

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

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 Dataflog

“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

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*Creating and Delivering an Effective
Data-Driven Presentation*

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

Contents

<i>Foreword</i>	xvii
<i>Preface</i>	xxi
<i>Acknowledgments</i>	xxv
<i>About the Book</i>	xxvii
<i>Intended Audience</i>	xxxi
<i>Overview of the Contents</i>	xxxiii
SECTION 1 PLANNING: REVIEWING STRATEGIC FUNDAMENTALS	1
TIP 1: Results Are Not the Biggest Factor in Success	3
TIP 2: Data Literacy Is a Two-Way Street	5
TIP 3: Don't Write Your Story . . . Tell Your Story!	7
TIP 4: Facts and Figures Are Not a Story	10
TIP 5: Know Your Audience	12
TIP 6: Slides Must Be Short, Visual, and to the Point	14
TIP 7: Charts and Graphs Are Like Jokes	16

TIP 8:	Short Presentations Are Harder to Prepare Than Long Ones	18
TIP 9:	An Executive Presentation May Have No Slides at All	20
TIP 10:	Budget Appropriate Time	22
TIP 11:	Be Yourself and Be Authentic	23
TIP 12:	What Is the Audience Buying Into? You!	24
SECTION 2	PLANNING: DESIGNING THE PRESENTATION	25
TIP 13:	Different Presentation Venues Require Different Approaches	27
TIP 14:	Try Different Ways to Organize Your Story	29
TIP 15:	Too Many Technical Details Will Undercut Your Impact	31
TIP 16:	Reveal Details Only to the Extent Required	33
TIP 17:	Focus on How to Use Your Results	35
TIP 18:	Use Analogies to Make an Impact	37
TIP 19:	Make Liberal Use of Appendices	38
TIP 20:	Create a Distinct Leave-Behind Document	40
TIP 21:	Create “Launch” Slides	43
TIP 22:	Break Content into Smaller Pieces	45

TIP 23:	Animations Are Your Friend	48
TIP 24:	Action Settings: A Hidden Gem	50
TIP 25:	Show the Fewest Numbers Necessary	52
TIP 26:	Distinguish Technical Significance from Business Significance	54
TIP 27:	Give the Audience Your Headlines	56
TIP 28:	Start with Your Recommended Actions	58
TIP 29:	Don't Focus on the "What"	60
SECTION 3	DEVELOPING: WORDING AND TEXT	63
TIP 30:	Minimize the Number of Words on Your Slides	65
TIP 31:	Use Simple Terms and Definitions	67
TIP 32:	Don't Use Technical Terms	69
TIP 33:	Clarify Your Definitions	70
TIP 34:	Provide Layperson and System Labels	72
TIP 35:	Use Consistent Phrasing	74
TIP 36:	If It Can't Be Read, Don't Display It	76
TIP 37:	Don't Shrink Your Font, Shorten Your Text	78
TIP 38:	Use Appropriate Spacing	80

TIP 39:	Use the Same Font throughout Your Presentation	82
TIP 40:	Beware the Missing Font	85
TIP 41:	Address Every Agenda Item Listed	87
TIP 42:	Identify When an Agenda Item Is Covered	89
TIP 43:	Spellcheck Is Not Always Your Friend	91
TIP 44:	Charts and Images Are Misspelling Factories	93
TIP 45:	Beware the Right Word, Wrong Place	94
TIP 46:	Keep Your Text Horizontal	95
SECTION 4	DEVELOPING: NUMBERS AND LABELS	97
TIP 47:	Use Consistent Precision	99
TIP 48:	Use Only the Precision Required to Make Your Point	101
TIP 49:	Match Precision to Accuracy Level	103
TIP 50:	Always Format Numbers	105
TIP 51:	Always Show Percentages as a Percentage	108
TIP 52:	Provide Quantities <i>and</i> Percentages	110
TIP 53:	Never Use Scientific Notation	112
TIP 54:	Use Names, Not Numbers, for Categories	114

TIP 55:	Watch for Truncated Labels	116
TIP 56:	Define All Acronyms and Abbreviations	118
TIP 57:	Use Dedicated Definitions Slides	120
TIP 58:	Clarify Aggregations Applied	122
TIP 59:	Focus on the Outcome of Interest	124
TIP 60:	Validate That Your Numbers Make Sense	126
TIP 61:	Add a Scale to Every Chart	128
TIP 62:	Ensure Your Charts Have Consistent Scaling	130
TIP 63:	An Axis Usually Should Start at 0	132
TIP 64:	Number Your Slides	134
SECTION 5	DEVELOPING: CHARTS, IMAGES, AND LAYOUTS	135
TIP 65:	Use a Mix of Chart Types	137
TIP 66:	Use a Mix of Slide Layouts	139
TIP 67:	Do Not Show Raw Output	142
TIP 68:	Keep It Simple	145
TIP 69:	Choose Charts That Are Easy to Interpret	147
TIP 70:	Don't Show Incomprehensible Graphics	149

TIP 71:	Use Complex Graphics Strategically	151
TIP 72:	Coordinate Your Colors	153
TIP 73:	Keep Colors in Context	155
TIP 74:	Shun Technical and Architectural Diagrams	157
TIP 75:	Don't Let Accent Graphics Steal the Show	159
TIP 76:	Format Tables Consistently	161
TIP 77:	Use Shading to Make Tables Easily Readable	163
TIP 78:	Don't Put Borders Around Charts	165
TIP 79:	Limit the Number of Categories	167
TIP 80:	Label Your Data	169
TIP 81:	Avoid Stacked Bar Charts	171
TIP 82:	Put the Cause on the <i>X</i> -Axis	173
SECTION 6	DELIVERING: FINAL PRESENTATION PREPARATION	175
TIP 83:	Practice Your Presentation	177
TIP 84:	Consult Some Confidants	179
TIP 85:	Don't Overprepare	181
TIP 86:	Adjust Your Story to the Audience	182
TIP 87:	Focus on Time, Not Slide Counts	185

TIP 88:	Always Be Prepared for a Short Presentation	187
TIP 89:	The Audience Won't Know What You Left Out	190
TIP 90:	Scale Figures to Be Relatable	192
TIP 91:	Be Clear about the Implications of Your Results	194
TIP 92:	Call Out Any Ethical Concerns	196
TIP 93:	Use Simplified Illustrations	198
TIP 94:	Don't Include Low-Value Information	200
TIP 95:	Make Critical Numbers Stand Out	202
TIP 96:	Make Important Text Stand Out Too	204
TIP 97:	Have Support in the Room	206
TIP 98:	Always Have Several Backup Plans	207
TIP 99:	Use a Slide Clicker	209
TIP 100:	Do Not Send Your Presentation in Advance	210
SECTION 7	DELIVERING: GIVING THE PRESENTATION	213
TIP 101:	Do Not Read Your Slides . . . Ever!	215
TIP 102:	Read the Room and Adapt	217
TIP 103:	Do Not Look at the Screen!	219
TIP 104:	Physically Point to Important Information	221

TIP 105:	Don't Let Bright Lights Throw You Off	222
TIP 106:	Don't Stand Still	223
TIP 107:	When Presenting Online, Look Right at the Camera	225
TIP 108:	Anticipate Random and Irrelevant Questions	227
TIP 109:	Handle Difficult People with Grace	228
TIP 110:	Don't Correct People in Front of the Room	230
TIP 111:	Never Pretend You Know If You Don't!	232
TIP 112:	Stress the Positive	234
TIP 113:	Be Honest about Costs as Well as Benefits	236
TIP 114:	Don't Hedge Too Much	239
TIP 115:	Be Clear about the Measure You Are Discussing	241
TIP 116:	Don't Ask Which Findings Are Important	242
TIP 117:	Tie Facts to Impacts	243
TIP 118:	Provide Specific Recommendations for Action	245
TIP 119:	Close with a "Wow" Tied to the Larger Context	247
	<i>Afterword</i>	249
	<i>About the Author</i>	251
	<i>About the Website</i>	253
	<i>Index</i>	255

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.

Although many of the tips in the book also apply to written content, the book is all about making live data-driven presentations. There are many books on different aspects of delivering data-driven content, such as performing analysis, creating visualizations, storytelling, presentation skills, and more. However, this is the only book that pulls from each of those subject areas and applies a lens focusing exclusively on the live presentation of data-driven content.

The tips that follow are derived from my 30+ years of presenting data-driven information to mostly nontechnical audiences. I have delivered hundreds and hundreds of presentations to companies and conferences myself, and I have been present in a similar number of presentations by others. Every tip in this book reflects a mistake that I have made and/or that I have seen others make. Ironically, some of the mistakes that seem so obvious as to make you say, “I’d never do that, so why did it get included in this book?” are the mistakes I see most often! I’ve always wished someone had taught me these lessons so that I didn’t have to learn them the hard way on my own, hence, my motivation to write this book and provide the lessons to readers as a way to pay it forward.

This book is needed now more than ever. Analytics and data continue to rise in prominence, and virtually anyone in the professional workforce today must deal with data, as a presenter and as a consumer of presentations. Although universities teach the theory behind how to generate analytics and data, they do not spend time on how to effectively present that information to others. Most continuing education and corporate training courses are similarly focused on generating technical results, not effectively delivering those results to an audience. Due to this, people still learn what they know about how to present data-driven information on the job, and, frankly, most people aren’t very good at it! If you learn to present data-driven information well, you will increase your effectiveness, your credibility, your career success, and the number of business outcomes you influence.