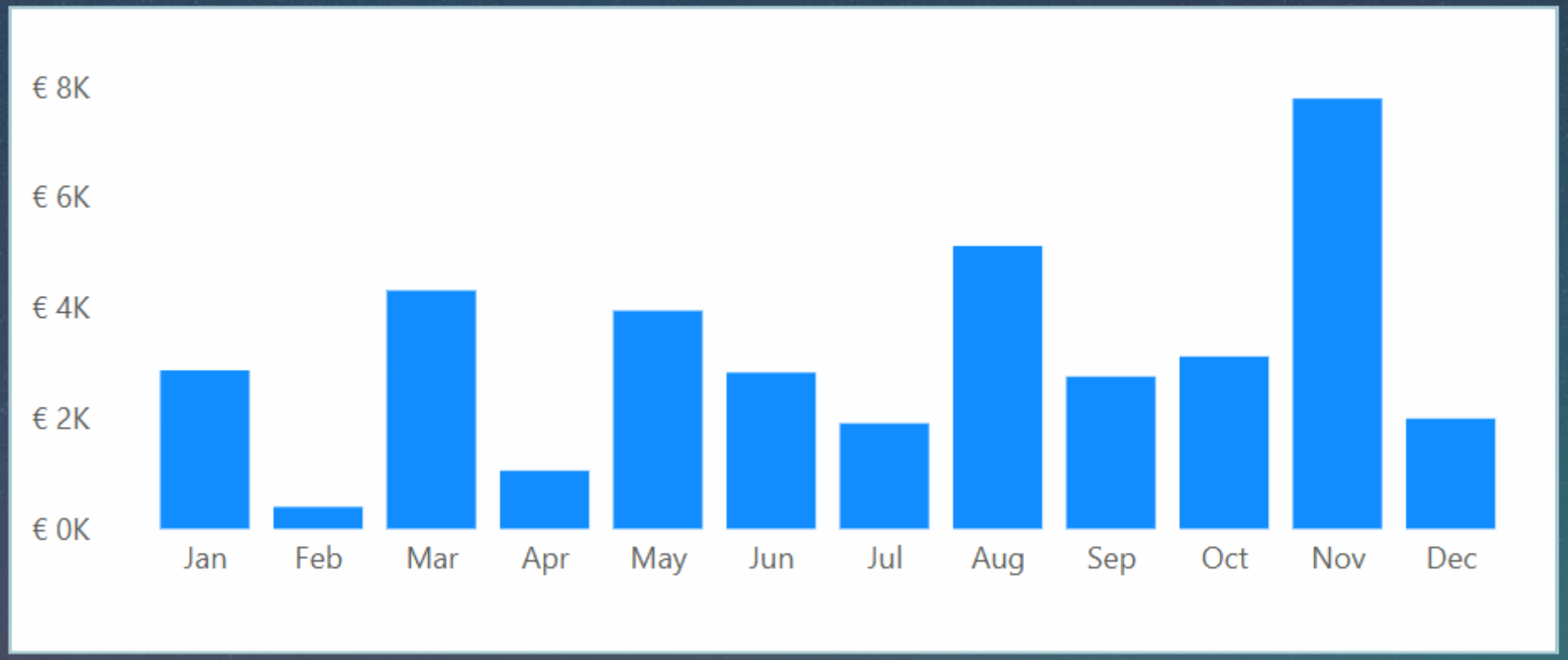
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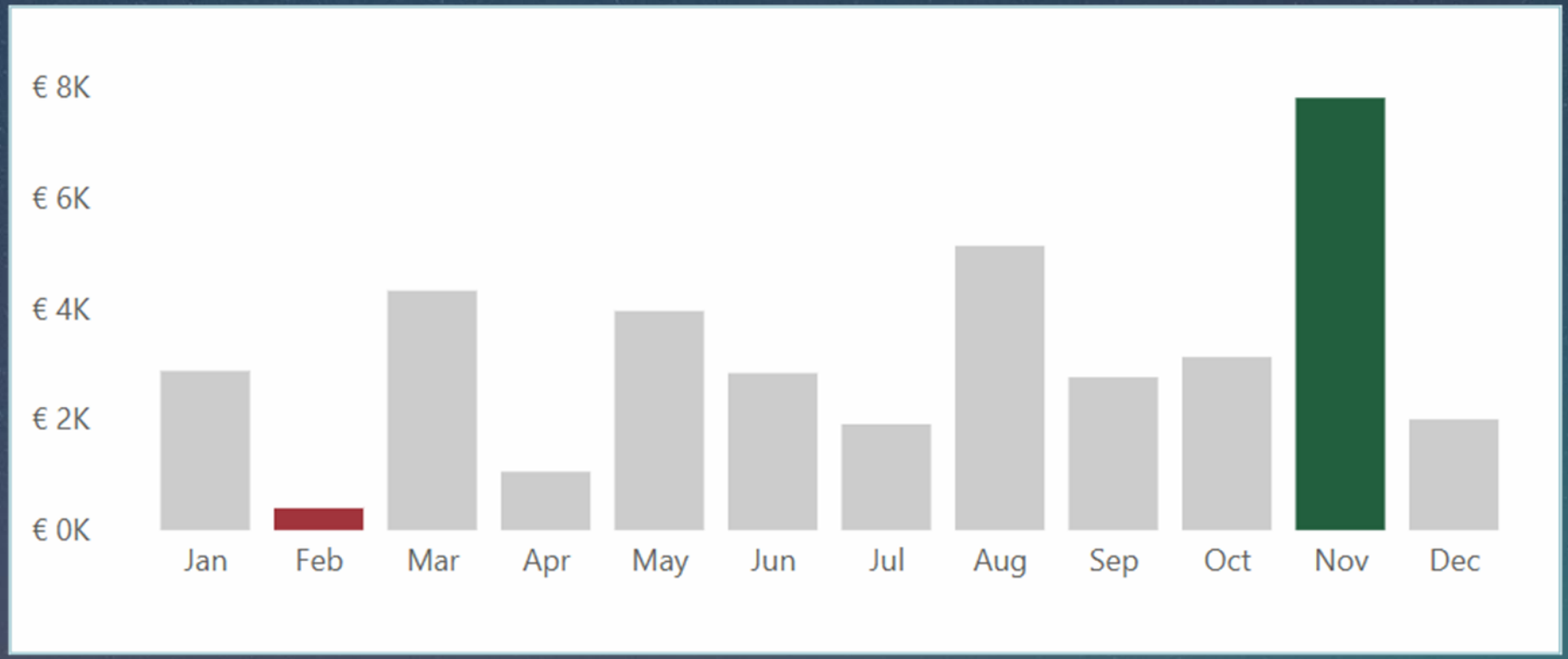
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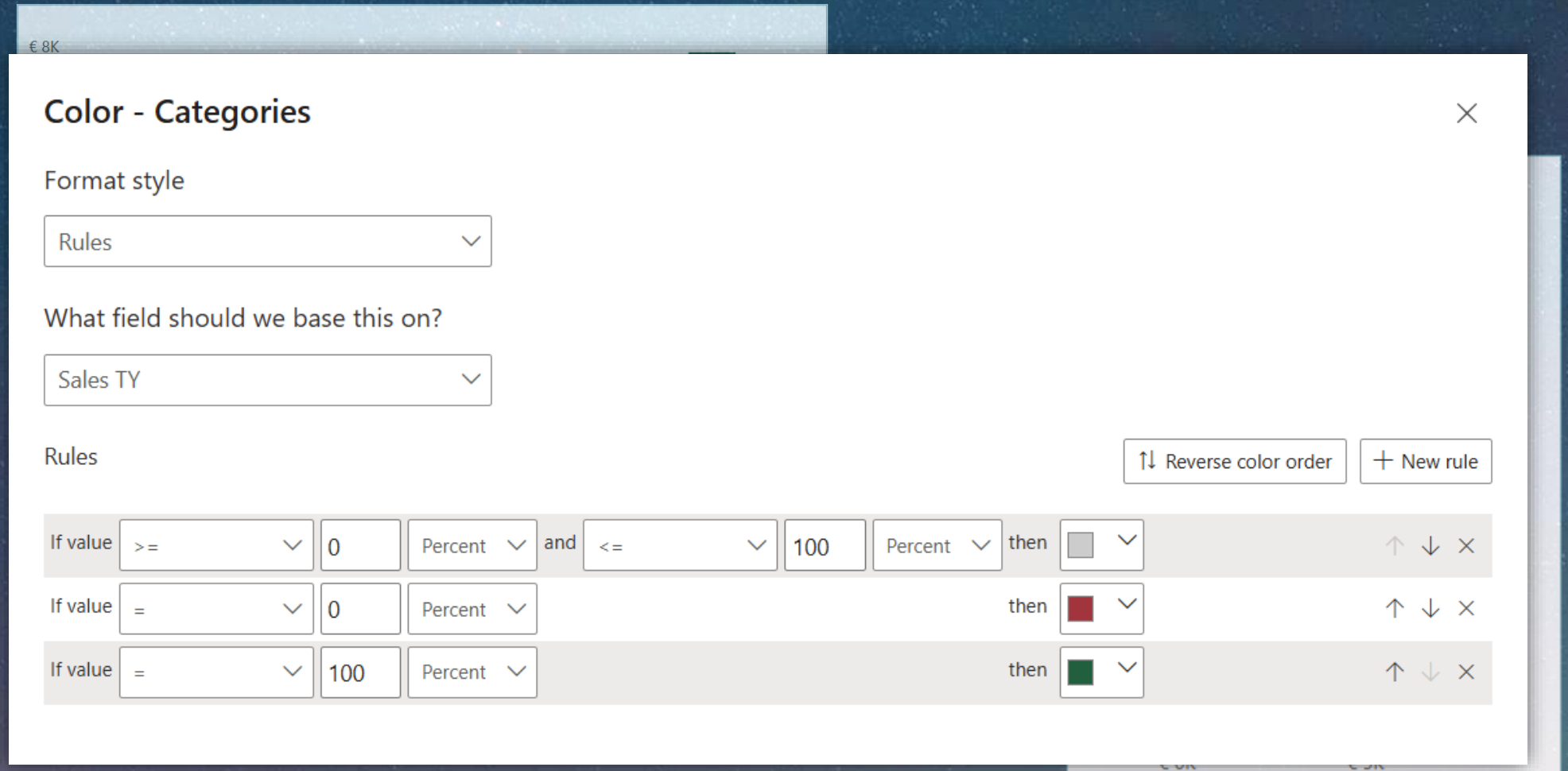
Highlight



Highlight

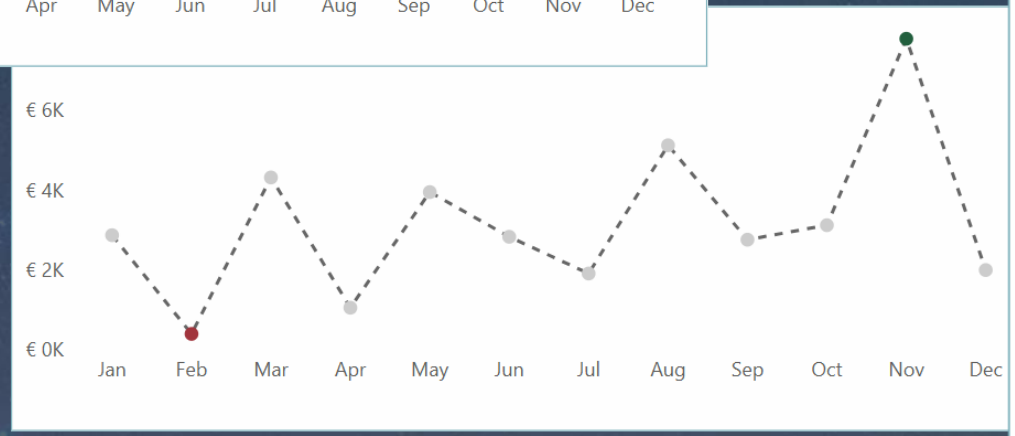


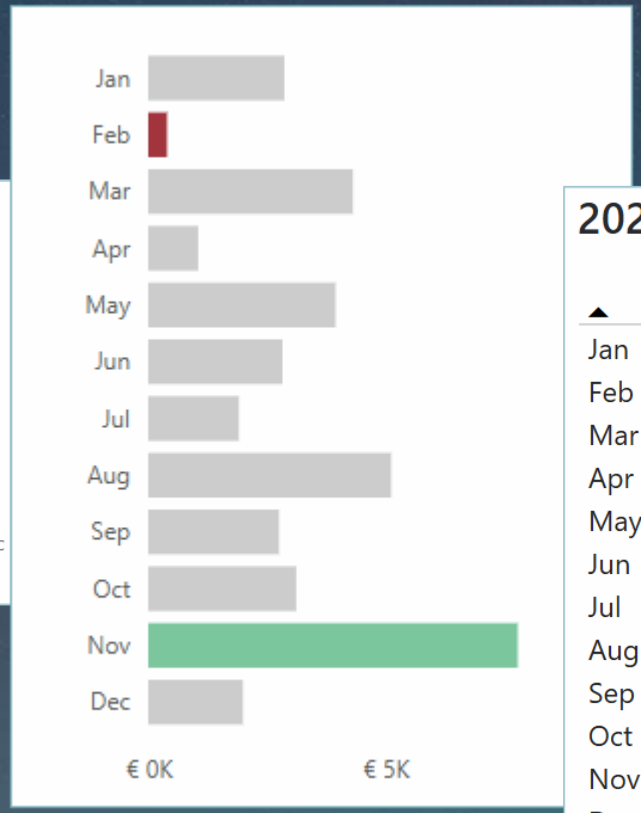
Highlight


€ 8K
Color - Categories
Format style
Rules
What field should we base this on?
Sales TY
Rules
Reverse color order
New rule
If value >= 0 Percent and <= 100 Percent then
If value = 0 Percent then
If value = 100 Percent then

Highlight what matters







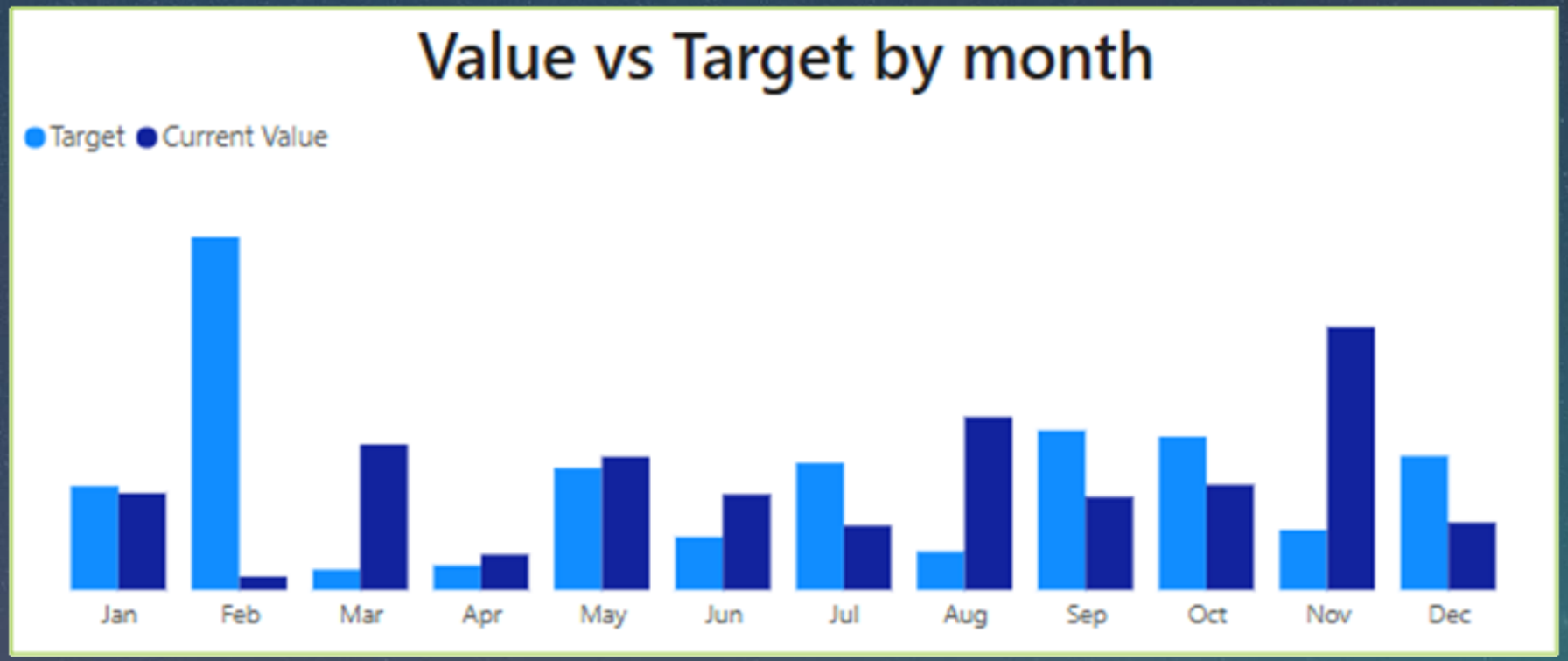
2025 Sales Report

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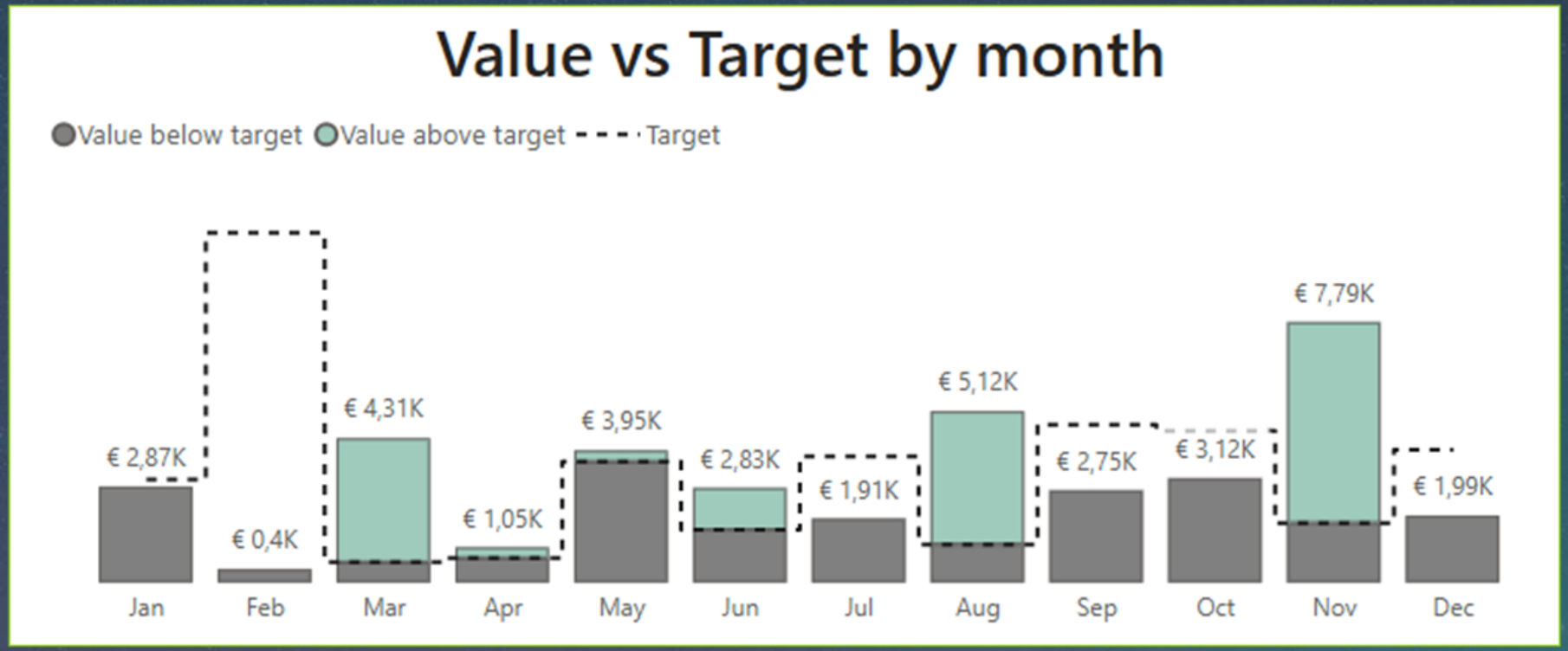
Column Charts & Targets



Targets


Value vs Target by month
Target
Current Value
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec

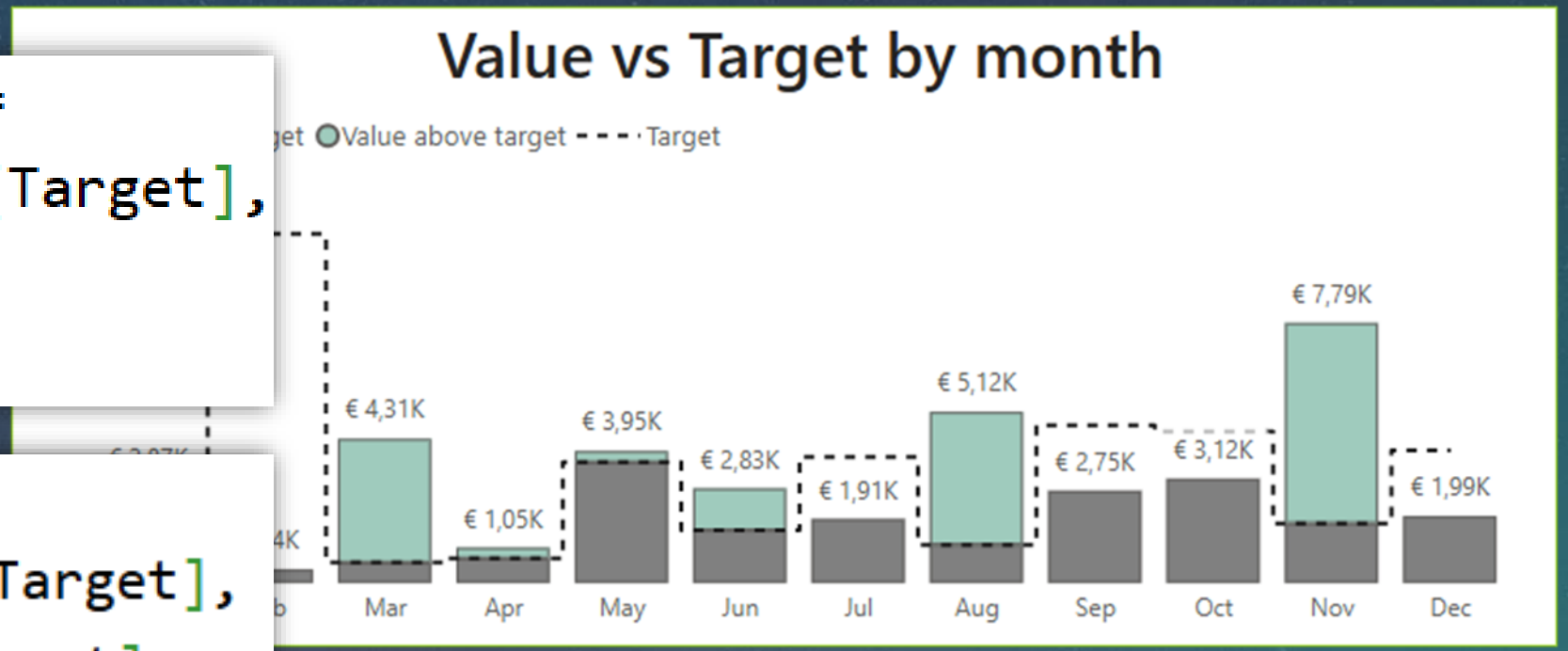
Targets - Stacked



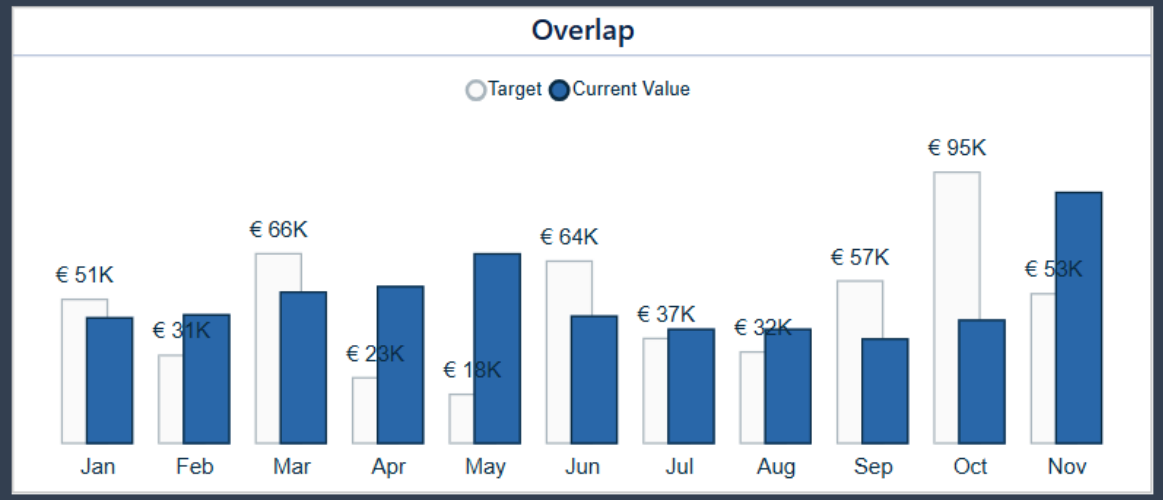
Targets - Stacked

```
1 Value below target =
2 IF([Current Value]<[Target],
3 [Current Value],
4 [Target])
```

```
1 Value above target =
2 IF([Current Value]> [Target],
3 [Current Value] - [Target],
4 blank())
```

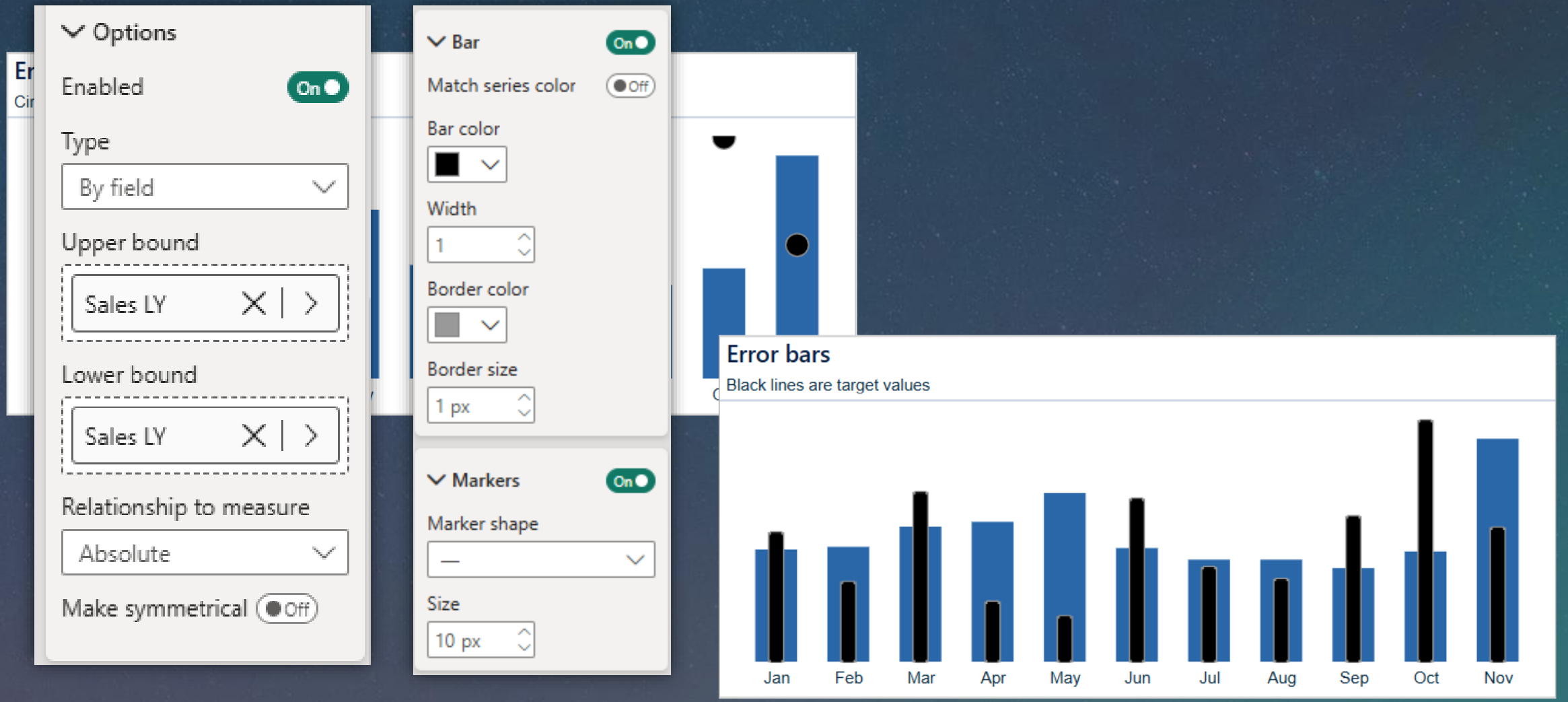


Targets Overlap



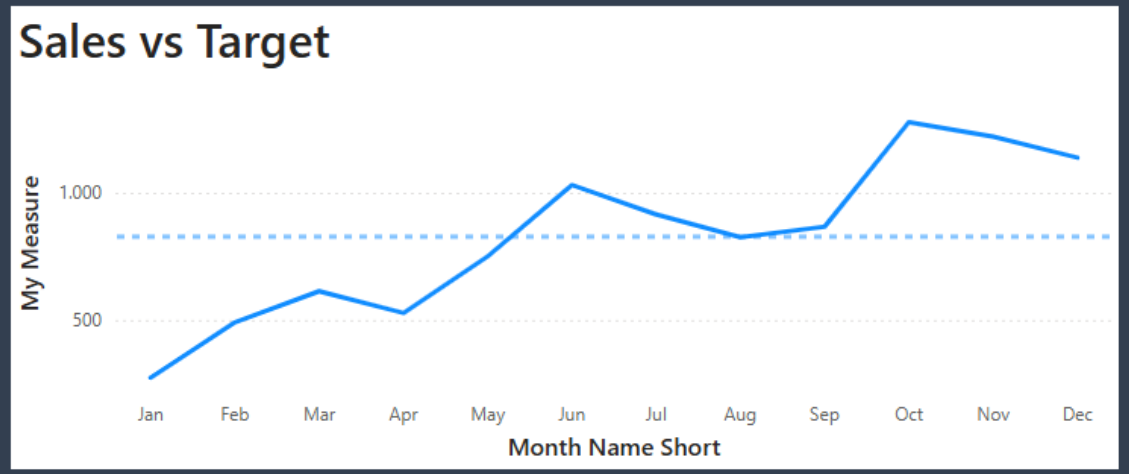


Targets Error Bars



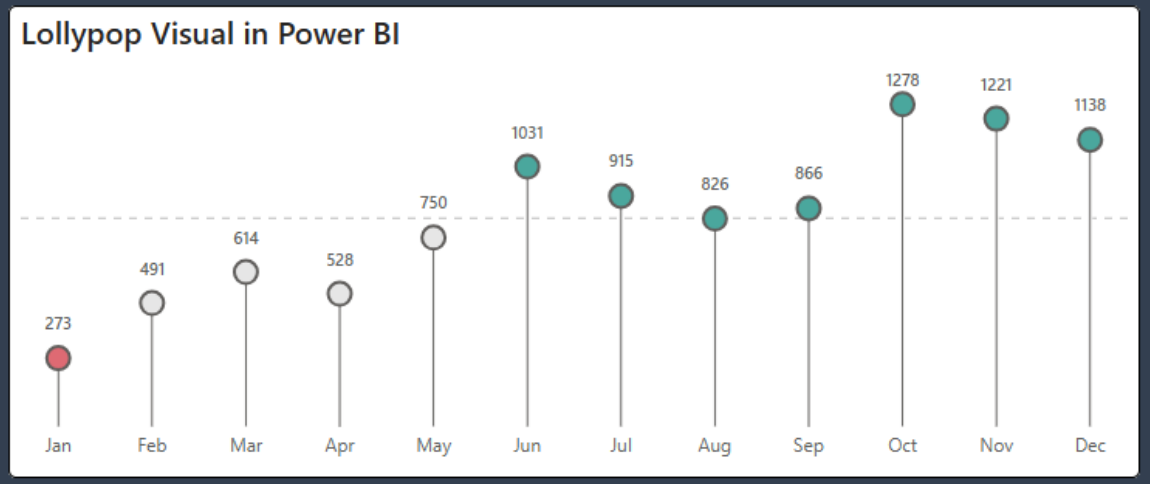
Combining techniques

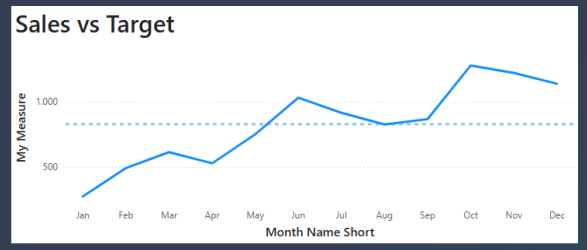
What is important?



- Make it easier to spot data points.
- Spot the successful months.
- Show values.

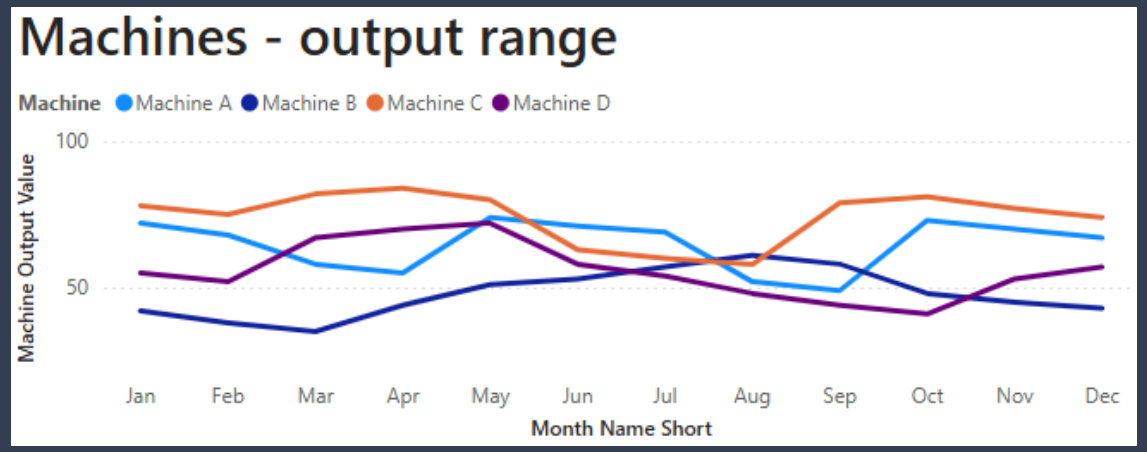
Combining techniques





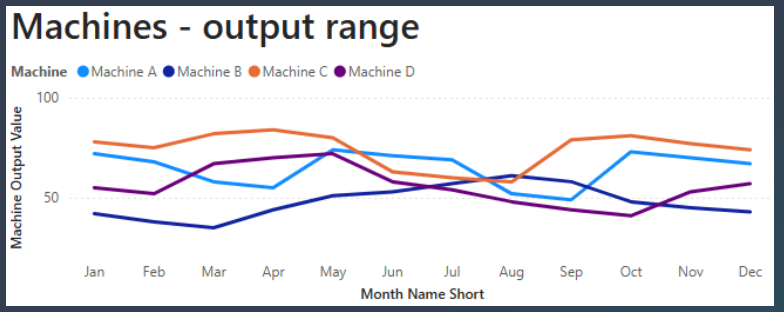
- Remove the line & add values
- Conditional formatting
- Error Bars

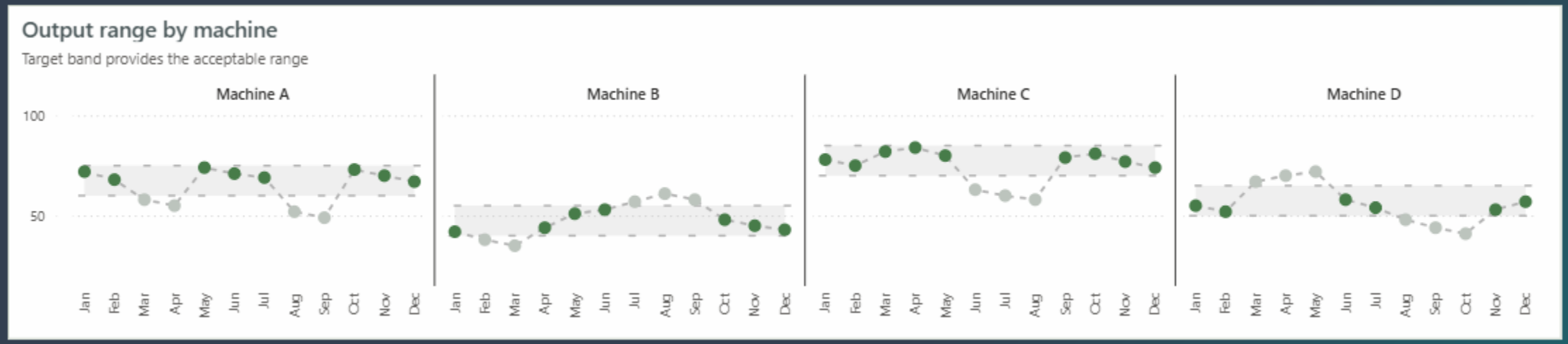
Guide the user



- What is important?
- Everything could be important!
- Guide the user!

Guide the user





- Line chart
- Smart multiples
- Error Bars
- Conditional formatting

1. Prioritize the User
2. Focus on Value and Actions
3. Make It Shine, But Be Picky