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 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
Winning the Room

Creating and Delivering an Effective Data-Driven Presentation

BILL FRANKS

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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.
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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
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 spell-
ing 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 prac-
ticed, 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 ques-
tions 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 con-
cerned, 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 an (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!
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.
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.