IBM Watson Analytics
Introduction

Watson Analytics offers you the benefits of advanced analytics without the complexity. A smart data discovery service available on the cloud, it guides data exploration, automates predictive analytics and enables effortless dashboard and infographic creation.

You can get answers and new insights to make confident decisions in minutes—all on your own.

Objectives

This script has three main sections in our introduction to Watson Analytics:

- Give a quick overview of how to navigate Watson Analytics and explore some of our latest features.
- Show how to navigate the community to ask questions, get sample files, and read expert blogs on the features of Watson Analytics.
- Give an opportunity to sign up for Watson Analytics.

Sign into Watson Analytics

On the opposite screen there is a launch page for Watson Analytics. Because Watson Analytics is a cloud solution it is impossible for us to use a single temporary user and reset the experience back to the beginning for the next user as we do with other scripts. Because of this, we are providing temporary Professional subscription profiles to use for this conference.

1. **Request a sign on profile** from a Support Representative walking around. This profile is a temporary profile and will only be good for the length of the conference. It will be deleted by week’s end.
2. On the Watson Analytics launch page ([https://watson.analytics.ibmcloud.com](https://watson.analytics.ibmcloud.com)), click the **Log In** button on the top right of the screen.

3. Type the **User ID** and the **password** provided and click on **Sign in**.
Welcome Screen of Watson Analytics

On the **Data** tab, you will find the datasets that you have uploaded and the options to bring in your own data.

On the **Discover** tab, you can explore powerful visualizations of your data in IBM® Watson Analytics™ and discover patterns and relationships that impact your business.

On the **Display** tab, you can communicate the insights that you've discovered by assembling them into a dashboard, infographic, or Expert Storybook.

### Analyze sales wins and losses

Converting opportunities in the pipeline into successful deals is the primary focus of the sales organization and is critical to any company!

In this example you play the role of a sales executive at an automotive supply wholesaler and you are trying to investigate a sales execution issue. We have not been converting enough opportunities lately. We want to better understand our sales pipeline and which deals our sales team can expect to win or lose based on data that we’ve pulled out of our pipeline database.
Uploading sample data

In front of you is the main screen for Watson Analytics. Each of the capabilities on the top of the screen will take you into a different area depending on what you would want to do. First though, we need data to work with.

1. To add data, click the **New data** button in the middle left of the screen.
2. Many options are available which we will explore later, for now, click on **Sample data**.
3. This will present a list of sample data available to you. Scroll down and look for **Find Patterns in Wins and Losses.xlsx**
4. Highlight that entry and on the bottom right, click **Import**.

You will be taken back to the Welcome Screen where you will see the dataset being transferred.
Ask your question right here on the Watson Analytics main page

We begin by typing a question in the natural language processor right here on the Watson Analytics main page. The built-in cognitive ‘smarts’ looks across all datasets to fetch the results and then ranks those insights in order of their relevance.

1. Type “Show my top 5 regions based on opportunity amount” in the “Ask a question about your data” field, and then press Enter.

2. Select the first suggestion How do the values of Opportunity Amount (USD) compare by Region. We can immediately see that Midwest and Pacific are the leading regions in terms of opportunity amount.
3. Next, we want to understand the deal conversion efficiency across these regions.

3.1 Click on **Color**, at the bottom right of the screen.

3.2 Click on **Search**.

3.3 Type in “**Opportunity Result**” to filter the fields and select it from the list and click on **Done**

The visualization will be immediately updated to account for the new field:

There is surely a lot of room for improving the sales execution efficiency across all these regions!
What really drives whether you’ll win or lose a sales deal?

We now want to understand the **WHY** behind what’s happening.

1. Click on the + button at the top of the page to create a new tab.

2. We ask the next question as though we are talking to an expert – Type “**I want to understand Opportunity Result**” in the “Ask a question about your data” field, and then press Enter. Choose the recommended spiral visualization: **What Drives Opportunity Result**

3. We then obtain the spiral visualization:
This easy to understand spiral visualization shows the factors that drive opportunity result and ranks them in order of their predictive strengths. Looks like the combination of ‘Revenue From Client Past Two Years (USD)’ and ‘Total Days Identified Through Qualified’ has the most significant impact on whether we win or lose deals.

4. In the list, click on the plus sign (+) to dig deeper for the top combination driver.

5. This detailed insight essentially shows ‘Revenue From Client Past Two Years (USD)’ along the y-axis and ‘Total Days Identified Through Qualified’ along the x-axis.

In general, looking from left to right we realize that the chances of winning a deal decreases as it stays longer in the pipeline (Loss in blue increases from left to right). We also see that an opportunity is more likely to result in a loss if the client didn’t buy anything from us within the last 2 years.
Biggest chance of winning a deal is when a client did business with us in the last two years and with a deal category of 0-25K.

Although, it is more likely for the deal to result in a win if they have bought in the last two years, the chance of the deal decreases as the rate of the sales deal rises (Higher deal category).

That was great insight and more importantly, in such a short time!

6. Before saving the Discovery, you might want to rename each tab so that it represents the type of visualization we explored or to something more meaningful. Click on “Untitled 1” and choose the “Rename icon”

7. Change “Untitled 1” to “Bar Chart” and press Enter.
   If you would like, you can change the names of the other tabs or skip to the next step.
   “Untitled 2” to “Spiral”, “Untitled 3” to “Win Chances”

Once all tabs have been renamed, we obtain the following:

8. Save the discovery by clicking on the save icon at the top right of the screen.
9. Rename it to “My First Discovery”, highlight the Personal Folder and click Save.

10. Click on the arrow on the top left of the screen and select “IBM Watson Analytics”
Wrapping it up in Display

In Display, we have the ability to customize an interactive dashboard with all the discoveries that we explored.

1. Click on the **Display Tile** on the top right of the screen.

2. Click on **+ New Display**.

3. Name it “**My First Display**”. Highlight **Dashboard** and click **Create**.

4. For my layout, I choose the second one with the solid outline.

5. On the left hand side, select **Personal**.
6. Click on the down arrow next to “My First Discovery”.

7. We find all the discoveries that we have created earlier. We can simply drag and drop each discovery on the page and re-size them as we want. Create your own dashboard by dragging items (Bar Chart and Spiral) to the “Untitled 1” tab workspace similar to what is shown below.

8. Save the display by clicking on the save icon at the top right of the screen.

You will be prompted to choose the location of the file. Click Save.

Using Display, you can bring visualizations together that interact with each other by using filters. You can export all your tabs or selected tabs to popular formats such as PDF, PowerPoint and images to share with others. In the Professional Edition of Watson Analytics, multiple people can work and collaborate on the same display.
Community

Watson Analytics has a very active community with an ever changing repository of information. Whether you require additional knowledge on how a feature works, would like more sample files, or if you need support, the Community is where all this can be found.

To access the community from Watson Analytics, do the following.

1. On the top right of the screen, click the question mark ( ).

On the drop down that appears, you can see options such as Docs (Documentation), Community, Getting started and About IBM Watson Analytics.

2. Click Community -> Home.

At this point you are looking at the main page of the Community which has different sections of Watson Analytics.

3. Scroll down to the bottom, notice these icons:

   - Find documentation, video and walkthroughs to help you succeed.
   - Ask questions, get support, and connect with Watson Analytics community
   - Articles covering many areas on how to use Watson Analytics by experts.
   - How to reach Support for assistance.
   - A formatted list of articles from all areas of the community.

Big Data University Course: https://bigdatauniversity.com/courses/introduction-watson-analytics/

Watson Analytics YouTube Chanel: https://www.youtube.com/user/watsonanalytics

Explore the different areas, then move to the next section to create your own free subscription. Close the community tab to return to the Watson Analytics welcome screen.
IBM Watson Analytics

Sign up for Watson Analytics

Watson Analytics offers a free 30 day professional subscription and then becomes a free subscription after the 30 days. If you wish to have your own free subscription, we first need to sign out of our current session. This is because Watson Analytics will attempt to re-use your IBM ID sign on if you are still active.

1. On the top of the screen, click the user icon and select **Sign out**.

2. Once signed out you will be brought back to the launch page, now click the Try it for free button.
3. Fill out the information as requested.

This will send a verification code by e-mail to the e-mail address listed.

Workshop Complete

Thank you for your time to walk through this workshop.

Please close the following before starting a new workshop or leaving:

- Browser
- This workshop