

BUSINESS STORYTELLING

DATA STORYTELLING

Building Clear and Actionable Data-Based Presentations

Workbook Edition



moxie
INSTITUTE

DATA STORYTELLING



Analyzable vs. Actionable Data:

- When thinking about the data you often present to key decision-makers, do you normally share analyzable or actionable data?
- Why do you think presenters tend to, not only share analyzable data, but also excessive amounts of data?
- What kind of impact could sharing just actionable data have on the recommendations you provide for key decision-makers?

Data Storytelling Process



NOTES:

GROUNDWORK

Problem or Opportunity:

- What is the problem or opportunity revealed by the data?
 - ▶ This is not a list. If your data analysis reveals multiple problems or opportunities, you need to sum those up into **ONE SENTENCE** even if the outcome is a very general statement.

Core Message:

- What is the core message your audience needs to hear regarding what action to take?
 - ▶ This too is **ONE SENTENCE** and can be framed as something to stop, start, continue as is, or continue with a few changes.
 - ▶ Use an If-Then structure. Here are some examples in which the same core message is expressed with varying tone: Indirect or Direct AND Motivating or Warning

	MOTIVATING	WARNING
INDIRECT	If we attract new listeners more effectively, we should reach our goal of 5,000 downloads this year.	If we don't attract new listeners more effectively, we are not likely to reach our goal of 5,000 downloads this year.
DIRECT	If we want to reach our goal of 5,000 downloads this year, we need to attract new listeners more effectively.	We are going to miss our goal of 5,000 downloads this year, if we don't attract new listeners more effectively.

AUDIENCE ANALYSIS

Who is your target audience?

Are there specific decisions they are looking to you to help them address?

What business drivers and metrics do they care about most?

Is there anything else top-of-mind for your target audience?

How do they like to receive data-based presentations?

Do they prefer to ask questions throughout or at the end of a presentation?

NARRATIVE

Tips For Opening Section:

- Write this out and be concise! Aim for two paragraphs.
 - ▶ **Paragraph #1:** Provide the context - place yourself in the big picture and help them get their brains in the room. (Introduce yourself, why you are there, etc.)
 - ▶ **Paragraph #2:** Provide the problem or opportunity as well as the core message.
-

Tips For Closing Section:

- You can write this out too if you wish! Also, aim for two paragraphs.
 - ▶ **Paragraph #1:** Again, sum-up the problem or opportunity and the core message to bring your audience back to the big picture.
 - ▶ **Paragraph #2:** Leave the key-decision makers with specific recommended action items, final thoughts and thank them for their time.
-

Tips For Both Sections:

- **Avoid Jargon:** Use plain-spoken language - you can “nerd-out” in the middle sections depending on your audience.
 - **Law of Primacy and Recency:** Remember that first impressions are strong impressions and we remember the most recent (last) material that was covered. You want to make your opening and closing clear and compelling.
 - **Edit On Your Feet:** As you write out your opening and closing, read it out loud. Does it sound like you? You want to allow your personality and authentic style to shine through here.
-

Tips For Middle Section:

- Think of the Opening and Closing as addressing the WHAT of your presentation, and the middle section as addressing the WHY and HOW.
- Outline the key messages you want to present. Think of these as making up the spine of your presentation. These are short sentences, not topics.
- Then, outline the data and other content you want to add to support each message.
 - ▶ In this workshop, we'll focus on 3 messages and the accompanying actionable data.

Opening Section

Middle Section (If using this as a fillable PDF, use a word processing program of your choice to complete the outline.)

Closing Section

Anticipating Counter Arguments:

- Pre-empt what you think could be “sticking points”
- Don’t get stuck in the weeds trying to counter everything
- Add pre-rebuttals to your narrative (ex. “You might be thinking..., but...”)
- Add analyzable data to your appendix (not your presentation)
- Add new content or restructure your narrative if needed.

**“Numbers have an important story to tell.
They rely on you to give them a clear and convincing voice.”**

-Stephen Few

NOTES:

VISUALIZATION

Slide Deck Mapping:

- Map out your deck with blank slides:
- Note in large text what you plan to put on each slide: data, a statistic, a big message, a diagram, single sentence, etc.
- Add the Opening, Middle, and Closing section content to the NOTES section of your slides.

Q3 PODCAST UPDATE

If we can learn more about how emerging competitors are winning market share, we can strategize to maintain our market leadership.

Customer loyalty remains strong.

[Data: Retention Rate vs industry average, '21-present]

Customer acquisition has declined significantly.

[Data: Conversions, '21-present]

Customer acquisition has declined significantly.

[Data: Conversion Rate, '21-present]

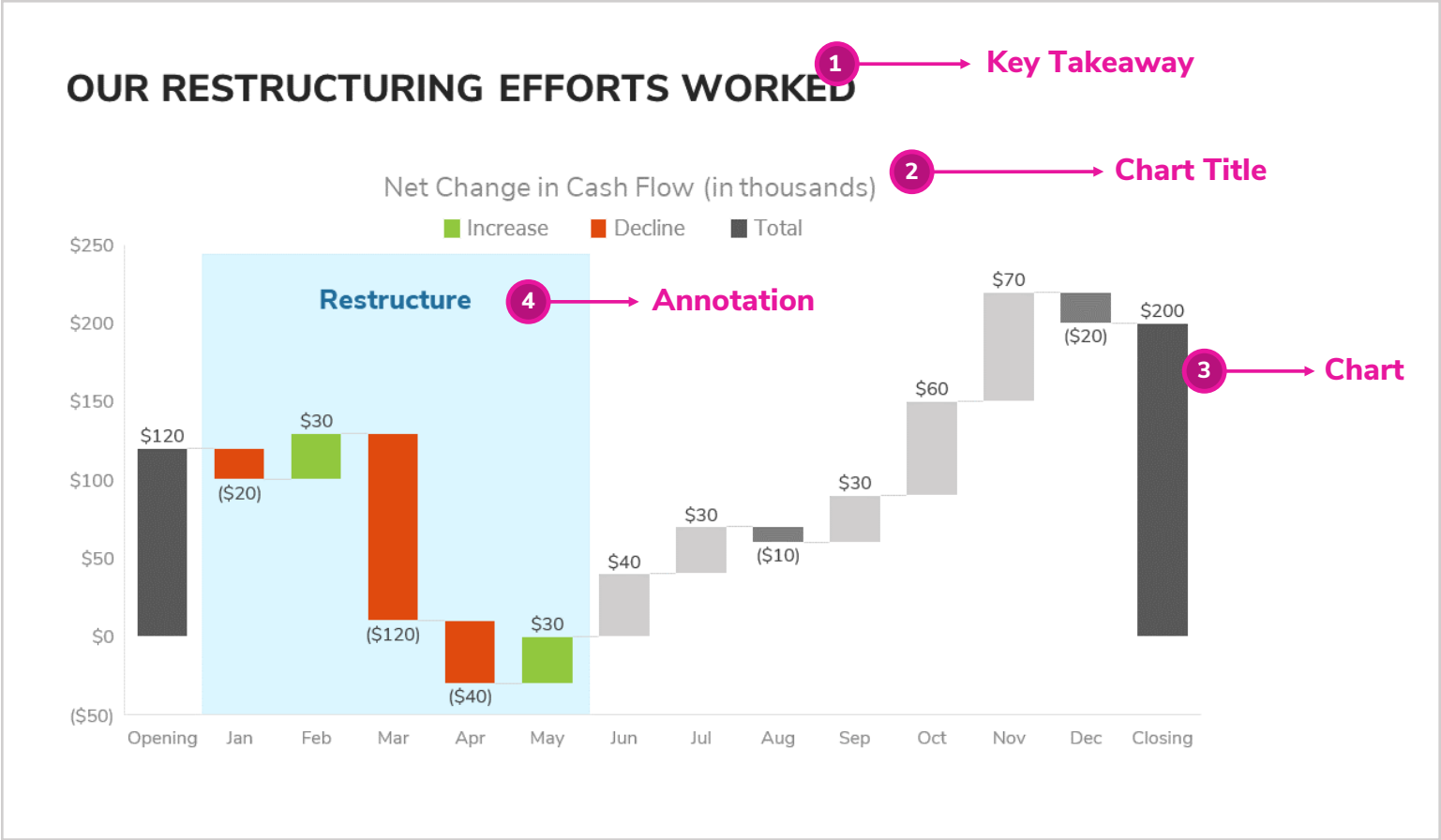
Increased competition is likely reducing our market share.

[Image: Emerging Competitor Logos]

NOTES:

Elements of a Data Display:

- Key takeaway
- Title of chart
- Chart itself (and a legend if necessary)
- Annotation



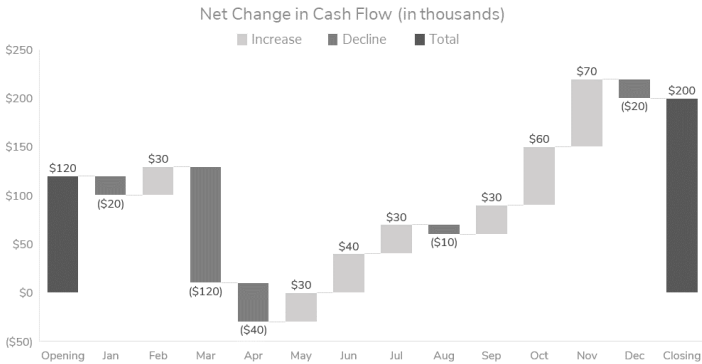
NOTES:

Contrast and Hierarchy:

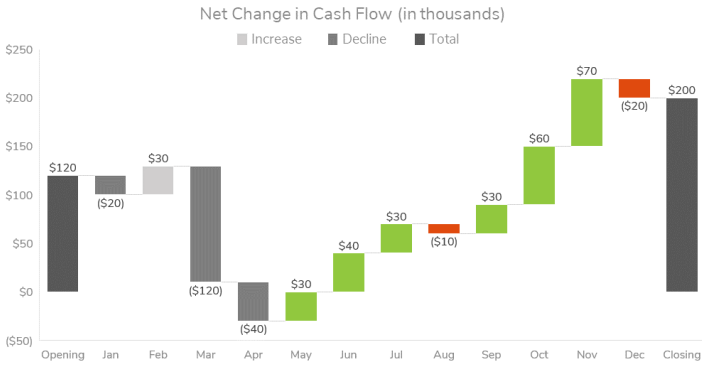
- Begin with neutral layer
- Add in color emphasis
- Add in annotation

NOTES:

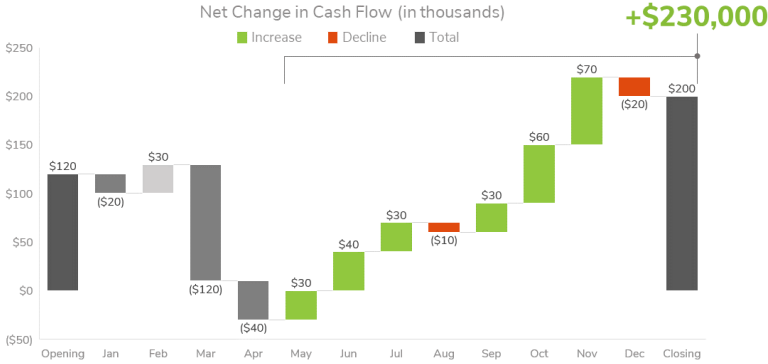
OUR RESTRUCTURING EFFORTS WORKED



OUR RESTRUCTURING EFFORTS WORKED



OUR RESTRUCTURING EFFORTS WORKED



Rehearse:

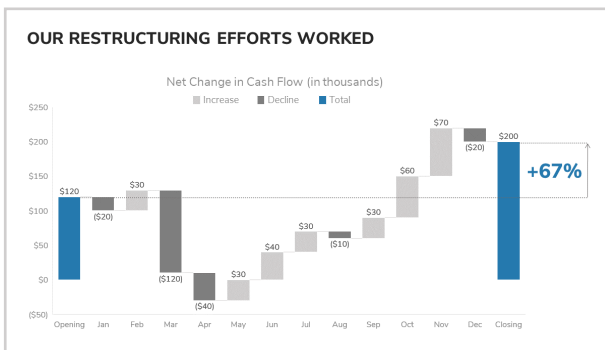
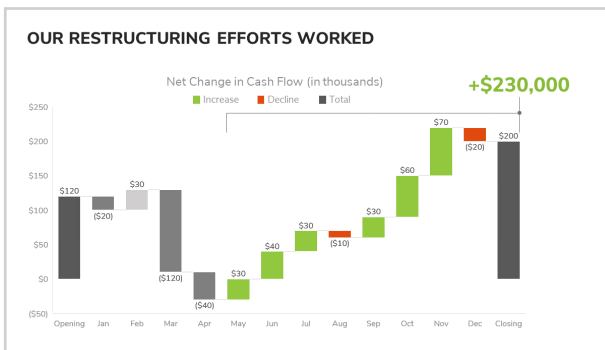
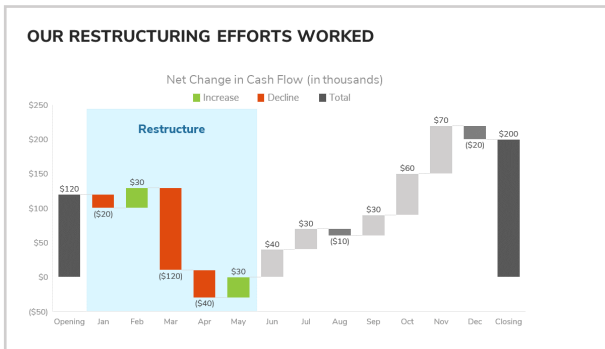
- Time the duration of your presentation and edit accordingly
- Don't use jargon for opening and closing—you can “nerd-out” in the middle
- Edit on your feet—say it out loud and see how it sounds
- Practice with others

PRESENTATIONS

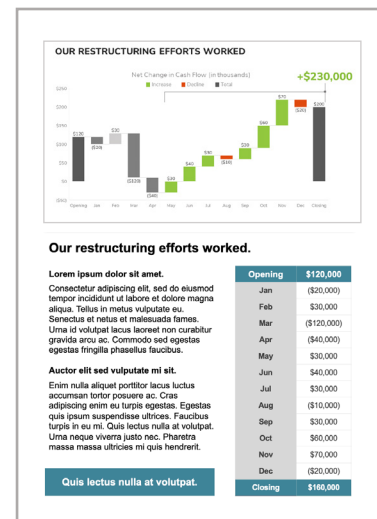
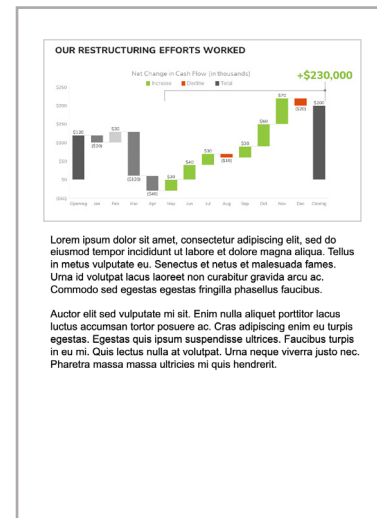
VS

HANDOUTS

- Slides serve as visual aids for the audience
- Only actionable data (some exceptions)
- One chart/graph/etc per slide (some exceptions)
- Analyzable data may go in the appendix

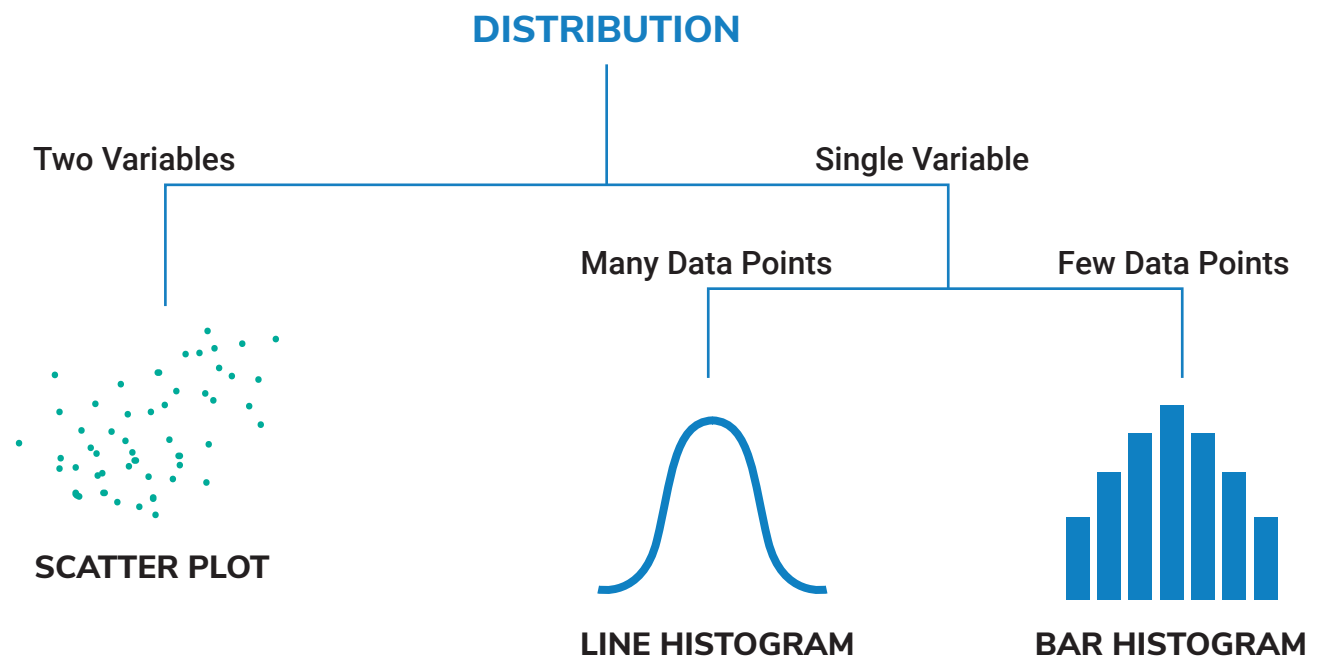
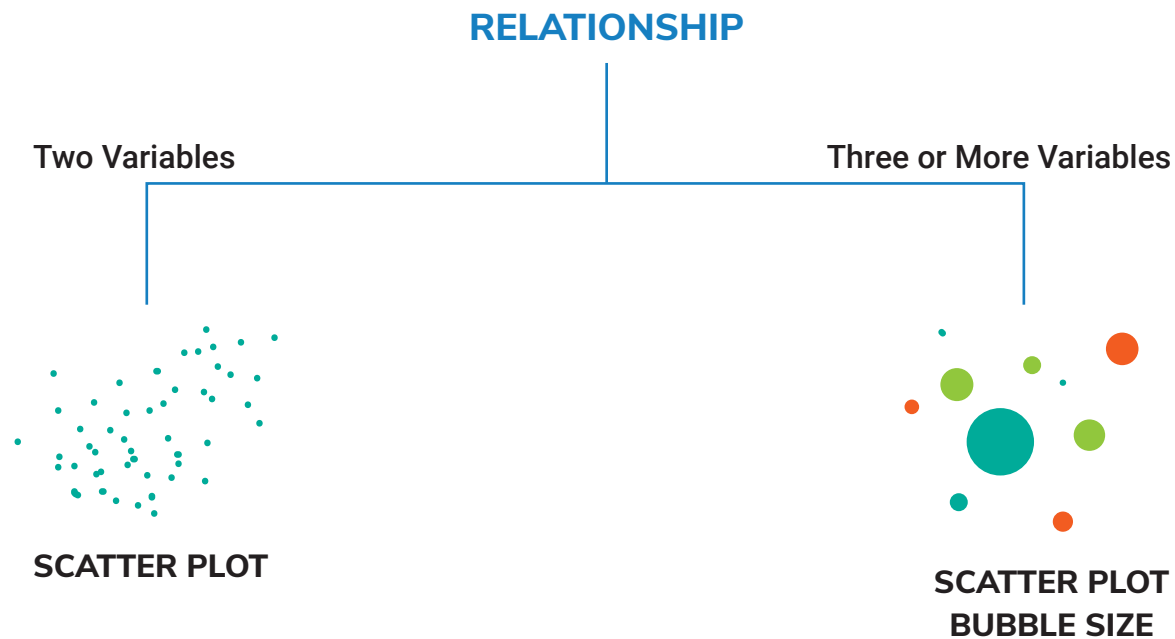


- Slides serve as a document meant to be read without you there
- Can include both analyzable and actionable data
- Can have numerous charts/graphs/etc. per page
- Provide stand-on-its-own, paragraph writing



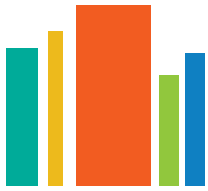
How To Create Effective Charts

Similar to the steps you take to do the Groundwork (i.e. analyze your audience and develop your core message) and create your Narrative (create a strong opening, middle, and closing) - you will want to determine what type of chart to use depending on what you are attempting to demonstrate in your data.



COMPARISON AMONG ITEMS

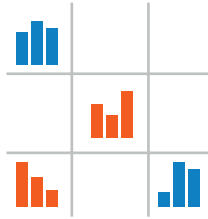
Two Variables Per Item



**VARIABLE WIDTH
COLUMN CHART**

One Variable Per Item

Many Categories

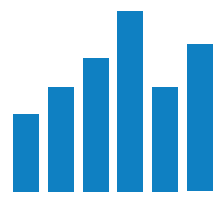


**TABLE WITH
EMBEDDED CHARTS**

Few Categories



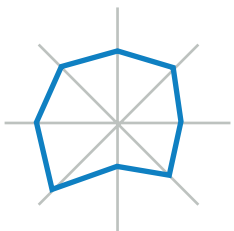
**BAR CHART
HORIZONTAL**



**BAR CHART
VERTICAL**

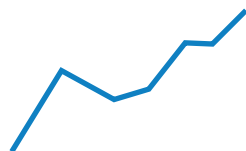
COMPARISON OVER TIME

Cyclical Data



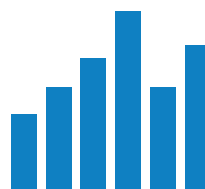
**CIRCULAR AREA
CHART**

Non-Cyclical Data



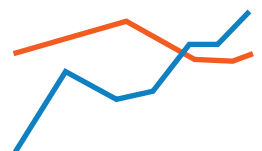
LINE CHART

Single or Few
Categories



**BAR CHART
VERTICAL**

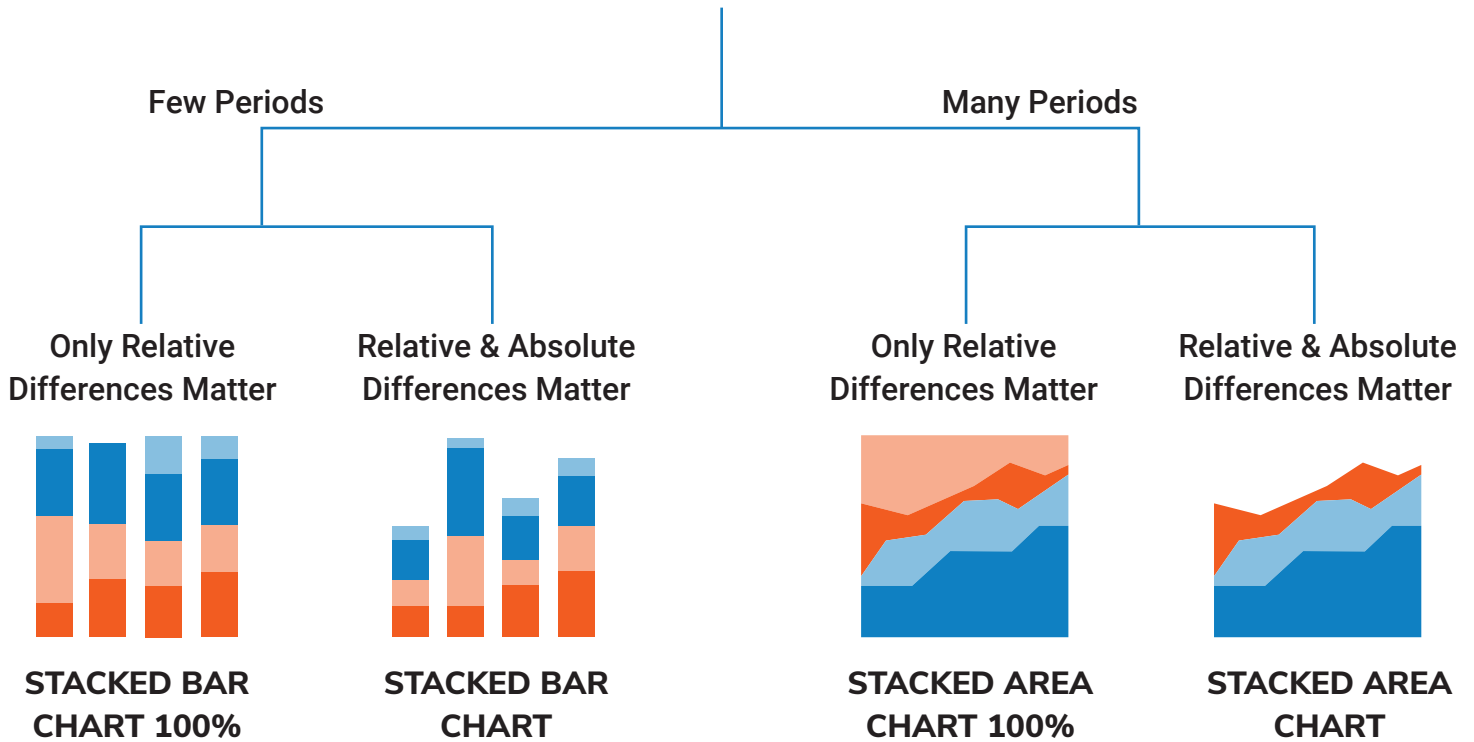
Many
Categories



LINE CHART

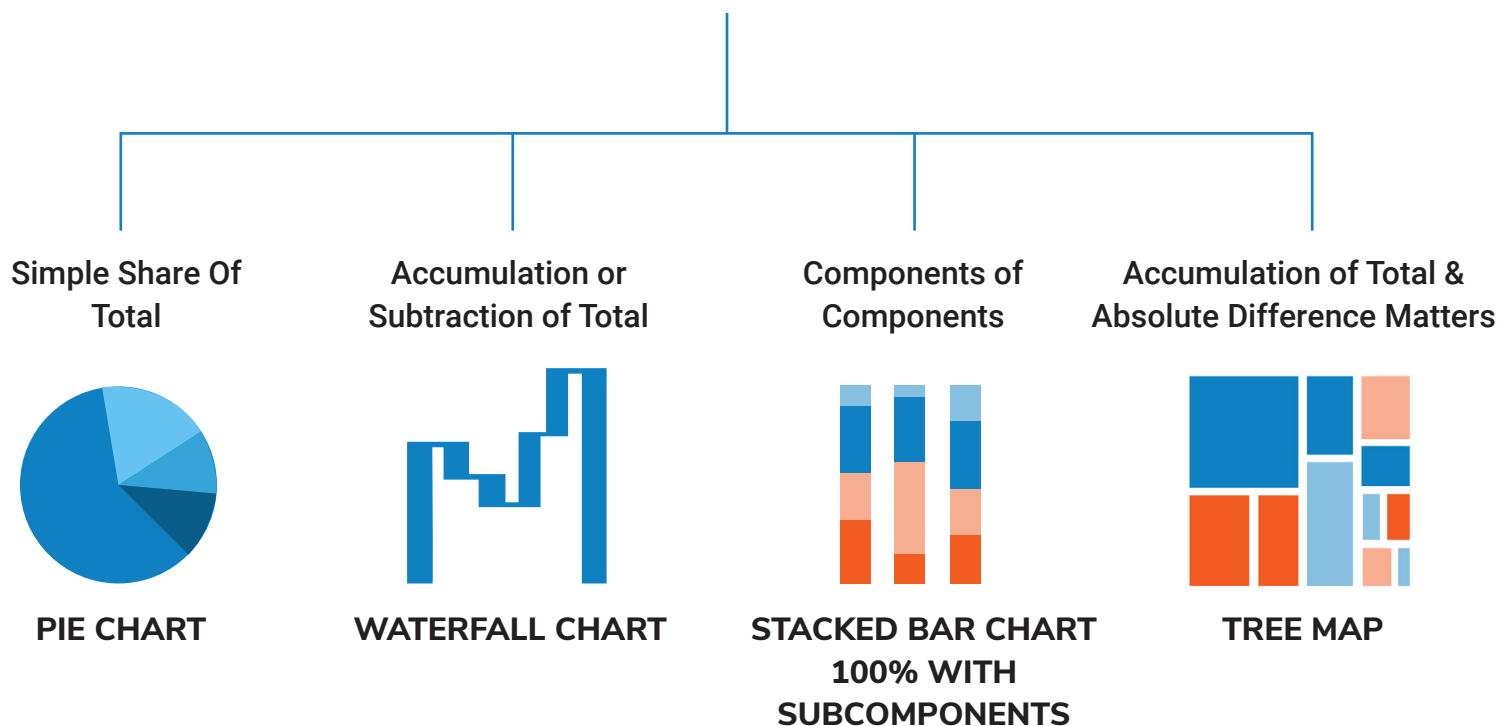
COMPOSITION

CHANGING OVER TIME



COMPOSITION

STATIC



WE WOULD LOVE YOUR FEEDBACK!

Scan the QR code below to take our super short, super fun
(okay, maybe not super fun) survey. We promise it's under a minute!



To continue to elevate your professional skills and accelerate your career goals or to just learn more about our industry-leading training and services, you can visit our website, send us an email or give us a call!

We look forward to supporting you on your journey!



discover@moxieinstitute.com



www.moxieinstitute.com



(858) 771-6827