

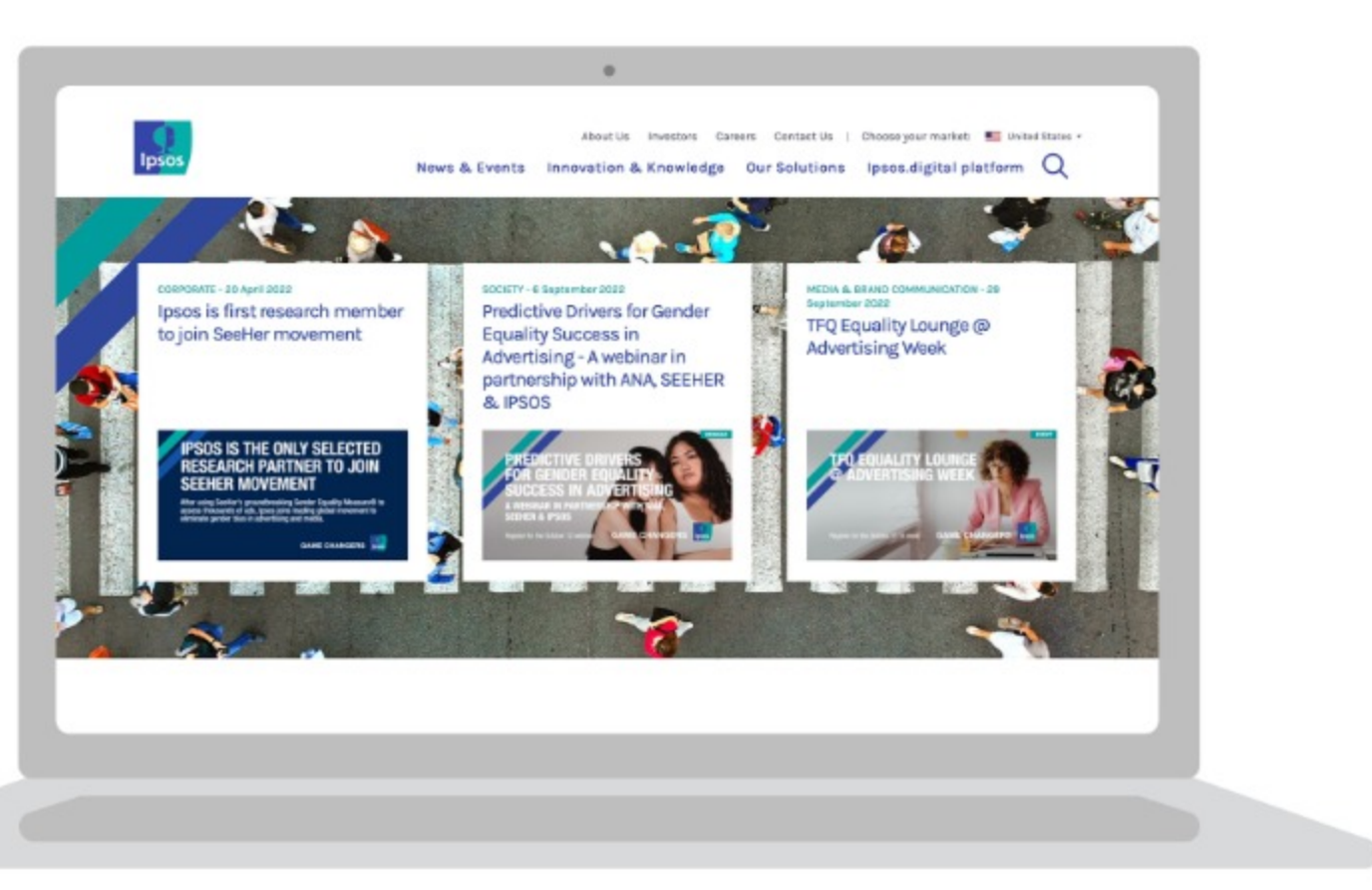
# Case study: Ipsos - Informing stakeholders with compelling data visualizations

In this course, you've learned a lot about business intelligence visualizations and what makes an effective BI presentation. In this case study, you'll learn about how Ipsos, a market research company, planned and executed a BI presentation. Ipsos worked with stakeholders to complete a brand-tracking project that involved advertisements and marketing. When the marketing team completed their dashboard, they presented their tracking tool and insights to their stakeholders.



## Company background

Ipsos is a globally-operating market research and polling company. The company builds solutions that provide insights into the actions, opinions, and motivations of citizens, consumers, patients, customers, and employees. Its solutions are based on data from surveys, social media monitoring, and qualitative or observational techniques.



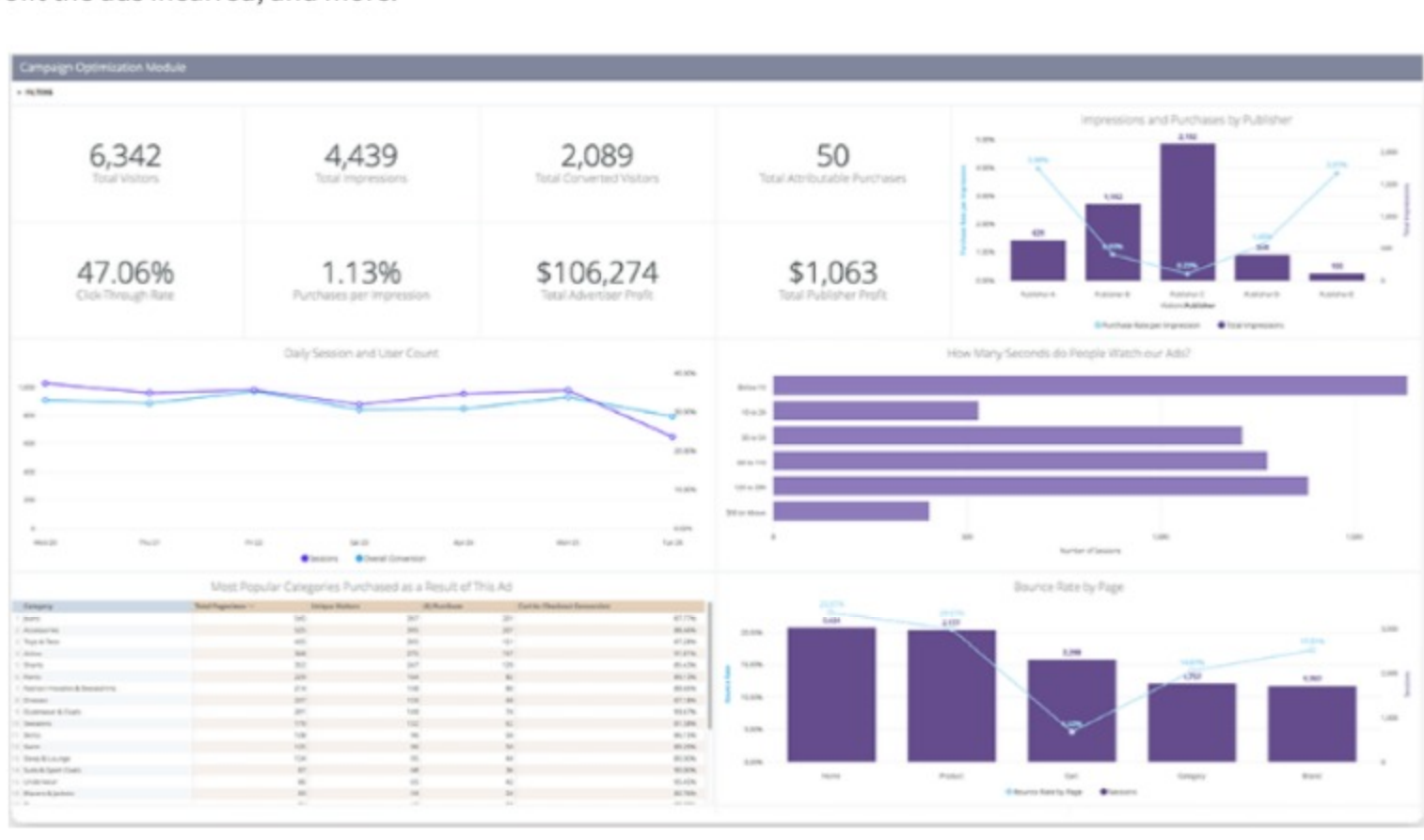
## The project details

The primary goal of the marketing team's presentation was to communicate their insights to their stakeholders.

To agree on project details, the Ipsos account team met with the client team. They agreed on a list of priorities for charts and visualizations, the content of the dashboard, and the basic aesthetic and usability elements.

The Ipsos team used Looker as its dashboard platform, since it would be compatible with client's existing Google Cloud infrastructure. This meant that Ipsos could avoid additional development on the data structure and create a dashboard that the client team would be most familiar with.

Ipsos built an advertisement dashboard that tracked the number of visitors and impressions that the client's ads received. It also measured how long people watched the ads, how many purchases resulted from the ad, how much profit the ads incurred, and more.



## The presentation approach

When preparing for the presentation, Ipsos decided to take a more conversational and interactive approach. They felt the dashboard should be experienced by its potential users as soon as possible. To do this, Ipsos made an effort to authorize and authenticate the stakeholder team's users in advance. By the time Ipsos began their presentation, the client team could use and interact with the dashboard in real time.

In the initial meeting, the Ipsos team described the output of the dashboard and demonstrated how the user interface worked. Ipsos focused the meeting on reporting functionality and saved the more technical content for follow-up meetings.

In these meetings, Ipsos invited other members of the client team and focused on other content. This content included the scripting, coding, and other technical aspects that wouldn't be appropriate for the core team.

In each meeting, Ipsos used their two-part plan of providing a demonstration first and then allowing the users to experience the platform themselves. It was helpful for everyone to watch the Ipsos expert describe and interact with the user interface before the interactive session.

## The feedback

At the end of the presentation, the client's representatives shared positive comments about Ipsos' work. They also mentioned a few aspects of the dashboard that they wanted to optimize.

After the presentation, the stakeholders organized their feedback in writing and delivered it to the Ipsos team. The feedback addressed two areas: the potential limitations of the platform for user data ingestion and the opportunities to further refine and develop the dashboard.

With this feedback, Ipsos could iterate on the dashboard tool and continue collaborating with their client.

## Lessons learned

Key lessons learned and actions Ipsos would repeat include:

- Establishing appropriate expectations and communicating frequently
- Including their audience in the creation of presentation content
- Encouraging participation during the presentation and identifying ways to involve the audience
- Demonstrating the dashboard during the presentation and allowing the audience to make data requests to the presenter
- Highlighting essential content and user benefits in the initial presentation, then focusing on highly technical content in subsequent meetings

For future presentations, Ipsos would adjust some trade offs they made about accessibility and complex data layouts. They learned they could generate simpler functionality at first, then later build out more complex designs that require advanced development later in the dashboard building process. This way, they could reduce the amount of iteration they have to do on their visualizations.

## Conclusion

A more casual and interactive approach to the presentation encouraged user learning and clarified feedback for the Ipsos team. Three parts in this process were helpful:

- Communicating and pre-planning with the client team about expectations and desired outcomes for the presentation
- Choosing to demonstrate the platform and its functionality live
- Pre-authorizing and authenticating users so that they could get on-platform and start exploring the tool as soon as possible

These choices led to faster adoption of the tool and allowed the feedback process to clearly and concisely focus on desired changes.

In your future presentations, you'll find the most effective strategies to streamline tool adoption and expedite feedback. The more effort you put into your presentation, the easier it will be to collaborate with your stakeholders.

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