Data Storytelling
PLAYBOOK

A Step-by-Step Plan for Data Changemakers to Build a Lasting Data Culture for Everyone
PREFACE

The Data Storytelling Playbook

My company’s culture isn’t data-driven enough.

My best people use data frequently, but others don’t.

It’s hard to understand the key metrics that drive the business.

Data adoption is low across my organization.

I want to drive change with data in my organization but don’t know where to start.

If you’re reading this, our guess is that you identify with one or more of these statements.

Afterall, that’s why we put together this Data Storytelling Playbook.

To make a data culture feel attainable.

To get everyone at your company using data — not just your top people or analysts.

To help you better understand the metrics that drive your business.

To increase data adoption across your organization.

And ultimately, help you drive change with data.

In this playbook, we’ll introduce you to philosophies, frameworks, and tools that will help you build a lasting data culture from a team perspective.
Each of us has unique talents. Some of us are the creatives. The builders. The strategic thinkers. We all have something that makes us who we are — as a person & as a professional. That diversity is what makes a good company.

Over the past few years, we’ve seen organizations everywhere pushing everyone, no matter who they are, to be more data-driven. To spend countless hours digging through dashboards and spreadsheets, and trying to get value from them. And you know what?

We think that is absolutely ridiculous.

There is no comparable skill that we are insisting everyone learn. Are we teaching our entire companies to pitch products? To balance financial statements?

No. Because that would be taking them away from what they do best.
We know that people should look at data to be better at their jobs, but you don’t have to strip away their humanity while doing it. If we can provide everyone—any industry, any level, any skill set—the ability to understand data without actually having to analyze it, we can get back to what really matters.

To what makes us human.

Spend more time perfecting your pitch. Spend more time thinking about the next creative marketing campaign. Spend more time solving the next big engineering problem. The list goes on and on.

At Narrative Science, we call this letting your people be people.

(We even wrote a whole book on the topic) It’s a principle that remains core to our organizational and data culture.

When everyone at your company is able to easily make data a daily habit, they work smarter — not harder. They fail faster. They learn faster. They hit goals — faster.

Giving them more time to do what they do best. To be creative. Innovative. Scrappy. Visionary. All the while growing the business.

So, how can you empower your people and build an entire team that’s enabled with data?

Keep reading to find out.
A recent study by The Economist Group reveals that, “90% of executives agree that gaining knowledge and becoming better informed is a priority to them.”

Additionally, “93% agree that they are open to new ideas and experiences when it comes to understanding their data.”

However, there are three major problems that get in the way of this goal:

1. **Lack of executive buy in**

   We can solve this by getting to know our executives. Typically there are 5 executive personas, each one with their own preferred way of consuming data.

   For example, we have:

   - **The Data Geek** - who loves data
   - **The Traveler** - who is always on the go
   - **The Emailer** - who only communicates by email
   - **The Presenter** - who wants the slide decks of metrics
   - **The Old School** - who want the data physically printed out

2. **Unclear executive priorities**

   To eliminate this problem, use a three step process to gain deeper
understanding of what exactly it is they care about. Figure out where they will have questions, determine what actions they want taken based on the data and what their ideal results are using the data. This is just making the discovery process more robust, it will eliminate confusion down the line.

3. We don’t deliver data stories

When any of us look at data - we all ask ourselves the same 4 questions:

1. What is the data telling me?
2. What drove these results?
3. What will happen in the future?
4. What, if anything, should I do about it?

Whether consciously or unconsciously, this is what we want to know.

And oftentimes, as consumers, we just want to cheat and get to the punch line.

“Tell me what we should do.”
“Just give me the answer.”

Unfortunately, it doesn’t work that way.

Every time you only answer [4] - you will inevitably get questions from your audience to help them fill in [1-3].

This is especially important to keep in mind when you are communicating stories with data to your executive team.

Executives need context to understand and trust what they are told. They want the whole story — but they don’t want to spend hours digging around through countless spreadsheets and dashboards to find it.

Data storytelling is the key to helping your executives easily understand the “so what”.

1 The Economist Group | Source: Ipsos Affluent USA Fall 2019; C-suite at companies with 1,000+ employees

Master Executive Data Storytelling with Zack Mazzoncini

Watch & learn how to inspire leaders to act in 3 steps.
Are You Giving Your Team The Tools They Need To Be Data-Driven?

We have likely all been in situations where a data driven culture was talked about but not actually instilled within a company; a time where it was part of the job to use data but it was either very difficult to get, hard to understand or you had to rely on another team or person to supply it. Most likely, it was a combination of a couple of these examples.

As a leader, it is easier to get insights in a digestible manner but it’s on your shoulders to ensure the rest of your team does as well. A data-driven culture comes from the top down and it is part of your job to ensure your managers and teams have the information they need to make smarter and faster decisions.

If you want your team to understand and leverage data to make better, faster decisions - it’s upon you as a leader to make it happen.

Get started using this 5-part framework.
01

Establish your Vision and Why it’s Important for your Company

a. Map your team goals & objectives to the company’s strategic initiatives.
b. Identify your team’s “north star” metric that results from hitting your goals.
c. Communicate how your team’s success will directly impact the company.

02

Make Change Real to Your Team

a. Start every team discussion with performance to your key metric.
b. Evangelize to others outside your team your metric and performance.
c. Find early adopters in your team, work with and reward them for adoption.

Episode #57 with Ganes Kesari

Listen & learn more about how to identify & reward data champions within your team.
Educate your Team on the Metrics that Matter to Them

a. Train your team on the leading indicators that tie to your metric.

b. Assign each team member to the leading indicators they impact.

c. Show how their actions and work impact these metrics.

Example:

Here’s what this looks like on our marketing team.

Our team is organized by pipeline stages because we believe marketing should feel accountable to revenue. All members own and focus on an input metric to revenue depending on where they sit such as:

- Traffic Growth
- Qualified Demo Requests
- Net New Meetings
- Net New Trials
- New Customers
- Net Retention

Of course, one person can’t do it alone.

However, each person is accountable for understanding their metric:

- Where are we today vs. plan?
- What are the Inputs and Outputs?
- What are the Drivers?
- How to forecast it?
- Whom do I need to work with to deliver?
- What do we need to be doing to be successful?

The point is you manage what you measure, and if you want your team to leverage data to make better decisions, hold them accountable.

Without accountability, no level of training or tooling will work.
04

Make Data a Daily Habit

a. Ensure you can adequately measure each metric and make it visible.
b. Make access easy for each person to review & leverage their metrics daily.
c. Leaders model behavior by using data daily and asking questions.

05

Refine and Improve

a. As your business evolves, update the metrics.
b. As your team executes the above, make the metrics more challenging.
c. As you learn what works/doesn’t, change the metrics.
Empower Your Analysts to Be Data Heroes for Your Company

We are entering a new era for data analysts. So much has changed for analysts over the past few years. People are tired of waiting on analysts to get the data they need. The whole process of analytics is becoming a more independent operation.

Data analysts now have the time to add value to their companies in new ways. They are not tied down by mundane reporting and analysis. They can spread their data wings.

The move toward AI and machine learning also aids them in this journey. They have time to spend on pure data science, not maintenance of data. They can scale their work and their message.

However, this can also be a challenge for data analysts. While they are now free from their repetitive tasks, they must find a new niche for themselves in the company and in the data world.

So how can analysts optimize their roles around these new trends? How can you enable your analysts to be superheroes for your company?

Start with instilling these best practices:
Ask the Right Questions

Every analyst has been taught to start with “what question do you want to answer?”

But it’s not the right question anymore.

Maybe it is the way the world worked 20-years ago when the question was required so that analysts could build a dashboard in an attempt to answer.

However, today, business data is changing all the time.

Right now, someone is engaging with you on a marketing channel, sales are talking to prospects, your customers are using your products, your supply chain is building and shipping products.

It’s time to flip it around:

1. Start with understanding “What is your business strategy?”
2. Ask what KPIs determine the success of the strategy?
3. Identify the drivers (inputs) of each KPI.
4. Build the drivers into your analysis.
5. Determine how your users want to consume the information.
6. Ensure changes and insights continually flow to users.
7. Monitor and iterate to bring future insight where it matters.
These days there is “no one question” to answer - there are many to answer. And it’s changing all the time.

The flow of data is continuous - not discrete - so your approach and analysis should be as well.

Context is Key

For a lot of people being dropped into the middle of a bunch of quantitative data can be disorienting and confusing.

Oftentimes data itself can’t tell the full story — there are external events or circumstances that explain the full ‘why’ behind your numbers.

Context is the human touch and is the key to empowering all of your people with data.

When your analyst can deliver insights that are in-context and personalized to your people, they are able to inspire smarter and faster decisions.
How Are You Using Data Everyday as an Individual Contributor?

Every company wants their employees to be data driven.

In fact, you have probably seen “we are looking for a data-driven [insert job here]” on every single job posting ever. Today, being data-driven is not a plus, it’s a must.

But what does being data-driven even mean? And how do you do it?

Let’s start with a framework of questions you can ask yourself to guide the process.

The questions that follow will allow you to reflect on your individual contribution to your company & how you can optimize your work using data.
Map Your Goals & Understand Your Impact

If you don’t know what your goals are, it will be pretty hard to be an efficient and data-driven employee. So, first things first- get your goals written down and know how they ladder up to the company goals. Without this piece, being data-driven is nearly impossible.

What are you working towards every day? How does this align with the broader company initiatives?

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What is the one metric that is an indicator of success for your team? And how does that relate to your goals?

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What are the leading indicators/metrics you can look at to make decisions faster?

For example, a leading indicator of Opportunities is qualified leads and an indicator of qualified leads are demo requests.

How does what you do as an individual (and your metric) impact the business?

Start Making Data a Daily Habit

This one can be the hardest because it’s likely a change in behavior but data should not be looked at just monthly or weekly but rather, it should be a daily habit so you can make decisions based on fact and not opinion.
How and where can you look at data daily? Can technology help you do this?

How can you make it easy for your team to see and understand your metrics? How do you share this? How often are you updating?

How can you lead by example and evangelize your performance within & outside of your team? How can you make data a part of every team discussion?
How You Can Be The (Data) Change(maker) You Wish To See In Your Organization

01

Own it

Everyone can and should be a Data Changemaker—someone who wants to make positive change at their company by making decisions based on data.

This seems obvious but most people and companies aren’t looking at data on a daily basis because it’s too hard or just straight up annoying. But find the way that works for you, what technology can help you, and hop on a road that’s actually guaranteed to help you make better business decisions.

Just start, that’s the hardest part.
Pick a North Star Metric
(and indicators that ladder into this one)

“Wait - one metric? Our business is more complicated, and this would never work.”

Wrong. The beauty of a single metric is that you begin to focus on what drives this metric and what does this metric drive? The Inputs and Outputs. You break down the leading indicators and figure out how to impact those metrics to impact your metric. You look at how your metric impacts the overall business and adjust the definition necessary to drive performance.

Tie this metric to a strategic initiative of the company - it needs to matter broadly.

Take Accountability
(all the time)

The true test isn’t patting yourself on the back when all is well; it’s what your team does when failing. We have had many such moments, this means stepping up when the metrics are good but also when they are bad. What you learn from making mistakes can be more valuable than anything else.
04

Make it Visible

Ensure everyone knows this is the metric you are focused on driving and why. When the metric is discussed in all-hands, your team discusses it. If you have a KPI dashboard in your company, it’s clear who is accountable to that metric and answers questions about it.

This step makes it real for your team - peer pressure can be a beautiful thing.

05

Overlay Human Judgement

(that’s why we have jobs after all)

I’m not saying to blindly let a metric drive what you do and who you are. However, without structured thinking and the discipline data provides - humans are susceptible to cognitive bias. Use the above to reduce uncertainty, and your judgment will be that much better.
Advocate for a Data-Driven Culture

Everyone reading this likely has a job in which they took because they wanted to work on an interesting problem at a company where they can make an impact. The best way to make an impact is to tie your decisions to business outcomes. How do you do this? Tie it to data. But, it’s best when the culture of the company thinks this way as well. It’s your job to lead by example and evangelize this across your team and cross-functionally.

The combination of data and experience is what makes for good decision-making.

This works best when coming from the top down. So if you’re the boss—great. Share this with your other leaders. And if you’re not, bring this to your boss. It’s good for both of you.