

# COACHING *for* LEADERS

## **DataStory: Explain Data and Inspire Action Through Story**

*by Nancy Duarte*

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### **Dave's Reading Highlights**

Storytelling makes the brain light up in a way no other form of communication does.

Progressing in your career toward management and leadership requires making decisions not only with your head, but also from your gut. Staying in your head and relying too much on data and analysis can lead to stunted and overly safe decisions.

In my own business, I've seen how valuable relying on intuition can be. I've made many decisions counter to the data. In the dot-com crash, the economy was in a tailspin, and Silicon Valley took a significant financial hit, which meant my business did, too. Instead of keeping all cylinders running in our four creative services—print, web, multimedia, and presentations—I chose to shutter three of them and focus solely upon presentations. The data didn't say to do that. Yet my gut told me that by being laser-focused on one thing, the firm had the best chance of making it through. I was able to keep our team intact as many other firms closed, and when the economy began to recover, our business spiked at an unprecedented growth rate.

The great mathematician John Tukey said, “ An approximate answer to the right problem is worth a good deal more than an exact answer to an approximate problem.”

Consider carefully what different audiences need to hear, and how they want to hear it. Whenever your audience changes, so should the language you use. The higher their level of authority, the more structured and brief your approach should be.

As a CEO and author, I took comfort in reading about these practices, because I use similar strategies to optimize my time. I’m not sharing the craziest ones here, because I’d like to retain some dignity. For example, when I’m on a book deadline, I start my day at 5 a.m. and block it to 11 a.m., just for writing. I can’t check email, because if I get an urgent or agitating message, my focus is shot for the rest of the morning.

My assistant books my family vacations and parties. We also use a secret code for who should or shouldn’t make it onto my calendar. I wash my hair three times a week, and let it air-dry for an hour while I answer emails in the mornings, which cuts down on blow-drying time. I bring physical printouts in need of signatures or feedback on flights so I can take advantage of the time during takeoff and landing, when electronic devices have to be off. Upon landing, I send them from a travel scanner.

Executives have personal preferences in how they receive recommendations. To communicate to them, find someone who can mentor you in understanding these preferences. Some executives read every last word of a thick report, or may want brief summaries with the important bits flagged. You must know everyone involved in the approval process, and you may need to tailor your approach in a number of different ways to appeal to each of them. For example, each person on my executive team has their own communication preferences, and many are different from mine. Some prefer email, others prefer Slidedocs, and still others prefer quick, one-on-one discussions.

Most executives are in positions of leadership because they can swiftly assess information and challenge it well. As they begin to get the gist of your recommendation, they immediately start seeing pros and cons. They interrupt you to get answers as fast as they can to key questions prompted by their deep business knowledge. In an effort to be expedient, they will cut in to gain clarity on the full picture of what you're suggesting, and how well you've thought it through.

Often, they'll hop all over the place, pelting you with questions. You need to mentally prepare for the intensity of that. Also, allow time for them to question you. Don't fill up the entire time slot you're given with your presentation. It's important to know how long you have, so if you're not told, ask. Most executive meetings get chopped into half-hour increments, so a good general rule is to formally prepare only 15 minutes so you have time for questions. You should also ask the person who suggested that you present to the executives about what to expect. Ask about the types of questions you should be prepared for. Take time to anticipate what those might be, but you probably won't be able to put your finger on all of them. Your sponsor may not either, so prepare to be surprised. You don't want to come across as a deer caught in the headlights.

The consequences of even one failed decision by an executive could bring unsurmountable internal and external chaos, or even epic public humiliation for themselves and the company. Let them interrupt you.

Tell me the facts, and I'll learn. Tell me the truth, and I'll believe. But tell me a story, and it will live in my heart forever." -Native American Proverb

Crafting a recommendation for approval is a blend of argumentative and persuasive writing. Why? You are not just trying to prove you have your facts right (argumentation). You are also trying to move others to action (persuasion). A written recommendation from data blends a bit from both types of appeals. Below is a summary of the distinctions between argument and persuasion, which might seem

oversimplified to professional logicians, but applied to business, it works.

When making recommendations, a common mistake is to jump right to a statement of what and how it should be done, skipping WHY altogether.

Even if data proves that your position is sound, doublecheck that you didn't enter the search for evidence with bias. Play the skeptic and antagonist of your own idea, and cruise through data scenarios that could disprove your claim. Whatever notable objections you think of, include them in your Slidedoc. If you don't thoughtfully present alternative perspectives, your audience is likely to think you failed to consider them. Ask yourself, "What if the opposite were true?" Also, address any answers that are unknown or unknowable.

Your audience needs to understand you quickly and clearly, so plot and annotate data in the clearest and most common visual format. Use charts that everyone is familiar with: bar, pie, and line charts. I know, right? With all the cool new visualization tools, that's what I've got for you? But remember, this book is in service of getting agreement on action. For gaining buy-in, clarity always outperforms cool.

Many executives say "send me five slides" when they want insights from you, and they are usually looking for a succinct Slidedoc to read. Because you won't be presenting it, a Slidedoc must contain enough meaty information to be a piece of standalone communication that can be consumed quickly.

Describing the number of people who could fit inside of something can help people understand a number. Employees, customers, patients, and students commonly inhabit things like vans, buses, planes, buildings, arenas, hospitals, or stadiums. Let's say you have 1 million users. It's easier for an audience to get a sense of that quantity if you compare it to the number of people who could be seated in a stadium. For example, the San Francisco Giants' baseball field has 41,915 seats. So, you could say: "Our users would fill the San

Francisco Giants' stadium almost 24 times.” For you precision geeks, the exact math is 23.85780746749374 times—see how helpful approximation can be! Instead of using dimensions or quantity of megabytes to describe the first iPod, Steve Jobs compared it to the size of a pocket—a very familiar thing.

The primary screen was so big that Gore had to get on a scissor lift to point to a rising red line depicting the increase in atmospheric carbon dioxide levels predicted for future years. As the line ascended higher and higher, the audience could see the end of the rise was imminent when a yellow dot was displayed. After all, the screen only went so high. What they didn't know was that the production team had built a secret screen above the 90-foot screen, which was hidden behind the stage drapery. The audience gasped as Gore continued to ascend on the lift as the extra screen was revealed, showing the shocking additional rise in carbon dioxide all the way to 2056. We call this a S.T.A.R. moment, which stands for Something They'll Always Remember. A S.T.A.R. moment can't be kitschy, or it could come off as a cheesy summer camp skit. The moment must be in keeping with the overall tone of your presentation. You are seeking to draw attention to the significance of surprising data, and you don't want theatrics to distract from it.

Almost everything can be counted and measured. It's thrilling to treasure-hunt through data and uncover bytes of golden opportunity or cures for many of life's ills. We are only in the formative phase of the ways in which data will change our lives, and it needs the help of a communicator. Transforming numbers into narratives will become part of every leader's job. We rely on data to tell us what has happened, and stories to tell us what it means. Stories frame data so decisions can be made faster and inspire others to take action by changing their hearts and minds. Words are powerful. Skillfully wielding them only comes with practice.