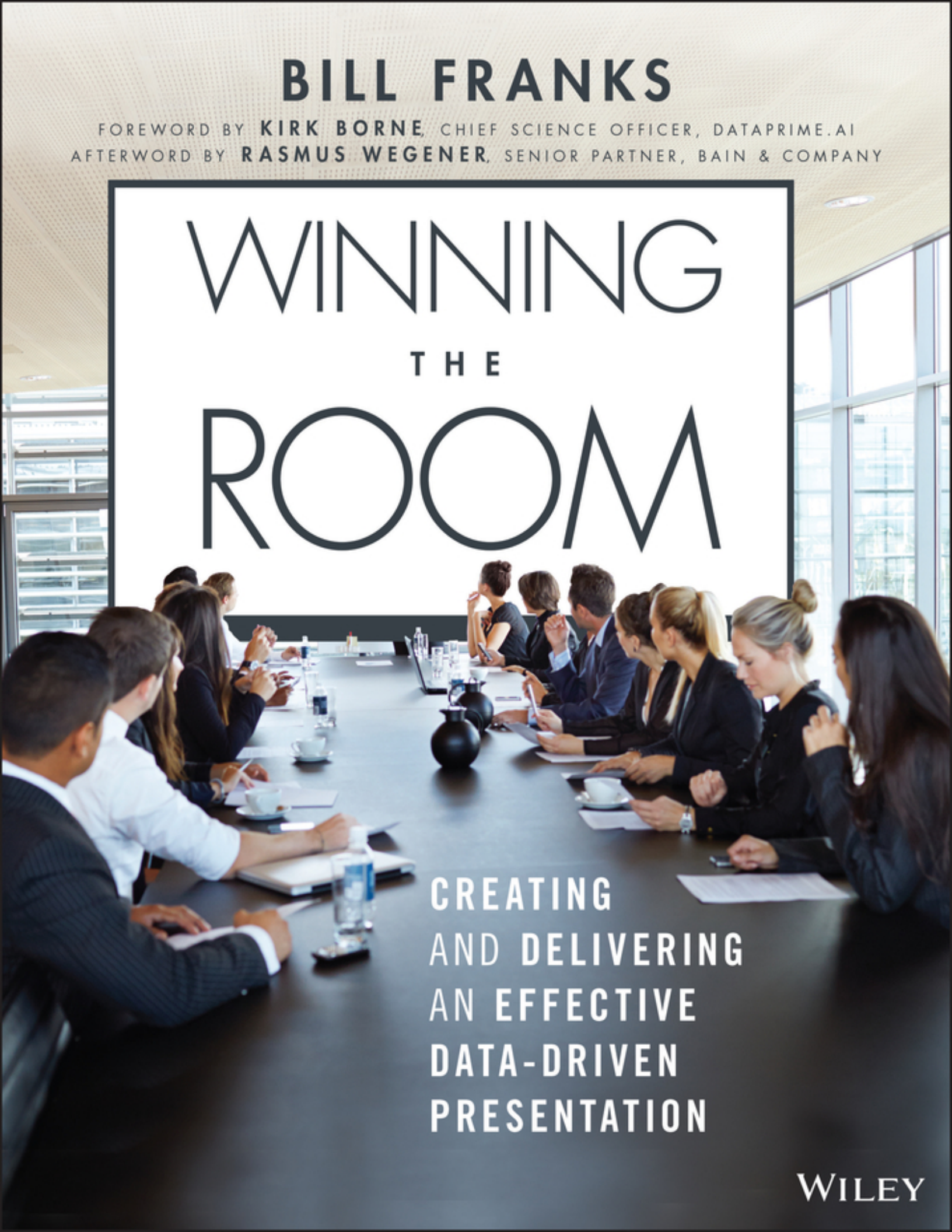
BILL FRANKS

FOREWORD BY **KIRK BORNE**, CHIEF SCIENCE OFFICER, DATAPRIME.AI
AFTERWORD BY **RASMUS WEGENER**, SENIOR PARTNER, BAIN & COMPANY

WINNING THE ROOM



CREATING AND DELIVERING AN EFFECTIVE DATA-DRIVEN PRESENTATION

WILEY

Table of Contents

- Cover
- Additional praise for *Winning the Room*
- Title Page
- Copyright
- Dedication
- Foreword
- Preface
- Acknowledgments
- About the Book
- Intended Audience
- Overview of the Contents
  - Section 1: Planning: Reviewing Strategic Fundamentals
  - Section 2: Planning: Designing the Presentation
  - Section 3: Developing: Wording and Text
  - Section 4: Developing: Numbers and Labels
  - Section 5: Developing: Charts, Images, and Layouts
  - Section 6: Delivering: Final Presentation Preparation
  - Section 7: Delivering: Giving the Presentation
- SECTION 1: Planning: Reviewing Strategic Fundamentals
  - Tip 1: Results Are Not the Biggest Factor in Success
  - Tip 2: Data Literacy Is a Two-Way Street
  - Tip 3: Don't Write Your Story … Tell Your Story!

Tip 4: Facts and Figures Are Not a Story
Tip 5: Know Your Audience
Tip 6: Slides Must Be Short, Visual, and to the Point
Tip 7: Charts and Graphs Are Like Jokes
Tip 8: Short Presentations Are Harder to Prepare Than Long Ones
Tip 9: An Executive Presentation May Have No Slides at All
Tip 10: Budget Appropriate Time
Tip 11: Be Yourself and Be Authentic
Tip 12: What Is the Audience Buying Into? You!
SECTION 2: Planning: Designing the Presentation
Tip 13: Different Presentation Venues Require Different Approaches
Tip 14: Try Different Ways to Organize Your Story
Tip 15: Too Many Technical Details Will Undercut Your Impact
Tip 16: Reveal Details Only to the Extent Required
Tip 17: Focus on How to Use Your Results
Tip 18: Use Analogies to Make an Impact
Tip 19: Make Liberal Use of Appendices
Tip 20: Create a Distinct Leave-Behind Document
Tip 21: Create “Launch” Slides
Tip 22: Break Content into Smaller Pieces
Tip 23: Animations Are Your Friend
Tip 24: Action Settings: A Hidden Gem
Tip 25: Show the Fewest Numbers Necessary
Tip 26: Distinguish Technical Significance from Business Significance

Tip 27: Give the Audience Your Headlines
Tip 28: Start with Your Recommended Actions
Tip 29: Don't Focus on the “What”
SECTION 3: Developing: Wording and Text
Tip 30: Minimize the Number of Words on Your Slides
Tip 31: Use Simple Terms and Definitions
Tip 32: Don't Use Technical Terms
Tip 33: Clarify Your Definitions
Tip 34: Provide Layperson and System Labels
Tip 35: Use Consistent Phrasing
Tip 36: If It Can't Be Read, Don't Display It
Tip 37: Don't Shrink Your Font, Shorten Your Text
Tip 38: Use Appropriate Spacing
Tip 39: Use the Same Font throughout Your Presentation
Tip 40: Beware the Missing Font
Tip 41: Address Every Agenda Item Listed
Tip 42: Identify When an Agenda Item Is Covered
Tip 43: Spellcheck Is Not Always Your Friend
Tip 44: Charts and Images Are Misspelling Factories
Tip 45: Beware the Right Word, Wrong Place
Tip 46: Keep Your Text Horizontal
SECTION 4: Developing: Numbers and Labels
Tip 47: Use Consistent Precision
Tip 48: Use Only the Precision Required to Make Your Point
Tip 49: Match Precision to Accuracy Level

Tip 50: Always Format Numbers
Tip 51: Always Show Percentages as a Percentage
Tip 52: Provide Quantities *and* Percentages
Tip 53: Never Use Scientific Notation
Tip 54: Use Names, Not Numbers, for Categories
Tip 55: Watch for Truncated Labels
Tip 56: Define All Acronyms and Abbreviations
Tip 57: Use Dedicated Definitions Slides
Tip 58: Clarify Aggregations Applied
Tip 59: Focus on the Outcome of Interest
Tip 60: Validate That Your Numbers Make Sense
Tip 61: Add a Scale to Every Chart
Tip 62: Ensure Your Charts Have Consistent Scaling
Tip 63: An Axis Usually Should Start at 0
Tip 64: Number Your Slides
SECTION 5: Developing: Charts, Images, and Layouts
Tip 65: Use a Mix of Chart Types
Tip 66: Use a Mix of Slide Layouts
Tip 67: Do Not Show Raw Output
Tip 68: Keep It Simple
Tip 69: Choose Charts That Are Easy to Interpret
Tip 70: Don't Show Incomprehensible Graphics
Tip 71: Use Complex Graphics Strategically
Tip 72: Coordinate Your Colors
Tip 73: Keep Colors in Context
Tip 74: Shun Technical and Architectural Diagrams
Tip 75: Don't Let Accent Graphics Steal the Show

Tip 76: Format Tables Consistently
Tip 77: Use Shading to Make Tables Easily Readable
Tip 78: Don't Put Borders Around Charts
Tip 79: Limit the Number of Categories
Tip 80: Label Your Data
Tip 81: Avoid Stacked Bar Charts
Tip 82: Put the Cause on the X-Axis
SECTION 6: Delivering: Final Presentation Preparation
Tip 83: Practice Your Presentation
Tip 84: Consult Some Confidants
Tip 85: Don't Overprepare
Tip 86: Adjust Your Story to the Audience
Tip 87: Focus on Time, Not Slide Counts
Tip 88: Always Be Prepared for a Short Presentation
Tip 89: The Audience Won't Know What You Left Out
Tip 90: Scale Figures to Be Relatable
Tip 91: Be Clear about the Implications of Your Results
Tip 92: Call Out Any Ethical Concerns
Tip 93: Use Simplified Illustrations
Tip 94: Don't Include Low-Value Information
Tip 95: Make Critical Numbers Stand Out
Tip 96: Make Important Text Stand Out Too
Tip 97: Have Support in the Room
Tip 98: Always Have Several Backup Plans
Tip 99: Use a Slide Clicker

Tip 100: Do Not Send Your Presentation in Advance
SECTION 7: Delivering: Giving thePresentation
Tip 101: Do Not Read Your Slides … Ever!
Tip 102: Read the Room and Adapt
Tip 103: Do Not Look at the Screen!
Tip 104: Physically Point to Important Information
Tip 105: Don't Let Bright Lights Throw You Off
Tip 106: Don't Stand Still
Tip 107: When Presenting Online, Look Right at the Camera
Tip 108: Anticipate Random and Irrelevant Questions
Tip 109: Handle Difficult People with Grace
Tip 110: Don't Correct People in Front of the Room
Tip 111: Never Pretend You Know If You Don't!
Tip 112: Stress the Positive
Tip 113: Be Honest about Costs as Well as Benefits
Tip 114: Don't Hedge Too Much
Tip 115: Be Clear about the Measure You Are Discussing
Tip 116: Don't Ask Which Findings Are Important
Tip 117: Tie Facts to Impacts
Tip 118: Provide Specific Recommendations for Action
Tip 119: Close with a “Wow” Tied to the Larger Context
Afterword
About the Author
About the Website

Index
End User License Agreement

List of Illustrations

Chapter 1

FIGURE 3A An Example of Too Much Text

FIGURE 3B A Cleaner Approach

FIGURE 6A A Clean and Visual Layout

FIGURE 9A Go Slide-Free with Printed Slide Snapshots

Chapter 2

FIGURE 14A Story Flow 1

FIGURE 14B Story Flow 2

FIGURE 19A A List of Appendices for the Audience

FIGURE 20A Use Notes Pages as a Leave-Behind Document

FIGURE 20B How to Print Notes Pages

FIGURE 21A A Framework Launch Slide

FIGURE 21B A Process Launch Slide

FIGURE 22A Quarterly Dashboard

FIGURE 22B Quarterly Dashboard Highlight – Sales by Channel

FIGURE 22C Quarterly Dashboard (with Animations)

FIGURE 23A Three Animation Options for Highlighting Key Figures

FIGURE 23B Using Transparency Animations

FIGURE 24A How to Apply Action Settings

FIGURE 25A Too Much Data Makes It Hard to See the Point

FIGURE 25B Showing Just the Data to Support the Headline

FIGURE 29A An Example of Too Much “What”

FIGURE 29B An Example of “Why,” “So What,” and “What Next”

Chapter 3

FIGURE 30A Evolving Your Points

FIGURE 31A Model Performance – Technical Version

FIGURE 31B Model Performance – Layperson's Version

FIGURE 33A Slide with an Unclear Metric Definition

FIGURE 33B Same Slide with the Metric Defined Clearly

FIGURE 34A Chart Including System Labels

FIGURE 35A Inconsistent and Confusing Phrasing

FIGURE 35B Consistent Phrasing

FIGURE 36A Chart with Hard-to-Read Text

FIGURE 36B Same Chart without Hard-to-Read Text

FIGURE 37A Never Shrink Your Font, Shorten Your Text

FIGURE 38A Spacing That Is Too Tight

FIGURE 38B Appropriate Spacing

FIGURE 39A Multiple Fonts Don't Look Right

FIGURE 39B Cutting and Pasting Can Lead to Different Fonts

FIGURE 39C A Single, Consistent Font Looks Best

FIGURE 40A Impact of a Missing Font

FIGURE 41A Today's Agenda

FIGURE 42A Use an Agenda Slide with Headers for Short Sections

FIGURE 42B Use Section Breaks for Longer Sections

FIGURE 43A Incorrect Spelling and Grammar Check Results

FIGURE 44A Graphs Are Not Checked for Spelling or Grammar!

FIGURE 45A Beware the Right Word, Wrong Place

FIGURE 46A Non-Horizontal Text Is Hard to Read

FIGURE 46B Horizontal Text Is Much Easier to Read

Chapter 4

FIGURE 47A Inconsistent Precision Does Not Look Good

FIGURE 47B Consistent Precision Looks Better

FIGURE 48A Too Much Precision Is a Distraction

FIGURE 48B Less Precision Is Often More Effective

FIGURE 49A Match Precision to Confidence Level

FIGURE 50A Without Formatting, Numbers Can’t Be Read

FIGURE 50B While Formatted, There Is More Detail Than Needed

FIGURE 50C This Version Is Much Cleaner

FIGURE 51A The Table Is Hard to Read with This Format

FIGURE 51B There Is Clearly a Problem with Bill's Gifts!

FIGURE 52A Don't You Want to See the Percentages Too?

FIGURE 52B The Percentages Make the Chart Much Better

FIGURE 53A Scientific Notation Is Very Hard to Read

FIGURE 53B This Version Is Much Easier to Read

FIGURE 54A It Is Not Clear What “0” and “1” Mean

FIGURE 54B The Legend Helps, but Not Enough

FIGURE 54C This Leaves No Room for Misinterpretation

FIGURE 55A Truncated Labels Ruin the Slide

FIGURE 55B All Labels Made to Fit

FIGURE 56A Two Options for Clarifying Acronyms

FIGURE 57A An Example Definitions Slide

FIGURE 58A Ambiguous Axis Label

FIGURE 58B Clarified Axis Label

FIGURE 59A Chart Is Not Focused on the Outcome of Interest

FIGURE 59B Chart Is Focused on the Outcome of Interest

FIGURE 60A A Chart That Clearly Can’t Be Correct
FIGURE 61A Data Scaled to Simplify Interpretation
FIGURE 62A Graphs without Scale
FIGURE 62B Graphs with Scale Added
FIGURE 63A Comparison Using Default Axes
FIGURE 63B Comparison Starting Axes at 0
FIGURE 64A How to Add Slide Numbers
Chapter 5
FIGURE 65A Too Many Charts of the Same Type Is Boring
FIGURE 65B A Mix of Chart Types Adds Appeal
FIGURE 66A Layout with Graph on Left, Text on Right
FIGURE 66B Layout with Graph on Right, Text on Left
FIGURE 66C Alternating Layouts across Slides
FIGURE 67A Raw Output Example 1
FIGURE 67B Raw Output Example 2
FIGURE 68A One Chart Is Clearly Better Than the Other!
FIGURE 69A An Old School Graphic Made with Text
FIGURE 69B The Left Chart Is Easier to Interpret
FIGURE 69C The Left Chart Is Easier to Interpret
FIGURE 70A Most Audiences Would Not Understand This Graphic
FIGURE 71A This Graphic Is Too Detailed

FIGURE 71B This Graphic Illustrates the Tree's Structure

FIGURE 72A How to Apply a Consistent Color Palette

FIGURE 72B These Color Combinations Are Difficult to Read

FIGURE 72C These Color Combinations Are Easier to Read

FIGURE 73A It Looks Odd for Negative Numbers to Be Green

FIGURE 73B Coloring Negative Numbers Red Looks “Normal”

FIGURE 74A Architecture Diagram: What a Non-Technical Audience Sees

FIGURE 75A A Dominating Accent Graphic

FIGURE 75B An Accent Graphic That Blends In

FIGURE 76A Inconsistent Formats Are Distracting

FIGURE 76B Consistent Formats Look Cleaner

FIGURE 77A Table without Shading

FIGURE 77B Table with Shading

FIGURE 78A Chart Borders Usually Look Bad

FIGURE 78B Chart Borders Usually Look Bad

FIGURE 79A Chart with Too Many Categories

FIGURE 79B Chart with an “All Other” Category

FIGURE 80A Data Labels Not Shown

FIGURE 80B Data Labels Included

FIGURE 81A It Is Very Hard to Compare All but the First Region

FIGURE 81B It Is Much Easier to Compare the Regions by Product

FIGURE 82A This Layout Implies Weight Gain Causes Daily Calories

FIGURE 82B This Layout Implies Daily Calories Cause Weight Gain

Chapter 6

FIGURE 86A Same Story, Very Different Target Audiences!

FIGURE 87A A Slide That Can Be Covered Quickly

FIGURE 87B A Slide That Might Take a While to Cover

FIGURE 88A PowerPoint Printout of Multiple Slides

FIGURE 88B Mark Off Points to Skip

FIGURE 90A This Scale Is Hard to Relate To

FIGURE 90B This Scale Is Very Easy to Relate To

FIGURE 92A Where Does Ethics Need Consideration?

FIGURE 93A Typical Approach with Exact Figures

FIGURE 93B Simplified Approach Emphasizing General Direction

FIGURE 94A There Is Little Value in Seeing All the Specific Defect Rates

FIGURE 94B A More Focused Way to Make the Point

FIGURE 95A It Isn't Clear where the Audience Should Focus

FIGURE 95B Options to Draw Attention to the Main Point

FIGURE 96A It Isn't Clear where the Audience Should Focus

FIGURE 96B Options to Draw Attention to the Main Points

Chapter 7

FIGURE 107A Looking at the Camera

FIGURE 107B Looking Just below the Camera at a Slide

FIGURE 107C Looking at a Participant in the Bottom Corner

FIGURE 113A A Misleading Slide Focused Only on the Positive

FIGURE 113B This Slide Draws Attention to a Serious Flaw

FIGURE 113C The Appendix Provides the Full Picture

FIGURE 117A A Fact Provided without Associated Impact

FIGURE 117B Additional Facts Provided along with Impacts

FIGURE 118A Specific Recommendations Provided

FIGURE 119A Results Tied to the Larger Context

Additional praise for *Winning the Room*

“Most business and data professionals struggle with delivering impactful presentations that consistently win the hearts and minds of their audience. In this book, Bill provides dozens of very practical and easy- to-adopt tips that will help you become an engaging and impactful presenter.”

—Mano Mannoochahr,
Chief Data and Analytics Officer, Travelers Insurance

“Storytelling and data are both important, but extremely hard to bring together effectively. This book enables all readers with an interest in data to think about how to create and tell a story with data that engages, teaches, and informs both technical and executive audiences alike.”

—Eric Weber,
Head of Data Product and Experimentation, Yelp

“Business communication has become critical in today's fast-moving world. In this book, Bill Franks has drawn on his many years of experience to create a simple guide with practical, readily usable examples that will help beginners in business communications develop effective skills, and help experienced practitioners remain on top of their game.”

—Dilip Krishna,
Managing Director, Deloitte

“Whether you're a novice or experienced at presenting data, this book is packed with practical tips that will enhance how you approach your next presentation. Rather than taking years to learn these tips, like me, Bill Franks's sage advice will fast-track your ability to create and deliver impactful data presentations.”

—Brent Dykes,
Author, *Effective Data Storytelling: How to Drive Change with Data, Narrative, and Visuals*,
Founder/Chief Data Storyteller, AnalyticsHero, LLC

“The world is driven by data, and it is vital to understand how to use and apply analytics within your business. Bill Franks has written an excellent guide with 119 useful tips on how to become successful in presenting your data so it will have the most impact.”

—Dr Mark van Rijmenam,
***Author, The Digital Speaker*, and founder of Datafloq**

“Whether you are an internal or external analytics consultant, this book provides practical guidance for becoming an effective data storyteller. Highly recommended for data professionals at all levels.”

—Rod Bates,
Managing Director, Data & Analytics,
PwC, and former VP, Decision Sciences and Data Strategy,
The Coca-Cola Company

“*Winning the Room* is relevant to a broad audience: The book is a pointed refresher for more seasoned business leaders, project managers, researchers, and consultants. It's also the one complete reference on presentation preparation for those early in their career: professionals, academics, and students alike.”

—Rasmus Wegener,
Senior Partner, Bain & Company

“To achieve profoundly better data-driven presentations and communications, every presenter of data should study and learn from this book, and every data-related curriculum should require this book for all their students. The book is a well-ordered guide through a full menu of must-dos, don't-dos, how-tos, and why-dos in data communications, data presentation, data storytelling, and presentation design.”

—Kirk Borne,
Chief Science Officer, DataPrime.ai

Winning the Room

Creating and Delivering an Effective Data-Driven Presentation

BILL FRANKS

WILEY

Copyright © 2022 by Bill Franks. All rights reserved.

Published by John Wiley & Sons, Inc., Hoboken, New Jersey.

Published simultaneously in Canada.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning, or otherwise, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, Inc., 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 750-4470, or on the web at www.copyright.com. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at http://www.wiley.com/go/permissions.

Limit of Liability/Disclaimer of Warranty: While the publisher and authors have used their best efforts in preparing this work, they make no representations or warranties with respect to the accuracy or completeness of the contents of this work and specifically disclaim all warranties, including without limitation any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives, written sales materials or promotional statements for this work. The fact that an organization, website, or product is referred to in this work as a citation and/or potential source of further information does not mean that the publisher and authors endorse the information or services the organization, website, or product may provide or recommendations it may make. This work is sold with the understanding that the publisher is not engaged in rendering professional services. The advice and strategies contained herein may not be suitable for your situation. You should consult with a specialist where appropriate. Further, readers should be aware that websites listed in this work may have changed or disappeared between when this work was written and when it is read. Neither the publisher nor authors shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages.

For general information on our other products and services or for technical support, please contact our Customer Care Department within the United States at (800) 762-2974, outside the United States at (317) 572-3993 or fax (317) 572-4002.

Wiley also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic formats. For more information about Wiley products, visit our web site at www.wiley.com.

Library of Congress Cataloging-in-Publication Data

Names: Franks, Bill, 1968- author.

Title: Winning the room : creating and delivering an effective data-driven presentation / Bill Franks.

Description: Hoboken, New Jersey : Wiley, [2022] | Includes index.

Identifiers: LCCN 2021046310 (print) | LCCN 2021046311 (ebook) | ISBN 9781119823094 (paperback) | ISBN 9781119823131 (adobe pdf) | ISBN 9781119823100 (epub)

Subjects: LCSH: Business presentations. | Business—Data processing.

Classification: LCC HF5718.22 .F73 2022 (print) | LCC HF5718.22 (ebook) | DDC 658.4/52—dc23

LC record available at https://lccn.loc.gov/2021046310

LC ebook record available at https://lccn.loc.gov/2021046311

Cover image(s): © Getty Images | Klaus Vedfelt

Cover design: Paul McCarthy

This book is dedicated to everyone
who is fully committed to making the effort required
to deliver effective data-driven presentations.

Foreword

How to deliver effective presentations—there's a topic that's frequently written about. And it should be! Effective communications, particularly in boardroom, client, conference, and other stakeholder presentations, is an essential component of success in business and in one's personal career development. What's new and urgent now is the need for *data-driven* communications. How one presents and communicates raw numbers, derived results, and inferred actionable insights from data are essential leadership and career skills in the current data-drenched digital era.

To be honest, my very first reaction when Bill asked me to write a foreword was “Oh, no, not another ‘How to deliver effective presentations’ book!” But then, the emphasis on live, in-person data presentation, data communication, and data storytelling (with a sprinkling of fun examples within my favorite category, “how to lie with graphs and statistics”) made me quickly get drawn in and fully engaged with the book.

Bill's narratives are anchored solidly to specific tips with corresponding specific graphics. It quickly becomes clear that he has lived through the good and bad examples provided. I also loved the rationales Bill gives, answering the “why” when he recommends a way to do something. This makes every page a real learning experience for the reader. I ended up thinking to myself, “Here's a case where first impressions were wrong.” And it was a delightful experience to have my mind changed in such a positive direction.

Data literacy is a very commonly discussed soft skill that goes along with data storytelling for effective data communications. What is important about any communications is that its success is measured in two ways —in the one communicating and in the recipient. Simply adequate data communications could be achieved by a data-literate speaker presenting things clearly enough but without showing empathy with the audience through good data storytelling. Conversely, good storytelling is lost on the audience if the speaker does a poor job in explaining the numbers and the insights derived therefrom. In the first case, the presenter engages with the data but not with the audience. In the latter case, the audience is engaged with the story but not with the data.

Ideal data communications therefore succeeds both ways, with the presenter and the audience in synch. In synch with what? In synch with understanding the answers to the three data-driven questions that should be addressed in the presentation: What? So what? And now what? In other words, What did I do and what did I learn from the data? Why should you care? And what data-driven actions should you now take?

To achieve profoundly better, even perfect, data-driven presentations and communications, every presenter of data should study and learn from this book, and every data-related curriculum should require this book for all their students. The book is filled with brilliant tips, spanning more than 100 nuggets of data-driven wisdom, from a master data analytics practitioner, business consultant, storyteller, and thought leader. You will find here a well-ordered guide through a full menu of must-dos, don't-dos, how-tos, and why-dos in data communications, data presentation, data storytelling, and presentation design.

The book's ultimate strategic goal is clearly stated in the first part of its title: *Winning the Room*. Backed up by years of experience and his own stories, Bill delivers a wealth of practical advice and recommendations that delightfully satisfy the tactical objectives of the book: “Creating and delivering an effective data-driven presentation.” Proven in the hard-won trenches of client engagement, the positive reinforcement checklist style of the book will be a refreshing departure from those preachy books that tell you what you are doing wrong in your presentations. This book delivers, page after page, on the promise of helping you to learn the how and why of *Winning the Room*.

Kirk Borne, PhD, Chief Science Officer, DataPrime.ai

Preface

You're part of a high-performing team that has some great data-driven results to share. After months of effort, the team's work on a major project is finished and you're ready to present the results to the senior leaders in your organization. You and the entire team are energized and excited about the upcoming presentation and spend substantial time pulling together the necessary facts and figures. Those facts and figures are impressive and leave you no doubt that what your team has found will yield massive benefits for the organization once the executives act on the findings. As you step to the front of the room, turn on your laptop, and start your data-driven presentation for the audience, you're feeling confident and proud.

The first information presented is a list of the key milestones of the project. To make sure that you accurately summarize the milestones, you turn to read the dates and descriptions from the screen. As you discuss the project's methodology, you provide the technical details behind each phase so that the executives understand the extent of the work your team did. You don't want the presentation to appear too long, so you keep your slide count to a minimum by putting as many points as possible on each slide. As the presentation progresses, questions indicate that audience members aren't understanding the technical details, so you go over all the details again, frustrated that they don't understand such simple concepts.

In preparing the presentation, you reused many of the technical slides that were used to explain the results to the extended project team because the slides had been proven effective with that audience. You notice a few spelling and

grammar errors early in the presentation but figure that nobody else will notice before you fix them. All numbers in the presentation are shown to three decimal places to reinforce the rigorous precision the team practiced, yet an audience member identifies some numbers that are not correct. You promise to update the figures before distributing the presentation.

At the end of the presentation, you summarize the facts the project team uncovered and the data that supports those facts. The executives ask questions to better understand the business and practical context of the results and how to make use of the information properly, so you promise to add more information on those topics before distributing the presentation. After asking the audience what they find most compelling about the findings, you are stunned at the lack of excitement exhibited by the executives. To help move things forward, you state that your primary recommendation is for the executives to reconvene to discuss what actions they might take based on the findings. You conclude by saying that you and the project team look forward to hearing what potential actions the executives identify and which they decide to pursue first.

After the team's months of hard work, no actions are taken, and the project is shelved. You receive feedback that the executives found the presentation hard to understand, unfocused, and boring. They certainly didn't see the potential you and your team saw. Worse, as far as the stakeholders are concerned, you and your team are now associated with an embarrassing failure of a project. Bye-bye end-of-year bonus! You are baffled by this and soon leave the company to find a job at an organization with executives who will be more enlightened and appreciative of your hard work.

Unfortunately, the same pattern repeats at the new company, and every company after that, because the problem wasn't with the executives in the audience … it was with you.

There were many errors in the presentation delivery described in the preceding paragraphs. I hope you noticed many of them. If not, don't worry because this book is here to educate you on what went wrong and what to do differently. Delivering an effective data-driven presentation to a(n) (often nontechnical) live audience isn't the same as discussing technical details with peers. Entirely different ways of organizing and presenting information are necessary to help an audience that doesn't have your expertise to do the following:

- Understand what you've found.
- Grasp the implications.
- Take action.

Delivering a live presentation is also very different from compiling a written document. You must be purposeful and diligent if you want to develop a presentation that conveys a compelling story while simultaneously avoiding myriad traps that undercut your credibility and limit your impact.

If your goal is to create and deliver effective data-driven presentations, this book will explain how to do that!

Acknowledgments

There are many individuals who get credit for helping to make this book happen. First are all the clients and coworkers over the years whom I presented to and watched present. Without delivering and watching so many presentations, I would not have had the opportunity to learn the lessons contained in this book.

I owe huge thanks to the students in the 2020–2021 Data Science 7900 classes I helped teach at Kennesaw State University. Seeing the struggles class members had with the early versions of their project presentations drove home in my mind how much there is to learn about developing presentations. The classes helped reinforce the need for some of these tips through their efforts. More important, seeing how fast the classes improved as they learned from their errors gave me the confidence that a book like this could have immediate impact for readers and was worth writing.

I also owe thanks to Jennifer Priestley and Sherill Hayes for being supportive and encouraging of this project. Their input helped to solidify the book's strategy and direction.

Finally, thanks to the people who were kind enough to review and provide feedback on my initial draft of the book. The input I received led to many changes and much rearranging that made the book better. Thank you to Fraser Douglas, Bill Franks (my dad, not me!), Mike Lampa, Scott Langfeldt, and Krista Sykes.

About the Book

Data literacy is one of the hottest topics in the business world today. Although most people think of literacy in terms of reading and receiving information, literacy is a two-way street that also involves writing and delivering information. The presentation of data-driven material is, therefore, a core component of data literacy. The onus isn't just on your audience to be ready to understand and receive the information you provide. The responsibility is also on you to present and explain your information in a way that can be effectively received by your audience. You must also help the audience understand what they stand to gain by acting on the information.

This book focuses on common errors that presenters make when delivering a data-driven presentation to a live audience. The negative effects of these errors are only magnified when presenting to nontechnical audiences, and the errors drastically undercut the impact of your presentation while lessening your personal credibility. Although presenting information in a clear, crisp, effective fashion enables you to stand out, it takes diligence and practice to do that consistently.

In the context of this book, a *data-driven presentation* is one that contains summarized data, analysis results, survey outcomes, results of experiments, or any other type of data derived to support the presentation. Also note that *presentation* in context of this book applies to a slide deck prepared for a live presentation and to how the presenter verbally delivers the compelling story that the deck supports. The live presentation can be in person, virtual, or a mix of both.