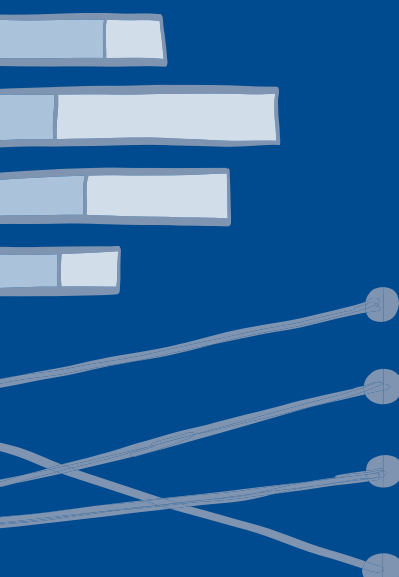
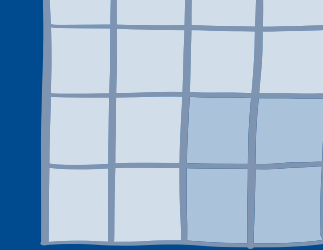
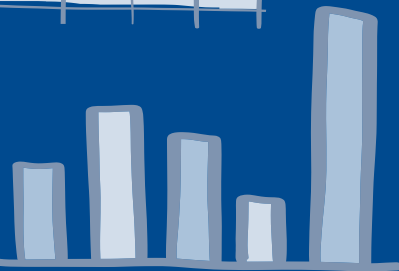


cole nussbaumer knaflic


storytelling
with data *let's*
PRACTICE!



	A	B	C
Y1	15%	22%	42%
Y2	40%	36%	20%
Y3	35%	17%	34%
Y4	30%	29%	58%



	A	B	C
CATEGORY 1	15%	22%	42%
CATEGORY 2	40%	36%	20%
CATEGORY 3	35%	17%	34%
CATEGORY 4	30%	29%	58%



WILEY

storytelling with data

let's **PRACTICE!**

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storytelling
with data *let's*
PRACTICE!

cole nussbaumer knaflic



illustrated
by
catherine
madden

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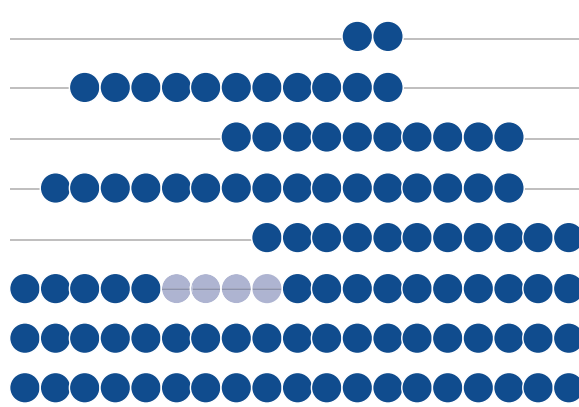
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Thanks to everyone who helped this book come to be...

2018												2019									
A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O			



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about the author

Cole Nussbaumer Knaflic tells stories with data. She is the founder and CEO of *storytelling with data* (SWD) and author of the best-selling book, *storytelling with data: a data visualization guide for business professionals* (Wiley, 2015), which has been translated into a dozen languages, is used as a textbook by more than 100 universities, and serves as the course book for tens of thousands of SWD workshop participants. For nearly a decade, Cole and her team have delivered knockout interactive learning sessions highly sought after by data-minded individuals, companies, and philanthropic organizations all over the world. They also help people create graphs that make sense and weave them into compelling stories through the popular SWD blog, podcast, and monthly challenge.

Prior to SWD, Cole's unique talent was honed through analytical roles in banking, private equity, and as a manager on the Google People Analytics team. At Google, she used a data-driven approach to inform innovative people programs and management practices and traveled to Google offices throughout the US and Europe to teach the course she developed on data visualization. Cole has acted as an adjunct faculty member at the Maryland Institute College of Art (MICA), where she taught Introduction to Information Visualization, and regularly guest lectures at prominent universities in the US and beyond.

Cole has a BS in Applied Math and an MBA from the University of Washington. When she isn't ridding the world of ineffective graphs, Cole is undertaking the adventures of parenting three young children with her husband at home in the Midwest and on travels abroad.

introduction

I often receive emails from people who have read my first book, *storytelling with data*, or attended one of our workshops by the same name. There are notes of encouragement, support for the work we're doing, and plenty of questions and requests. I especially love hearing the success stories: reports of having influenced a key business decision, spurred an overdue budget conversation, or prompted an action that positively impacted an organization's bottom line. The most inspiring accounts are those of personal growth and recognition. One grateful reader applied *storytelling with data* principles during an interview, helping him land a new job. All of this success is the result of people from different industries, functions, and roles committing time to improve their ability to communicate with data.

I also hear regularly from people who want *more*. They've read the book and understand the potential impact of telling stories with data, but struggle with the practical application to their own work. They have additional questions or feel they are facing nuanced situations that are keeping them from having the desired impact. It's clear that people crave more guidance and practice to help fully develop their data storytelling skills.

Others reach out who are—or would like to be—teaching the lessons outlined in *storytelling with data*. In many cases, they are university instructors (it's amazing to think that *storytelling with data* is used as a textbook at more than 100 universities around the world!) or they are a part of a learning and development function within an organization, interested in building an in-house course or training program. There are also leaders, managers, and individual contributors who want to upskill their teams or provide good coaching and feedback to others.

This book addresses all of these needs for individuals, teachers, and leaders. By sharing invaluable insight through many practical examples, guided practice, and open-ended exercises, I will help build your confidence and credibility when it comes to applying and teaching others to apply the *storytelling with data* lessons.

How this book is organized & what to expect

Each chapter starts with a brief recap of the key lessons that are covered in *storytelling with data*. This is followed by:

practice with Cole: exercises based on real-world examples posed for you to consider and solve, accompanied by detailed step-by-step illustration and explanation

practice on your own: more exercises and thought-provoking questions for you to work through individually without prescribed solutions

practice at work: thoughtful guidance and hands-on exercises for applying the lessons learned on the job, including practical instruction on when and how to solicit useful feedback and iterate to refine your work from good to great

Much of the content you'll encounter here is inspired by our *storytelling with data* workshops. Because these sessions span many industries, so do the examples upon which I'll draw. We'll navigate between different topics—from digital marketing to pet adoption to sales training—giving you a rich and varied set of situations to learn from as you hone your data storytelling skills.

Warning: this is not a traditional book that you sit and read. To get the most out of it, you'll want to make it a fully interactive experience. I encourage you to highlight, add bookmarks, and take notes in the margins. Expect to be flipping between pages and examples. Draw, discuss with others, and practice in your tools. This book should be beat up by the time you're done with it: that will be one indication that you've utilized it to the fullest extent!

How to use this book in conjunction with the original

SWD: let's practice! works as a great companion guide to *storytelling with data: a data visualization guide for business professionals* (Wiley, 2015; henceforth referred to as *SWD*). It will not replace the in-depth lessons taught there, but rather augment them with additional dialogue, many more examples, and a focus on hands-on practice.

This book generally follows the same chapter structure as *SWD* with a couple of differences, as shown in Figure 0.1. Chapters 7, 8, and 9 are comprehensive exercises that offer additional guidance and practice applying the lessons covered throughout *SWD* and here.

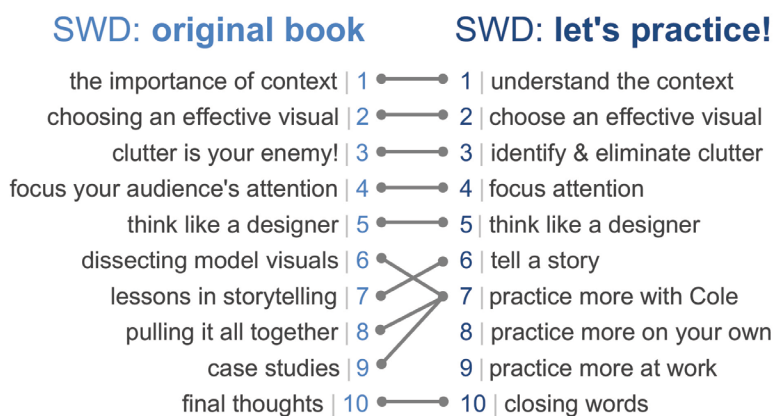


FIGURE 0.1 How *SWD* chapters correspond to this book

If you've picked up both *SWD* and *SWD: let's practice!*, you can use them in a couple of ways. You can read *SWD* once from start to finish to understand the big picture before digging into specifics. From there, you can determine which lessons you'd like to practice and can dive into the relevant sections within this book. Alternatively, you can peruse *SWD* one chapter at a time, then turn here to practice what you've read through hands-on exercises.

If you've already read *SWD*, feel free to jump right in as you will be familiar with these topics.

And if you've only bought this book, there is enough context within to give you the basics. You can always pick up a copy of *SWD* or check out the many resources at storytellingwithdata.com for supplemental guidance.

Do you want to learn or teach?

SWD: let's practice! was written with two different audiences in mind, united by a common goal—to communicate more effectively with data. Broadly, these two distinct groups are:

1. Those wanting to learn how to communicate more effectively with data, and
2. Those wanting to provide feedback, coach, or teach others how to communicate more effectively with data.

While the content is relevant for both groups, there will be subtle differences when it comes to getting the most out of it. Depending on your goal, the following strategies will maximize efficiency.

I want to learn to communicate more effectively with data

Because some later content builds upon or refers back to earlier content or exercises, begin with Chapter 1 and work through in numerical order. After that, you'll likely find yourself revisiting sections of interest and focusing your practice based on your specific needs and goals.

Start by reviewing the lesson recap for a given chapter. If you encounter anything that isn't familiar and you have access to *SWD*, turn back to the corresponding chapter for additional context.

After that, move straight into the *practice with Cole* exercises. First, work through each on your own—don't just jump to the solution (you're only cheating yourself!). If you're using this book with others, many of these activities lend themselves well to group discussion. The exercises in this section don't necessarily need to be worked through in order, though they do occasionally build upon prior exercises.

Once you've spent time on the given exercise (not just in your head: I strongly encourage you to write, draw, and use your tools), read through the provided solution. Observe where there are similarities and differences between that and your response. Be aware that there are very few situations where there is a single "right" answer. Some approaches are better than others, but there are usually numerous ways to solve a given problem. My solutions illustrate just one method that applies the lessons covered in *SWD*. Do read through all of the solutions, as many points of advice, tips, and nuances will arise that you will find helpful and insightful.

After completing the *practice with Cole* exercises, turn to the *practice on your own* section for more. These problems are similar to those in the first section, except that they don't include any predetermined solutions. If you are working in a group, have individuals first tackle a given exercise separately, then come together to present and discuss. Invariably, different people approach exercises in distinct ways, so you can learn a good deal through this sharing process. Confering with others is also great practice for talking through your design choices and decisions, which can further clarify thinking and help improve future application. Whether completing on your own or as part of a group, get feedback on your recommended approach. This will help you understand if what you propose is working, as well as where you can iterate to further improve effectiveness.

If, at any time, you find yourself with a current project that would benefit from applying the lessons outlined in a specific chapter, flip straight to the *practice at work* exercise section within that chapter. These contain guided practice that can be applied directly to real-world work situations. The more you practice implementing the various lessons in a work setting, the more they will become second nature.

Each chapter ends with discussion questions related to the lessons. Talk through these with a partner or perhaps even use as the basis of a larger book club conversation.

While the exercise sections in each chapter focus primarily on applying the given lesson, Chapters 7, 8, and 9 offer more comprehensive examples and exercises for applying the entire *storytelling with data* process. **Chapter 7** (“practice more with Cole”) contains full-blown case studies presented for you first to solve, followed by my thought process for tackling and completing. **Chapter 8** (“practice more on your own”) has additional case studies and robust exercises to practice the process without prescribed solutions. **Chapter 9** (“practice more at work”) has tips on how to apply the *storytelling with data* process at work, guides to facilitate group learning, and assessment rubrics that you can use to evaluate your own work and seek feedback from others.

As part of your learning, it’s also imperative that you set specific goals. Communicate these to a friend, colleague, or manager. See **Chapter 9** for more on this.

Next, let’s talk about how those interested in teaching others to effectively tell stories with data can use this book.

I want to provide feedback, coach, or teach others

You might be a manager or leader who wants to give good feedback on a graph or presentation from your team. Or perhaps you have a role in learning and development and are building training programs around how to communicate effectively with data. You may be a university instructor teaching students this important skill. In all of these scenarios, the chapter recap will provide an overview of the given lesson. After that, you will likely find the most value in the second and third exercise sections: *practice on your own* and *practice at work*. Each chapter ends with discussion questions that can be assigned, incorporated into tests, or used as the basis of group conversations.

The *practice on your own* section within each chapter contains targeted exercises helping those undertaking them practice the lessons outlined in the respective chapter and relevant section of SWD. These can be used as the basis of hands-on exercises in a classroom setting or assigned as homework. Some will also lend themselves well for use as group projects. These examples are provided without prescribed solutions. The problems in these sections can also work as models: consider where you could substitute data or visuals to create unique exercises.

Practice at work’s guided exercises can be used directly in a work setting as part of an ongoing program for professionals. They can be assigned, completed, and discussed in a group or classroom setting. Managers looking to develop their team’s skills may ask them to focus on specific exercises through their work or projects, or use with individuals as part of a goal-setting or career development process. For those teaching, **Chapter 9** has additional *practice at work* exercises, including facilitator guides and assessment rubrics.

A quick note on tools

Many tools are available for visualizing data. You may use spreadsheet applications like Excel or Google Sheets. Perhaps you are familiar with chart creators such as Databrewer, Flourish, or Infogram or data visualization software like Tableau or PowerBI. Maybe you write code in R or Python or leverage Javascript libraries like D3.js. Regardless of your tool of choice, pick one or a set of tools and get to know them as best you can so the instrument itself doesn't become a limiting factor for effectively communicating with data. No tool is inherently good or evil—pretty much any can be used well or not so well.

When it comes to undertaking the exercises in this book, you are encouraged to use whatever means for visualizing the data you have at your disposal. These may be tools you use currently, or possibly one or more that you'd like to learn. The visuals that illustrate the *practice with Cole* solutions were all created in Microsoft Excel. That said, this is certainly not your only choice and I welcome you to use other tools. We are also adding solutions built in other tools to our online library for you to explore.

On the topic of tools, there are a couple I highly recommend having on hand while reading this book: a pen or pencil and paper. You may consider dedicating a notebook to use as you work your way through the various exercises. Many direct you to write and sketch. There are important benefits to low-tech physical creation and iteration that we'll explore and practice, which can make the process of working in your technical tools more efficient.

Where to get the data

Downloads for the data throughout this book and for all of the visuals shown in the solutions for the *practice with Cole* exercises can be found at storytellingwithdata.com/letspractice/downloads.

Let's get started

There has never been a time in history where so many people have had access to so much data. Yet, our ability to tell stories with our graphs and visualizations has not kept pace. Organizations and individuals that want to move ahead must recognize that these skills aren't inherent and invest in their development. With a thoughtful approach, we can all tell inspiring and influential stories with our data.

I'm excited to help you take your data storytelling to the next level.

Let's practice!

understand the context

A little planning can go a long way and lead to more concise and effective communications. In our workshops, I find that we allocate an increasing amount of time and discussion on the very first lesson we cover, which focuses on context. People come in thinking they want data visualization best practices and are surprised by the amount of time we spend on—and that they *want* to spend on—topics related more generally to how we plan for our communications. By thinking about our audience, message, and components of content up front (and getting feedback at this early stage), we put ourselves in a better position for creating graphs, presentations or other data-backed materials that will meet our audience's needs and our own.

The exercises in this chapter focus primarily on three important aspects of the planning process:

1. **Considering our audience:** identifying who they are, what they care about, and how we can better get to know them and design our communications with them in mind.
2. **Crafting and refining our main message:** the Big Idea was introduced briefly in *SWD*; here, we'll undertake a number of guided and independent exercises to better understand and practice this important concept.
3. **Planning content:** storyboarding is another concept that was introduced in *SWD*—we'll look at a number of additional examples and exercises related to what we include and how we organize it.

Let's practice **understanding the context!**

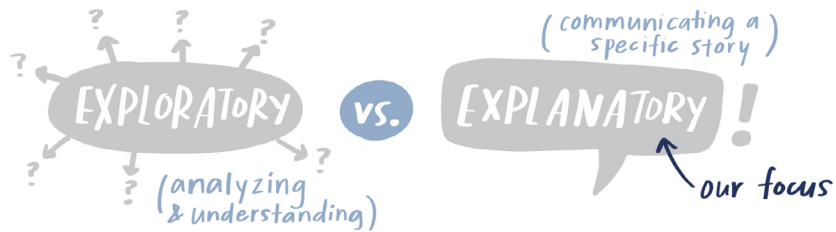
First, we'll review the main lessons from *SWD* Chapter 1.

SWD
BOOK
CHAPTER 1

FIRST, LET'S RECAP

The IMPORTANCE of CONTEXT

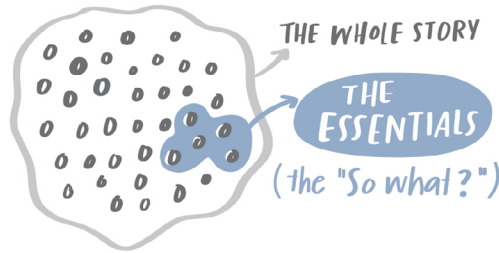
TYPES of ANALYSIS



WHERE to BEGIN?



THREE MINUTE STORY



Knowing exactly what you want to communicate reduces reliance on slides and data

BIG IDEA*

*from Nancy Duarte (Resonate)



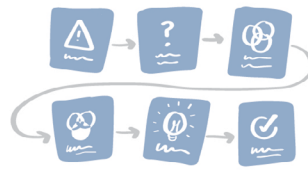
A SINGLE SENTENCE that...

the "So what?" boiled down further

- ① articulates your point of view
- ② conveys what is at stake
- ③ is one complete sentence

STORY BOARDing

UPFRONT PLANNING to CREATE STRUCTURE



STICKY NOTES help to ...

- avoid attachment to work done on computer
- force concise articulation
- easily rearrange the flow

① BRAINSTORM

② EDIT

③ GET FEEDBACK

PRACTICE with COLE

- | | | | |
|---|------------------------------------|---|---------------------------------|
| 1.1
get to
know your
audience | 1.2
narrow
your
audience | 1.3
complete
the
BIG IDEA
worksheet | 1.4
refine
and
reframe |
| 1.5
complete
another
BIG IDEA
worksheet | 1.6
critique
the
BIG IDEA | 1.7
storyboard! | 1.8
storyboard
(again!) |

PRACTICE on your OWN

- | | | | |
|--|--|--------------------------|---------------------------------|
| 1.9
get to
know your
audience | 1.10
narrow
your
audience | 1.11
let's
reframe | 1.12
what's the
BIG IDEA? |
| 1.13
what's the
BIG IDEA
(this time?) | 1.14
how could
we arrange
this? | 1.15
storyboard! | 1.16
storyboard
(again!) |

PRACTICE at WORK

- | | | | | |
|---|--|--|--|--|
| 1.17
get to
know your
audience | 1.18
narrow
your
audience | 1.19
identify
the
action | 1.20
complete
the
BIG IDEA
worksheet | 1.21
solicit
feedback
on your
BIG IDEA |
| 1.22
create the
BIG IDEA
as a team | 1.23
get the
ideas out
of your head | 1.24
organize
your ideas
onto a
storyboard | 1.25
solicit
feedback
on your
storyboard | 1.26
let's
discuss |

PRACTICE with COLE

When communicating with data, don't do it for yourself - do it for your audience! The following exercises will help you consider your audience, craft your message, and plan your content, setting you up for effective communication.

Exercise 1.1: get to know your audience

Who is my audience? What do they care about? These may seem like obvious questions to ask ourselves when we step back and think about it, but too often we completely skip this step. Getting to know our audience and understanding their needs and what drives them is an important early part of the process for successfully communicating with data.

Let's examine what this looks like in the wild and how we can get to know a new audience.

Imagine you work as a People Analyst (a data analyst within the Human Resources, or HR, function) at a medium-sized company. A new head of HR has just joined the organization (she is now your boss's boss). You've been asked to pull together an overview with data to help the freshly hired head of HR get up to speed with the different parts of the business from a people standpoint. This will include things like interview and hiring metrics, a headcount review across different parts of the organization, and attrition data (how many are leaving and why they are leaving). Some of your colleagues in other groups within HR have already had meet-and-greets with the new leader and given their respective synopses. Your direct manager recently had lunch with the new head of HR.

How could you get to better know your audience (the new head of HR) in this circumstance? **List three things you could do to understand your audience, what she cares about, and how to best address her needs.** Be specific in terms of what questions you would seek to answer. Get out your pen and paper and physically write down your responses.

Solution 1.1: get to know your audience

Since this isn't likely a case where we can ask our audience directly what she cares about, we'll need to get a little creative. Here are three things I could do to set myself up for success when it comes to better understanding my audience and what matters to her most:

1. **Set up time to get a debrief from colleagues who have already met with the new leader.** Talk to those who have had conversations with the new head of HR. How did those discussions go? Do they have any insight on this new leader's priorities or points of interest? Is there anything that *didn't* go well from which you can learn and adapt?
2. **Talk to my manager to get insight.** My manager has lunched with the new leader: what insight did he get about potential first points of focus? I also need to understand what my manager sees as important to focus on in this initial meeting.
3. **Use my understanding of the data and context plus some thoughtful design to structure the document.** Given that I've been working in this space for a while, I have a big picture understanding of the different main topics that someone new to our organization will assumably be interested in and the data we can use to inform. If I'm strategic in how I structure the document, I can make it easy to navigate and meet a wide variety of potential needs. I can provide an overview with the high level takeaways up front. Then I can organize the rest of the document by topic so the new leader can quickly turn to and get more detail on the areas that most interest her.

Exercise 1.2: narrow your audience

There is tremendous value in having a specific audience in mind when we communicate. Yet, often, we find ourselves facing a wide or mixed audience. By trying to meet the needs of many, we don't meet any specific need as directly or effectively as we could if we narrowed our focus and target audience. This doesn't mean that we don't still communicate to a mixed audience, but having a specific audience in mind first and foremost means we put ourselves in a better position to meet that core audience's needs.

Let's practice the process of narrowing for purposes of communicating. We'll start by casting a wide net and then employ various strategies to focus from there. Work your way through the questions and write out how you would address them. Then read the following pages to better understand various strategies for narrowing our audience.

You work at a national clothing retailer. You've conducted a survey asking your customers and the customers of your competitors about various elements related to back-to-school shopping. You've analyzed the data. You've found there are some areas where your company is performing well, and also some other areas of opportunity. You're nearing the point of communicating your findings.

QUESTION 1: There are a lot of different groups of people (at your company and potentially beyond) who could be interested in this data. Who might care how your stores performed in the recent back-to-school shopping season? Cast as wide of a net as possible. **How many different audiences can you come up with who might be interested in the survey data you've analyzed? Make a list!**

QUESTION 2: Let's get more specific. You've analyzed the survey data and found that there are differences in service satisfaction reported by your customers across the various stores. **Which potential audiences would care about this? Again, list them.** Does this make your list of potential audiences longer or shorter than it was originally? Did you add any additional potential audiences in light of this new information?

QUESTION 3: Let's take it a step further. You've found there are differences in satisfaction across stores. Your analysis reveals items related to sales associates as the main driver of dissatisfaction. You've looked into several potential courses of action to address this and determined that you'd like to recommend rolling out sales associate training as a way to improve and bring consistency to service levels across your stores. **Now who might your audience be? Who cares about this data? List your primary audiences.** If you had to narrow to a specific decision maker in this instance, who would that be?

Solution 1.2: narrow your audience

QUESTION 1: There are many different audiences who might care about the back-to-school shopping data. Here are some that I've come up with (likely not a comprehensive list):

- Senior leadership
- Buyers
- Merchandisers
- Marketing
- Store managers
- Sales associates
- Customer service people
- Competitors
- Customers

Eventually, *everyone in the world* may care about this data! Which is great, but not so helpful when it comes to narrowing our audience for the purpose of communicating. There are a number of ways we can narrow our audience: by being clear on our findings, specific on the recommended action, and focused on the given point in time and decision maker. The answers to the remaining questions will illustrate how we can focus in these ways to have a specific audience in mind when we communicate.

QUESTION 2: If service levels are inconsistent across stores, the following audiences are likely to care most:

- Senior leadership
- Store managers
- Sales associates
- Customer service people

QUESTION 3: We want to roll out training—that sparks some questions for me. Who will create and deliver the training? How much will it cost? With this additional clarity, some new audiences have entered the mix:

- Senior leadership
- HR
- Finance
- Store managers
- Sales associates
- Customer service people

The preceding list may all *eventually* be audiences for this information. We've noted inconsistencies with service levels and need to conduct training. HR will have to weigh in on whether we can meet this need internally or if it will require us to bring in external partners to develop or deliver training. Finance controls the budget and we'll have to figure out where to get the money to pay for this. Store managers will need to buy-in so they are willing to have their employees spend time attending the training. The sales associates and customer service people will have to be convinced that their behavior needs to change so that they will take the training seriously and provide consistent high quality service to customers.

But not all of these groups are immediate audiences. Some of the communications will take place downstream.

To narrow further, I can reflect on where we are at in time: today. Before we can do any of the above, we need approval that rolling out training is the right course of action. A decision needs to be made, so another way of narrowing my audience is to be clear on timing as well as who the decision maker (or set of decision makers) is within the broader audience. In this instance, I might assume the ultimate decision maker—the person who will either say, “yes, I’m willing to devote the resources; let’s do this,” or “no, not an issue; let’s continue to do things as we have been”—is a specific person on the leadership team: the head of retail sales.

In this example, we have employed a number of different ways to narrow our target audience for the purpose of the communication. We narrowed by:

1. Being specific about what we learned through the data,
2. Being clear on the action we are recommending,
3. Acknowledging what point we’re at in time (what needs to happen now), and
4. Identifying a specific decision maker.

Consider how you can use these same tactics to narrow your audience in your own work. Exercise 1.18 in *practice at work* will help you do just that. But before we get there, let’s continue to practice together and turn our attention to a useful resource: the Big Idea worksheet.


Exercise 1.3: complete the Big Idea worksheet

The Big Idea is a concept that can help us get clear and succinct on the main message we want to get across to our audience. The Big Idea (originally introduced by Nancy Duarte in *Resonate*, 2010) should (1) articulate your unique point of view, (2) convey what's at stake, and (3) be a complete sentence. Taking the time to craft this up front helps us get clarity and concision on the overall idea we need to communicate to our audience, making it easier and more streamlined to plan content to get this key message across.

In *storytelling with data* workshops, we use the Big Idea worksheet to help craft our Big Idea. Attendees commonly express how unexpectedly helpful they find this simple activity. We'll do a few related exercises so you can practice and see examples of the Big Idea worksheet in action. Let's start by continuing with the example we just worked through for narrowing our audience. As a reminder, the basic context follows.

You work at a national clothing retailer. You've conducted a survey asking your customers and the customers of your competitors about various elements related to back-to-school shopping. You've analyzed the data. You've found there are some areas where your company is performing well, as well as some areas of opportunity. In particular, there are inconsistencies in service levels across stores. Together with your team, you've explored some different potential courses of action for dealing with this and would like to recommend solving through sales associate training. You need agreement that this is the right course of action and approval for the resources (cost, time, people) it will take to develop and deliver this training.

Think back to the audience we narrowed to in Exercise 1.2: the head of retail. **Work your way through the Big Idea worksheet on the following page for this scenario.** Make assumptions as needed for the purpose of the exercise.

the BIG IDEA worksheet storytelling  WITH 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.

FIGURE 1.3a The Big Idea worksheet

Solution 1.3: complete the Big Idea worksheet

the **BIG IDEA** worksheet

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

storytelling data®

PROJECT Back-to-school opportunity

WHO IS YOUR AUDIENCE?

<p>(1) List the primary groups or individuals to whom you'll be communicating.</p> <p><i>the executive team</i></p>	<p>(3) What does your audience care about?</p> <ul style="list-style-type: none"> - <i>Having a highly profitable back-to-school shopping season</i> - <i>Making customers happy because happier customers spend more</i> - <i>Beating the competition</i>
<p>(2) If you had to narrow that to a single person, who would that be?</p> <p><i>the head of retail</i></p>	<p>(4) What action does your audience need to take?</p> <p><i>Agree that training is the right way to deal with inconsistent service levels and approve the resources it will take to make that happen (cost, time, people) ←</i></p>

WHAT IS AT STAKE?

<p>What are the benefits if your audience acts in the way that you want them to?</p> <ul style="list-style-type: none"> - <i>better service levels = happier customers</i> - <i>happier customers spend more, come back more often, tell friends about their positive experience</i> 	<p>What are the risks if they do not?</p> <ul style="list-style-type: none"> - <i>no action could lead to negative word of mouth</i> - <i>people shopping with competitors</i> - <i>reputational risk</i> - <i>lost revenue</i>
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FORM YOUR BIG IDEA

It should:

<p>(1) articulate your point of view, (2) convey what's at stake, and (3) be a complete (and single!) sentence.</p>	<p><i>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!</i></p>
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FIGURE 1.3b Completed Big Idea worksheet

Exercise 1.4: refine & reframe

Consider both your Big Idea from Exercise 1.3 and the one I came up with in Solution 1.3. Answer the following questions.

QUESTION 1: Compare and contrast. Are there common points where they are similar? How are they different? Which do you find to be more effective and why?

QUESTION 2: How did you frame? Reflect on the Big Idea you originally crafted. Did you frame it positively or negatively? What is the benefit or risk in your Big Idea? How could you reframe it to be the opposite?

QUESTION 3: How did I frame? Revisit the Big Idea articulated in Solution 1.3. Is it framed positively or negatively? What is the benefit or risk in this Big Idea? Again, how could you reframe it to be the opposite? How else might you refine?

Solution 1.4: refine & reframe

Given that I don't have your Big Idea as I write this, I'll focus on Question 3, which poses some questions about mine. Here it is again for reference:

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!

How did I frame? What is the benefit or risk? This is currently framed positively, focusing on the benefit of the revenue we stand to gain by investing in sales associate training.

How could you reframe it to be the opposite? I could reframe negatively a couple of different ways. One simple way would be to focus on the same thing at stake—revenue—but change to emphasize the loss that could result from not taking action.

If we don't invest in sales associate training to improve service levels, we will lose customers and have lower revenue for the upcoming back-to-school shopping season.

But revenue isn't the only thing at stake. What if I know that my audience is highly motivated by beating the competition? Then I could try something like this:

We are losing to the competition when it comes to important aspects of our store experience - we will continue to lose unless we invest in sales associate training to improve the customer experience across our stores.

How else can we refine this Big Idea? There's no single right answer. There are a number of different potential benefits (more satisfied customers, greater revenue, beating the competition) and risks (unhappy customers, lower revenue, losing to competition, negative word of mouth, reputational damage). What we assume our audience cares most about will influence how we frame and what we focus on in our Big Idea.

In a real-life scenario, we'd want to know as much about our audience as we can to make smart assumptions. Check out Exercise 1.17 in *practice at work* for guidance on getting to know your audience. Next, let's look at another Big Idea worksheet.

Exercise 1.5: complete another Big Idea worksheet


Let's do another practice run with the Big Idea worksheet.

Imagine you volunteer for your local pet shelter, a nonprofit organization whose mission is to improve the quality of animal life through veterinary care, adoptions, and public education. You help organize monthly pet adoption events, which feed into the organization's broader goal of increasing permanent adoptions of pets by 20% this year.

Traditionally, these monthly events have been held in outdoor spaces in your community (parks and greenways) on Saturday mornings. However, last month's event was different. Due to poor weather, the event was relocated indoors to a local pet supply retailer. Surprisingly, after the event, you observed something interesting: *nearly twice as many pets were adopted* compared to previous months.

You have some initial ideas about the reasons for this increase and think there's value in holding more adoption events at this retailer. You'd like to conduct a pilot program over the next three months to see if the results help confirm your beliefs. To implement this pilot program, you'll need additional support from the pet shelter's marketing volunteers to publicize the events. You've estimated the monthly costs to be \$500 for printing and three hours of a marketing volunteer's time. You want to ask the event committee to approve the pilot program at next month's meeting and are planning your communication.

Complete the Big Idea worksheet on the following page for this scenario, making assumptions as necessary for the purpose of the exercise.

storytelling  WITH data®

the BIG IDEA worksheet

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.

FIGURE 1.5a The Big Idea worksheet

Solution 1.5: complete another Big Idea worksheet

The following illustrates one way to complete the Big Idea worksheet for this scenario.

the BIG IDEA worksheet

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

storytelling with data®

PROJECT Adoption venue pilot

WHO IS YOUR AUDIENCE?

(1) List the primary groups or individuals to whom you'll be communicating.

Shelter events planning committee
They'll decide based on a majority vote

(3) What does your audience care about?

Increasing pet adoptions- in general and specifically toward the organization's 20% increase goal, which will improve ability to fundraise; they are cost-conscious, so low-cost options are often supported

(2) If you had to narrow that to a single person, who would that be?

Jane Harper, the most influential person on the committee whose opinion would likely affect the outcome

(4) What action does your audience need to take?

Approve my pilot program of holding pet adoptions at a local pet supply retailer for the next 3 months and provide additional marketing resources: \$500 to print posters + 3 hours/month of a marketing volunteer's time

WHAT IS AT STAKE?

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

More adoptions (lower euthanization), which will help us achieve the broader 20% goal, and help with future fundraising

What are the *risks* if they do not?

- Missed opportunity to increase adoptions
- More animals don't find homes
- Greater euthanization + associated cost
- Miss 20% goal

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.

Approve our low-cost pilot program that has potential to markedly increase adoptions and result in better future fundraising opportunities.

FIGURE 1.5b Completed Big Idea worksheet

Exercise 1.6: critique the Big Idea

Being able to give good feedback on the Big Idea is important both when we work with others, as well as for critiquing and refining our own work. Let's practice giving feedback on the Big Idea.

Suppose you work for a health care center that has been analyzing recent vaccine rates. Your colleague has been focusing on progress and opportunities related to flu vaccines. He has crafted the following Big Idea for the update he is preparing and has asked for your feedback.

While flu vaccination rates have improved since last year, we need to increase the rate in our area by 2% to hit the national average.

With this Big Idea in mind, write a few sentences outlining your response to the following.

QUESTION 1: What questions might you ask your colleague?

QUESTION 2: What feedback would you provide on his Big Idea?

Solution 1.6: critique the Big Idea

QUESTION 1: The immediate questions I'd have for my colleague would be about their audience: who are they? What do they care about?

QUESTION 2: In terms of giving specific feedback on the Big Idea, let's think back to the components of the Big Idea—it should (1) articulate your point of view, (2) convey what's at stake, and (3) be a complete (and single!) sentence. Let's consider each of these in light of my colleague's Big Idea.

1. **Articulate your point of view.** The point of view is that vaccination rates are low compared to the national average and need to be increased.
2. **Convey what's at stake.** This isn't clear to me currently. I'm going to want to ask some targeted questions to better understand what is at stake for the audience.
3. **Be a complete (and single!) sentence.** Good job on this front. It's often difficult to summarize our point in a single sentence. If anything, we have room to possibly add a little more to the sentence to make it meatier and more clearly convey what is at stake.

In general, the Big Idea in its current form gives me the *what* (increase vaccination rates), but not the *why* (it also doesn't get into the *how*, though there's only so much we can fit into a sentence, and this piece can come into play through the supporting content).

You could argue that the *why* is because we're lower than the national average, but this doesn't feel compelling enough. Is my audience going to be motivated by a national average comparison? Is that even the right goal? Is it aggressive enough? Too aggressive? Can we get more specific by thinking through what will be most motivating for the audience?

It's clear my colleague believes that we should increase flu vaccination rates. But let's consider why our audience should care. What does this mean for them? Are they motivated by competition—maybe we're lower than that other medical center across town, or our area is low compared to the state, or perhaps the national comparison is the right one but can be articulated in a more motivating way? Or maybe my audience is driven by generally doing good—we could get into patient advantages or highlight general community well-being benefits that would be well served by increasing vaccination rates. If we think about positive versus negative framing—which will be best for this scenario and audience?

The conversation I have with my colleague will cause him to explain his thought process, what he knows about his audience, and what assumptions he's making. The dialogue we have will help him both refine his Big Idea as well as be better prepared to talk through this with his ultimate audience. Success!

Exercise 1.7: storyboard!

I sometimes feel like a broken record because I say this so frequently: storyboarding is the most important thing you can do up front as part of the planning process to reduce iterations down the road and create better targeted materials. A storyboard is a visual outline of your content, created in a low-tech manner (before you create any actual content). My preferred tool for storyboarding is a stack of sticky notes, which are both small—forcing us to be concise in our ideas—and lend themselves to being easily rearranged to explore different narrative flows. I typically storyboard in three distinct steps: brainstorming, editing, and seeking and incorporating feedback.

We'll do a couple of practice storyboarding runs so you can both get a feel for it and see illustrative approaches. Let's start with an example you should be familiar with now (we've seen it previously in Exercises 1.2, 1.3, and 1.4). As a reminder, the basic context follows.

You work at a national clothing retailer. You've conducted a survey asking your customers and the customers of your competitors about various elements related to back-to-school shopping. You've analyzed the data. You've found there are some areas where your company is performing well, as well as some areas of opportunity. In particular, there are inconsistencies in service across stores. Together with your team, you've explored different potential courses of action for dealing with this and would like to recommend solving through sales associate training. You need agreement that this is the right course of action and approval for the resources (cost, time, people) it will take to develop and deliver this training.

Look back to the Big Idea that you created in Exercise 1.3 (or if you didn't create one, select one of the Big Ideas from Solutions 1.3 or 1.4). Complete the following steps with a specific Big Idea in mind.

STEP 1: Brainstorm! What pieces of content may you want to include in your communication? Get a blank piece of paper or a stack of stickies and start writing down ideas. Aim for a list of at least 20.

STEP 2: Edit. Take a step back. You've come up with a ton of ideas. How could you arrange these so that they make sense to someone else? Where can you combine? What ideas did you write down that aren't essential and can be discarded? When and how will you use data? At what point will you introduce your Big Idea? Create your storyboard or the outline for your communication. (I highly recommend using sticky notes for this part of the process!)