KPMG

Crack the Case for FDD Directors

January 2023

CPE check-in

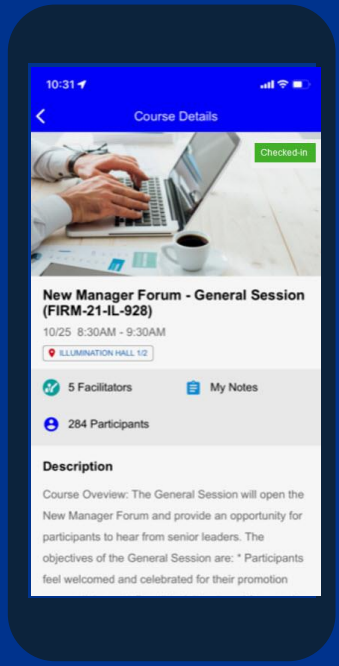
To check-in for CPE using the Lakehouse App:

- Ensure **Bluetooth** and **Location Services** are enabled on your device.
- The class must display on your schedule in the app.
- You must be in the correct meeting room, and launch the app during the scheduled class time.
- If check-in is successful, you will see a green checked-in notification on your schedule.

If your app does not display the green checked-in notification:

- From My Schedule, select the class that is in progress.
- Click on the blue check-in button and enter the 4 digit code provided by your facilitator.
- If check-in is still unsuccessful, ask to sign the paper roster.

(Also use the paper roster to document any class time missed, so credit adjustments can be performed in compliance with NASBA CPE standards.)



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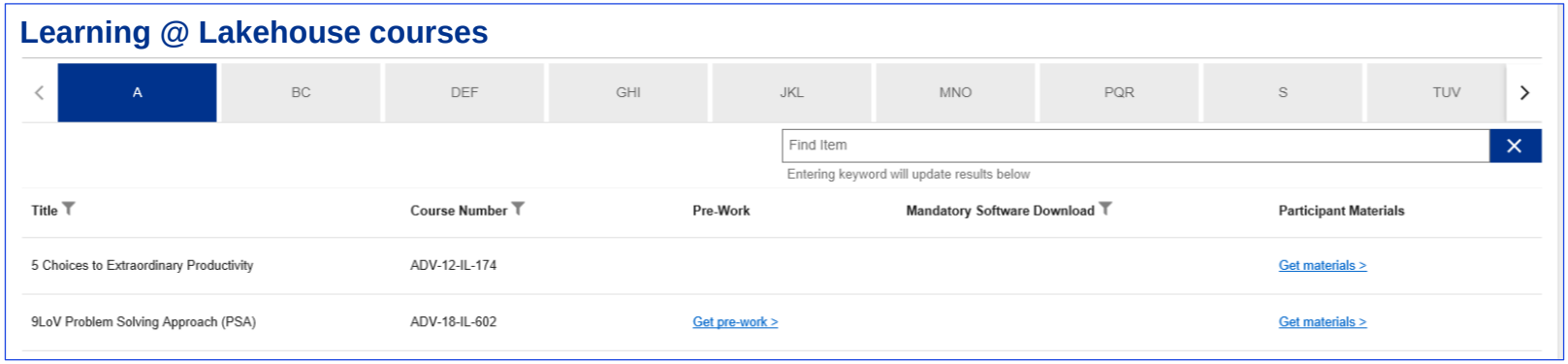
Course materials

US Portal > **Advisory Learning @ Lakehouse** (Advisory University)

Select **Participant Materials**.

Select **Get Materials** for your courses.

Download materials.



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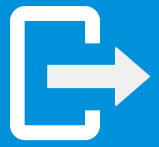
Some housekeeping items to go through…



Restrooms and exits

Clear distractions

Be fully engaged

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Today’s facilitators

David Ohrvall
Zintervu CEO

Author of Crack the Case and Interview LOGIC

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David Ohrvall

Founder, MBACASE

Wharton

ICU Japan

Accenture

Wharton

Nalco

Bain & Company

Equity Office Properties

Zintervu

CRACK THE CASE

INTERVIEW LOGIC

Zintervū

World Class Case Interview & Problem Solving Training

United States

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Berkeley Haas
Boston College
Boston University
Bowdoin College
Carnegie Mellon Tepper
Chicago Booth
Columbia
Colorado
Darden
Dartmouth Tuck
Duke Fuqua
Emory
George Washington
Georgetown
Georgia Tech
University of Georgia
HBS
Iowa
IU Kelley
Johns Hopkins
Kellogg
Maryland
Michigan Ross
Michigan State
MIT
Minnesota
Notre Dame
NYU Stern
Ohio State
Olin WUSTL
Owen Vanderbilt
Pepperdine
Rice
Stanford
SMU
Temple
UT McCombs
Texas A&M
USC Marshall
UCLA Anderson
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UC Irvine
UNC Kenan-Flagler
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Richard Ivey School (UWO)
Queen's University
McGill University
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Cambridge Judge
Cass, Imperial
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HEC

Asia - Middle East

INSEAD Abu Dhabi
American University Cairo

Asia – Pacific Rim

INSEAD Singapore
National University Singapore
Hong Kong UST
CEIBS Shanghai

Learning objectives

- Define a roadmap on how to progress through the analytical process from planning to insight delivery.
- Apply the Crack the Case system to strategically dissect a business into its value drivers.
- Prioritize value drivers for each unique business situation.
- Create and interpret analytical charts.
- Develop and explain succinct insights to your client.

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WB 1

1, 4, 9, 16, 25, 36, 49

* Content credit, Roger von Oech, A Whack on the Side of the Head

Candy canes
Fireworks
Easter eggs
Shamrocks
Cupid

* Content credit, Roger von Oech, A Whack on the Side of the Head

A guy walks into a bar . . .

* Content credit, Roger von Oech, A Whack on the Side of the Head

There are two types of people in this world

Those who divide everything into two groups, and those who don’t.

- Kenneth Boulding

WB 2

Sort and Match

Adult	Diffuse	Generalization	Play
Ambiguity	Direct	Humor	Precision
Analysis	Dream	Hunch	Reality
Approximate	Exact	Logic	Reason
Child	Fantasy	Metaphor	Specific
Consistency	Focused	Paradox	Work

Soft

Hard

* Content credit, Roger von Oech, A Whack on the Side of the Head

WB 2

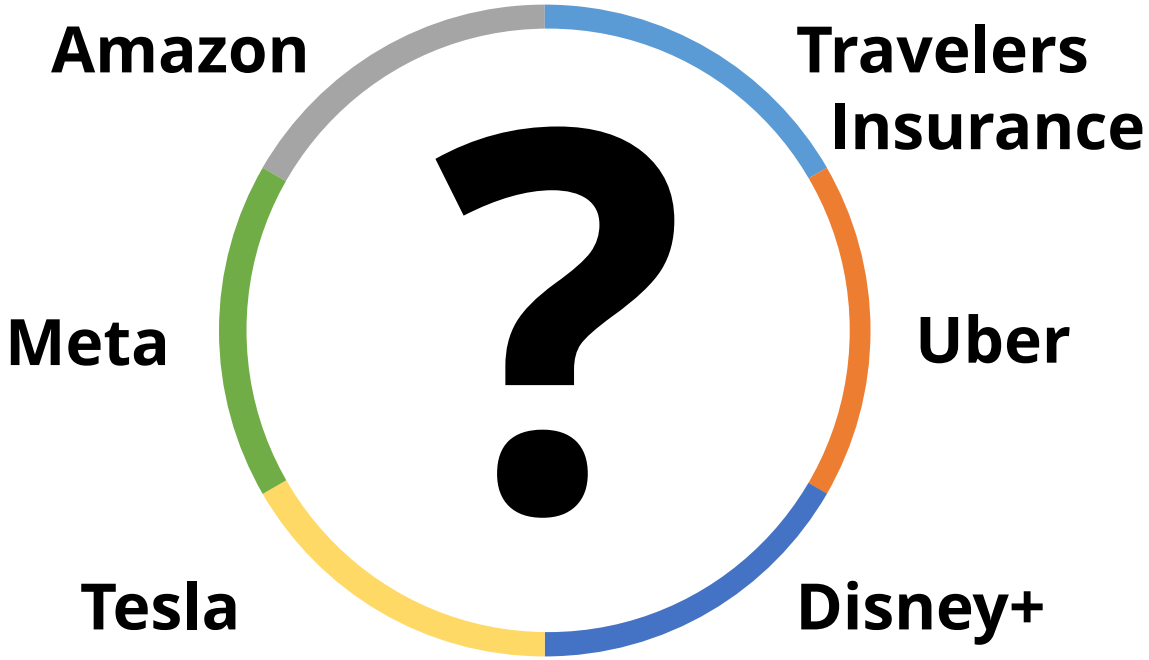
Thinking

Soft	Hard
Metaphor	Logic
Dream	Reason
Humor	Precision
Ambiguity	Consistency
Play	Work
Approximate	Exact
Fantasy	Reality
Paradox	Direct
Diffuse	Focused
Hunch	Analysis
Generalization	Specific
Child	Adult

* Content credit, Roger von Oech, A Whack on the Side of the Head

WB 3

What's your hunch? (For each situation)

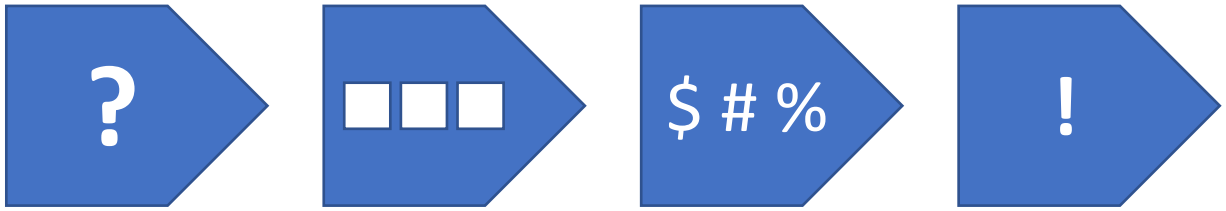


"Be more holistic"

"Think strategically"

"Deliver more value"

It's easy to get stuck delivering in the same manner

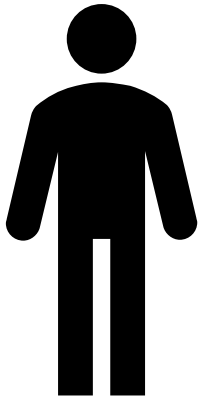


What's the problem?

How do I approach it?

What data do I need?

What's the answer?

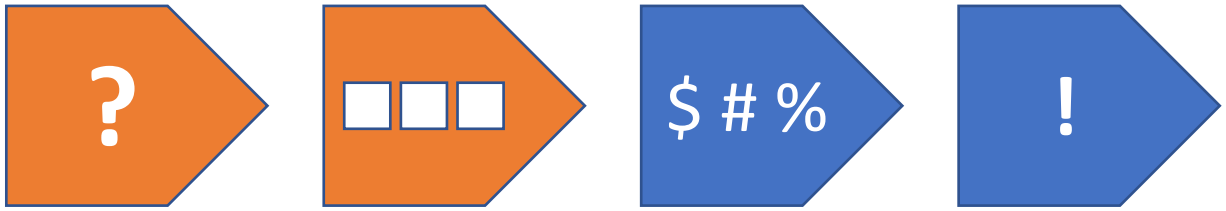


"Be more holistic"

"Think strategically"

"Deliver more value"

Soft and hard thinking together produces better results

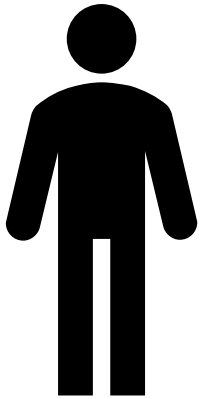


What's the problem?

How do I approach it?

What data do I need?

What's the answer?

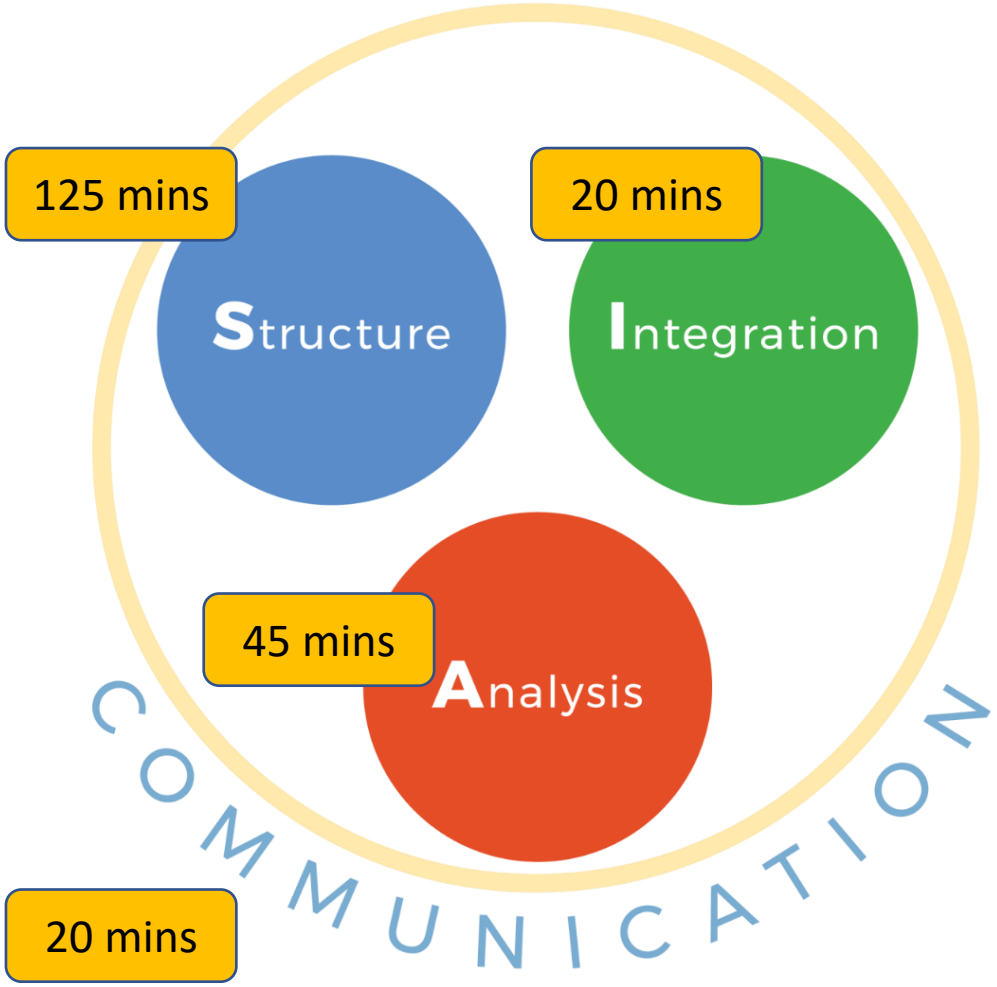


WB 4

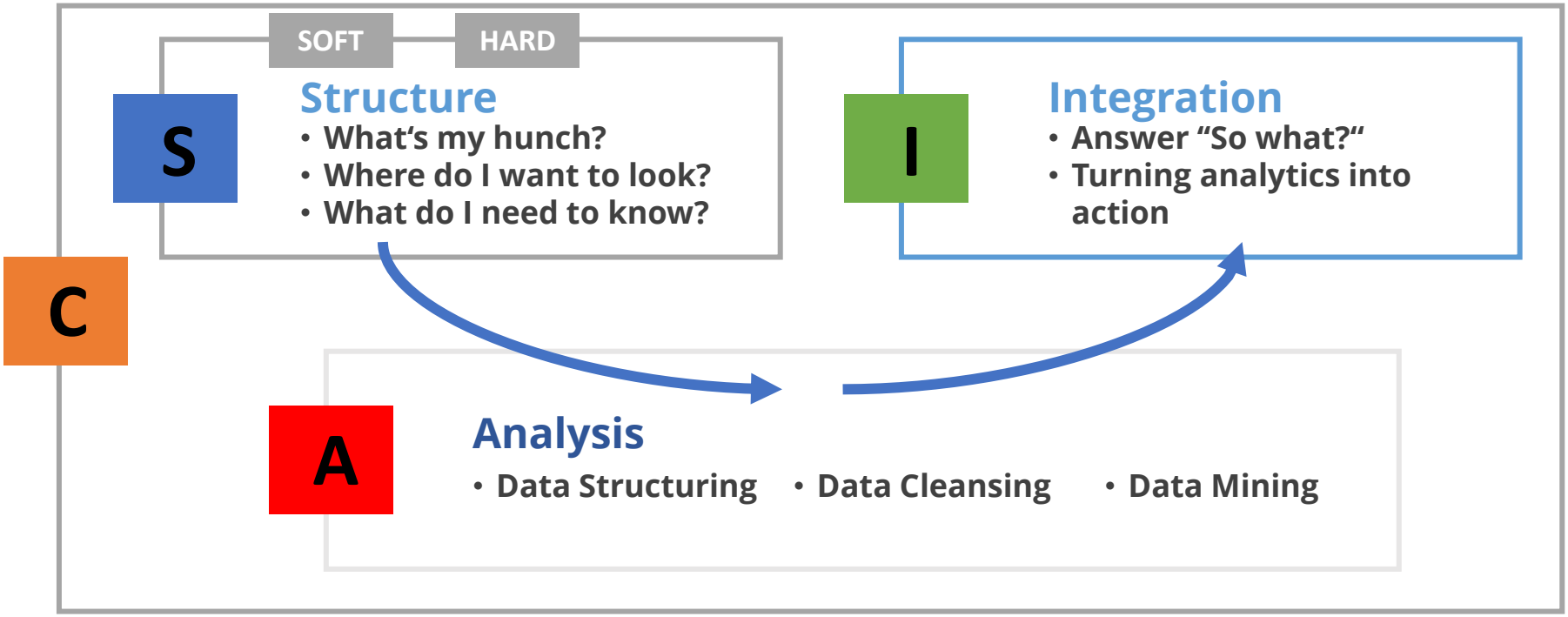
CSAI

We will use this flow to solve problems

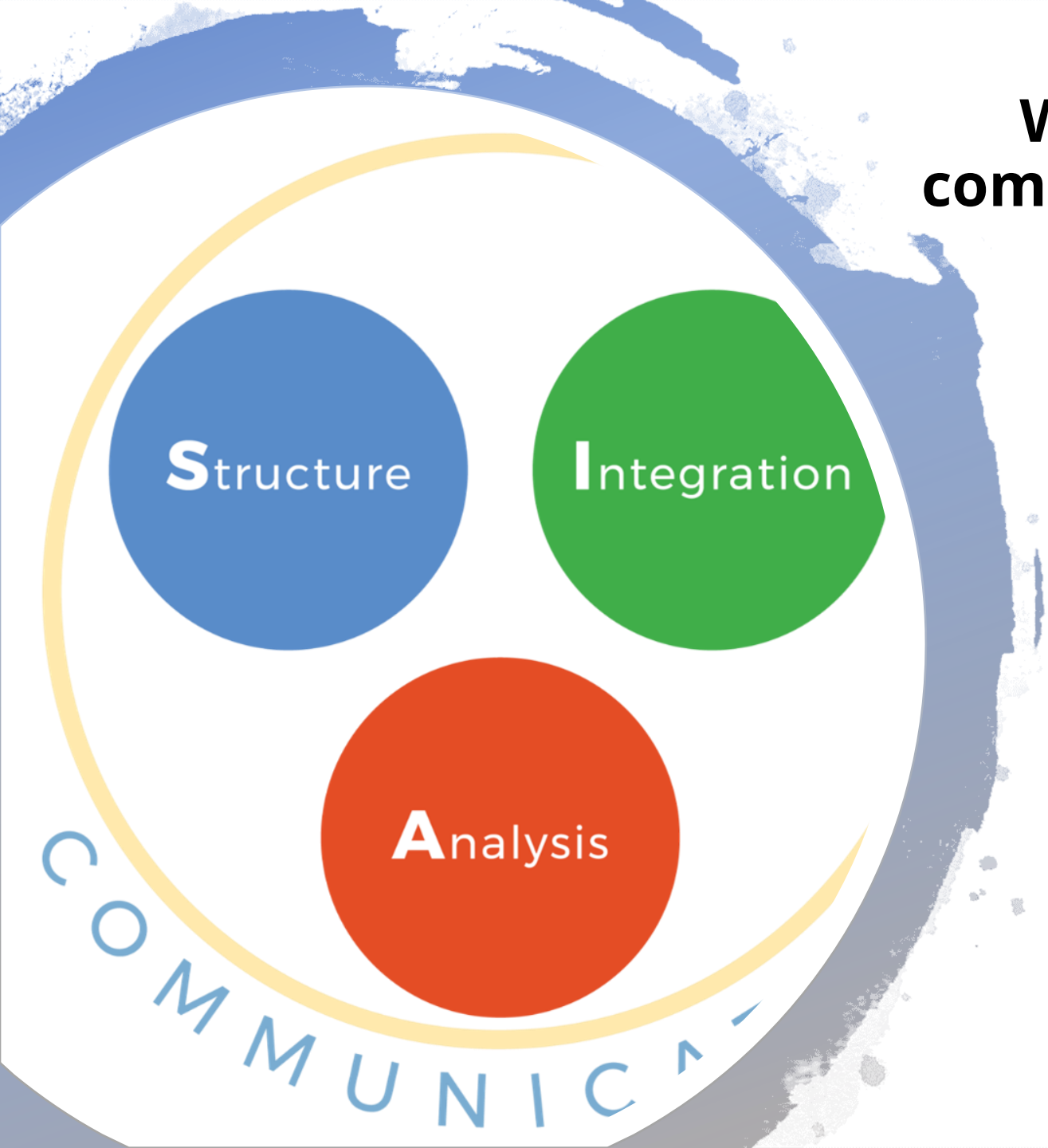
Using this approach will help you find insights quickly



Using CSAI to Solve Problems



What makes communication effective?



WB 5

Solo Exercise

Goldman Sachs

Goldman Sachs just announced they are laying off thousands of workers.

What do you want to know?

Quickly jot down seven questions.

WB 6

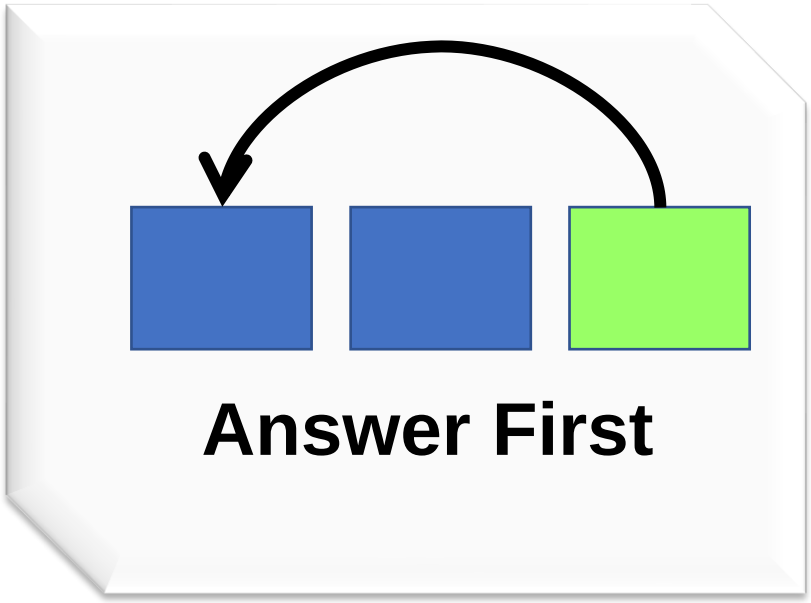
When were you extraordinary?

Let's hear about it.

- Take 3 mins.
- Jot down your bullets.
- Deliver the story to a partner.
- Ask a question.

Partner Exercise

Bring your main points to the front, in the order that matters most.



WB 7

What is structured thinking?

You need both parts to be effective

Structure - Focusing on the What

MVM Overview	Zone by Zone Exercises	Block, Break & Discuss
Understand the drivers of business	Practice thinking through each driver	Learn Block, Break, Discuss
Use the MVM, zone by zone	Work with partners and alone	Argue for a strategic decision

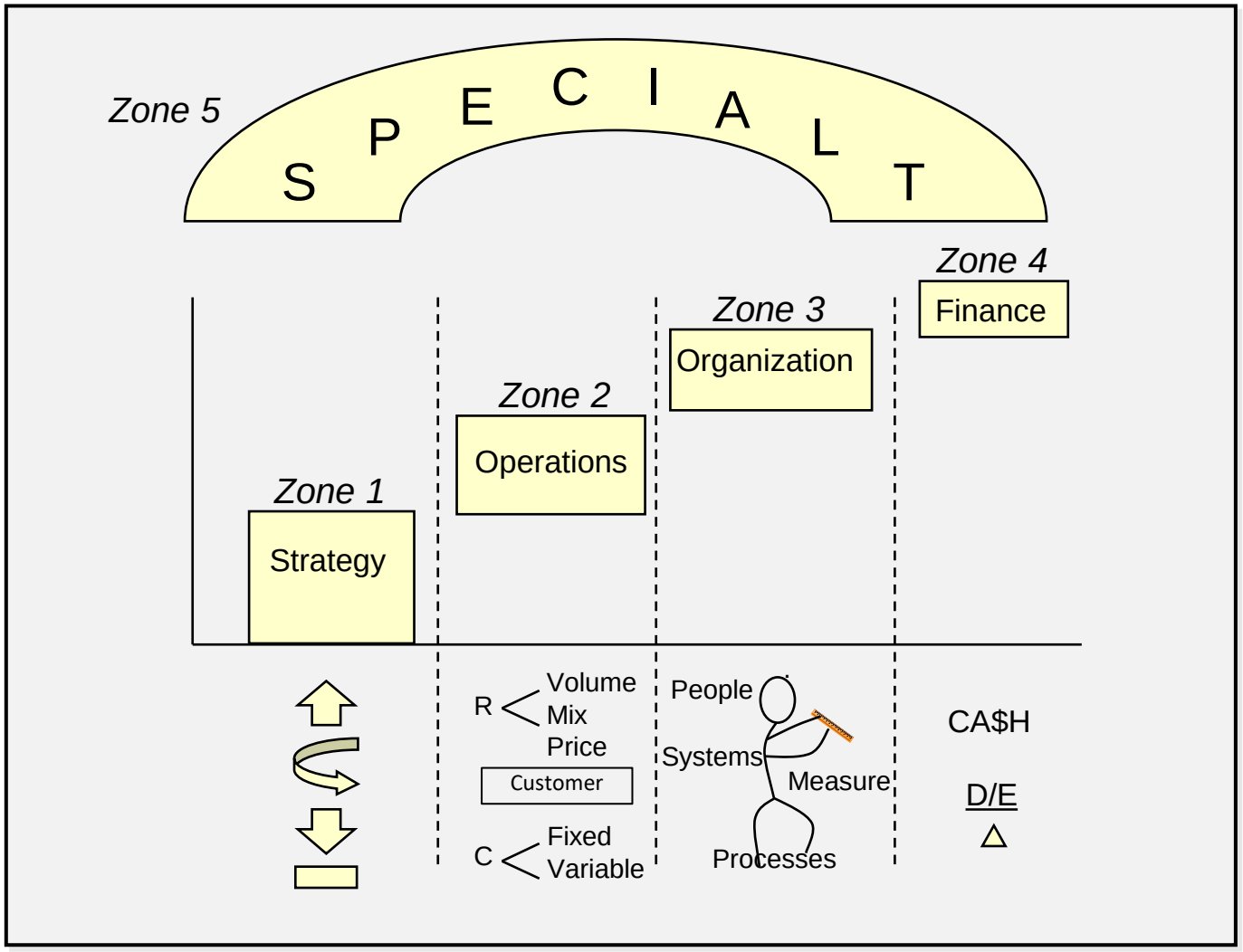
Break

What's your objective with every business problem?

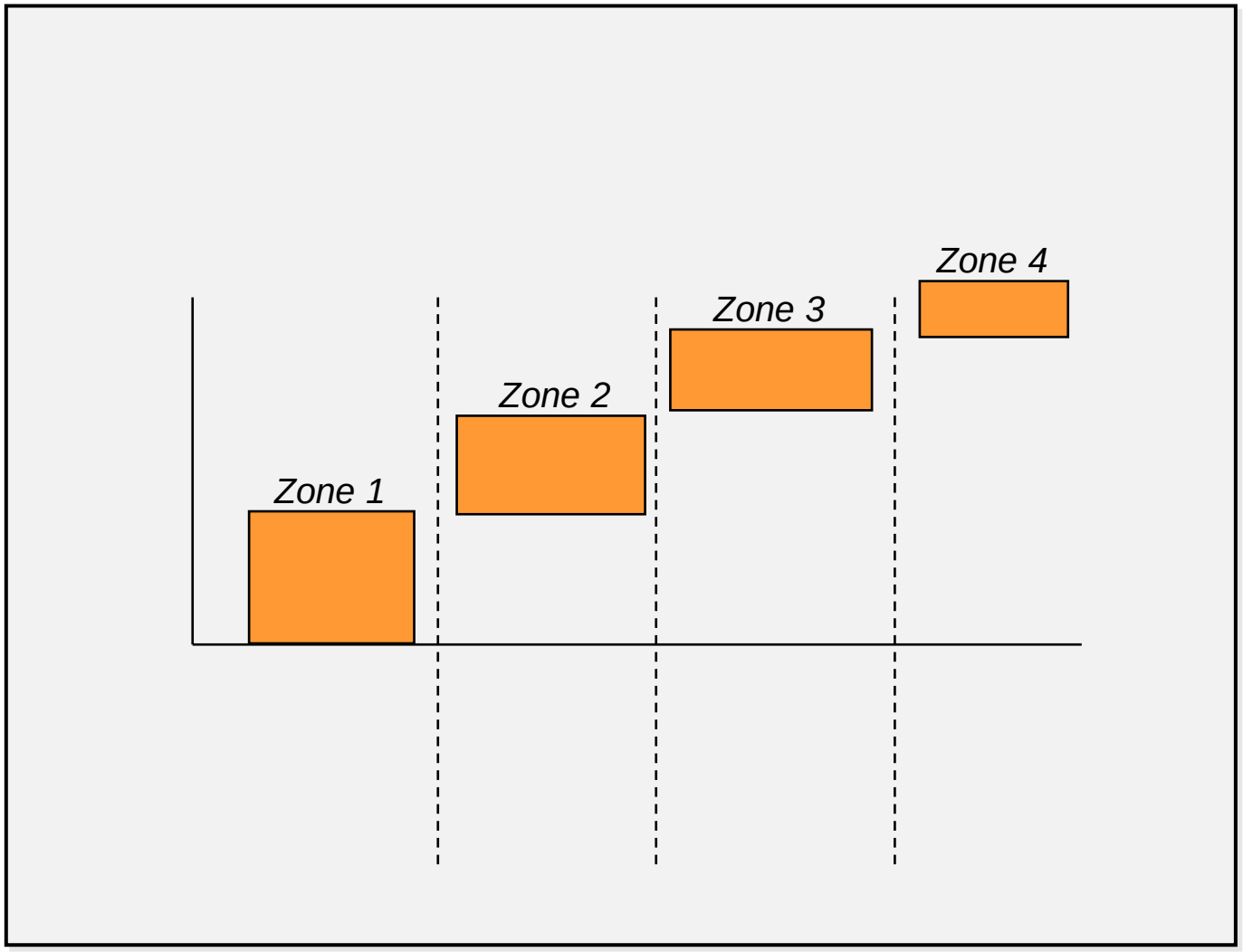
Maximize the Value of the Company

WB 8

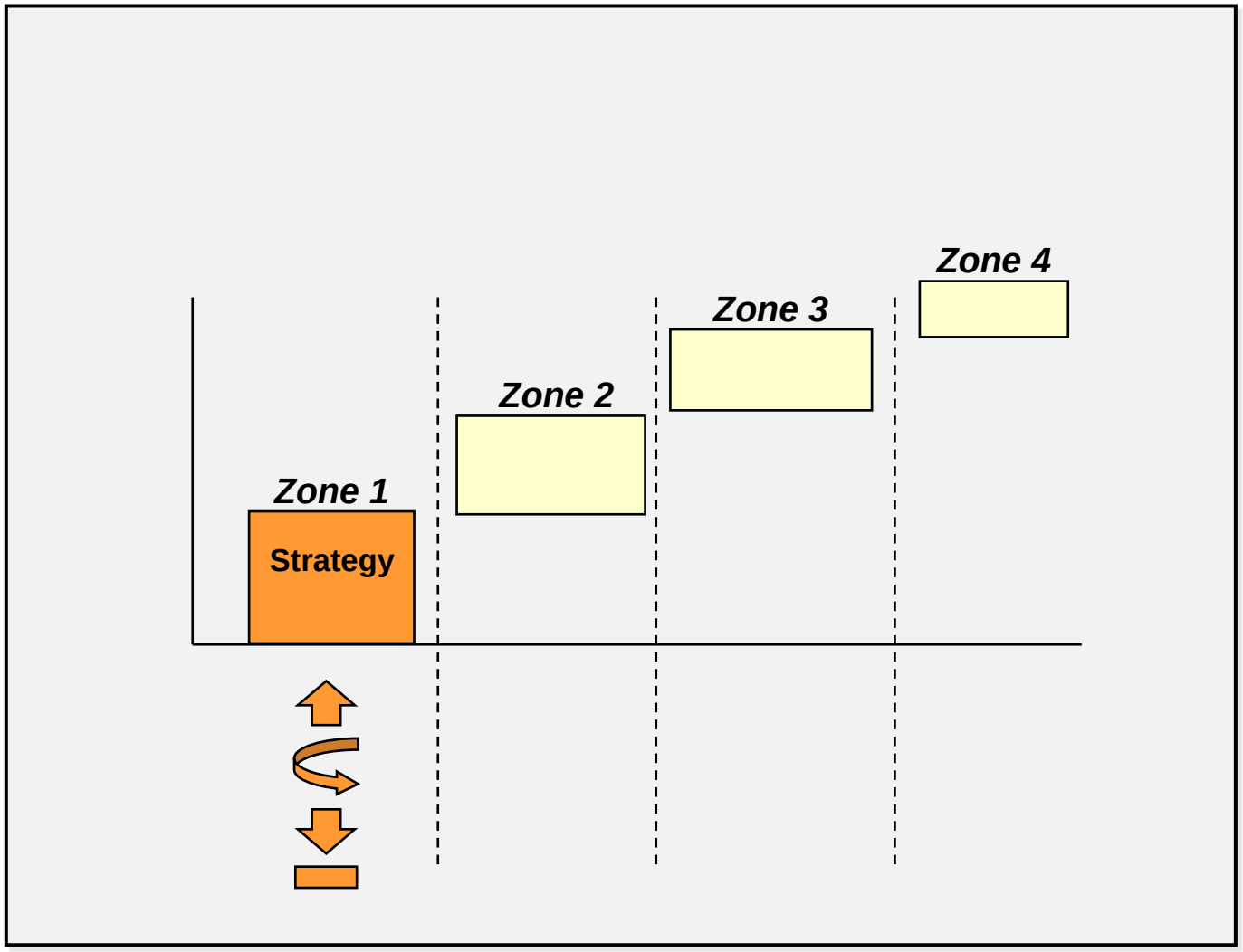
Think Zone by Zone



Waterfall – each zone adds value



Zone 1 - Strategy



WB 9

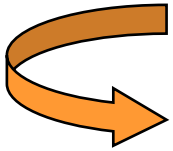
Zone 1 - Strategy

Expand

- Merge
- Acquire
- Joint Venture

Reduce

- Divest



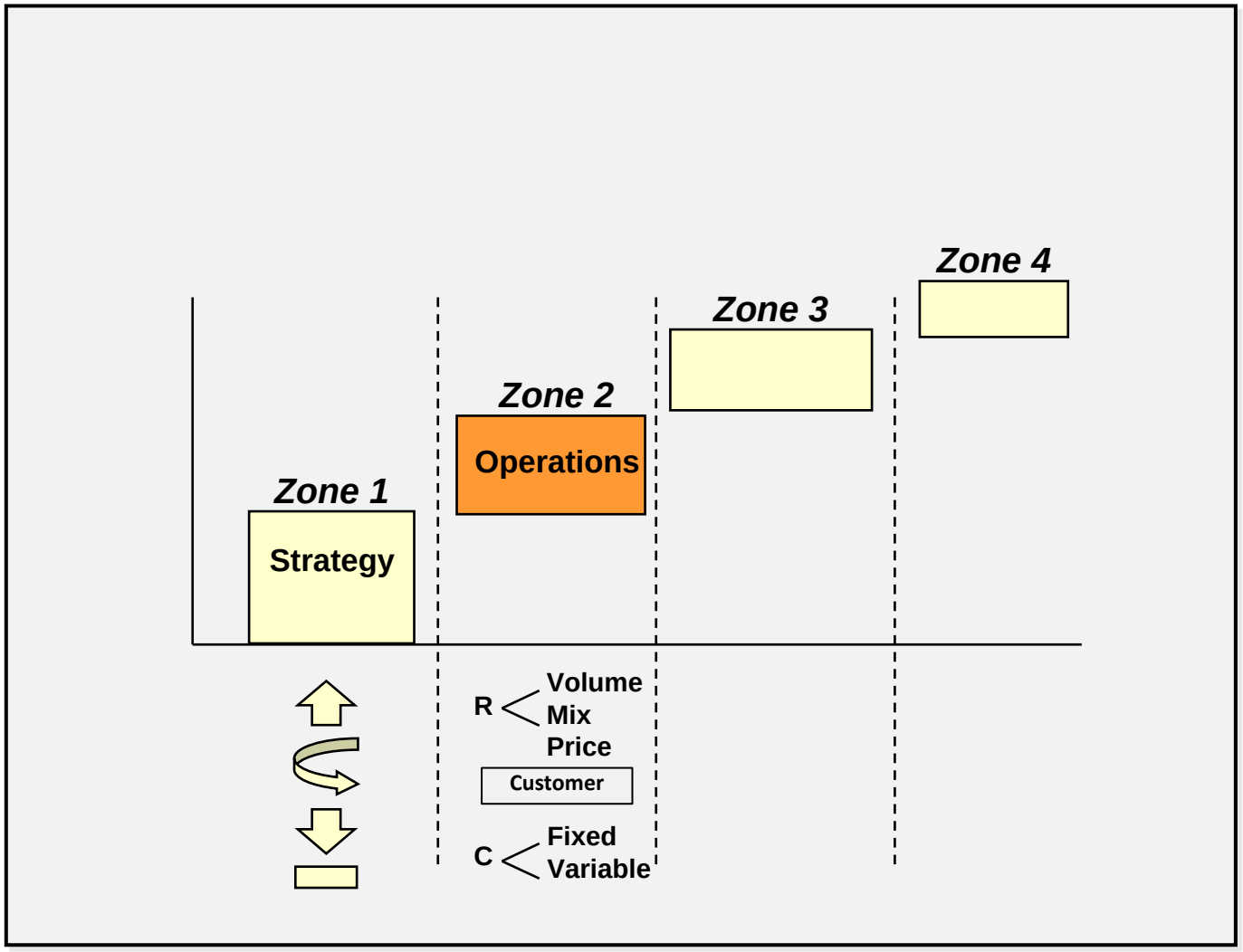
Change Direction

- Enter a New Market
- Exit a Market
- Develop and Sell New
- Reposition

Maintain

- Do Nothing

Zone 2 – Operations



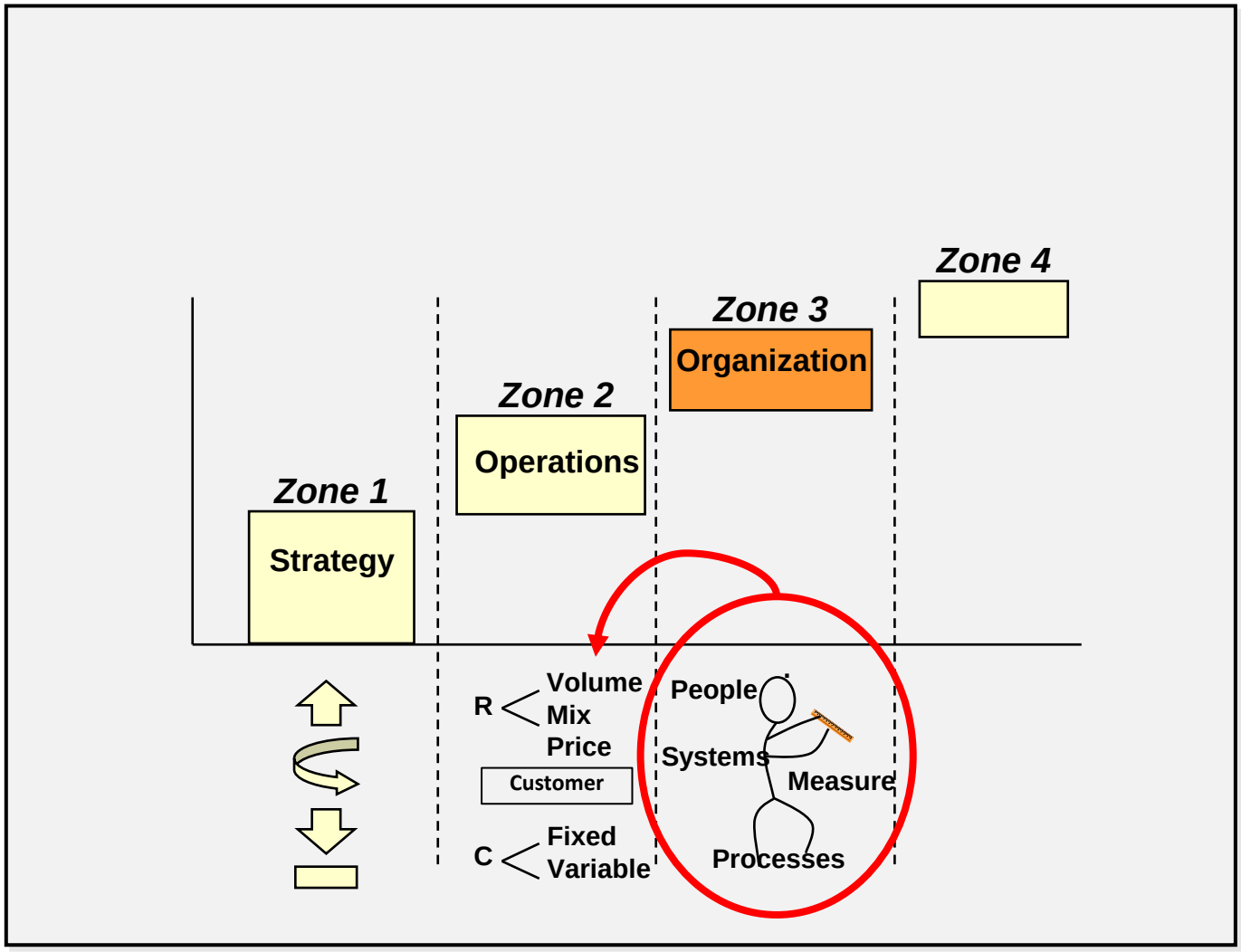
WB 10

Zone 2 – Operations

REVENUE - COSTS

Price	Volume	Reduce Costs	Customer
• Raise prices • Change your pricing matrix	• Keep customers • Increase share of wallet • Change the mix of volume • Acquire new customers • Develop new channels or use existing better	• Fixed costs • Variable costs	• Understand the customer • What do they want? • How do they impact our price, volume and costs?

Zone 3 – Organization

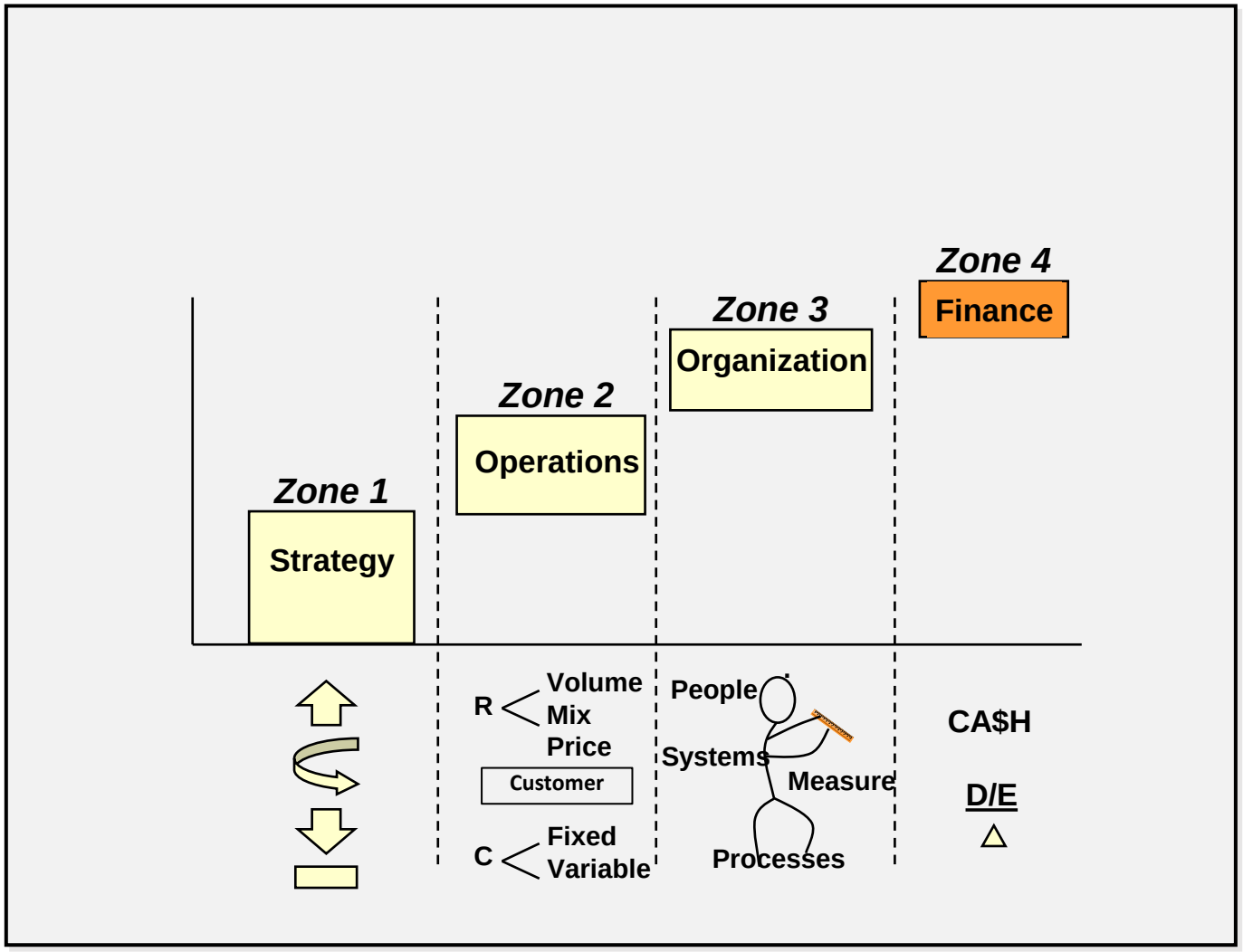


WB 11

Zone 3 – Organization

People	Processes	Information	Measure
• Build skills • Optimize compensation • Simplify the organization	• Improve quality • Focus on internal efficiency & supply • Focus on capabilities	• Upgrade information systems • Simplify and integrate • Automate	• Create and compare metrics

Zone 4 – Finance



WB 12

Zone 4 – Finance

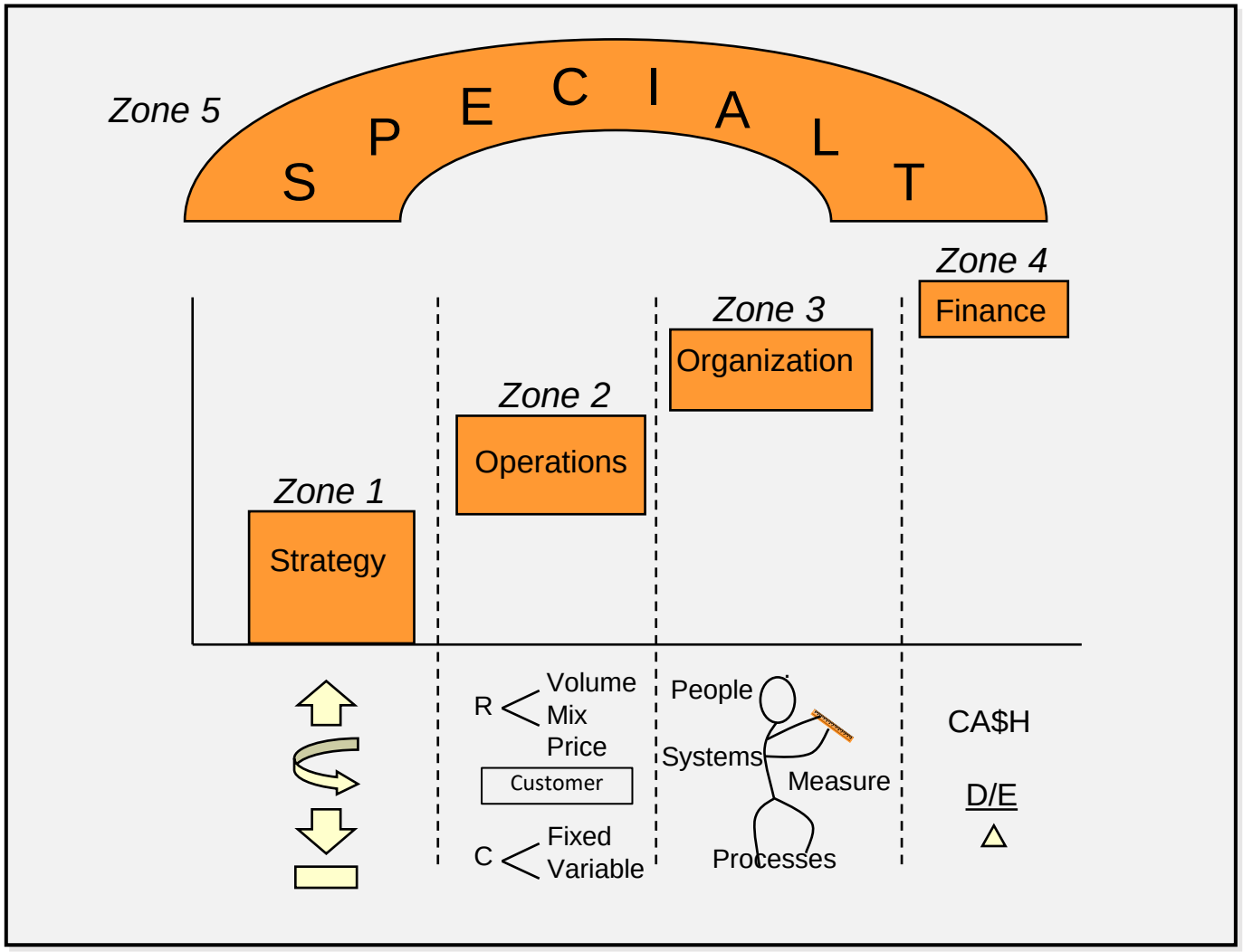
Cash is King	Balance of debt and equity
• Reduce inventory • Reduce receivables • Increase payables	• What is the right amount of each?

WB 13

Zone 5 – External Forces

Suppliers	Technology
People	Legal
Economy	Auditing
Competitors	Industry

Maximum Value Model (MVM™)



Structure - Focusing on the What

MVM Overview

- Understand the drivers of business
- Use the MVM as a reference tool

Zone by Zone Exercises

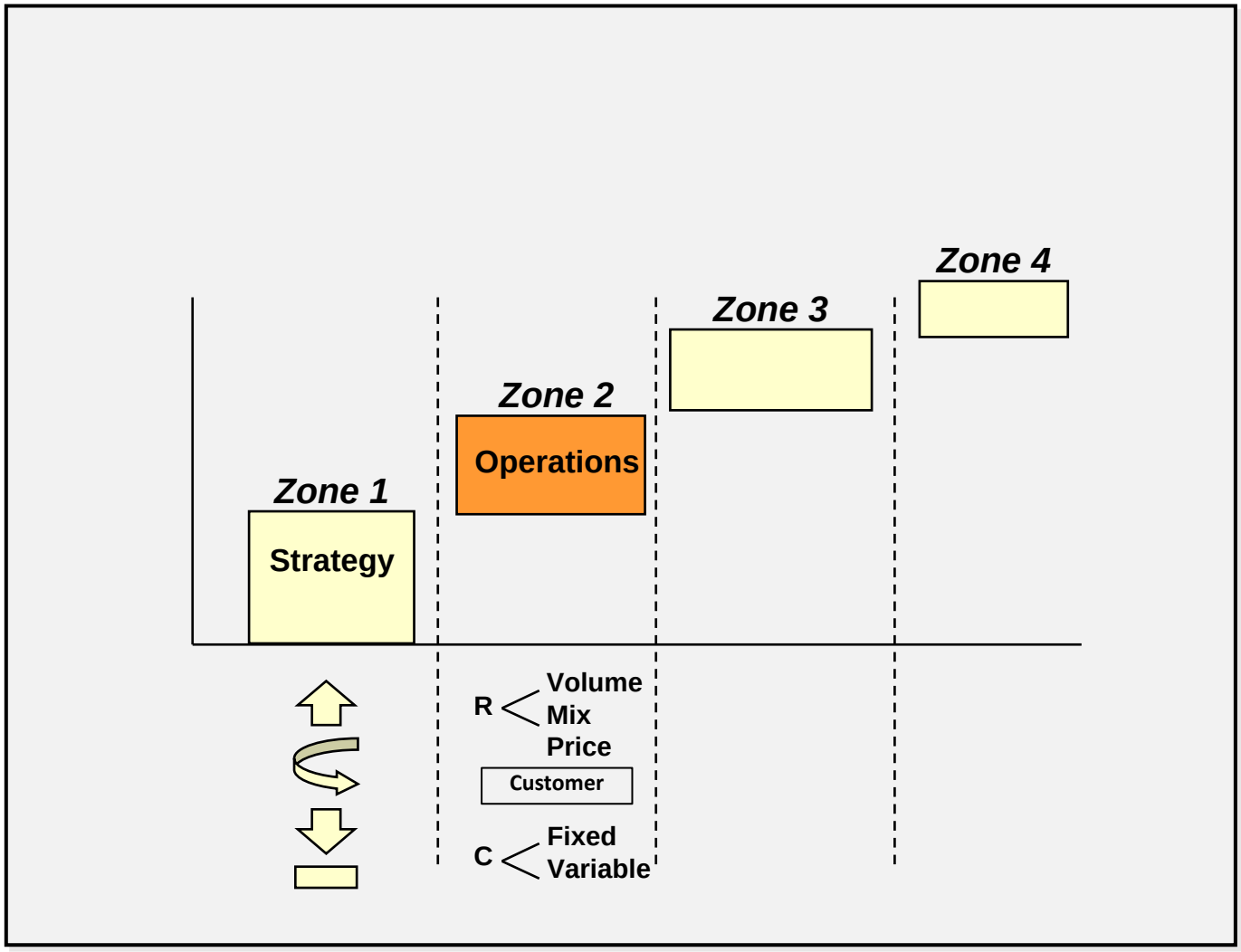
- Practice thinking through each driver
- Work with partners and alone

Block, Break & Discuss

- Learn Block, Break, Discuss
- Argue a Strategic Decision

Break

Zone 2 – Operations



Zone 2 – Operations

REVENUE - COSTS

Price	Volume	Reduce Costs	Customer
• Raise prices • Change your pricing matrix	• Keep customers • Increase share of wallet • Change the mix of volume • Acquire new customers • Develop new channels or use existing better	• Fixed costs • Variable costs	• Understand the customer

WB 14

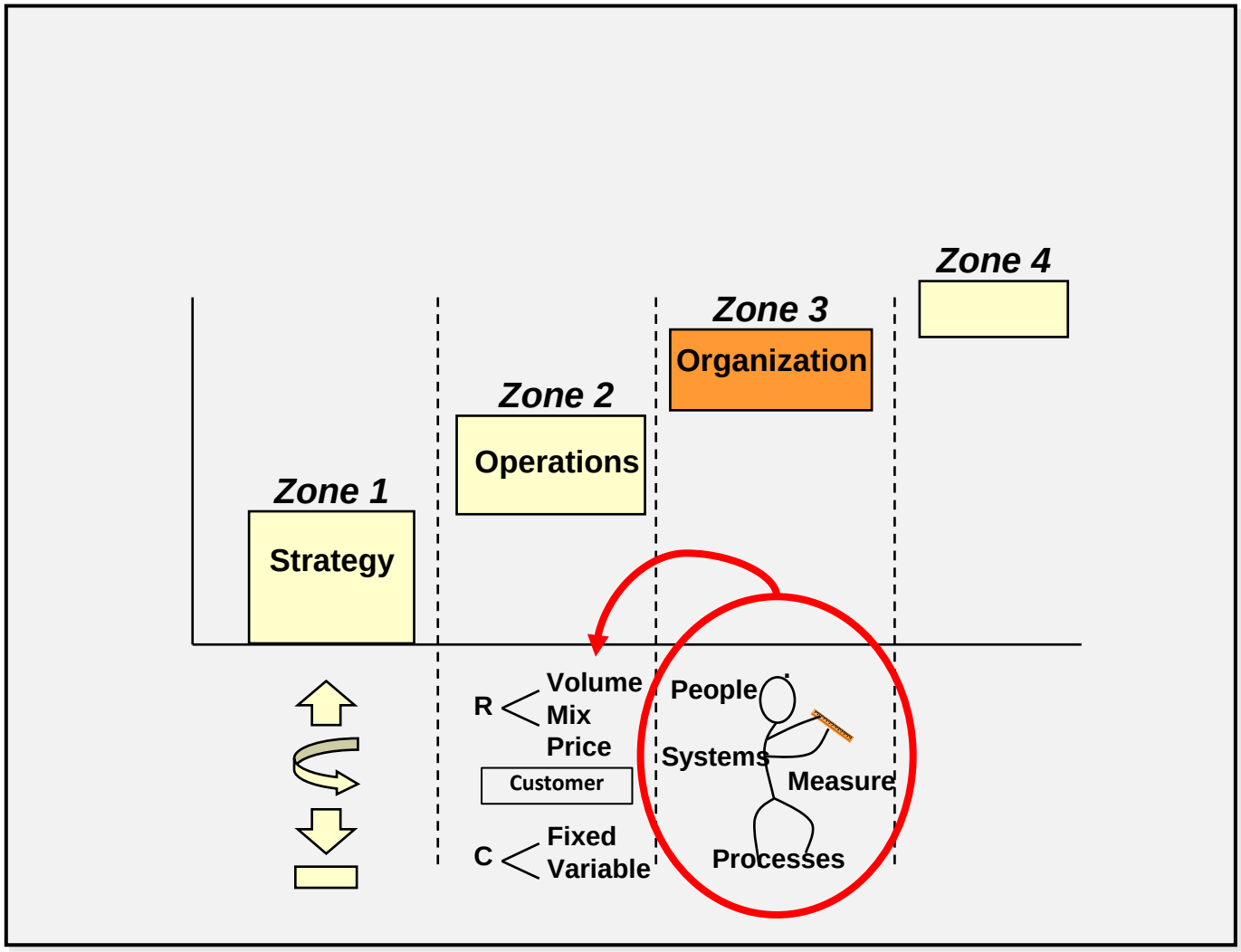
Zone 2 – Operations Exercise

Partner Exercise

- Form teams of 2
- Profit is DOWN for some scenarios and UP for others. What do you think is causing the problem?
- Have explanations for at least 2 variables.

DOWN	UP
• Local Mall • Starbucks (in city) • Caterpillar Equip. • Gas Station with Mini Mart	• Amazon • Local Grocery Store • Large Cable Television Provider • Electricity Provider

Zone 3 – Organization



Zone 3 - Organization

Price x Volume – (Fixed + Variable Costs) = PROFIT

People	Processes	Information Systems	Measure
• Build skills • Optimize compensation • Simplify the organization	• Improve quality • Focus on internal efficiency & supply • Focus on capabilities	• Upgrade information systems • Simplify and integrate • Automate	• Create and compare metrics

WB 15

Zone 3 – Organization Exercise

Partner Exercise

- Form teams of 2
- Tie each element back to the profit drivers: price, volume, fixed cost and variable cost. Identify which organization element is changing and how it might have an impact on profit.
- Be ready to explain to management the pros and cons of the new decision.

WB 15

Zone 3 – Organization Exercise

United and Continental airlines merge all of their pilots, flight attendants and ground crew.

Del Monte is installing a new, pineapple canning system in half of their plants.

Eli Lilly Pharmaceutical has just installed a new "Pharma Tab", a tablet software for their sales reps.

Budget Rental just upgraded their handheld check-in devices their agents use for car returns.

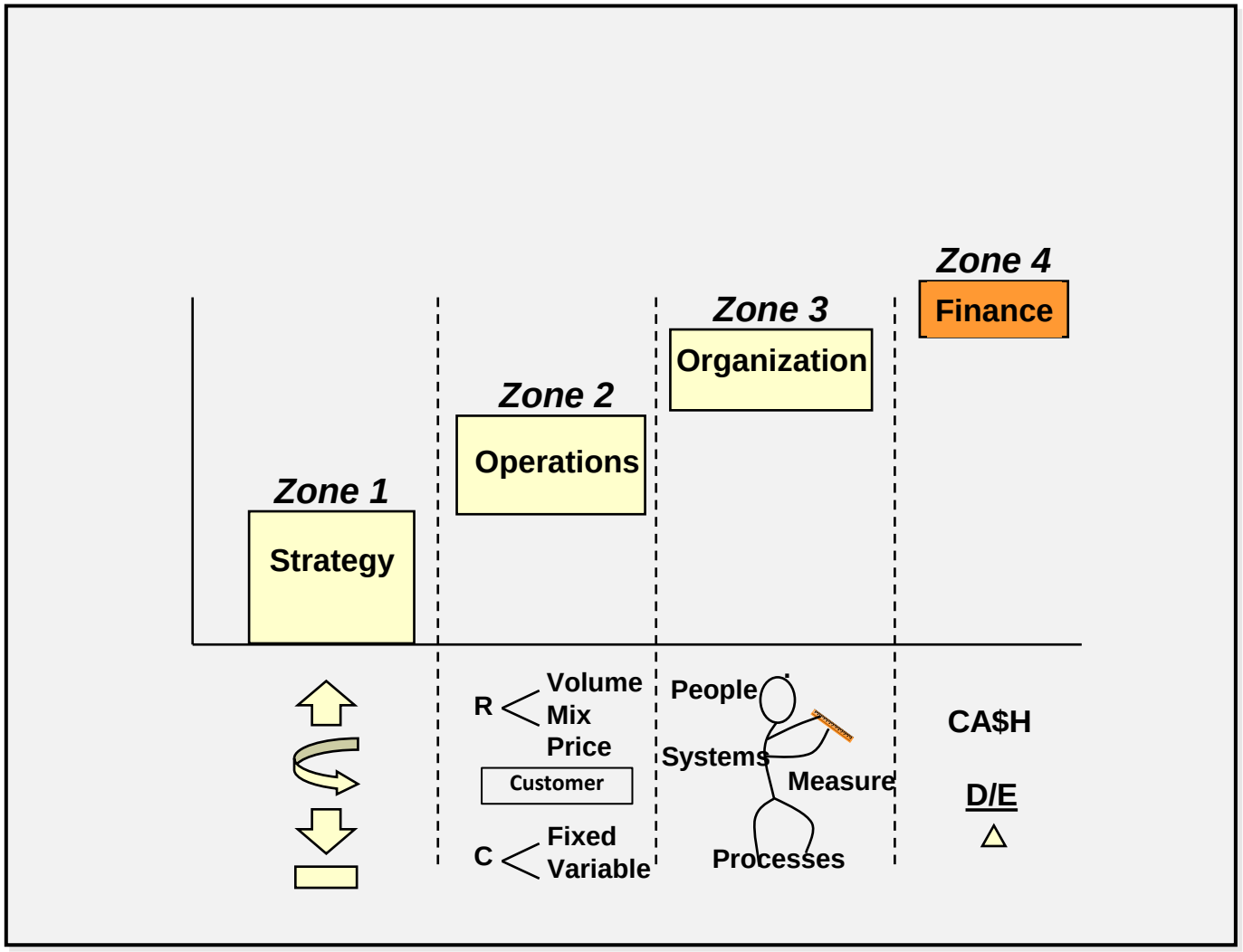
A Broadway theater decided to eliminate half of their stage hands.

Gready Cheady and Co. law firm no longer bills clients by receipt but charges a 20% of revenues flat fee.

Young & Fancy teen clothing store is now tracking rate of returns by customer.

Local authorities now require the movie theater to empty and sanitize their popcorn poppers every night.

Zone 4 – Finance



Zone 4 – Finance

Cash is King	Balance debt and equity
• Reduce inventory • Reduce receivables • Increase payables	• What is the right amount of each?

WB 16

Zone 4 – Finance Exercise

Partner Exercise

- **Partner Exercise**
- For each of the following situations on the next slide, write out the implications.
- What questions would you ask and what data would you want to find?

Zone 4 – Finance Exercise

- **Winery** - Our winery wants to reduce their excess inventory of wine bottles. What are the risks?
- **Luggage** - The local luggage store in the mall wonders if they are carrying too much inventory. What would you talk to them about?
- **Accounting** - Your friend's accounting business is experiencing cash flow issues. He services small businesses. What are some things you would talk to him about?
- **Designer Store** – Dress Divine is in the process of renewing supplier contracts. The owner has run a successful high-end dress business importing gowns from all over the world. What do you advise?
- **HVAC –** Sonny is finally striking out on his own with a heating and air conditioning small business. How would you counsel him?

15 Minute Break

Zone 5 – External Forces

Suppliers

Public

Economy

Competitors

Technology

Legal

Auditing

Industry

WB 17

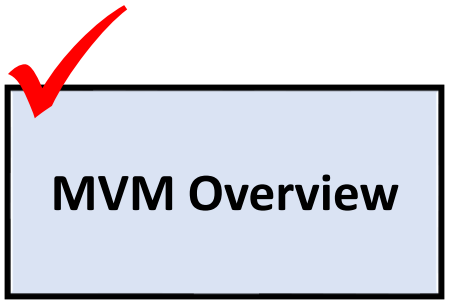
Zone 5 – External Forces

Partner Exercise

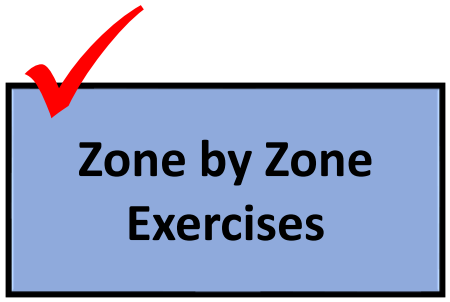
Which external forces would be involved in the following corporate actions? For each external force explain the full impact it may have on the business. There may be several impacts for each one.

1. Nuhouse Construction wants to continue to build houses in the suburbs while expanding to building condos in the city.
2. Nike is thinking about entering Malaysia.
3. Tim Horton's (Canada) wants to launch ice cream cakes.
4. Ford Motor company is thinking about raising the standard price on its 4-wheel drive vehicles.
5. PowerTap makes cables for the iPhone. They now must suddenly phase them out with the newer models.

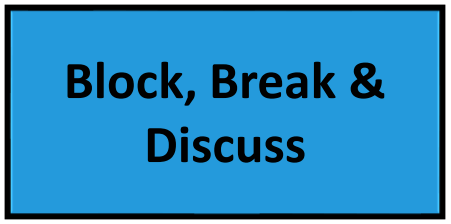
Structure – Moving to the What



- Understand the drivers of business
- Use the MVM as a reference tool



- Practice thinking through each driver
- Work with partners and alone



- Learn Block, Break, Discuss
- Argue a Strategic Decision

What do you think of UBER?

UBER Block, Break and Discuss

BLOCK

BREAK

DISCUSS

Better Customer Experience

Outside of the car

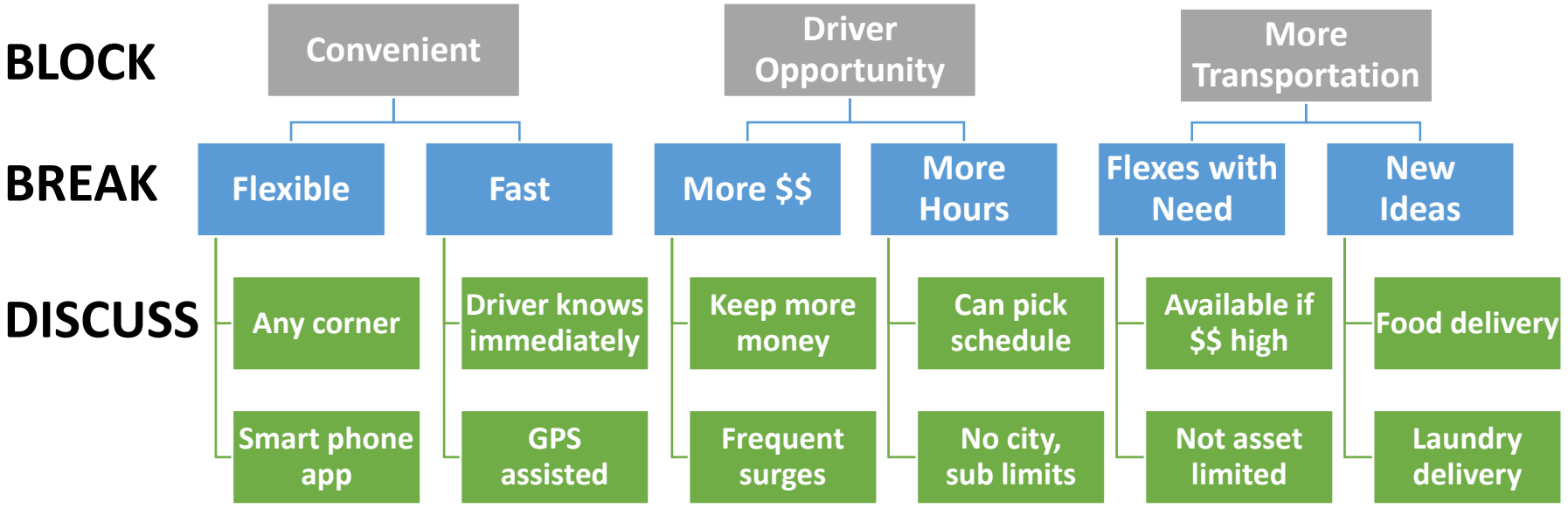
In the car

You can get a ride from any location using your smartphone.

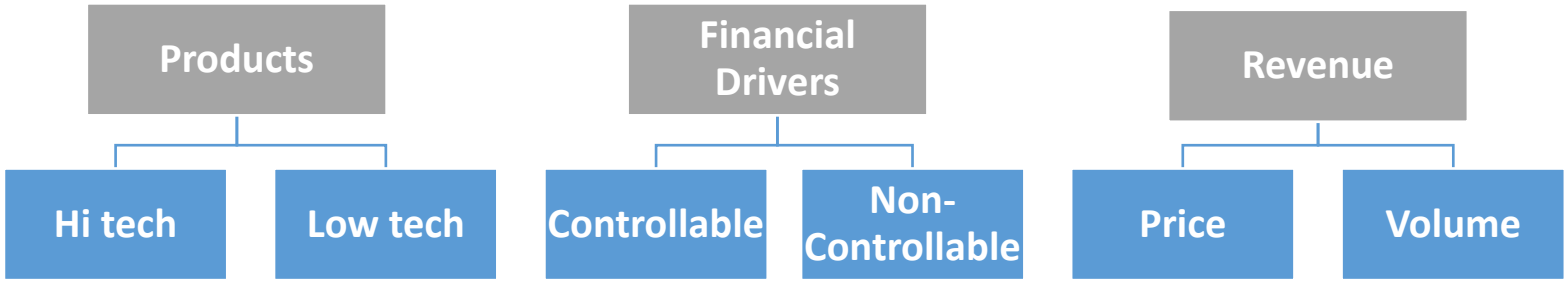
Competition has forced the drivers to try harder.

UBER Block, Break and Discuss

Hunch: "Uber is great for so many reasons"



Create clean breaks whenever possible MECE – mutually exclusive, collectively exhaustive



We should get a cat or dog!
We should <u>not</u> get a cat or dog!

Solo Exercise

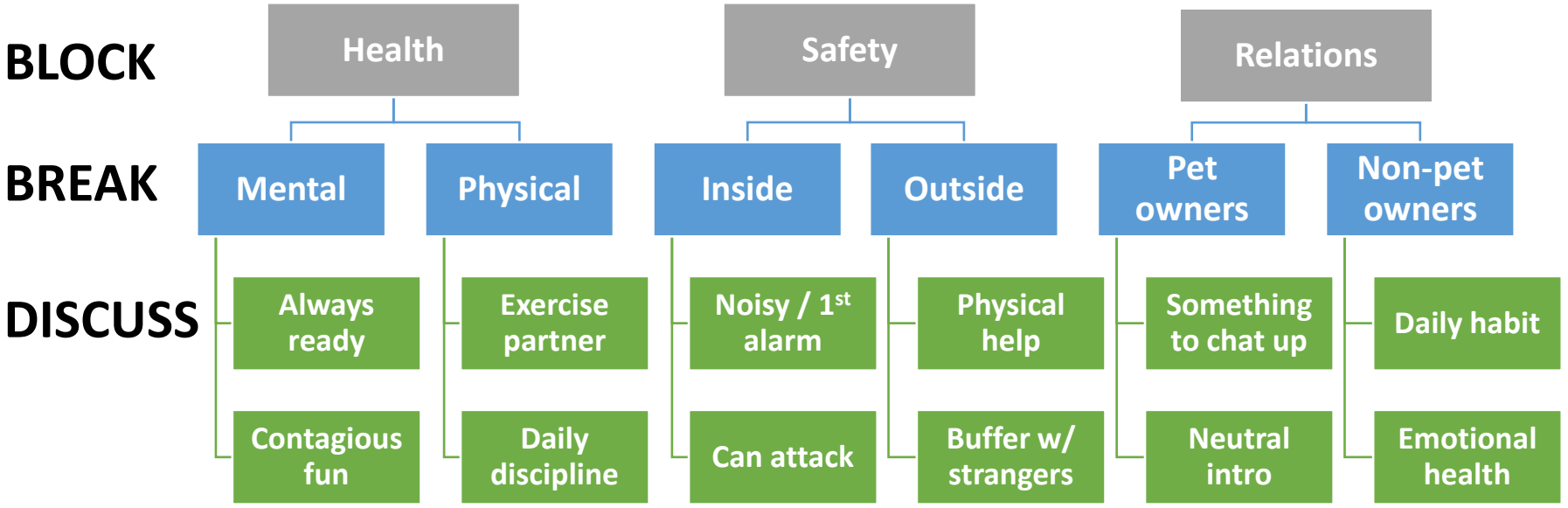
WB 18

Partner Exercise

- 3 minutes / Solo exercise
- Block out your main categories.
- Break your blocks into an “A” and a “B”.
  - Make sure they are as “clean” as possible.
  - It’s a good habit to be ready to show depth of thinking.
- Write out a support for each A and B.
  - These pieces may trigger a thought or question.
  - How can you add substance?
- Present persuasively to a partner (1 min each). Be Answer First by making your strongest point first.

About that pet . . .

Hunch: "We should definitely get a dog!"



Everyone should . . . .

- Watch more movies
- Learn how to play the piano
- Be a (favorite team) fan
- Skydive!
- Visit China
- Spend more time in the sun!
- Stop using plastic bottles
- Play an individual sport (e.g. golf)
- Choose your own. What are you passionate about?

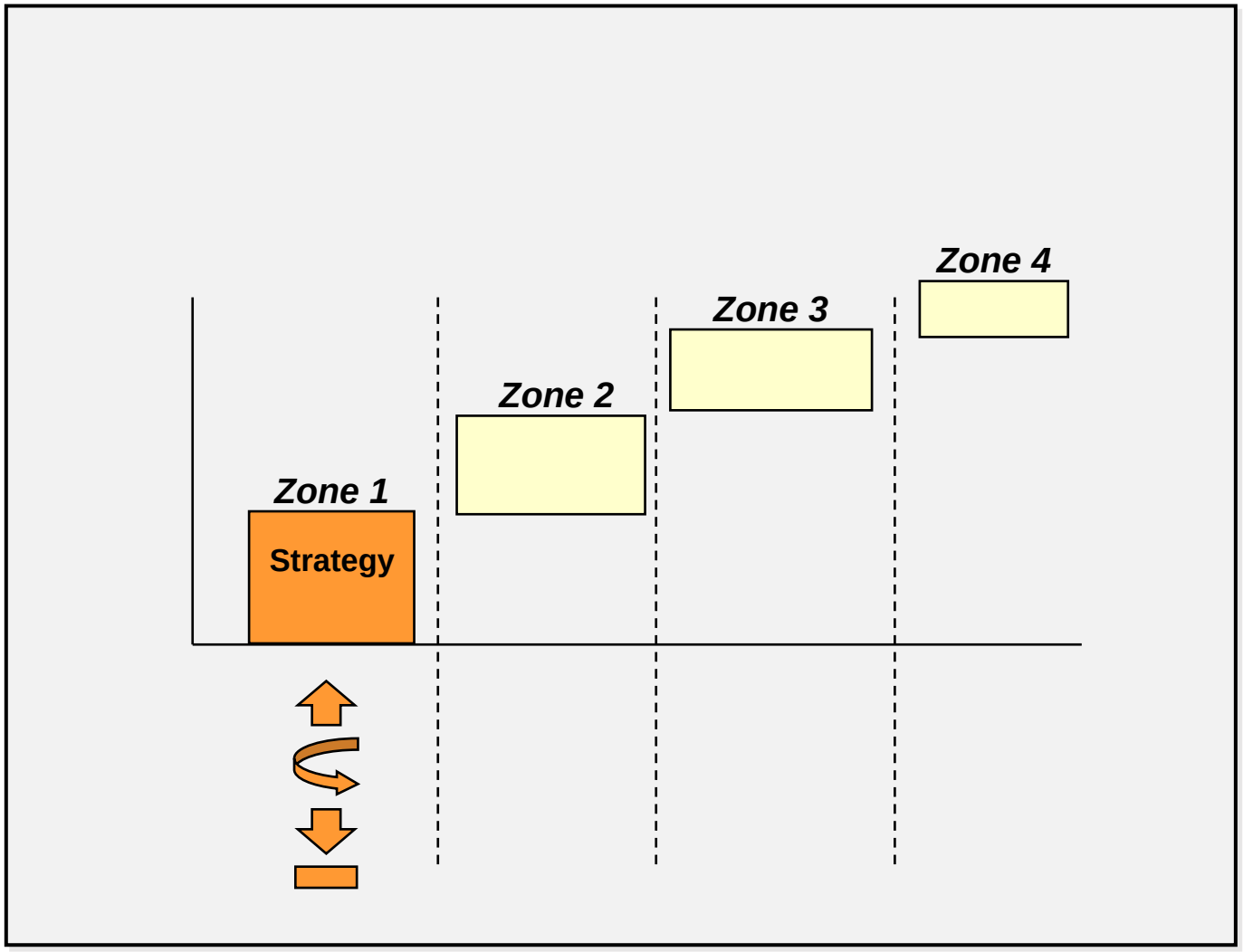
WB 19

Solo Exercise

Create a Block, Break & Discuss

- 3 minutes / Solo exercise.
- Block out your key categories.
- Write out a support for each A and B.
  - These pieces may trigger a thought or question.
  - How can you add substance?
- Be ready to share.

Zone 1 - Strategy



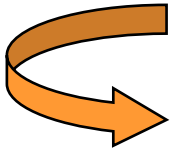
Zone 1 - Strategy

Expand

- Merge
- Acquire
- Joint Venture

Reduce

- Divest



Change Direction

- Enter a New Market
- Exit a Market
- Develop and Sell New
- Reposition

Maintain

- Do Nothing

WB 20

Zone 1 – Strategy Exercise

Team Exercise

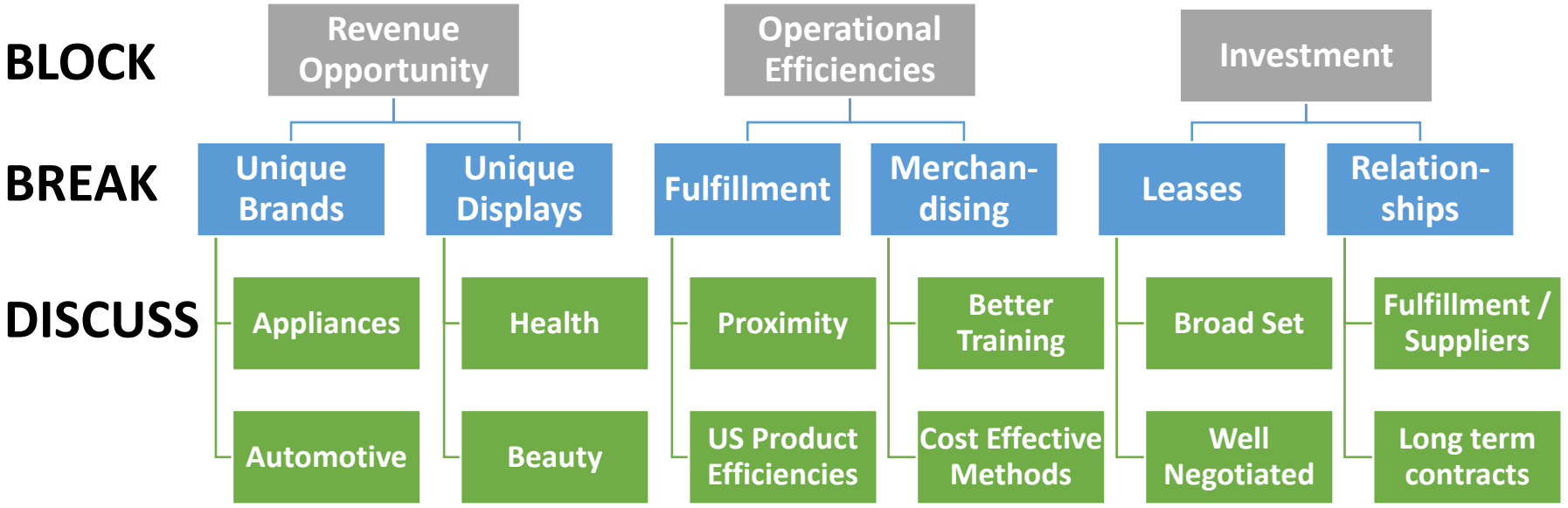
- Break into teams of 3 people. 15 minute exercise.
- Find an example company that took a listed action.
- Create a Block, Break & Discuss arguing for a different path.
- Find these through Google or your experience (last 24 mos.)
- Be ready to present your ideas.

Team A	Team B	Team C	Team D
• Merge • Enter a New Market • Do Nothing	• Acquire • Exit a Market • Do Nothing	• Joint Venture • Develop & Sell New Products • Do Nothing	• Exit • Reposition the Company's Brand • Do Nothing

TARGET in Canada

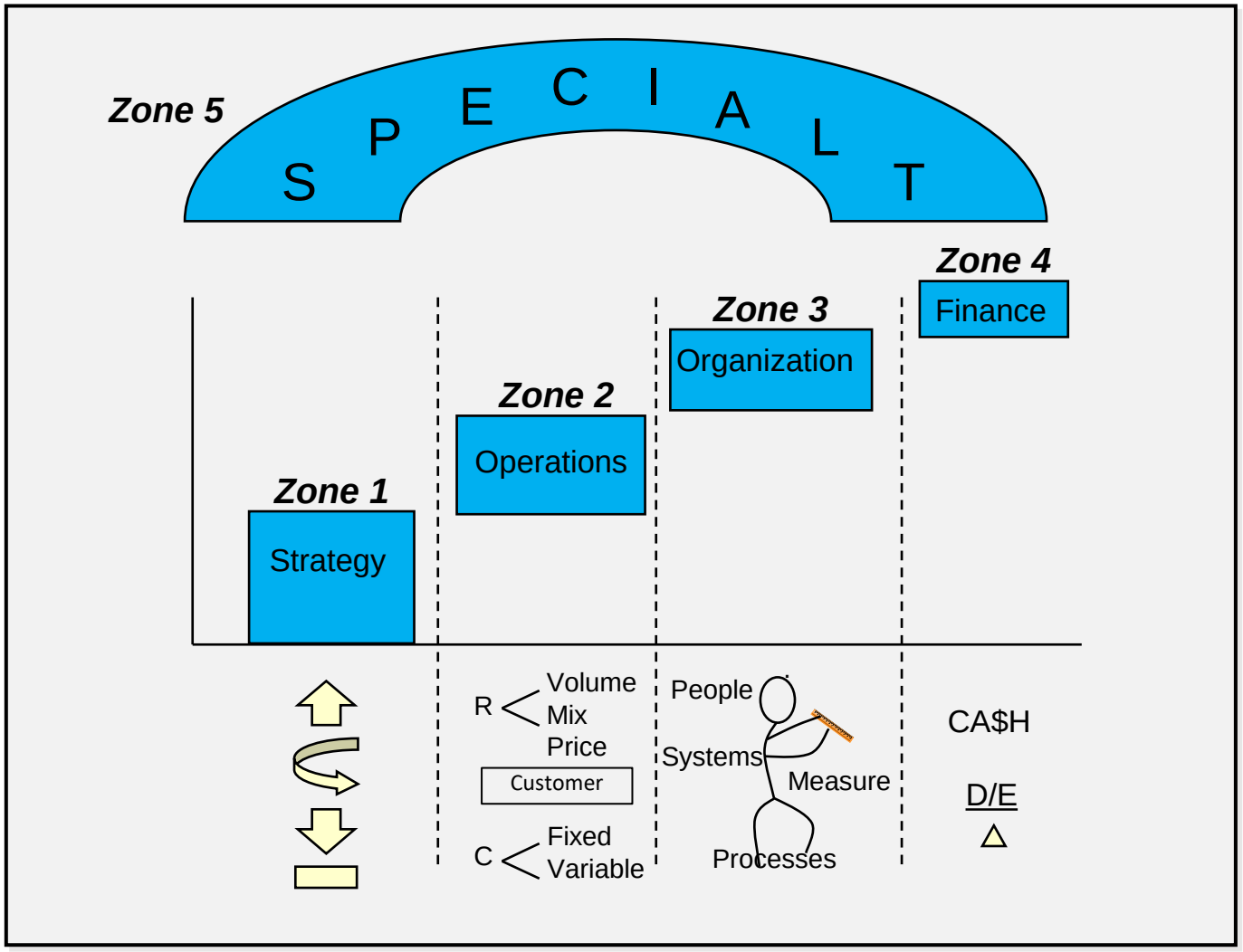
Example

Hypothesis: “Target should have stayed in Canada.”



Maximum Value Model

You worked through each zone!



Structure & Analysis – Combining What & How

Connecting

- Learn zone to zone connecting questions
- Build holistic skills through practice

Prioritizing the Analysis

- Create a Block, Break, & Ask to find key data
- Use your BBA to prioritize your analysis

Applying to Real Examples

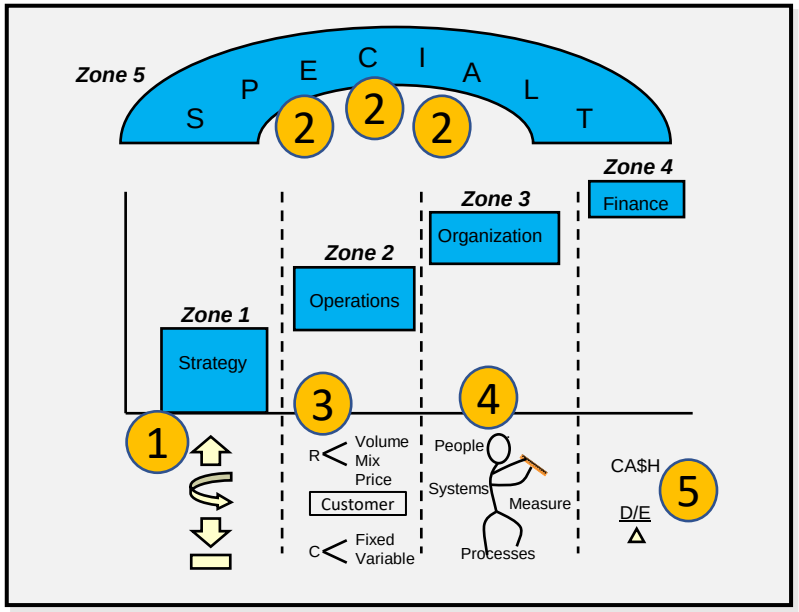
- Kahoot!
- Build a BBA for each scenario and look for data
- Reach a conclusion!

Connect the Zones Exercise

- Review each business action
- Think through common sense questions you'd want to ask
- Mark the zones you'd explore
- Participate and volunteer your thoughts

1 - Merge, Acquire, Joint Venture

WB 21



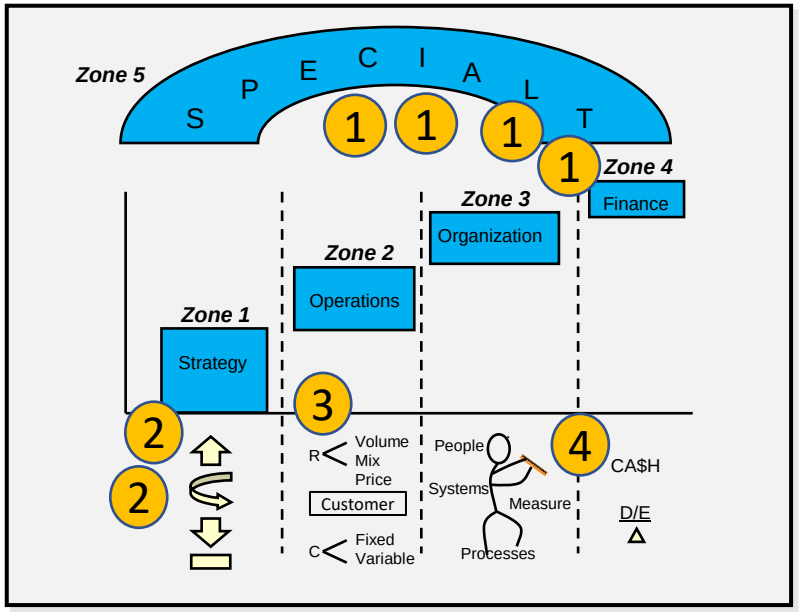
Scenarios

- **Two companies are merging.**
- **Target company is in the process of an acquisition.**
- **Target company is considering a joint venture.**

1. Target company is in growth mode.
2. Economy – right environ? Comp – are they responding? Ind – common now?
3. What are sales projections by product? What are customers expecting?
4. What integration challenges are there? Culture, role overlap, new roles.
5. What financing is planned? How does this position their debt structure?

2 - Growth Strategy

WB 22



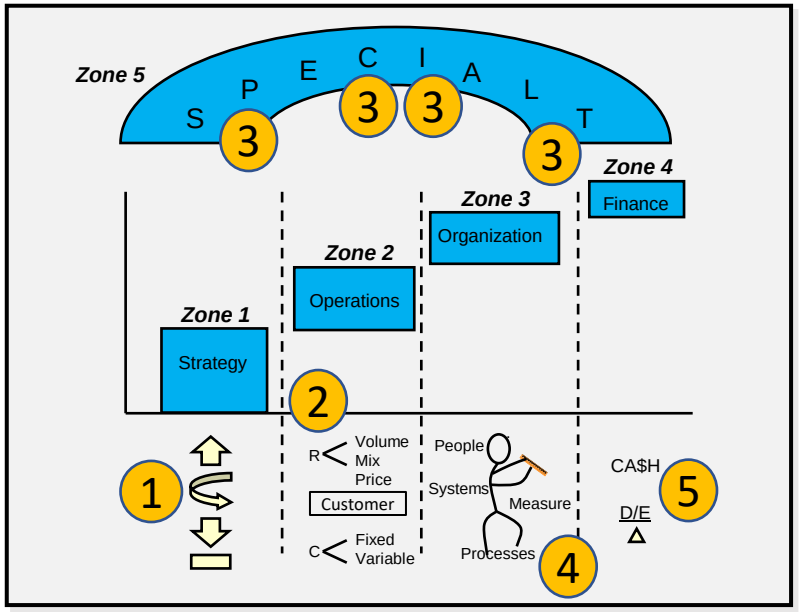
Scenarios

- **Two divisions need growth.**
- **Target wants to grow in their Japanese division.**
- **How would you assess this is feasible?**

1. Assess industry. Where's growth? Comp actions? Ind / legislative / tech shift?
2. How grow? Expand thru acquisition? Enter new markets? Dev new prod/serv?
3. What are sales projections by product and service?
4. What are the implications for funding and cash flow?

3 - New Business or Product

WB 23



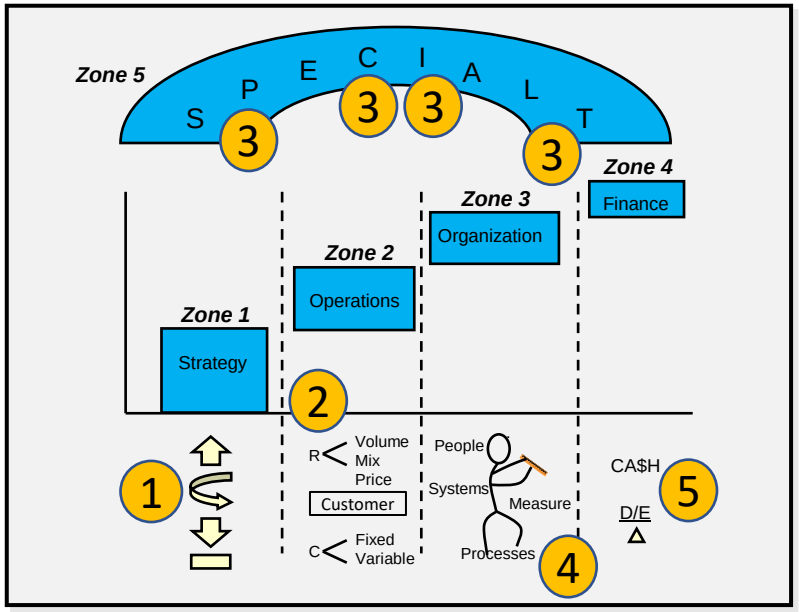
Scenarios

- **Target wants to launch a new product globally.**
- **Target is thinking about entering new prod categories.**
- **How would you assess their plans?**

1. Target company is shifting directions.
2. What are the initial pricing estimates? What volume needed to hit targets?
3. Supplies available? How compare to comp offer? Any ind or tech barriers?
4. Do we have the distribution channels in place? Production capabilities?
5. How will we finance these initiatives?

4 - Enter a New Geography or Market

WB 24



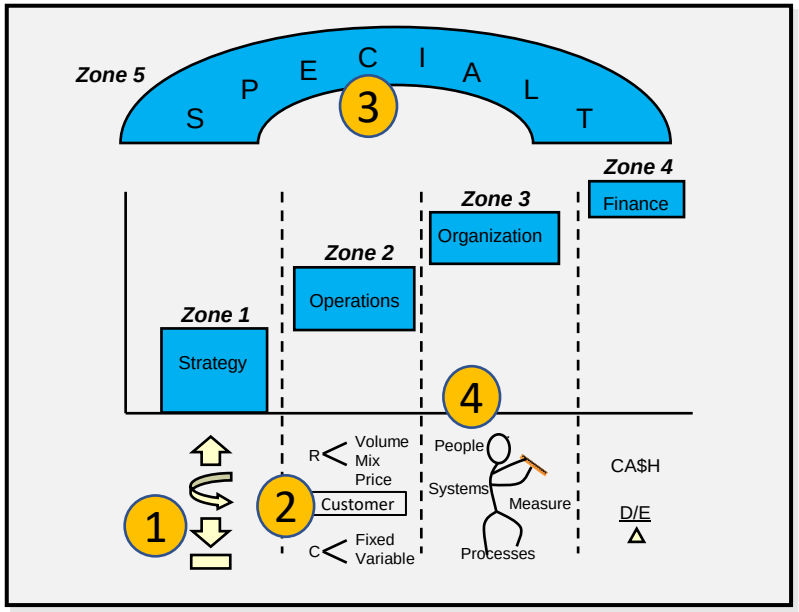
Scenarios

- **Should target continue with plan to take product to the EU?**
- **Target is expanding to TX and GA.**
- **How would you assess their plans?**

1. Target company is shifting directions by entering a new market.
2. What's demand? How build awareness? How much can we charge?
3. Enough raw materials? Prod compare to comp? Ind barriers in new market?
4. Do we have the people needed to develop, market and sell? Channels?
5. What will happen to the balance of debt and equity?

5 – Exit a Business or Market

WB 25



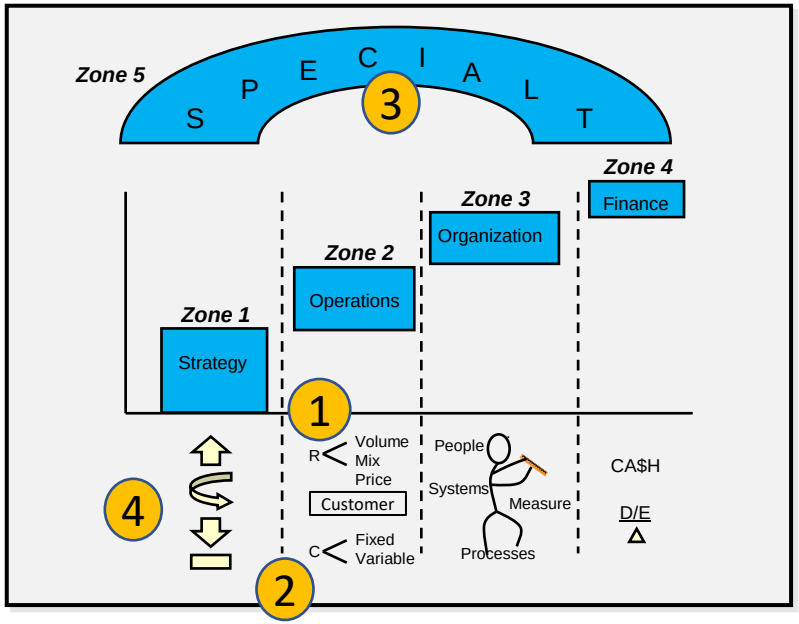
Scenarios

- **Should target spin off one branch of restaurants?**
- **Women's apparel line wants to exit the teen market.**
- **How would you assess if this action makes sense?**

1. Exit will impact costs and revenues greatly. Org ready?
2. Will the organization be able to remove costs quickly? Which categories?
3. How are competitors faring in similar prod / service categories?
4. What's the people impact? Headcount removal? Role and org redefinition?

6 – Maximize Profit

WB 26

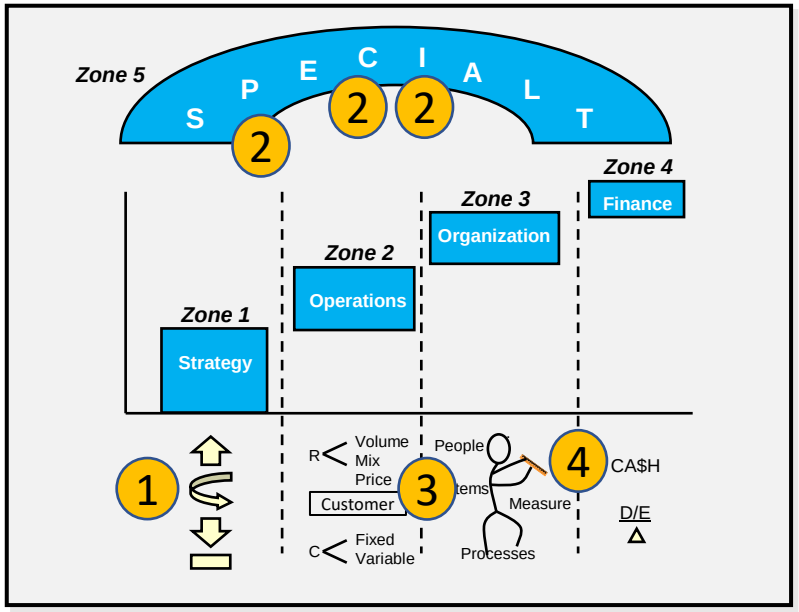


Scenarios

- **Target is promising significant profit increases.**
- **Target is cost obsessed? Are their revenue options to drive profit?**
- **What would you analyze?**

1. Cut revenue (prod, geog, other). Check mkt. share. What's working?
2. Which cost categories are above or below benchmarks? How reduce?
3. How do competitors compare? What are they doing we're not?
4. Any major strategy necessary? (e.g. enter mkt, add products, change price?)

7 – Change Price

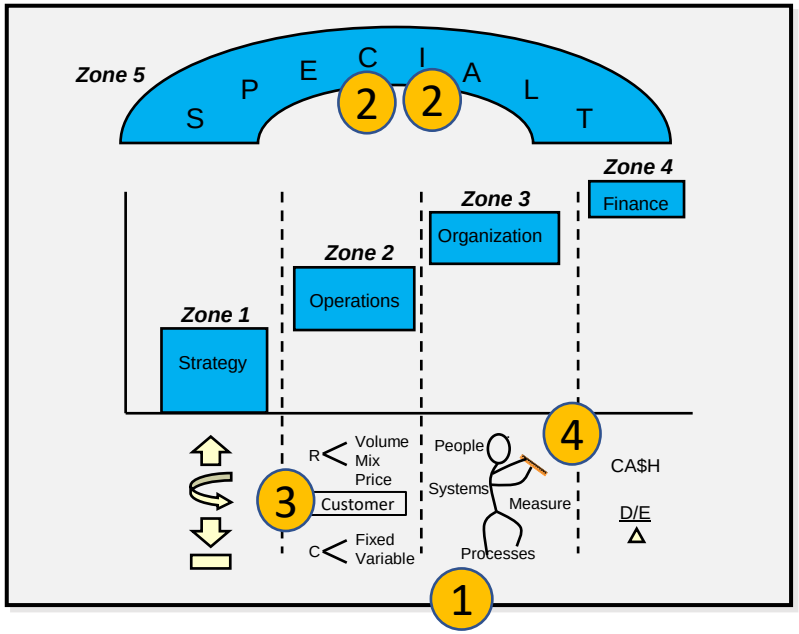


Scenarios

- **Target is talking about a new pricing strategy.**
- **Target thinks one of their issues is high transfer pricing.**
- **What would you analyze?**

1. Pricing repositioning could redefine brand and product perception.
2. How do prices compare to competitors / ind overall? Supplier impact?
3. What are the pricing options and the associated volume trade-off?
4. What tracking processes are in place to test and refine pricing approach?

8 – Streamline a Process

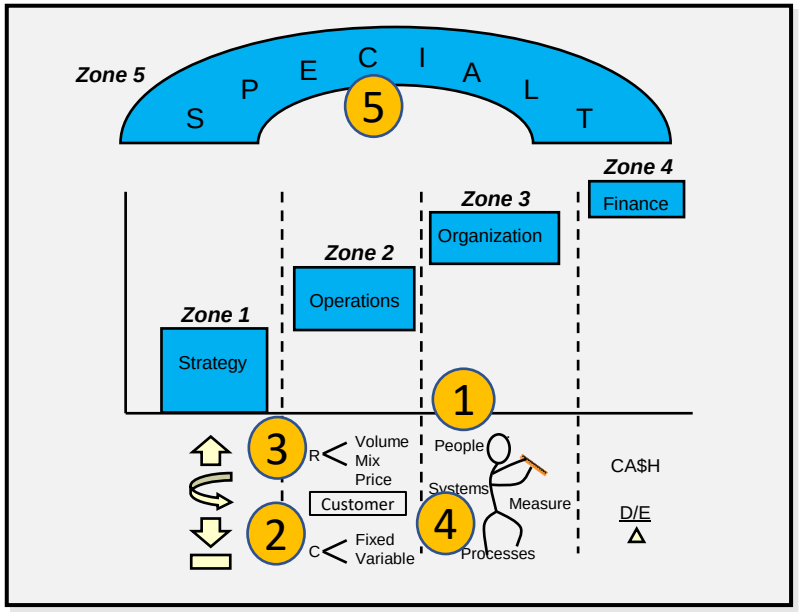


Scenarios

- **Target's order to cash process is 50% slower than the benchmark.**
- **Target is know for chaotic back processes.**
- **What would you assess?**

1. How is process used? Time, outputs, quality? Which ones need most help?
2. What is the gap between competitor and industry benchmarks?
3. Which steps are most value added in terms of reducing costs? Boosting rev?
4. How should we track the value going forward? How make continuous?

9 – Restructure the Team

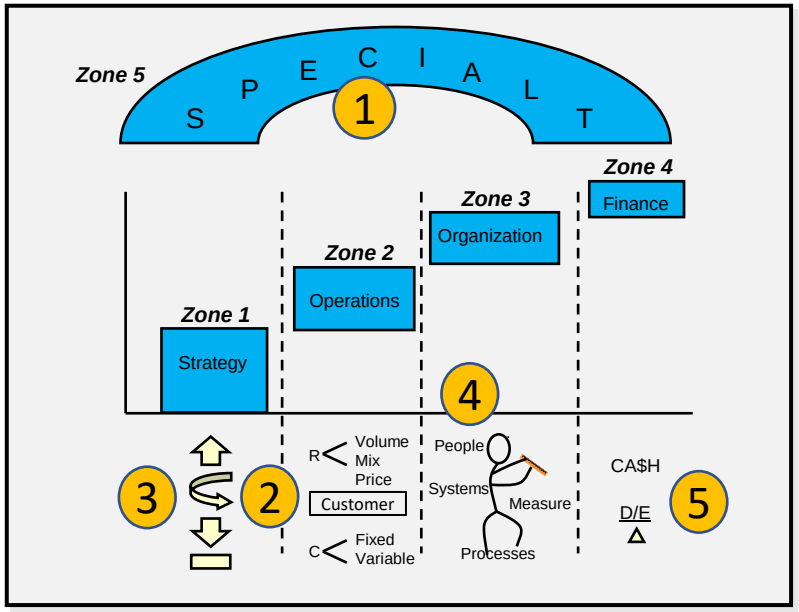


Scenarios

- **Acquirer is thinking of replacing 3 of the 5 management team members.**
- **Should we reorg the sales team?**
- **How would you assess their plans?**

1. What is the organization in question? How many people and activities?
2. What are the current costs with the team and how will they change?
3. How can this team be more effective? How impact volume and price?
4. How do people work together? Which processes and output should change?
5. Are there competitive benchmark to review? Who's doing it better?

10 – Competitor Attack

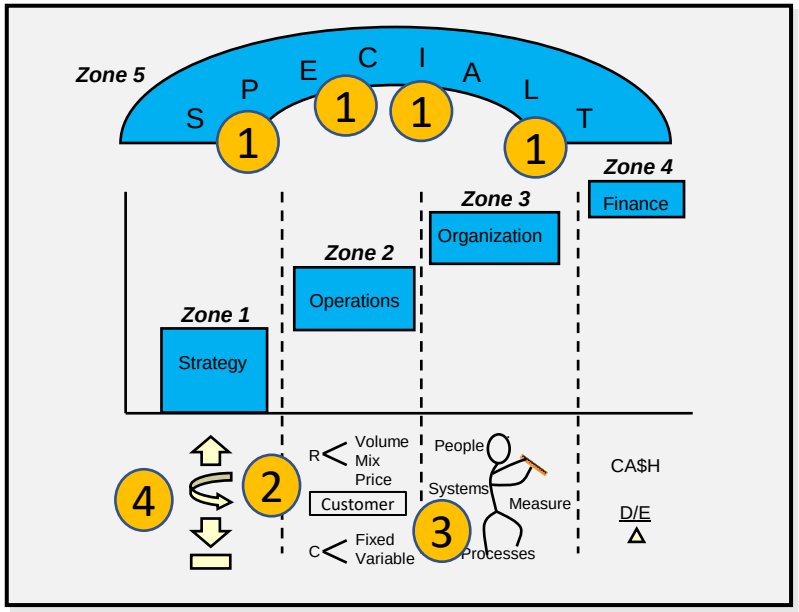


Scenarios

- **Target's competitor just lowered prices 15% across the board.**
- **Target's competitor may be coming out with a new tech.**
- **Competitor is faster to market.**

1. What comp behaviors have changed? How affecting their bottom line?
2. What is the impact of "staying competitive" in terms of price, vol and costs?
3. What is the broader strategy? New products or markets? New pricing?
4. Is the organization in place to make a concerted response? Tech? Processes?
5. Will funding be affected by these changes?

11 – Market Shift

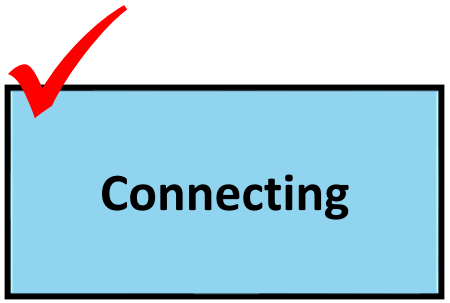


Scenarios

- **Targets tech product will be out of date in six months.**
- **Market consolidations are trending.**
- **How would you assess this is feasible?**

1. What shift is taking place? Can we define each element and their impact?
2. What is the specific impact on revenue and cost streams? 6-12 month impact?
3. Do we have processes, people or tech in place to diminish the impact? How?
4. What are the strategic changes target needs to make?

Structure & Analysis – Combining What & How



- Learn zone to zone connecting questions
- Build holistic skills through practice

Prioritizing the Analysis

- Create a Block, Break, & Ask to find key data
- Use your BBA to prioritize your analysis

Applying to Real Examples

- Kahoot!
- Build a BBA for each scenario and look for data
- Reach a conclusion!

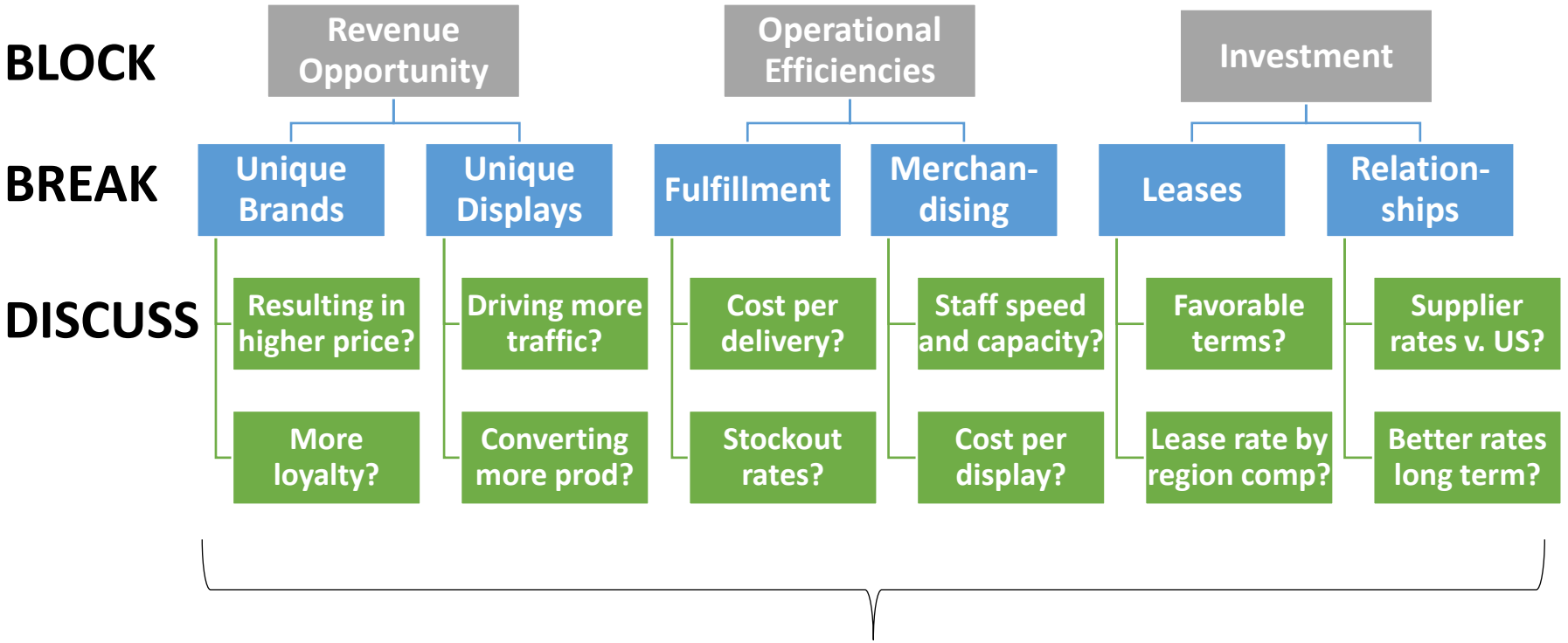
Analysis

How do you find the right data?

TARGET in Canada

Example

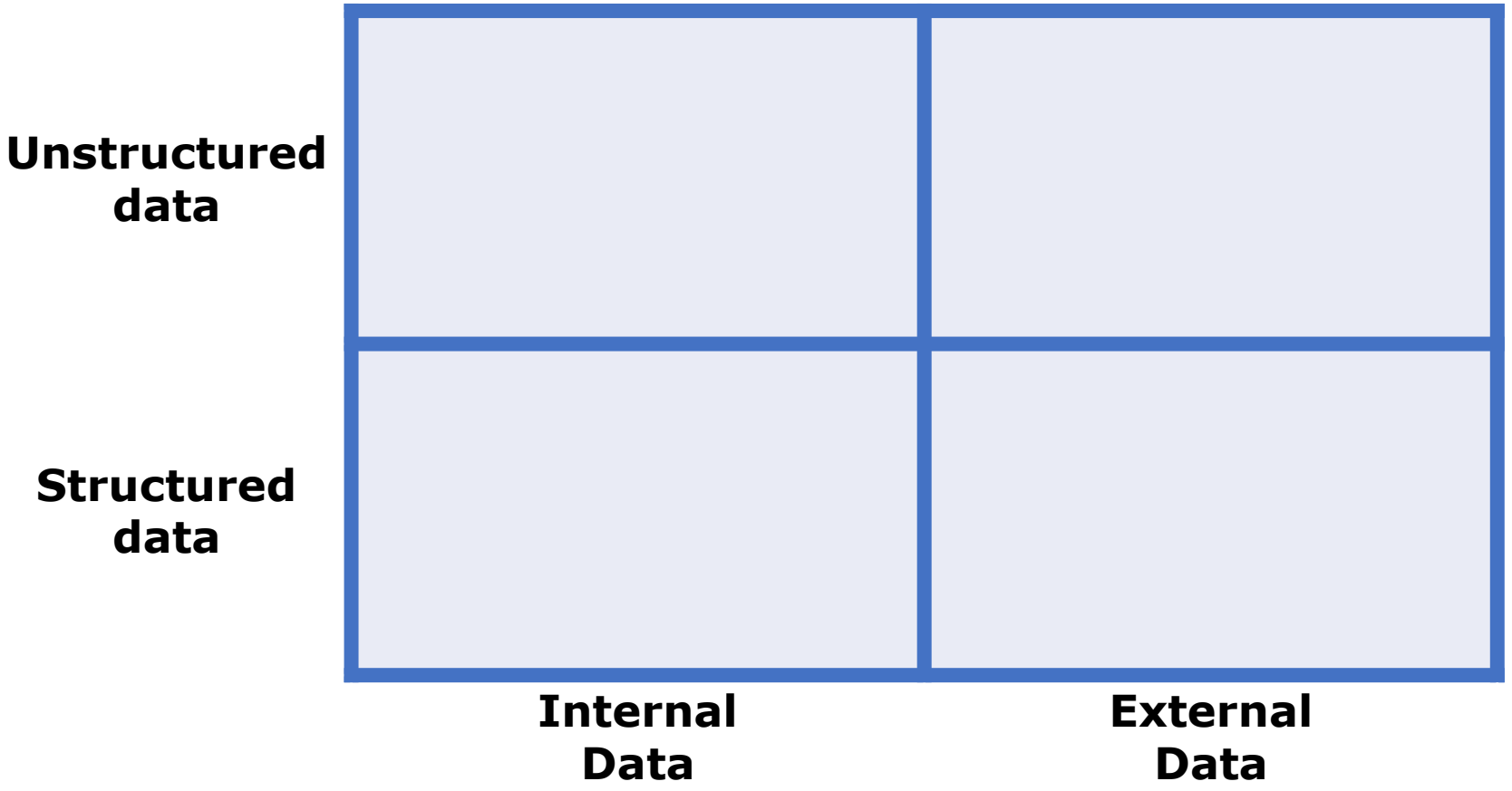
Hypothesis: "Target should have stayed in Canada."



Support with analysis: "If I got the data, what decision could we make?"

A 2x2 can spur your thinking about alternative data sources

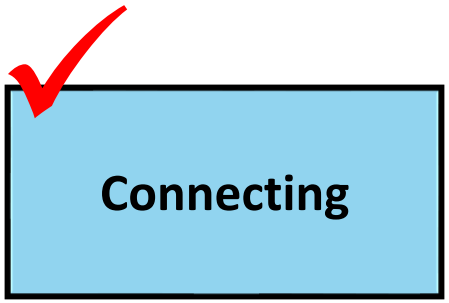
WB 27



Asking Questions

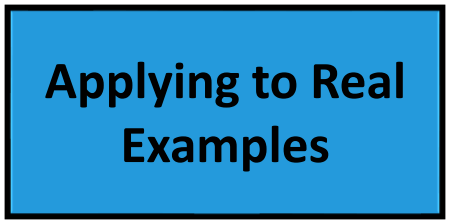
Vague	Specific
How are customers responding to our displays?	What is the conversion rate (old display v. new)?
What is the state of our Canadian supplier relationships compared with the US?	What percent of Canadian suppliers offer better terms (rates, shipment) v. US?
Is our pricing approach strong and aligned with the US?	What percent of our products are priced at premium rates?

Structure & Analysis – Combining What & How



- Learn zone to zone connecting questions
- Build holistic skills through practice

- Create a Block, Break, & Ask to find key data
- Use your BBA to prioritize your analysis



- Kahoot!
- Build a BBA for each scenario and look for data
- Come to a conclusion!

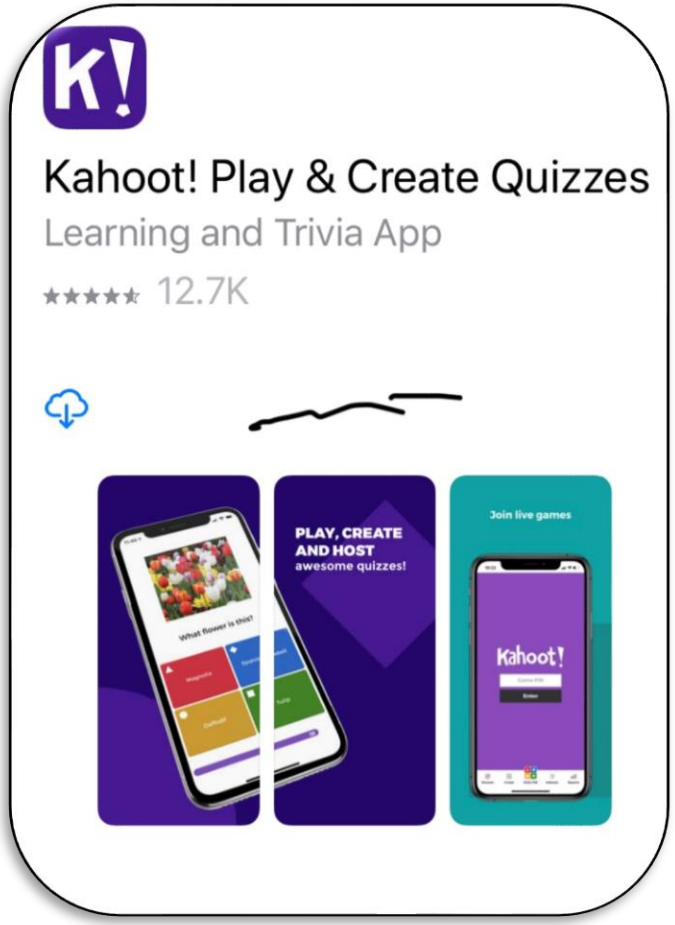
Go to Kahoot.it on your phone

OR

Download the Kahoot! mobile app (Android or iOS)

You will need this for our next team exercise.

Kahoot!



WB 28, 29

Target Company: **Netflix**

Team Exercise

- **Your client wants to talk in 1 hour**
- **Form a team of 3**
- **Question:** What do you think about Netflix's five-year outlook?
- You reviewed the CIM but want to do some data digging on your own.
- Start with a hypothesis (good or bad opportunity).
- You have 15 minutes to create a Block, Break & Ask with at least 4 blocks.
- Remember to look for specific data.
- Divide and conquer to gather info quickly.
- Use any resource at your fingertips to find basic data.
- After 15 minutes you'll receive some additional data.

ALL SET?

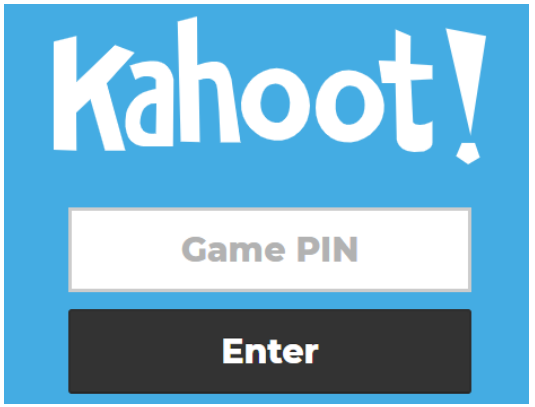
Go to Kahoot.it on your phone

OR

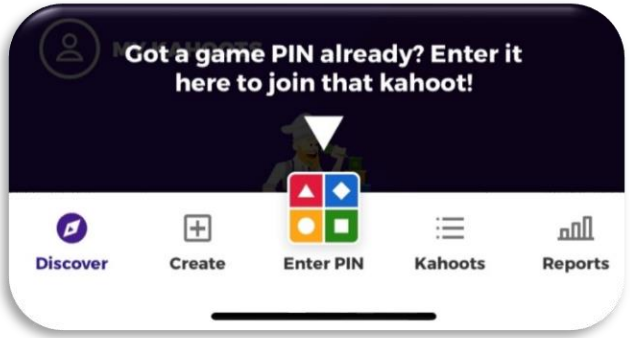
Download the Kahoot! mobile app (Android or iOS)

Only 1 person per team (of 3) enter the PIN and name the team.

Kahoo.it screen:



App screen:

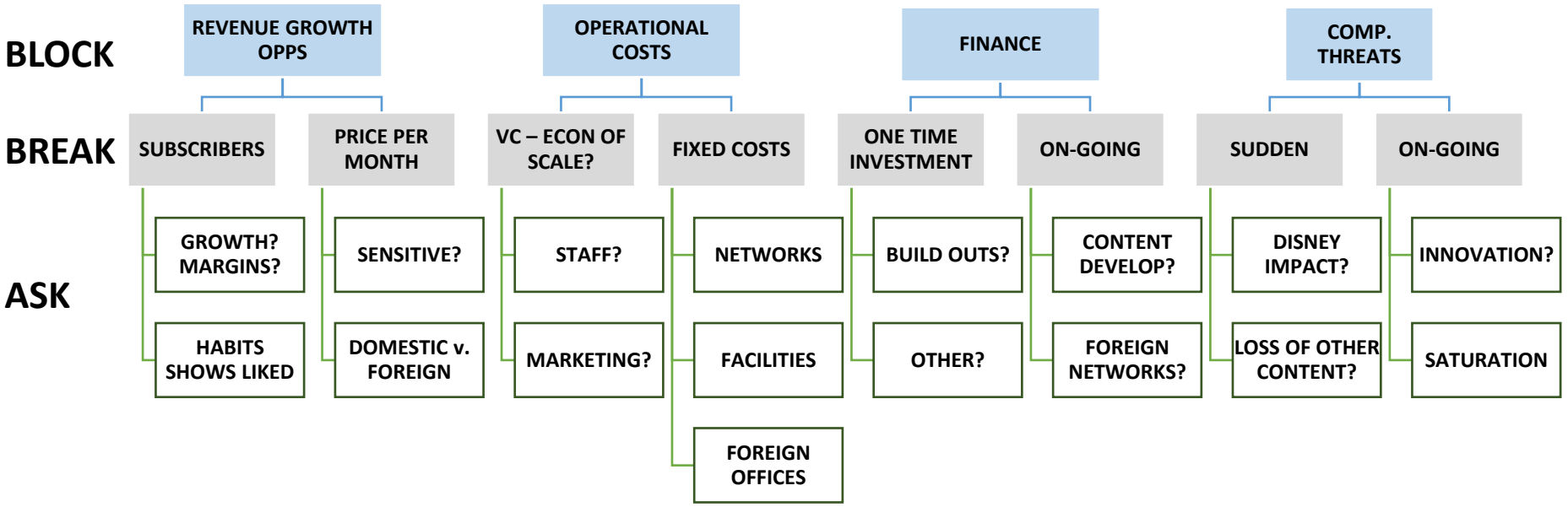


PIN: I will give it soon.

NETFLIX

Sample

Hypothesis: “Netflix is a solid acquisition target.”



WB 30, 31

Target Company: **Yeti**

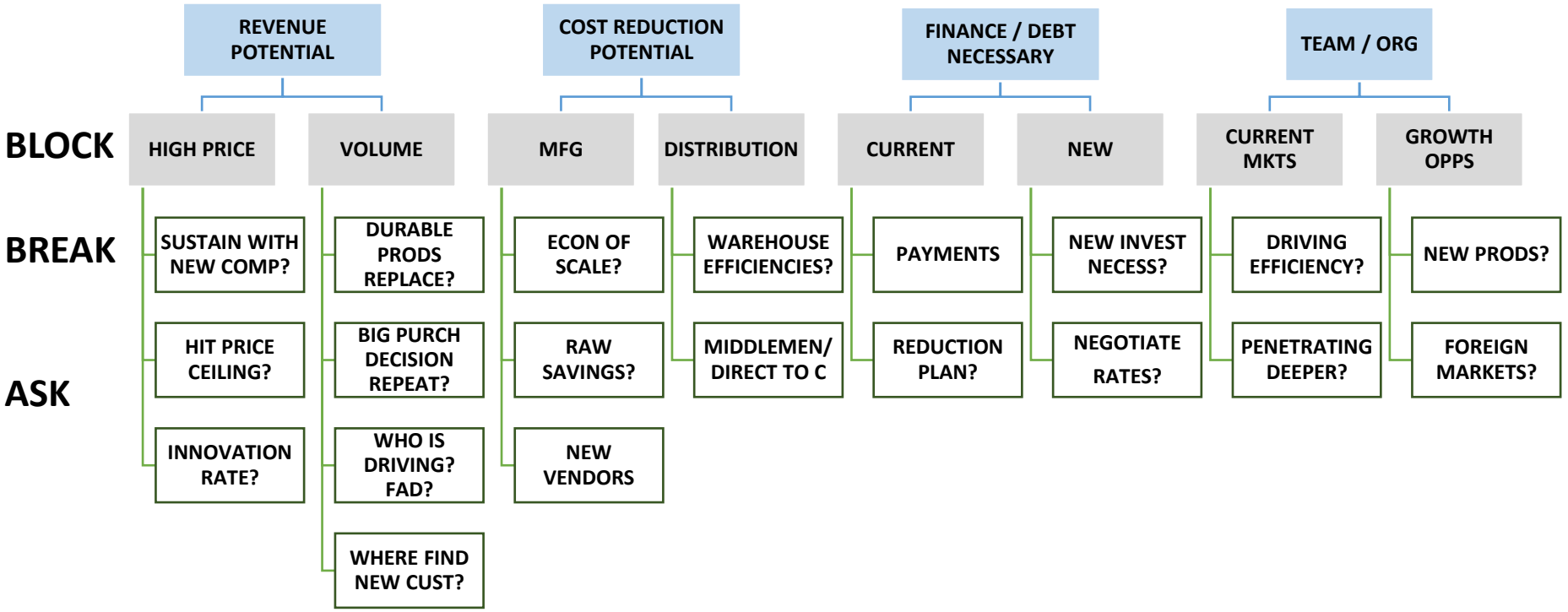
Team Exercise

- **Your client wants to talk in 1 hour**
- **Question:** Should we acquire Yeti?
- You reviewed the CIM but want to do some data digging on your own.
- Start with a hypothesis (good or bad opportunity).
- You have 15 minutes to create a Block, Break & Ask with at least 4 blocks.
- Remember to look for specific data.
- Divide and conquer to gather info quickly.
- Use any resource at your fingertips to find basic data.
- After 15 minutes you'll receive some additional data.

YETI

Sample

Hypothesis: “Yeti has growth potential. Acquire them.”



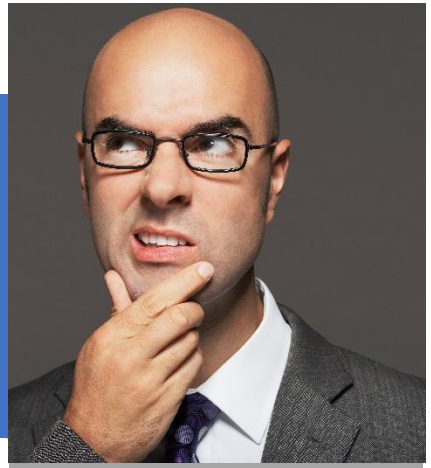
WB 34

Integration

How do I show the "So what?"

Data Visualization

"I don't need a 50 page presentation proving how much work you did, I want the one killer slide that makes the insight obvious."



"Minimize the statistical mumbo jumbo. I trust that you wouldn't be sharing it with me if it wasn't statistically significant."

"Fancy analytics are of little use to me if it's not actionable."

Data Visualization

Choosing the right type of chart is important.

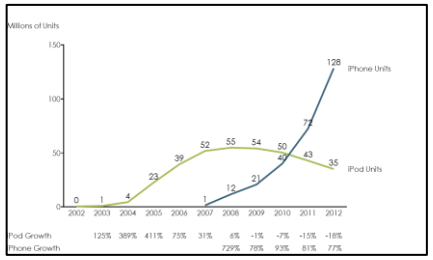
Make sure your graphs are clearly labeled.

The takeaway should “pop off the page.”

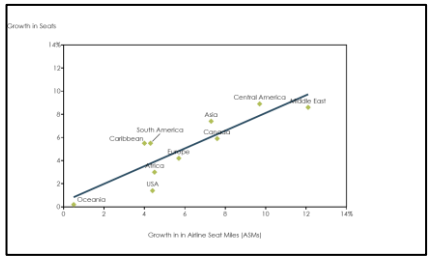
WB 35

Make the "So What?" pop

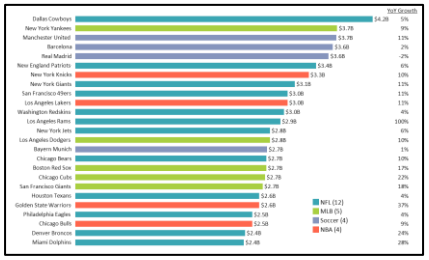
Time Series



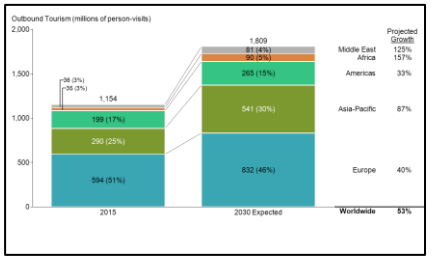
Scatter Plot



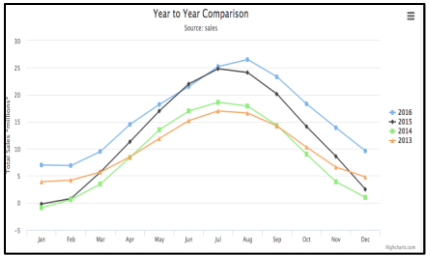
Ranked Bar



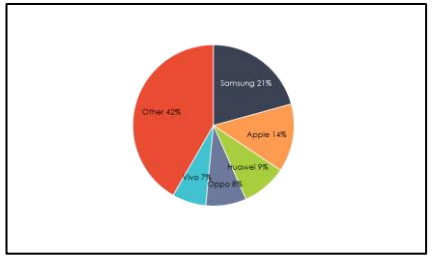
Stacked Bar



Year Over Year

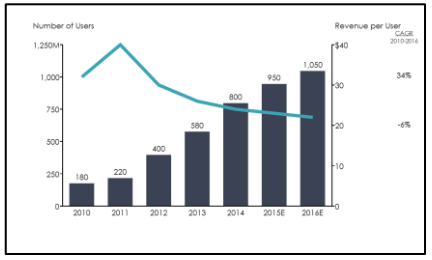


Pie

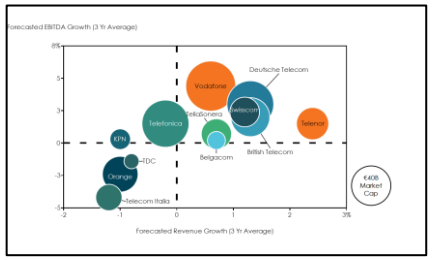


100% Bar

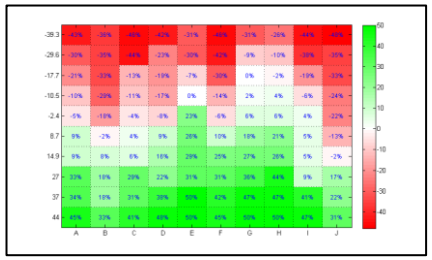
Line Bar Combo



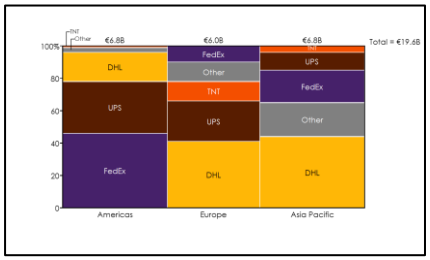
Bubble



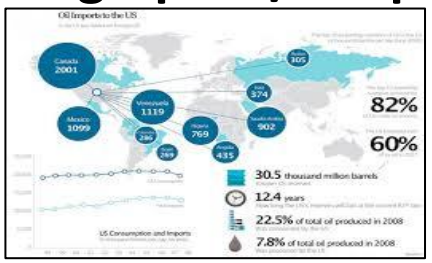
Heat



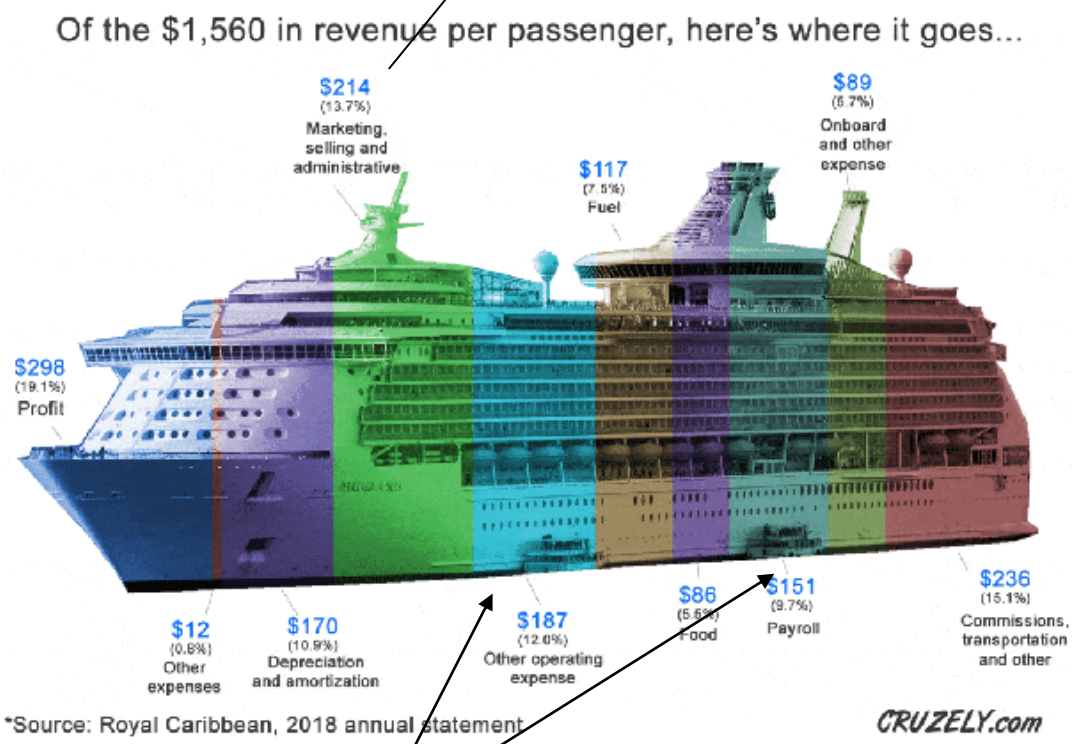
Mekko



Infographic / Map



And avoid USA Today "chart junk."

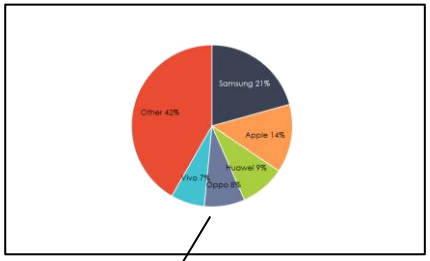


Percentage is the only meaningful number

Human eye can't detect size difference

Pie charts aren't always the best option.

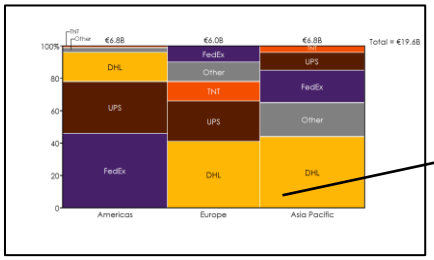
Pie



100% Bar

Very difficult to see differences

Mekko



Capture subtle differences

Challenge your charts and avoid spreadsheets

WB 36

Data Visualization #1

How would you communicate the following insight in a presentation?

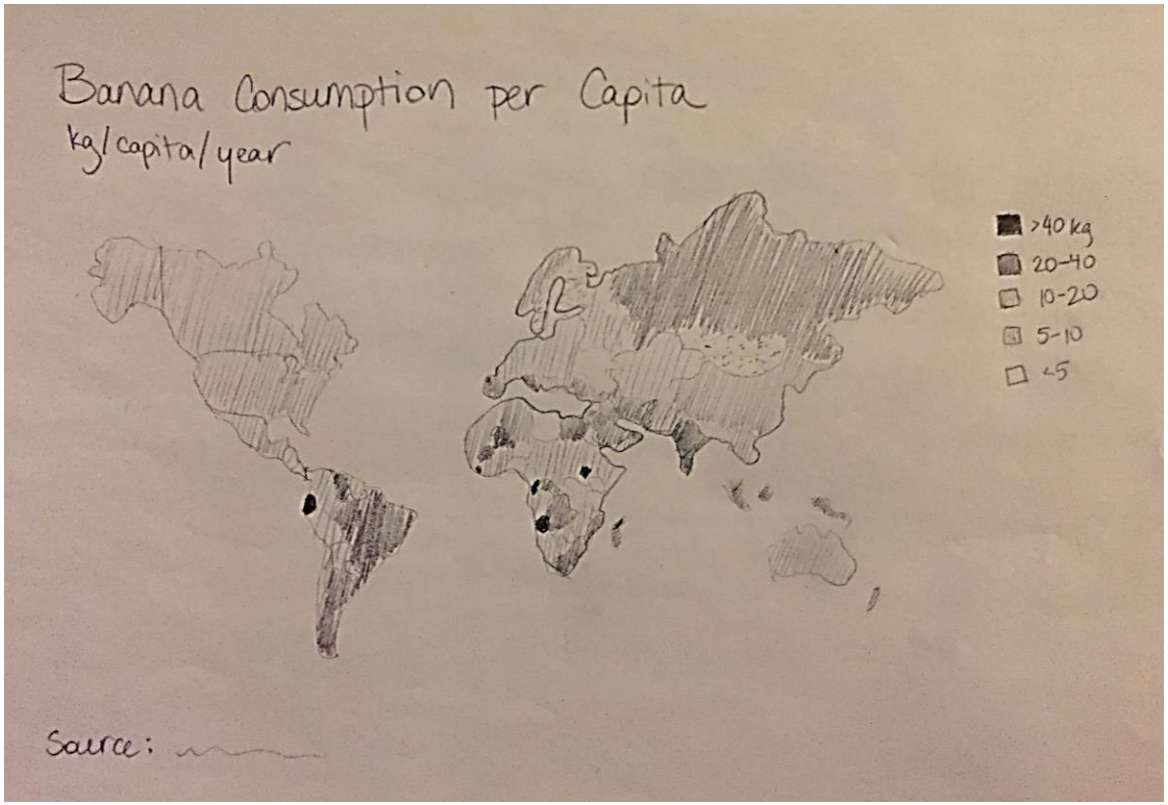
While bananas are enjoyed by people across the world, banana consumption is much higher in some countries than others.

Data Visualization

Variance in banana consumption by country

How would you show it visually?

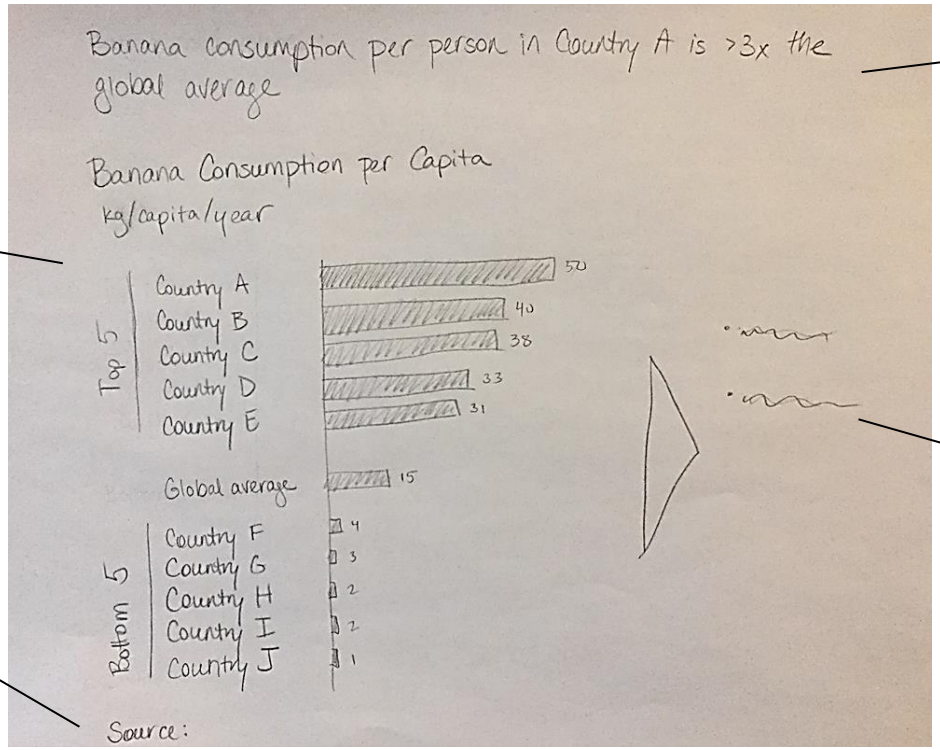
Option 1


Banana Consumption per Capita
kg/capita/year
>40 kg
20-40
10-20
5-10
<5
Source:

Option 2

Chart has clear labels, legends

Data source identified



Reinforce the "so what" at the top of the page

Potential business implications called out

WB 36

Partner Exercise

Data Visualization

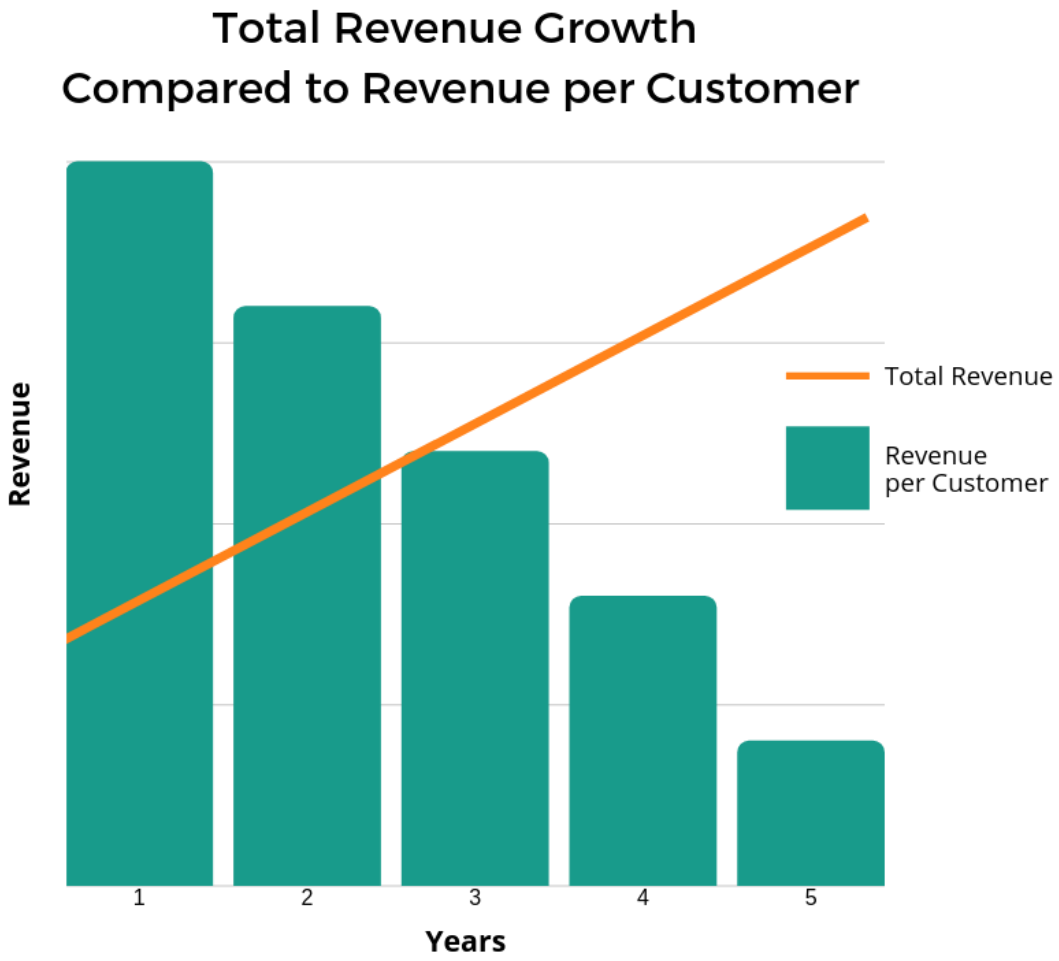
Exercise

Work with a partner on the additional data visualization exercises in your workbook.

Be ready to share your sketches in 10 minutes.

Data Visualization #2

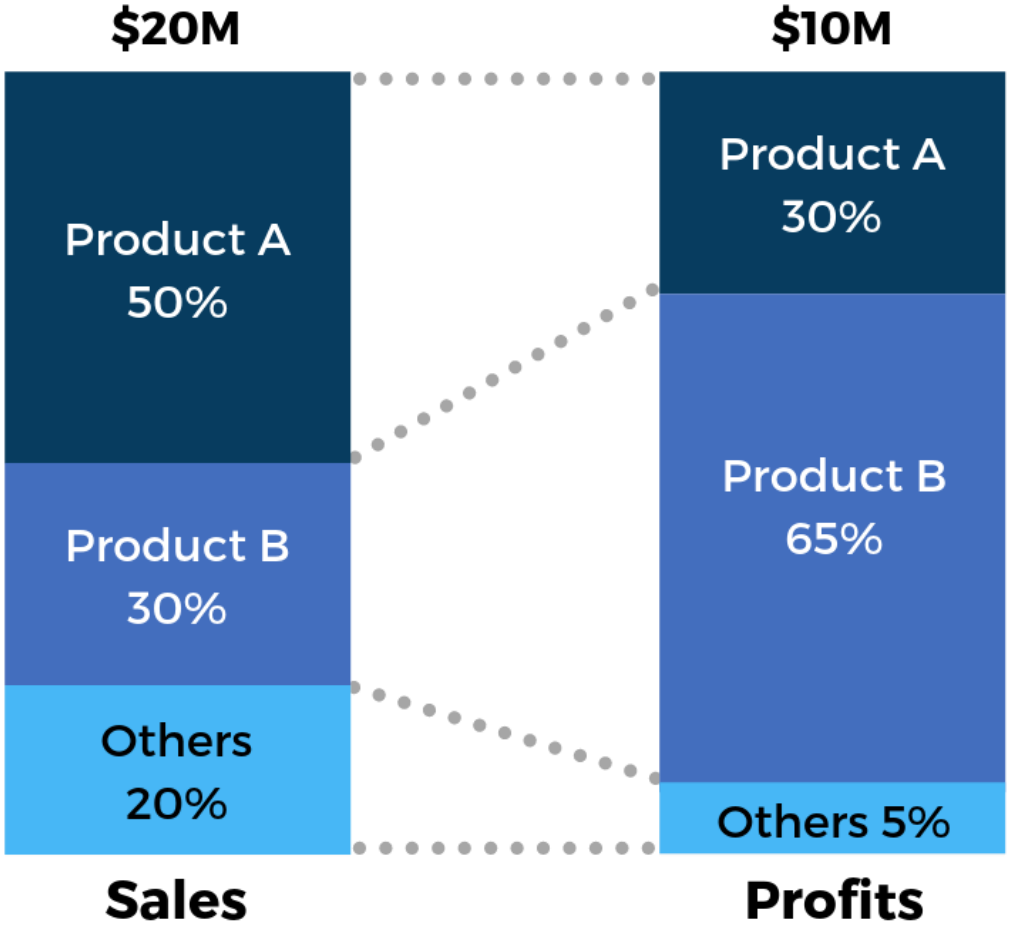
Although the company has seen steady growth in revenues over the last 5 years, revenue per customer is on the decline.



Data Visualization #3

Of the 20 products the company sells,

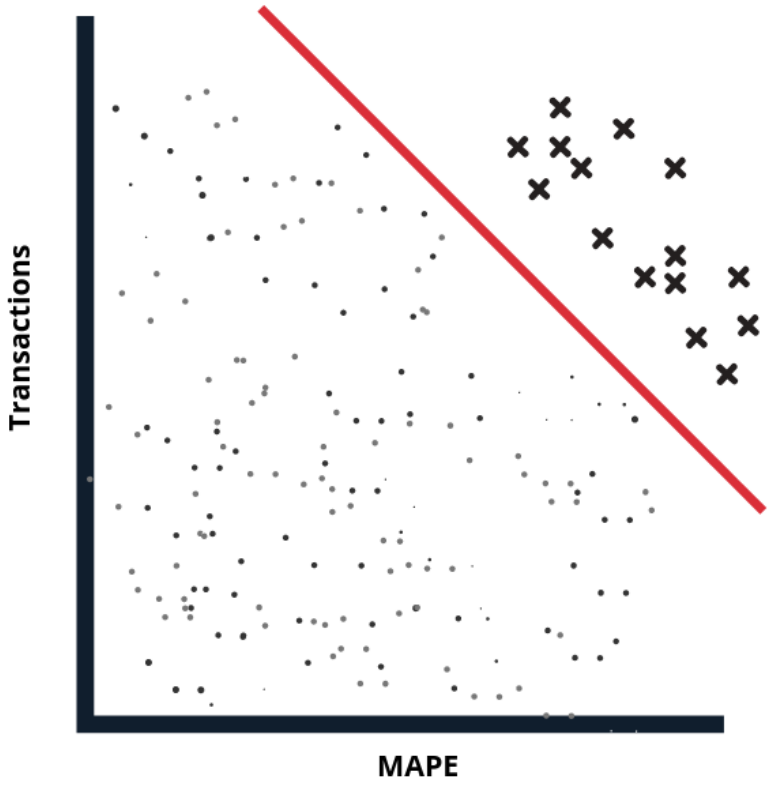
- Product A accounts for 50% of the company's sales and 30% of profits
- Product B accounts for 30% of the company's sales and 65% of profits



Data Visualization #4

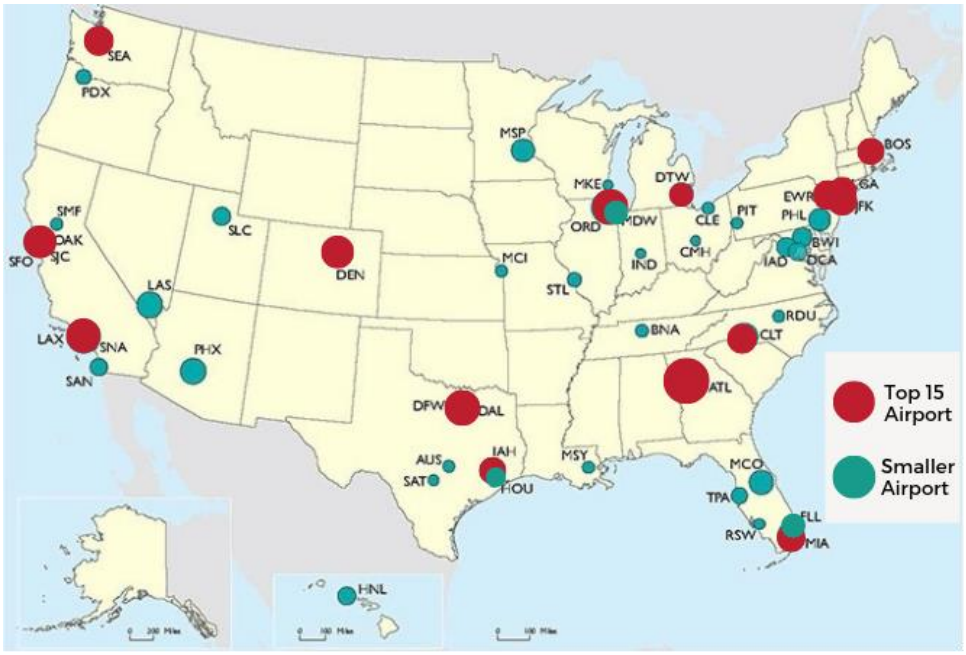
Of the 55,000 transactions analyzed, the following 14 were flagged by the system for further investigation based upon risk evaluation criteria.

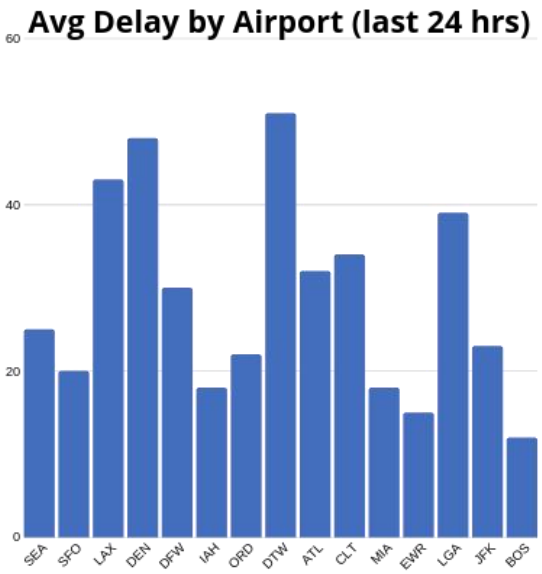
MAPE from prior month transactions
Classified by linear regression numeric prediction

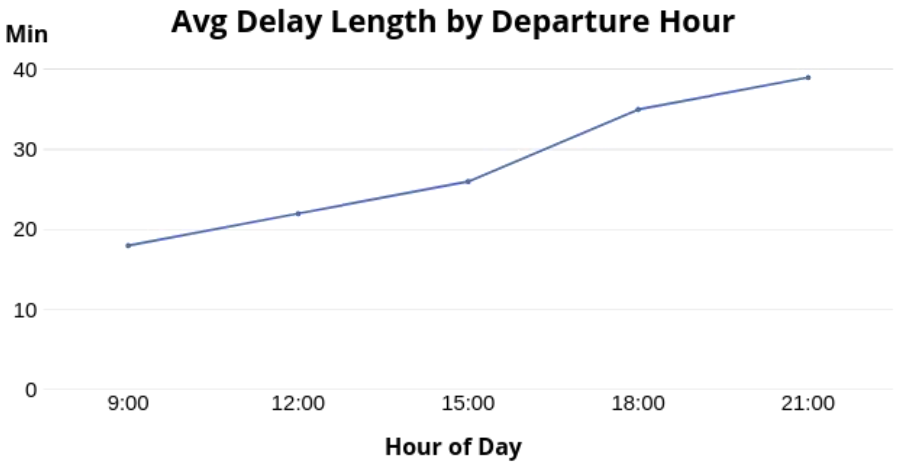


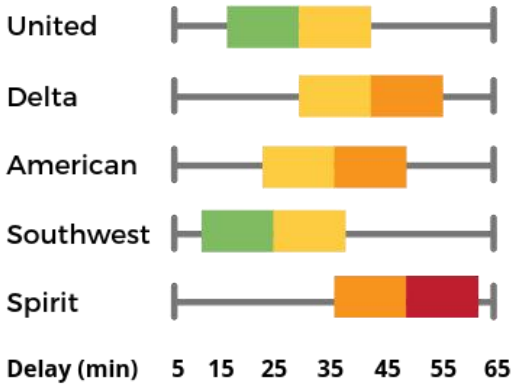
Data Visualization #5

Create a dashboard to show real time flight delay statistics for the 15 largest airports in the US.



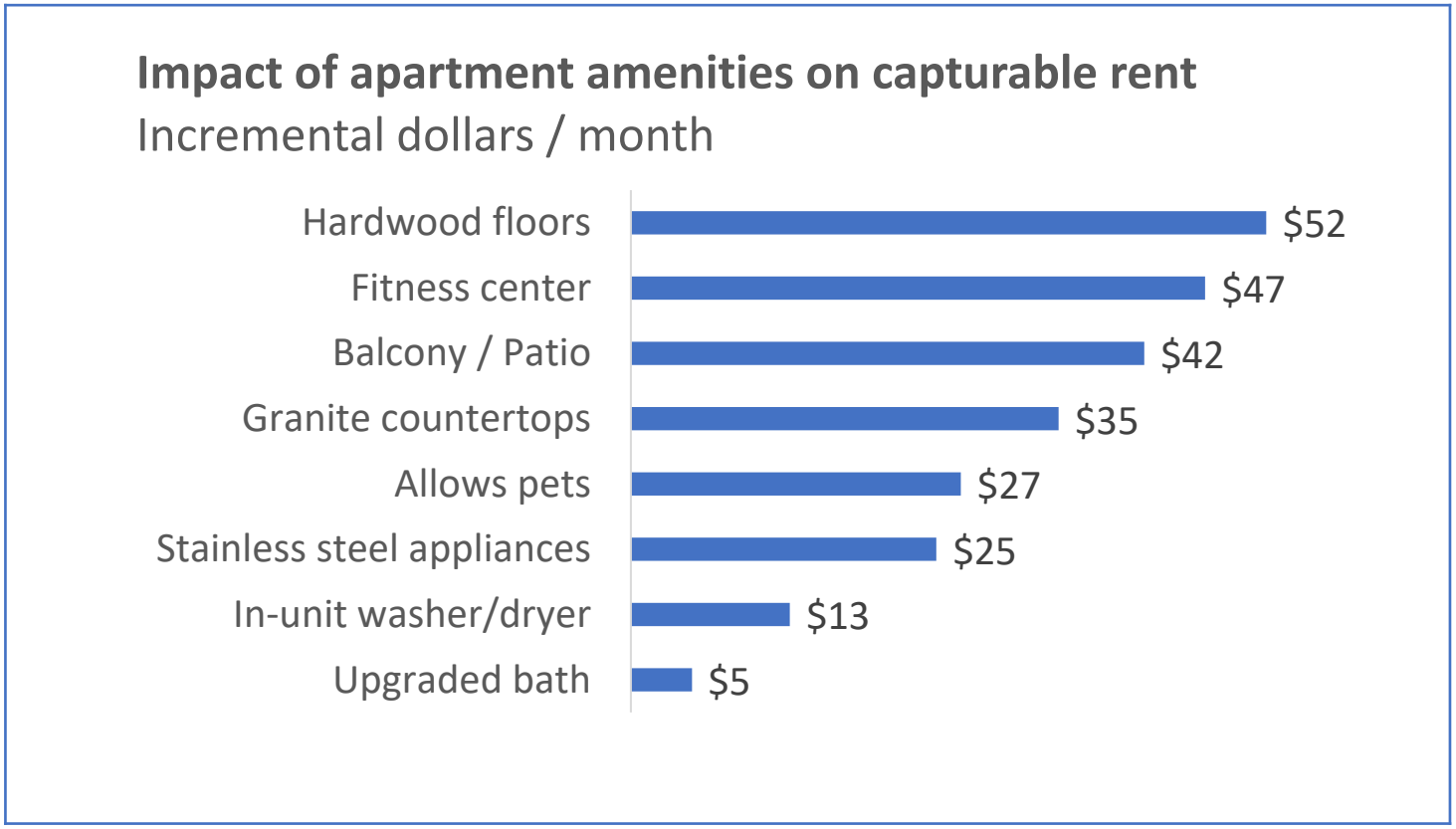






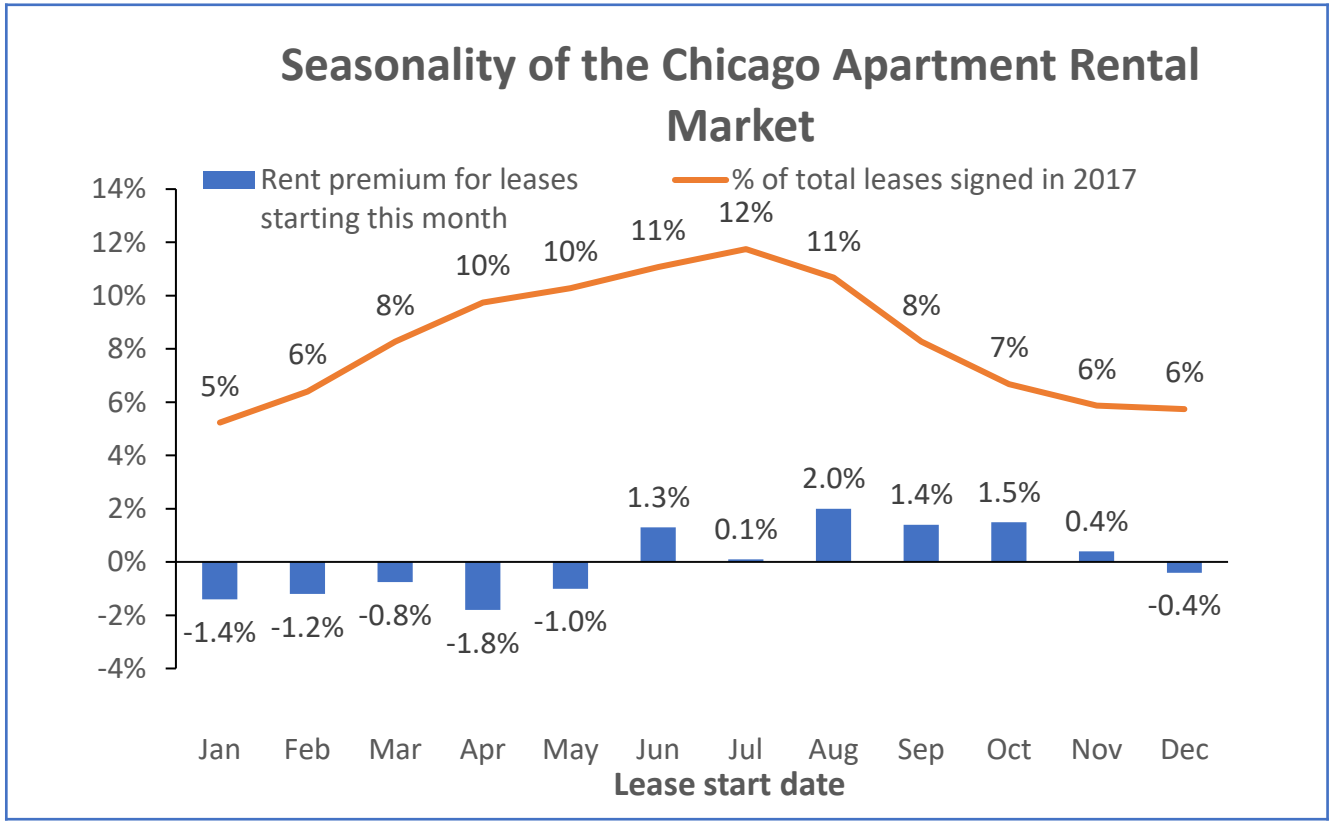
Solo Exercise

Tag:



Solo Exercise

Tag:



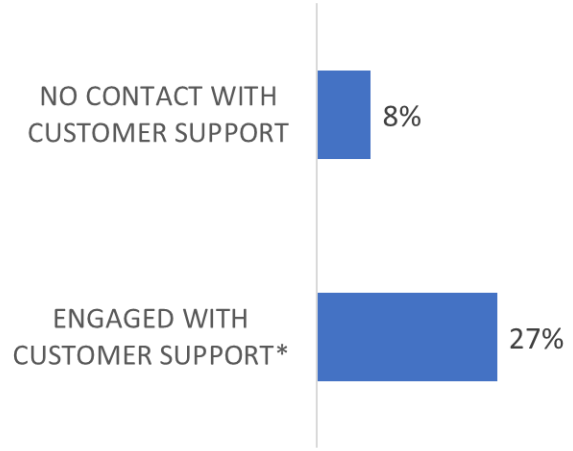
Solo Exercise

Tag:

Lead conversion

Percent of website registrants who placed a first order

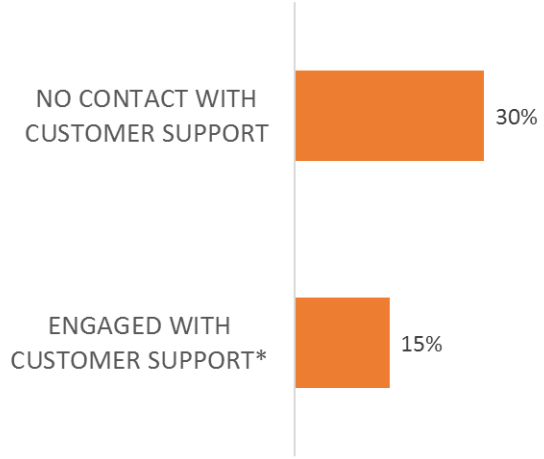
Jan – Dec 2017



Customer retention

Percent of subscribers who cancelled after a delivery exception

Jan – Dec 2017



** Interacted with a customer support agent via phone, live chat, or email*

Crack the Case
Key Points

- **Communication**
  - Be Answer First and accelerate your thinking with concise questions
- **Structuring**
  - Use Block, Break and Ask to organize your thoughts
  - Prioritize with a hypothesis
  - Use an integrated structure like the MVM
- **Analysis**
  - Be specific about what you need
  - Think about what decision you could make with the data
- **Integration**
  - Emphasize “So What?” with all slides
  - Be comfortable with editing your message

Course evaluation

- Please provide evaluative feedback on today's session.
- The evaluation will be delivered to you tomorrow.

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What questions do you have?

Thank you!

LinkedIn

davidohrvall

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