

Excel**Shir**  
*You'll see.*

# Data Storytelling

Intro Workshop



Taught by Shir Aviv



# Who am I?



# Who I've Worked With

**Publicis**  
**LifeBrands**  
Medicus

SAATCHI  
&  
SAATCHI

diadeis   
creating brand efficiency

**HUGE**

**Bloomberg**

J.P.Morgan

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**vimeo**

**Etsy**

**AMERICAN  
EXPRESS**

**REBAG**

**ExcelShir**  
You'll see.



# Session Overview

#	Type	Activity
1	A small icon of a lightbulb inside a square frame, representing an idea or concept.	What is Data Storytelling?
2	A small icon of a pencil, representing writing or editing.	Identify & share your why
3	A small icon of a person's head and shoulders next to a screen, representing a presentation or example.	Data Storytelling example
4	A small icon of a person's head and shoulders next to a screen, representing a presentation or example.	Data Storytelling frameworks
5	A small icon of two hands, one above the other, representing a collaborative exercise.	Big Idea exercise
6	A small icon of two hands, one above the other, representing a collaborative exercise.	Storyboard exercise
7	A small icon of two circular arrows forming a loop, representing a recap or refresh.	Recap key topics
8	A small icon of a clipboard with a document, representing an evaluation survey.	Training evaluation survey
9	A small icon of a plus sign inside a circle, representing a bonus or additional content.	Bonus: Data visual before & after
10	?	Q&A



# What is Data Storytelling?

**Data Storytelling** is the art and science of conveying a compelling narrative by strategically leveraging information.



## In Other Words...

Data Storytelling is all about  
**effective communication.**



# When Data Storytelling, **Don't...**

- Confuse
- Convince
- Coerce



# When Data Storytelling, Do...

- Inform
- Influence
- Inspire

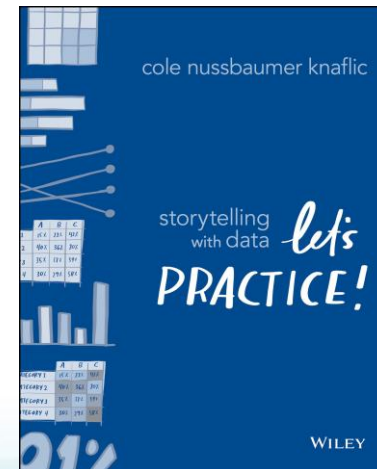
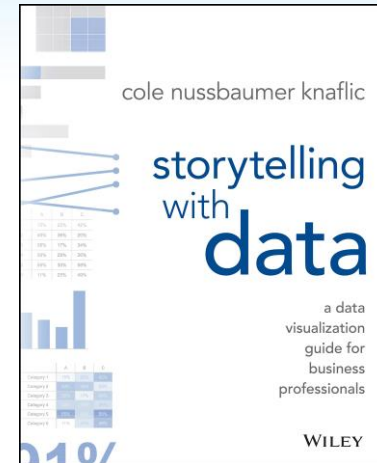
# What's at Stake for *You* Personally?

1. What can you **gain** from becoming an effective Data Storyteller?
2. What can you **lose** from *not* becoming an effective Data Storyteller?

# What's at Stake for *Me* Personally?



# Cole Knaflic (OG Data Storyteller)



# Example: Back-to-School Shopping



Let's **invest** in employee training to  
**improve** the in-store customer experience

**Source:** Knaflic, Cole. Storytelling With Data: Let's Practice! Wiley, © 2019

**Free Download:** <https://www.storytellingwithdata.com/letspractice/downloads>

Back-to-school shopping accounts for

**30%**

of our annual revenue. Because of this, it is a huge driver of our overall annual success.

Data source: monthly Sales report. Based on prior three years (2017, 2018, 2019) of annual back-to-school sales compared to total annual sales.

# What we'll cover today

**1 Discuss what we've learned**  
from our survey analysis<sup>1</sup> and

**2 Suggest specific recommendations**  
on changes to make for the upcoming back-  
to-school shopping season to improve  
customer satisfaction and increase sales.

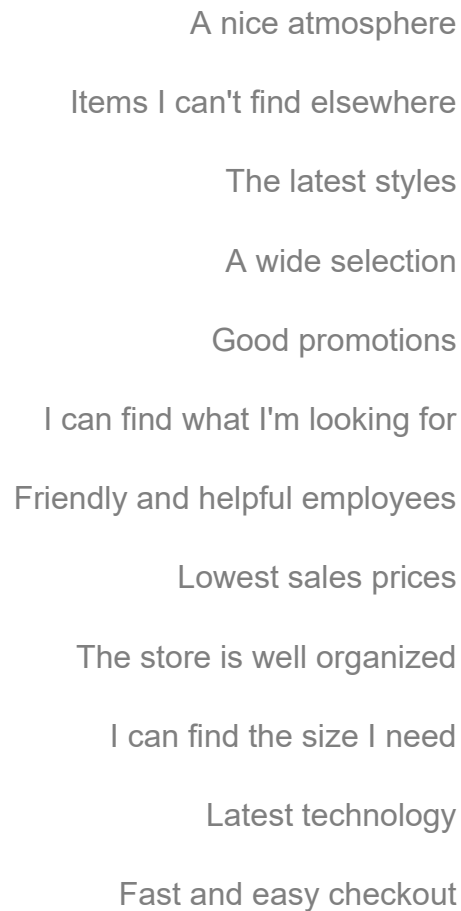
<sup>1</sup>Comprehensive details on survey methodology and related info can be found in the Appendix on pages 15-20.

# Back-to-school shopping: consumer sentiment

STORE OFFERS...

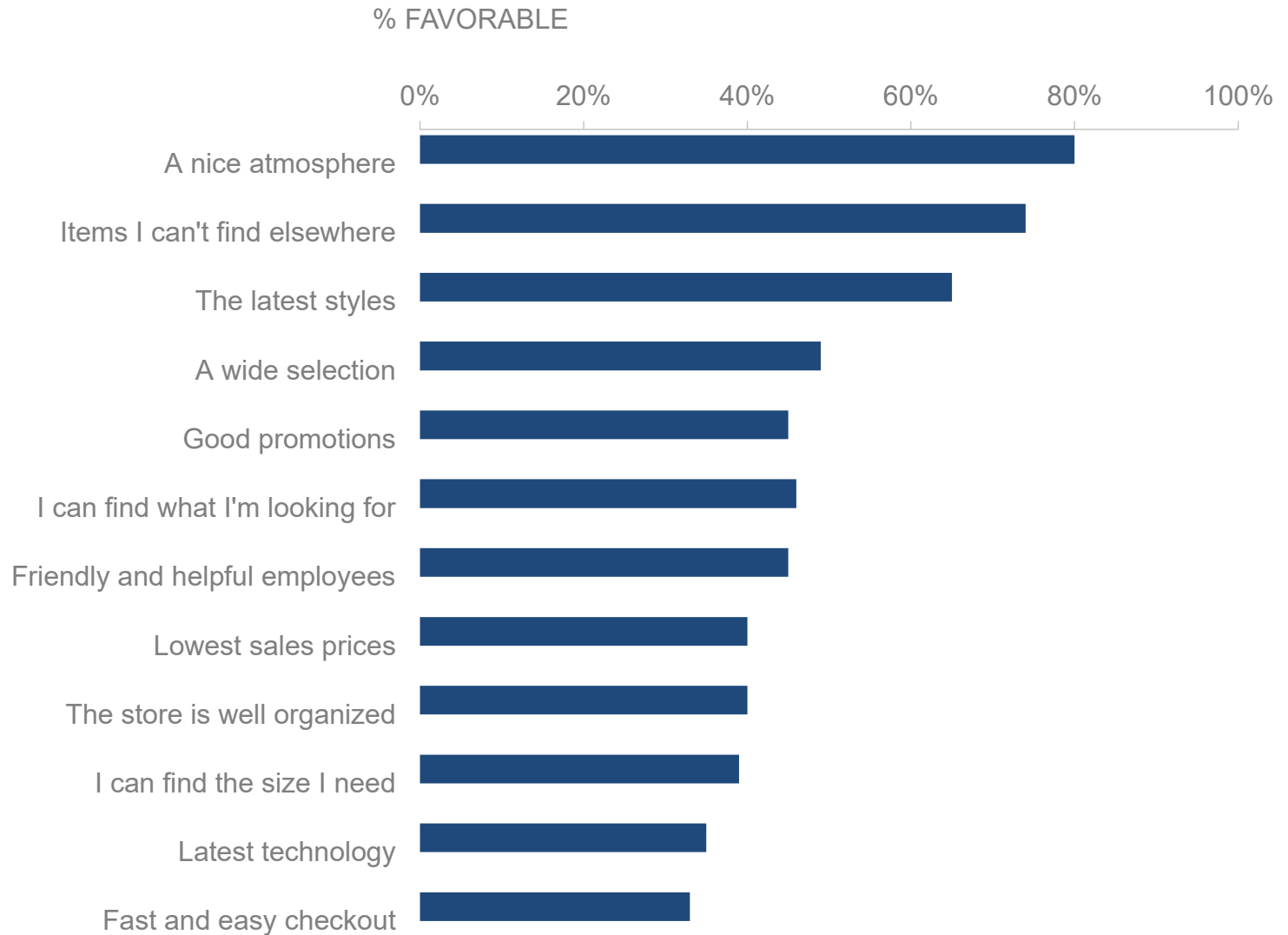
% FAVORABLE

0% 20% 40% 60% 80% 100%



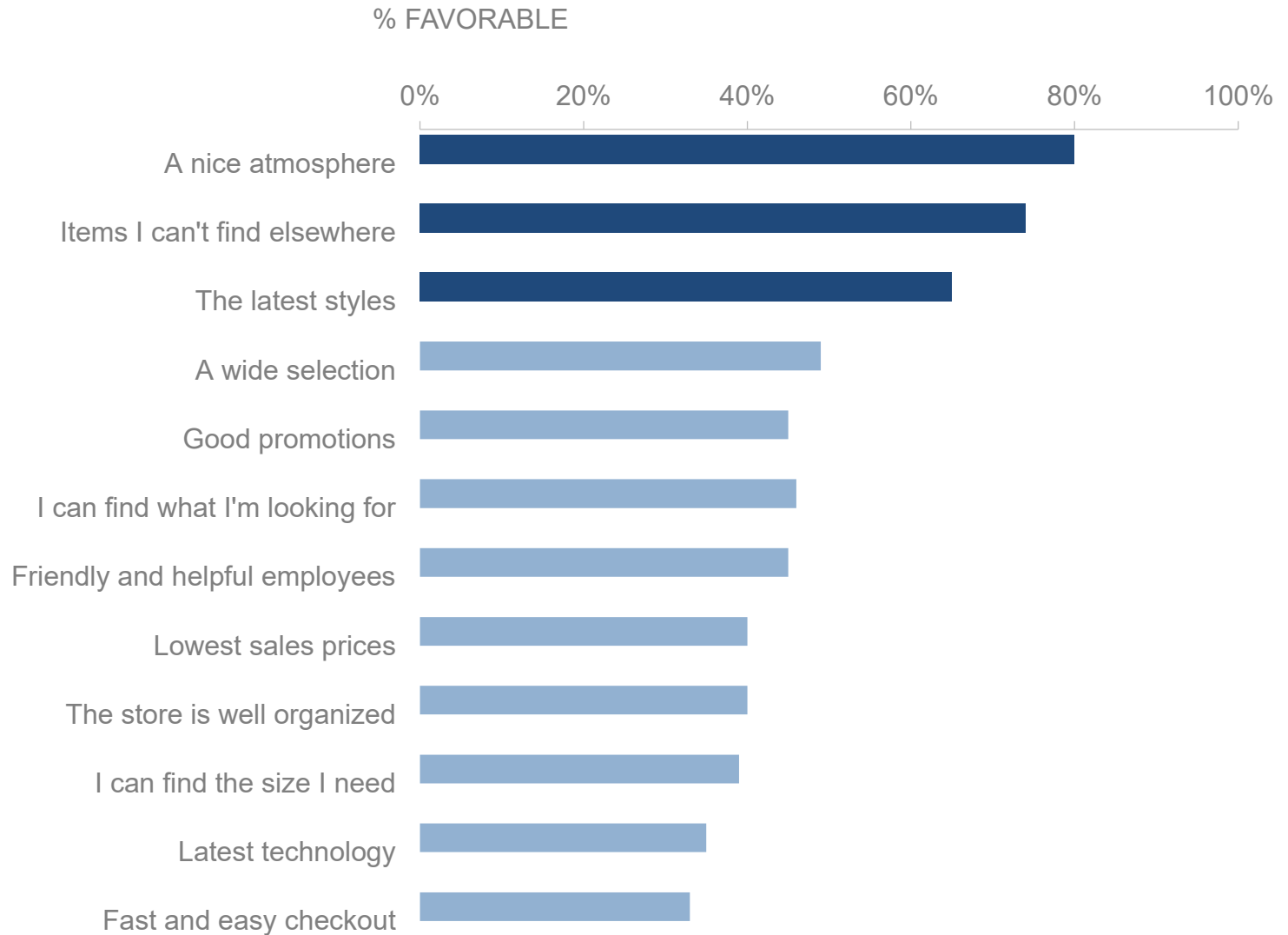
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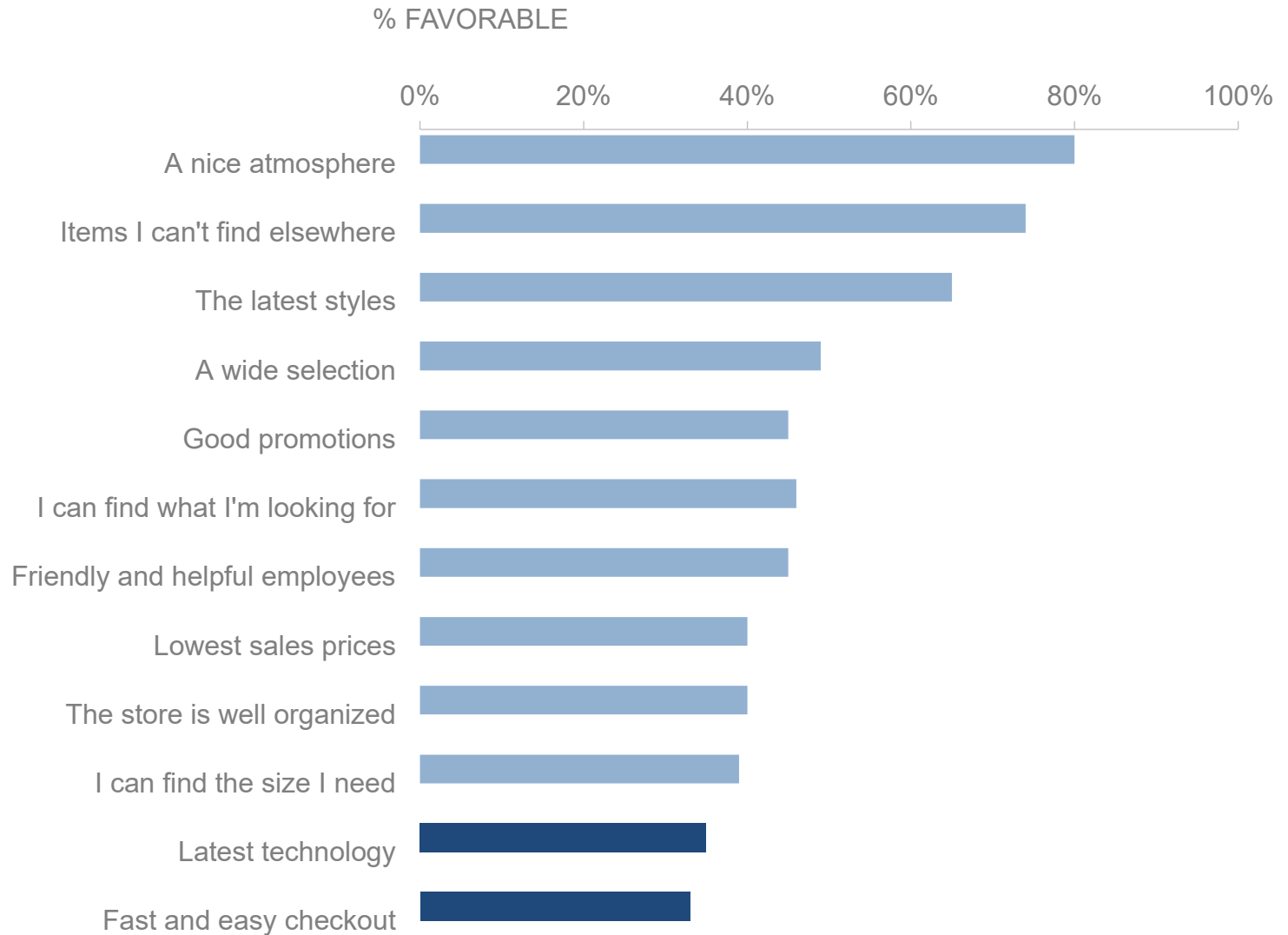
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# Back-to-school shopping: consumer sentiment

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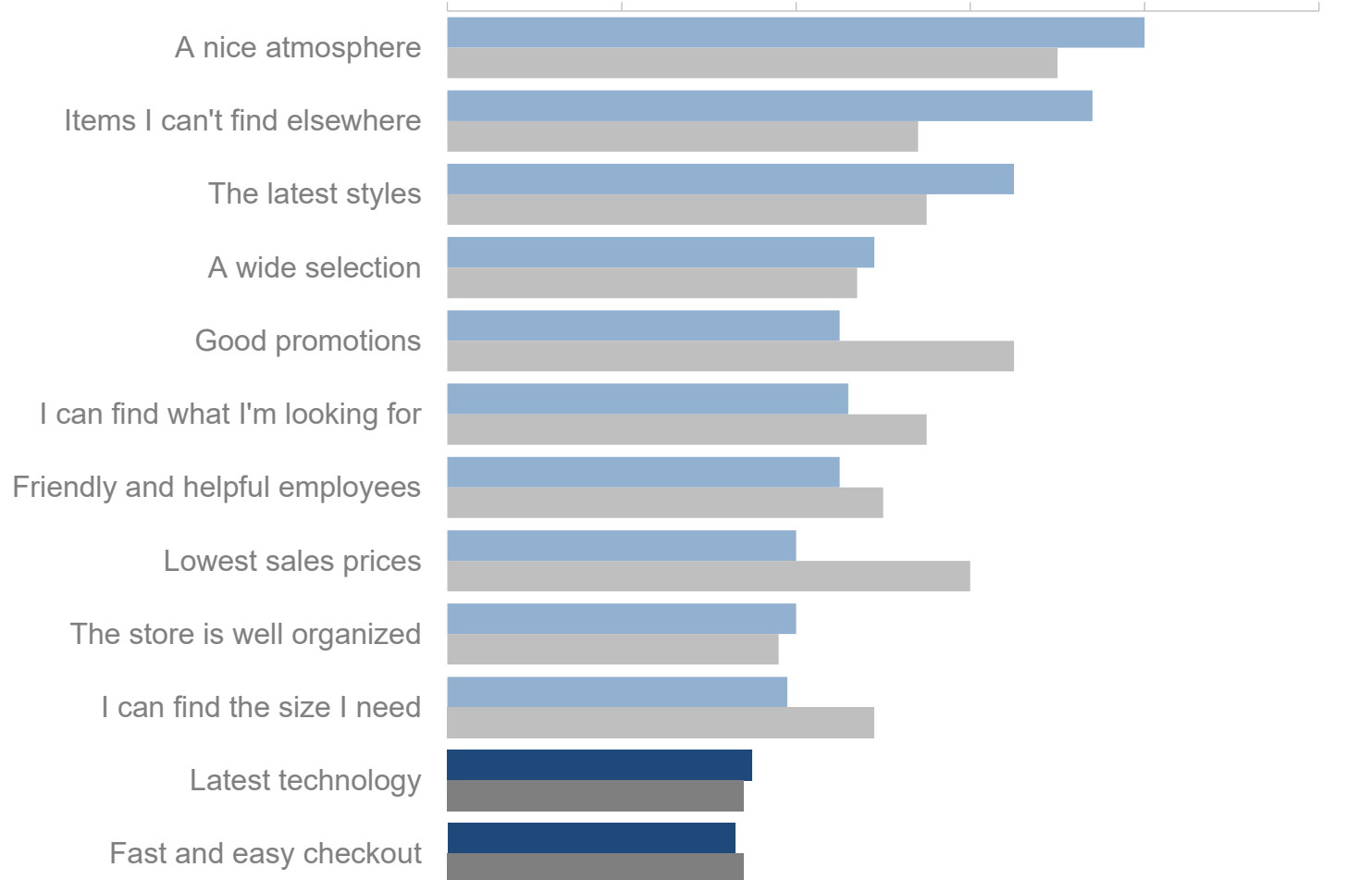
# Back-to-school shopping: consumer sentiment

■ Our store   ■ All stores

STORE OFFERS...

% FAVORABLE

0%   20%   40%   60%   80%   100%



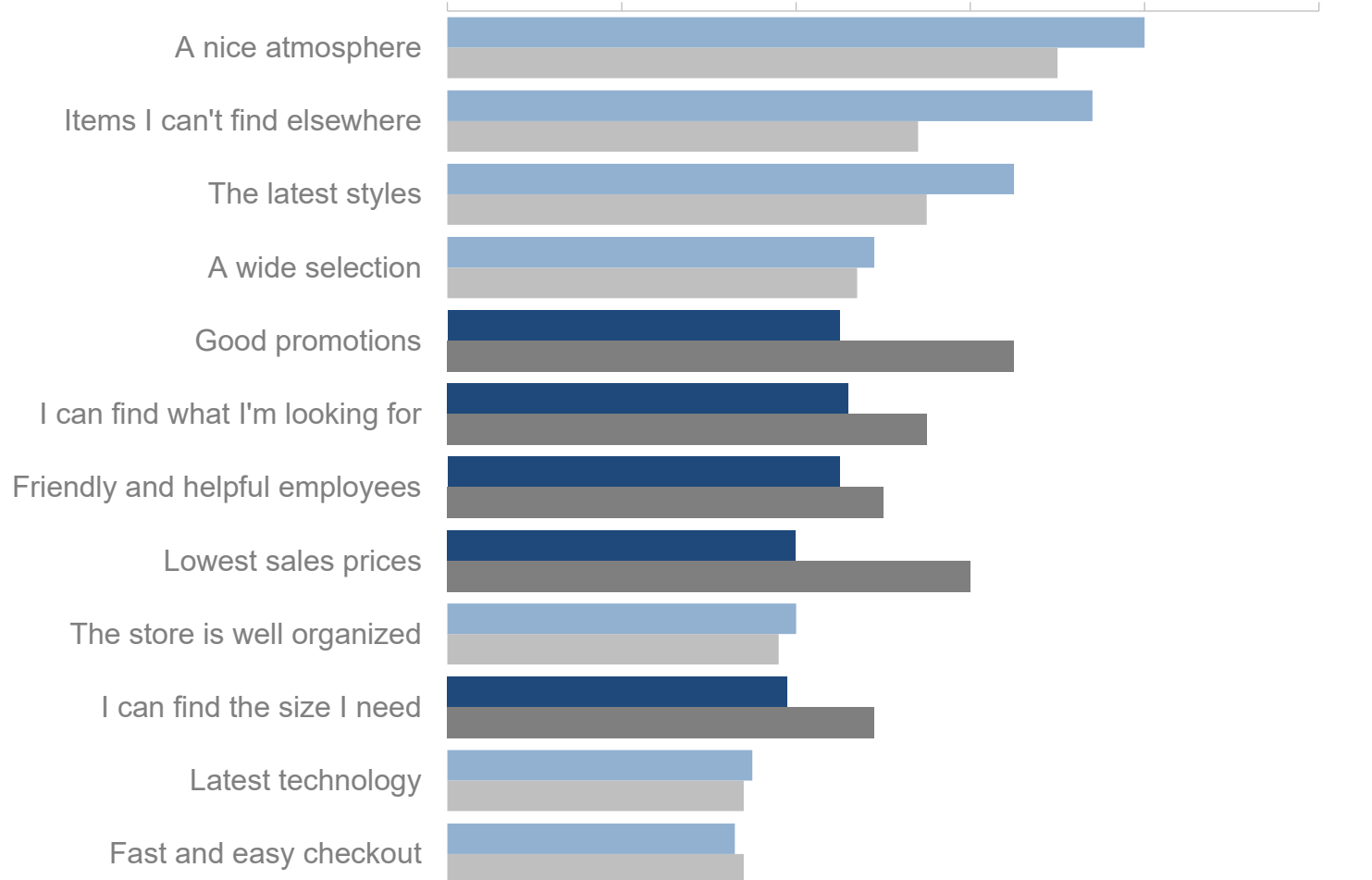
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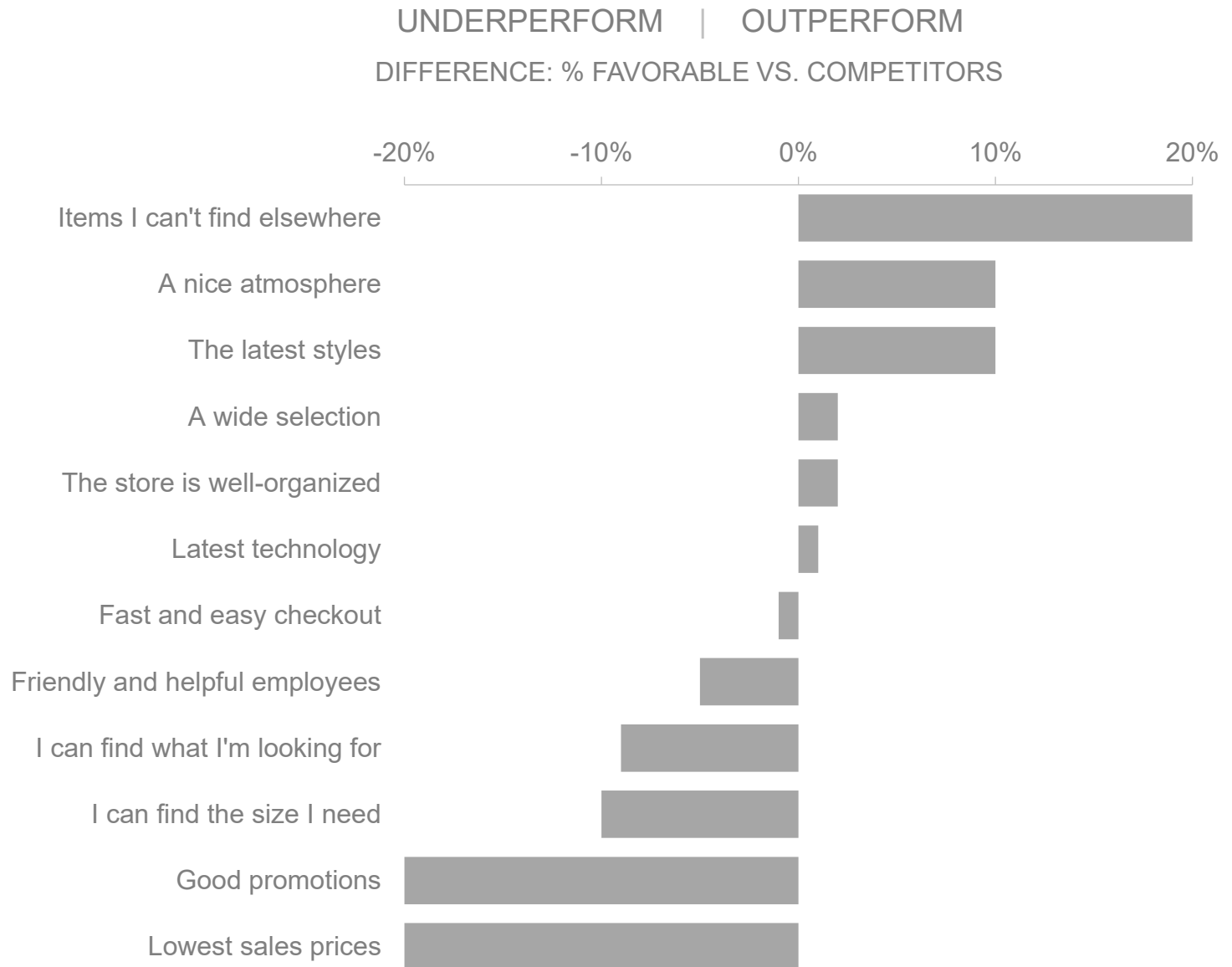
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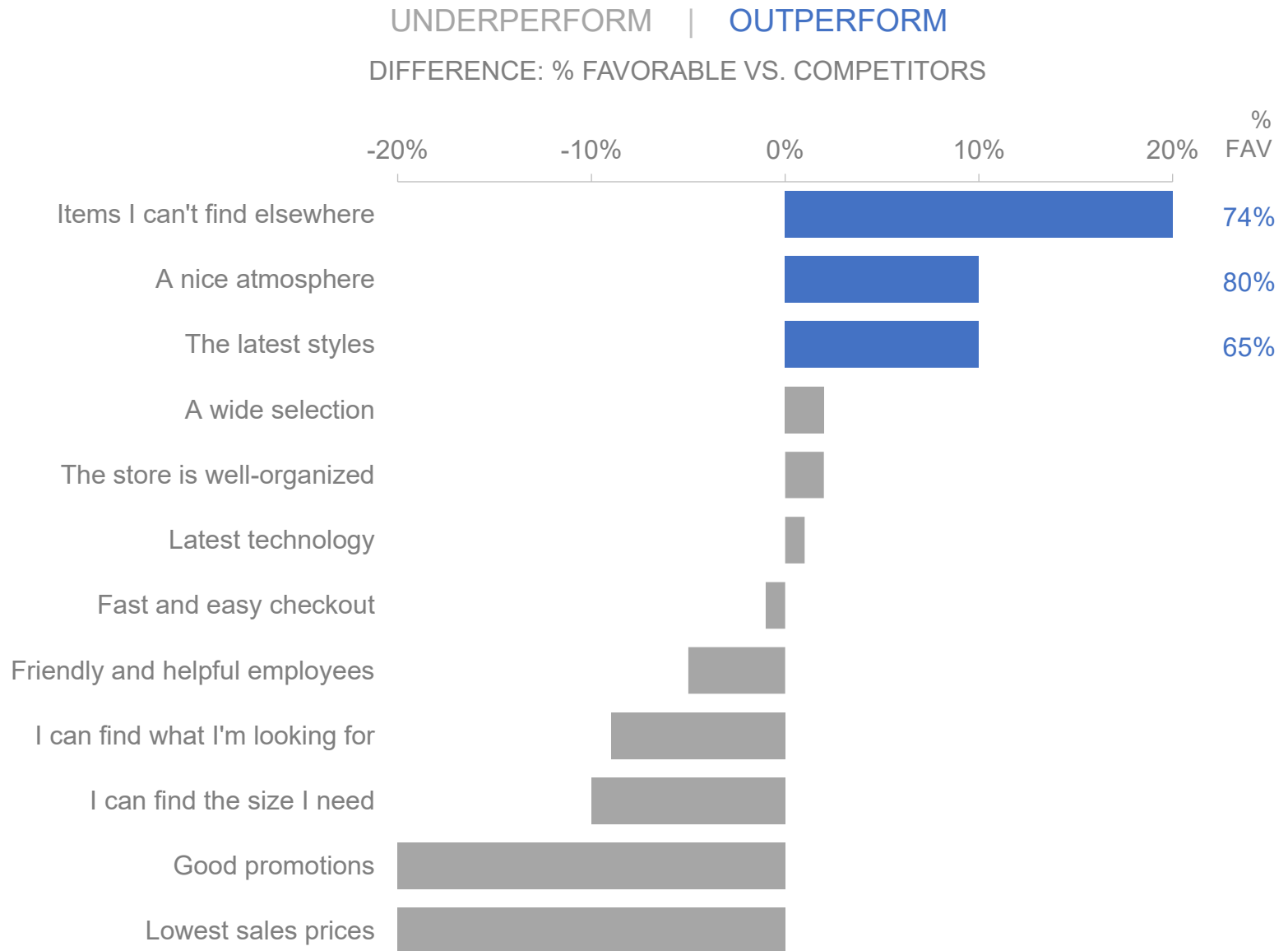
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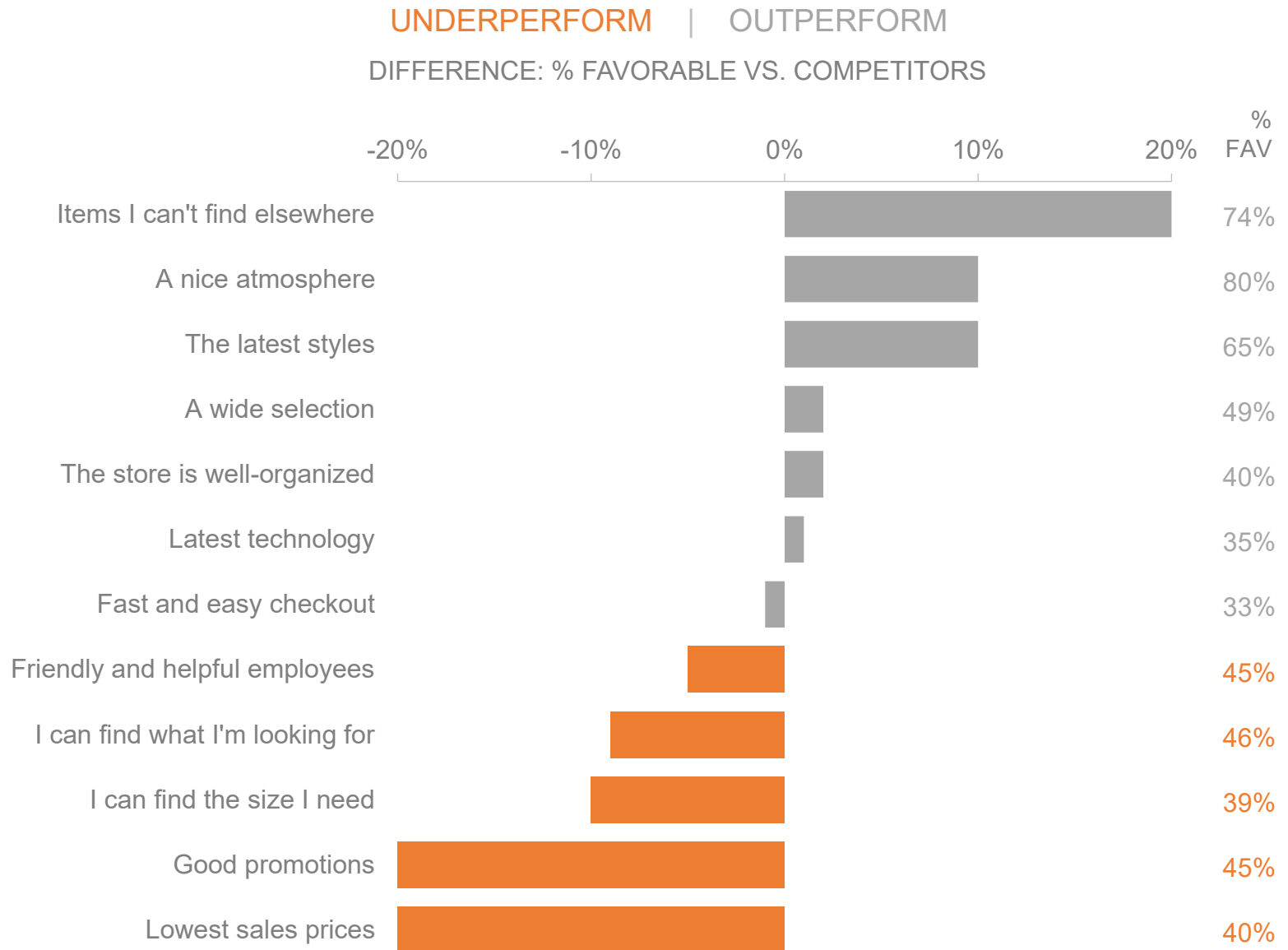
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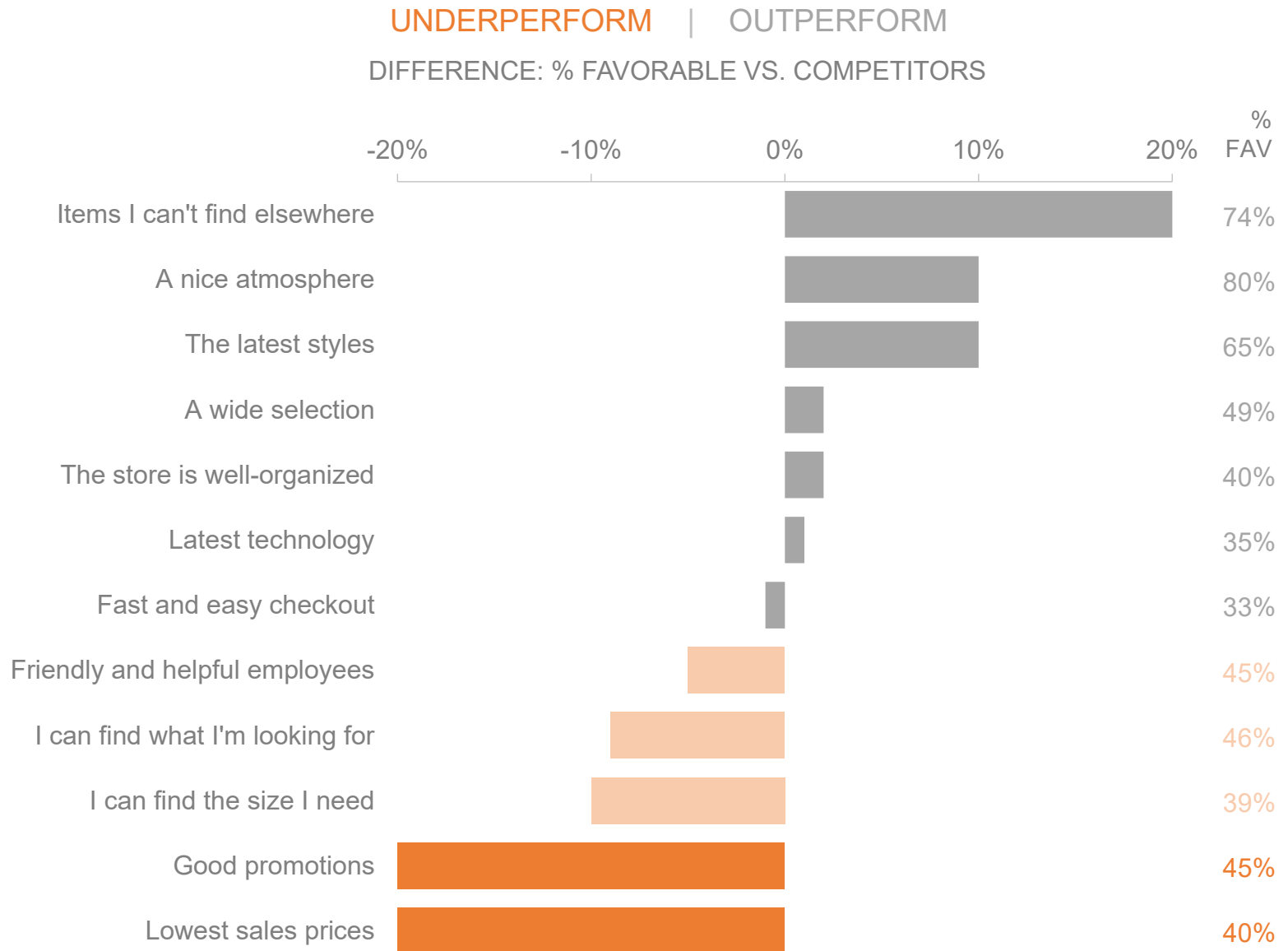
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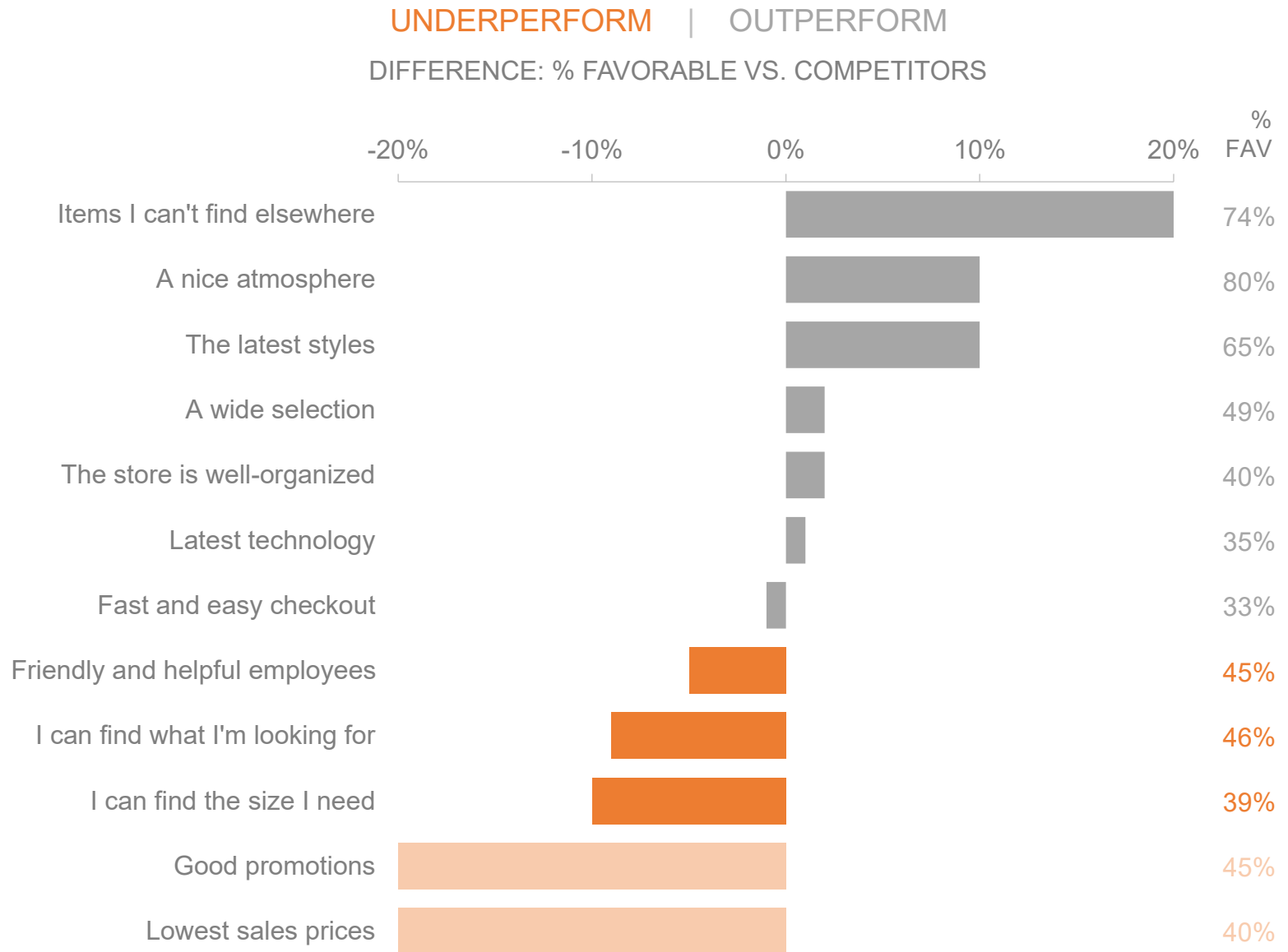
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# Back-to-school shopping: consumer sentiment

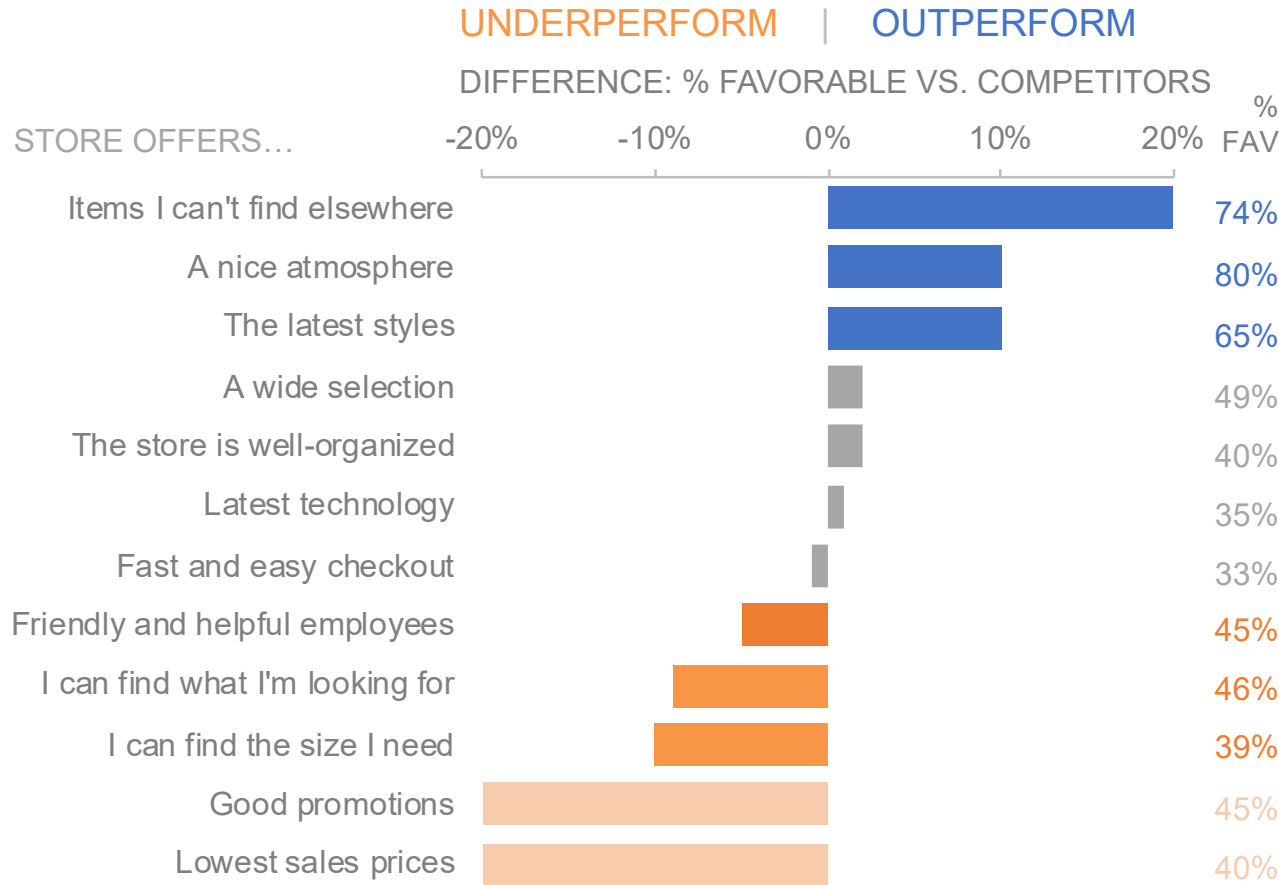
STORE OFFERS...



Let's **invest** in employee training to  
**improve** the in-store customer experience

# Action needed: invest in employee training

## Back-to-school shopping: consumer sentiment



### THE GOOD NEWS:

We're beating the competition when it comes to **the latest styles that people can't find elsewhere and store atmosphere.**

### WE CAN IMPROVE:

We score low and lower than the competition in areas related to **helpful employees and customers being able to find what they are looking for.** We also score lower than the competition on promotions/sales, but don't recommend focusing here.

### RECOMMENDATION:

**Invest in employee training to improve customer experience.**



# Let's Discuss...

# Cole Knaflic's Storytelling with Data

1. Understand the context
2. Choose an effective visual
3. Clear the clutter
4. Focus attention
5. Think like a designer
6. Tell a story

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*Memory Trick: “C V C A D S” as in “QVC channel ADS, but with a C”*

# Undeniable ROI: 4 Weeks to Effective Data Storytelling

1. Stakeholder alignment
2. Analyze
3. Visualize
4. Storytell

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*Memory Trick: “S A V S” as in...*

*“Apply these salves to heal your communication wounds.”*

# Our Focus Today...

## 1. Context / Stakeholder alignment

 Exercise: Big Idea

 Exercise: Storyboard

# Exercise: Big Idea



I demo



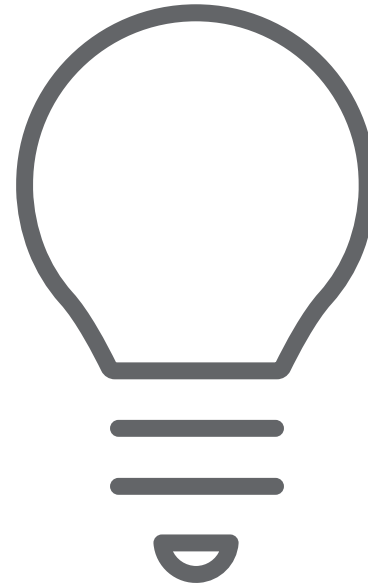
You do



Pair share



We review



# Big Idea Worksheet

## the **BIG IDEA** worksheet

storytelling  data®

Identify a project you are working on where you need to communicate in a data-driven way. Reflect upon and fill out the following.

PROJECT \_\_\_\_\_

### WHO IS YOUR AUDIENCE?

- (1) List the primary groups or individuals to whom you'll be communicating.
- (2) If you had to narrow that to a *single person*, who would that be?
- (3) What does your audience care about?
- (4) What action does your audience need to take?

### WHAT IS AT STAKE?

What are the *benefits* if your audience acts in the way that you want them to?

What are the *risks* if they do not?

### FORM YOUR BIG IDEA

It should:

- (1) articulate your point of view,
- (2) convey what's at stake, and
- (3) be a complete (and single!) sentence.

# Who is Your *Audience*?

1. List the primary groups or individuals to whom you'll be communicating.
2. If you had to narrow that to a *single person*, who would that be?
3. What does your audience care about?
4. What action does your audience need to take?

# What is *at Stake*?

1. What are the *benefits* if your audience acts in the way that you want them to?
2. What are the *risks* if they do not?

# Form Your Big Idea, Which Should...

1. Articulate your point of view
2. Convey what's at stake
3. Be a complete (and single) sentence

# Who is Your *Audience*?

1. Primary groups:
  - The executive team
2. Single person:
  - Head of retail
3. What do they care about?
  - Having a highly profitable back-to-school shopping season.
  - Making customers happy because happier customers spend more.
  - Beating the competition.
4. What action do they need to take?
  - Agree that training is the right way to deal with inconsistent service levels and approve the resources (cost, time, people) it will take to make that happen.

# What is *at Stake*?

1. What are the *benefits* if your audience acts in the way that you want them to?
  - Better service levels = happier customers.
  - Happier customers spend more, come back more often, tell friends about their positive experience.
2. What are the *risks* if they do not?
  - No action could lead to negative word of mouth.
  - People shopping with competitors.
  - Reputation risk.
  - Lost revenue.

# Form Your Big Idea, Which Should...

1. Articulate your point of view
2. Convey what's at stake
3. Be a complete (and single) sentence

Let's invest in sales associate training to improve the in-store shopping experience and make the upcoming back-to-school season the best revenue generating one yet!



# What's Your Big Idea?

- Use your own project (recommended)
- Or use Pet Shelter Volunteer example

# When Pair Sharing Your Big Ideas...

- 5 minutes per person
- Active listening
- Provide specific & constructive feedback

# Big Idea – We Review



# Exercise: Storyboard



I demo



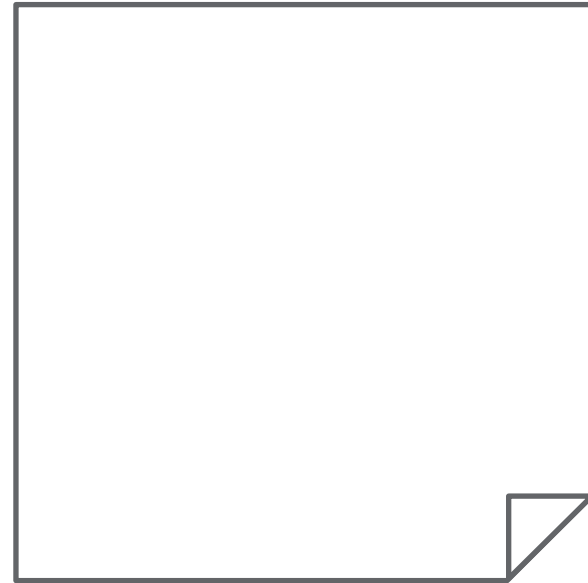
You do



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# Back-to-School Shopping Big Idea

Let's invest in sales associate training to improve the in-store shopping experience and make the upcoming back-to-school season the best revenue generating one yet!



# Brainstorm List of Ideas to Convey

1. Historical context (back-to-school shopping is important).
2. Problem we're trying to solve (historically not data driven).
3. Different ways we envisaged solving the problem.
4. Course of action we undertook: survey.
5. Survey: customer groups we asked, general demographics, response rates.
6. Survey: details on competitors.
7. Survey: questions we asked, open and close date of survey.
8. Data: how our store compares across the various items.
9. Data: how this breaks down across stores and regions.
10. Data: how we compare to the competition.
11. Data: how competitor comparison breaks down by stores & regions.
12. Good news: where we're doing best or beating competition (with store breakdown).
13. Bad news: where we're doing worse or lower than competition (with store breakdown).
14. Areas for improvement.
15. Potential remedies.
16. Recommended course of action: invest in sales training.
17. Resources needed (people, budget).
18. What this will solve.
19. Projected timeline.
20. Discussion to have / decision to be made.



# Write Down 5-10 Key Ideas on Sticky Notes

Recommendation:  
Invest in employee  
training (+ details)

Back-to-school  
shopping is  
important  
(demonstrate)

Historically  
not data-  
driven

All the details:  
-WHO we asked  
-WHO responded  
-Competitors  
-Etc.

Survey

What we  
learned from  
the data  
(analysis  
results)

Discussion /  
Approval

Opportunity:  
Inconsistencies  
in service  
levels

Ways we  
considered  
becoming  
more data-  
driven



# Experiment with Order of Sticky Notes

Back-to-school shopping is important (demonstrate)

Historically not data-driven

Ways we considered becoming more data-driven

Survey

All the details:  
-WHO we asked  
-WHO responded  
-Competitors  
-Etc.

What we learned from the data (analysis results)

Opportunity: Inconsistencies in service levels

Recommendation: Invest in employee training (+ details)

Discussion / Approval

# Group Sticky Notes Into Sections

PROBLEM

Back-to-school shopping is important (demonstrate)

Historically not data-driven

Ways we considered becoming more data-driven

ACTION / ANALYSIS

Survey

All the details:  
-WHO we asked  
-WHO responded  
-Competitors  
-Etc.

What we learned from the data (analysis results)

OUTCOME

Opportunity: Inconsistencies in service levels

Recommendation: Invest in employee training (+ details)

Discussion / Approval



# What's Your Storyboard?

- Use your own project  
(same one from the previous exercise)
- Or use Pet Shelter Volunteer example



# Directions for Storyboard Exercise

1. Brainstorm a list of ideas to convey (aim for 20 ideas)
2. Write down 5-10 key ideas on sticky notes (1 idea per sticky note)
3. Experiment with the order of sticky notes
4. Group sticky notes into sections
5. Continue experimenting & improving



# When Pair Sharing Storyboards...

- 5 minutes per person
- Active listening
- Provide specific & constructive feedback

# Storyboard – We Review



# Let's Recap



# Data Storytelling

- Data Storytelling is the art and science of conveying a compelling narrative by strategically leveraging information
- All about effective communication
- Don't **confuse, convince, or coerce**
- Do **inform, influence, and inspire**

# What's at Stake for *You* Personally?

1. What can you **gain** from becoming an effective Data Storyteller?
2. What can you **lose** from *not* becoming an effective Data Storyteller?

# What's at Stake for *Me* Personally?



# Cole Knaflic's Storytelling with Data

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*Memory Trick: “C V C A D S” as in “QVC channel ADS, but with a C”*



# Undeniable ROI: 4 Weeks to Effective Data Storytelling

1. Stakeholder alignment
2. Analyze
3. Visualize
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*Memory Trick: “S A V S” as in...*

*“Apply these salves to heal your communication wounds.”*

# Big Idea

- Identify your *audience*
- Identify what is *at stake*
- Your Big Idea should:
  1. Articulate your point of view
  2. Convey what's at stake
  3. Be a complete & single sentence

# **Storyboard**

1. Brainstorm list of ideas to convey
2. Write down 5-10 key ideas on sticky notes
3. Experiment with order
4. Group into sections
5. Get feedback, and continue improving

## Further Study

- **Storytelling with Data** by Cole Knafllic
- **Show me the Numbers** by Stephen Few
- **Resonate** by Nancy Duarte
- **Undeniable ROI** with Shir Aviv

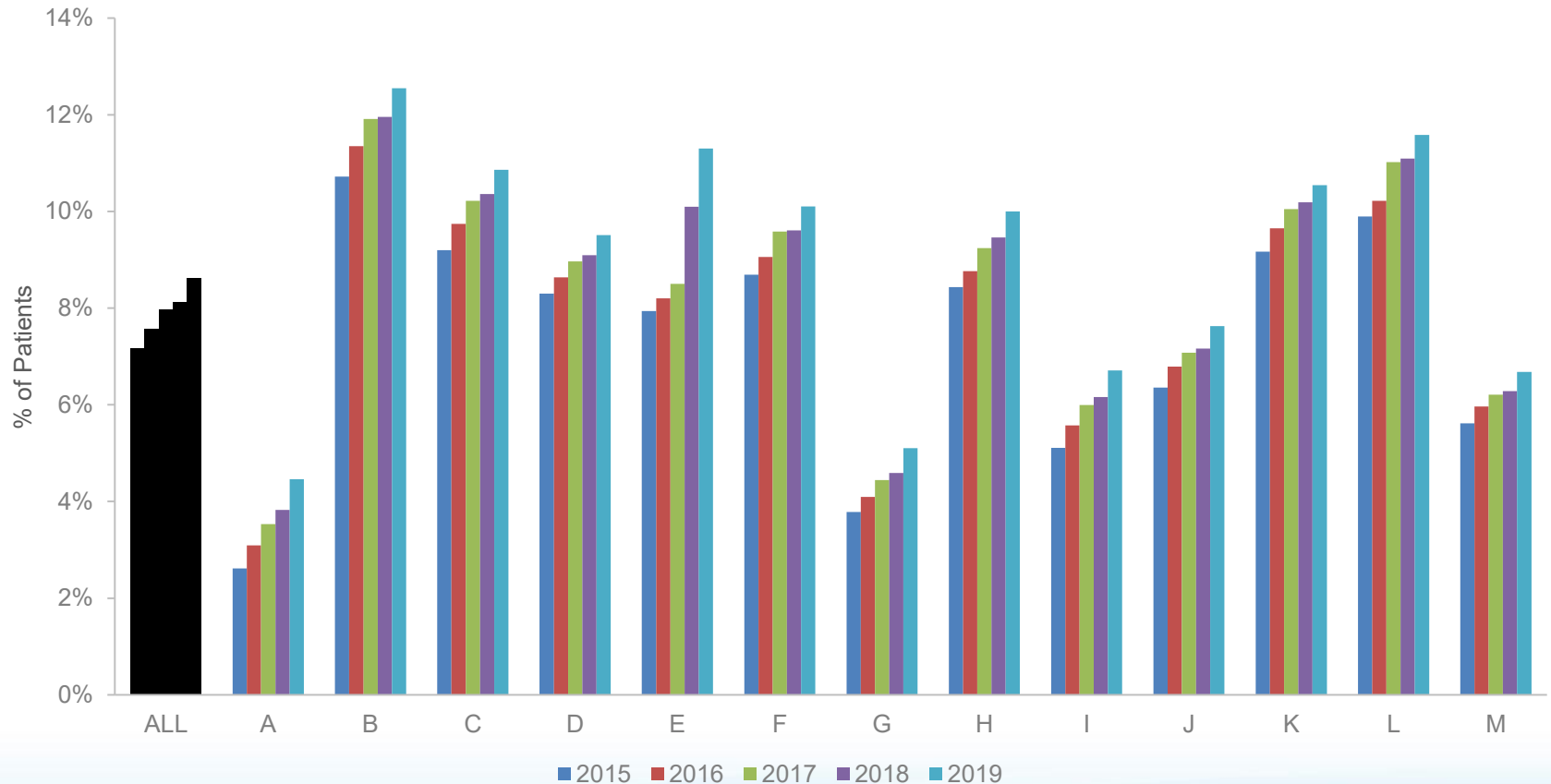
# Training Evaluation Survey



[https://excelshir.com/  
uja-data-storytelling-  
intro-workshop](https://excelshir.com/uja-data-storytelling-intro-workshop)

# ⊕ Data Visual: Before

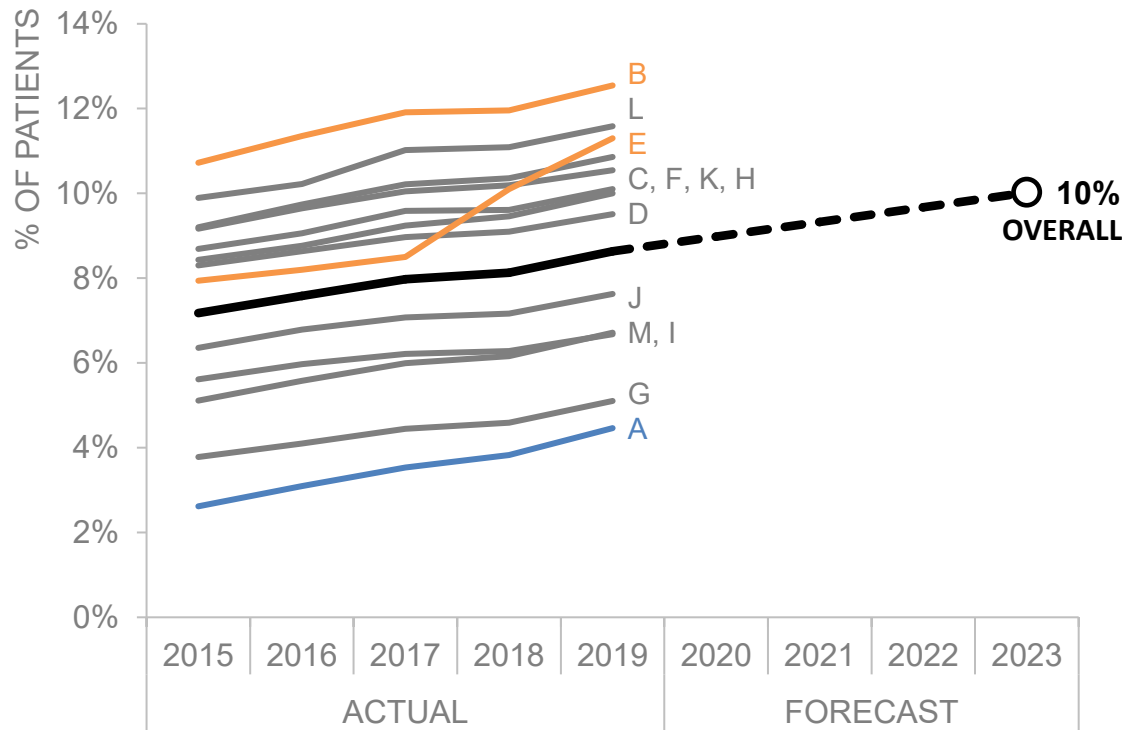
Diabetes Rates by Medical Center



# ⊕ Data Visual: After

## Rising diabetes rates: do we need additional staff?

### Diabetes rates by medical center



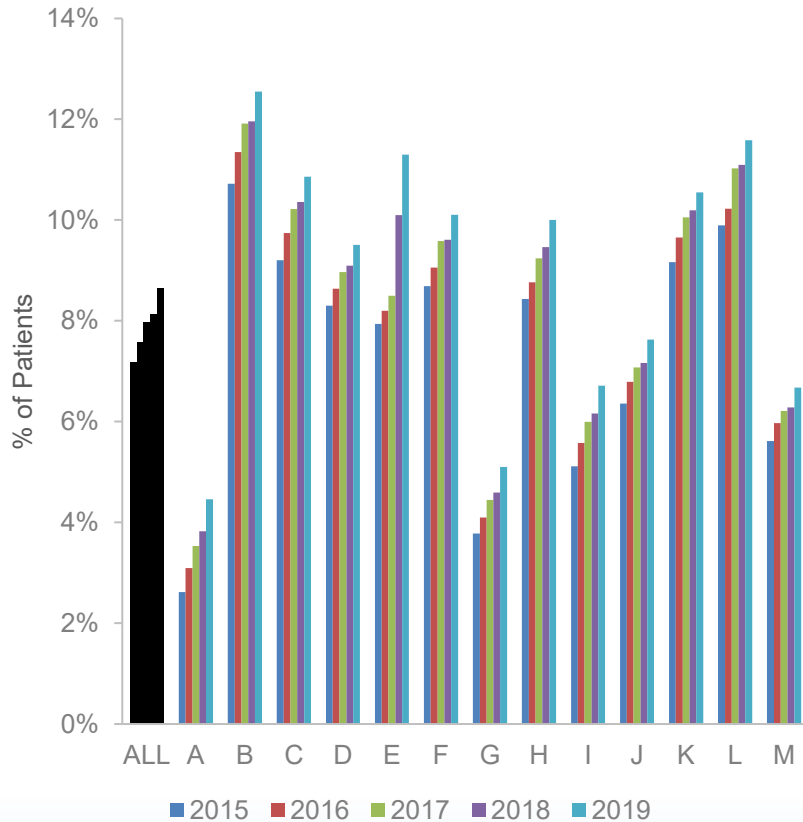
**Center B has the highest rate** (12.5%) and **Center E has seen a marked increase** between 2017 (8.5%) and today (11.3%). What factors are influencing these levels?

The diabetes rate across all centers has increased from 7.2% in 2015 to 8.6% in 2019. At the current pace, this will increase to 10% by 2023. **This implies an additional 14,000 patients per year** for the next four years.

The good news is that we have an opportunity to learn what factors are influencing **Center A, which has the lowest rate and top patient care**. Next steps: Let's determine if these factors can be applied broadly.

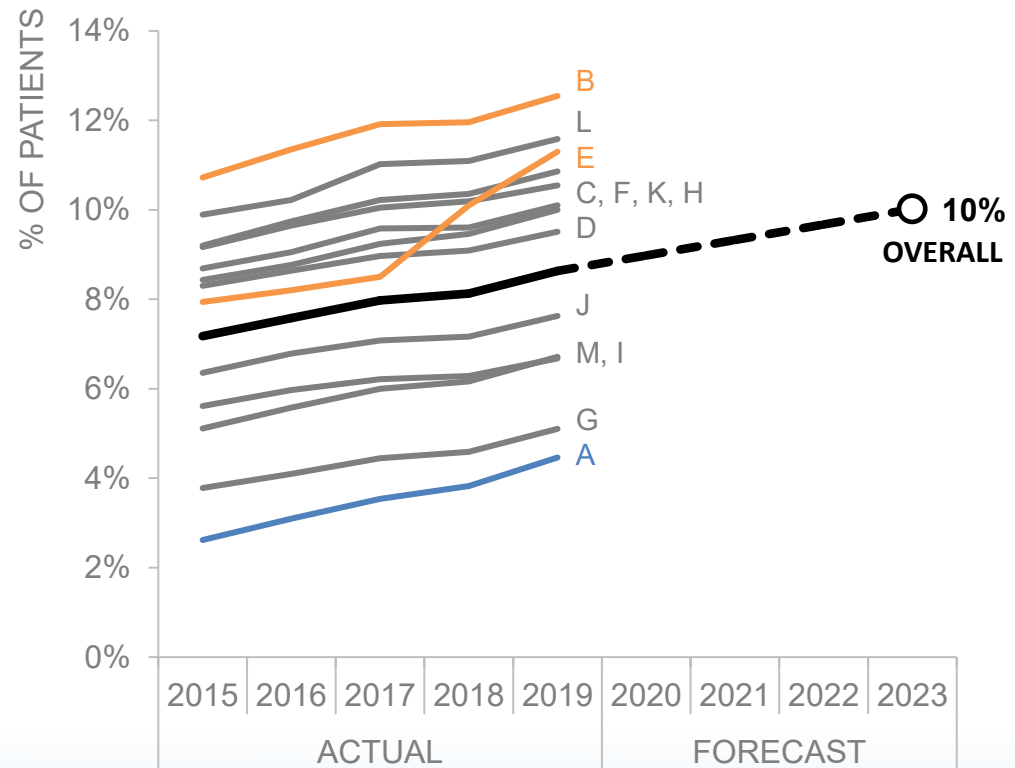
# ⊕ Data Visual: Comparison

Diabetes Rates by Medical Center



Rising diabetes rates: do we need additional staff?

Diabetes rates by medical center





# Parting Words: Bad & Good News

- Data Storytelling requires **study & practice** to cultivate.
- Data Storytelling is an exceptionally rare **superpower**.



# Parting Questions to Ponder

1. How much study & practice are you willing to **invest** in Data Storytelling?
2. How will you **leverage** this exceptionally rare superpower?

# Thank You!



# Questions?



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You'll see.