

cole nussbaumer knaflic

best-selling author of *storytelling with data*

storytelling with **you**

plan, create, and
deliver a stellar
presentation



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To **you** and your next presentation

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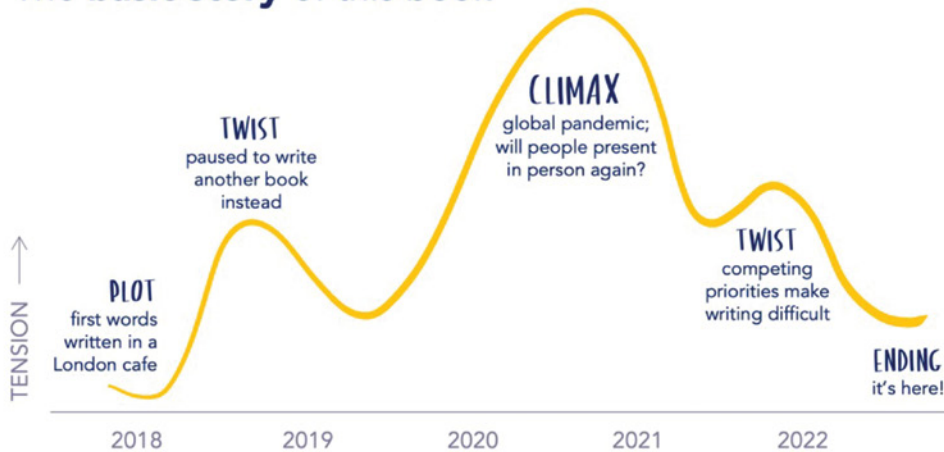
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The **basic story** of this book



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about the author

Cole Nussbaumer Knaflic tells stories that drive change. In her analytical roles in banking, private equity, and as a manager on the Google People Analytics team, she grew to appreciate the potent pairing of well-designed visuals with engaging delivery. Cole's desire to help others understand and develop these skills propelled this self-described introvert to step out from behind her computer and onto the stage. Today, she is a highly sought-after speaker, having honed her craft through more than a thousand workshops and as a keynote presenter at marquee conferences and Fortune 500 events.

Cole is founder and CEO of storytelling with data (SWD) and author of best-selling books *storytelling with data: let's practice!* and *storytelling with data: a data visualization guide for business professionals*, which has been translated into more than 20 languages, is used as a textbook by hundreds of universities, and serves as the course book for tens of thousands of SWD workshop participants. For more than a decade, Cole and her team have delivered interactive learning sessions to data-minded individuals, companies, and philanthropic organizations all over the world. They also help people create graphs that make sense and weave them into compelling stories through the popular SWD community, blog, podcast, and videos.

Cole has a BS in Applied Mathematics and an MBA from the University of Washington. When she isn't ridding the world of ineffective graphs or galvanizing others to present powerfully, Cole is undertaking the adventures of parenting three children with her husband at home in the Midwest and on travels abroad.

introduction

Let's begin with a story

When I was twelve years old, I ran for senator.

I was in junior high school, and this was my first time running for an elected position in student government. I recall spending many hours perfecting my campaign signs. I'd beg my mother to take me to our small town's general store, where I would pick out the perfect combination of colorful poster boards and paint. I was discerning about which friends I enlisted to help—was Lisa's penmanship up to par? Leading up to the election, my bedroom floor was littered with materials: rulers to ensure straight lines, stencils for precise lettering, and supplies for the button maker. A large piece of butcher paper taped to the wall registered contending ideas for my campaign slogan. Looking back, choosing "Be picky, vote for Nicky" was not one of my prouder moments.

I also spent a good amount of time on my speech. Introducing freshly baked cookies into the student store, having one school dance *al fresco* on the football field (instead of the malodorous gym), and building volunteer time into the school calendar were top priorities. I typed furiously on my family's electric typewriter, perfecting one line at a time as it appeared in the small display before moving onto the next. It was a great speech.

When election day came, I clearly remember the nerve-wracking walk across the gym to the podium to deliver those carefully crafted promises. Two hundred familiar faces looked at me expectantly from the bleachers. My hands

trembled as I started to read what I had written. “Talk louder!” someone shouted from the crowd. I could hear my voice shaking, amplified through the speakers. It was difficult to breathe. It was *not* a good performance.

Despite all of that, I won the election. Apparently, the allure of cookies was enough to overcome my lack of confidence. I got one thing right: I knew my audience. This was an early presentation lesson that I didn’t fully appreciate until later. Though baked goods aren’t always an option, it is *always* about the cookie—identifying that idea, opportunity, potential reward, or vision of the future that your audience will find irresistible.

My journey to storyteller

I am not a naturally strong speaker nor an innate storyteller. I consider myself to be an introvert. The environment in which I feel most at ease is where I am sitting now, writing these words: alone, behind my laptop. You wouldn’t guess any of this about me. That’s because today I am comfortable and effective speaking in front of a packed room or standing on stage confidently delivering a presentation. This did not happen by chance; these are carefully practiced and honed skills. While the learning has absolutely been intentional, it’s also been somewhat curious, since I didn’t initially set out to do any of this.

My first job was in banking. I was fresh out of undergrad with an applied mathematics degree, working as an analyst in credit risk management. A hard worker and always looking for ways to make things efficient, I had a knack for analyzing data and graphing it effectively. I was promoted. Within a couple of years, I found myself managing a small team and was responsible for presenting monthly data to our Chief Risk Officer and his leadership group.

The challenge was that I still had the same shaky hands and quivering voice as I did in junior high. This audience of leaders—mostly men and at least a decade my senior—made me nervous. Over time, I learned to put my paper down so my trembling hands wouldn’t be the first thing they noticed. Breathing more deeply helped to steady my voice. But I still had a big issue: filler

words. I was uncomfortable with silence and as a result simply didn't ever pause. If I couldn't find the word I was looking for, I wouldn't stop to collect my thoughts. Instead, I would fill that space with "likes," "ahs," and "ums." I tried introducing disincentives to change my behavior. I had my team listen to my monthly meetings via teleconference and count my offenses. I'd owe a dime for each one. This paid for a number of team happy hours. However, I was no better off in my meetings with management.

Though my career was growing professionally and I could do great work behind the scenes, my lackluster live presentations weren't doing the material and findings justice.

When the credit risk crisis hit in 2007, I left banking to apply the analytical skills I'd developed to another area on the Google People Analytics team. Google was a fantastic environment in which to work, and I feel tremendously grateful for the advancement this role afforded me. One such opportunity was being able to create a class and teach others how to effectively communicate their data.

The course's focus on data visualization was something that had been an area of interest for me for some time. It turned out to be a popular topic and was rolled out as an offering across Google globally. This was amazing—and highly intimidating, given that I'd never formally taught anything! Fortunately, I was able to sign up for an internal series of courses to help *learn* how to *teach*. Two simple tips I picked up during that program greatly impacted me, forever changing the way I communicate: stand up and don't shift. You'll hear more about these later.

During my years at Google, in addition to my core role in People Analytics, I taught scores of classes on visualizing data. Participants came from all parts of the organization: Sales, Engineering, Product, Marketing, and People Operations. I started to recognize how different types of individuals communicate in distinct ways. I gained visibility to various scenarios, challenges, and opportunities for communicating—both through participants' stories and through the different situations in which I taught. I built experience guiding small teams through

hands-on activities and large groups through structured content and facilitated discussions. I was invited to speak on stage at my first conference. Eventually, interest in my course outside of Google led me to teach at other companies.

By early 2012, it was becoming clear to me that the need for communicating effectively with data extended far beyond Google. I took a leap and decided to take my passion project—*storytelling with data*—to the next level, leaving my day job to concentrate on ridding the world of exploding 3D pie charts one workshop at a time. This started small, and admittedly, the stakes were relatively low (I was happy to have my travel expenses covered and a willing audience!). Those early workshops gave me an opportunity to gain traction and a good amount of practice. At first, I focused mainly on making sure my slides were superb, the lessons made sense, and the flow was smooth. It was only after I was comfortable with my content that I turned my attention to delivery. It was time to face my demons from that old gymnasium.

In the same way I had observed how graphing data differently changed the way people reacted, I started to notice how nuances in my delivery influenced others. Watching my audience for cues and feedback, I would see the impact of varying simple things, like my volume and speed. I could get someone to contribute to the discussion based on where I stood in the room and use my hands and body for emphasis. When a group became pensive, softening my voice could draw them into the present, their ears perking up in attention. Becoming animated would immediately shift the energy in the room. Every new audience meant a fresh opportunity to experiment, learn, and refine my storytelling and presentation skills.

Along with this, I had a growing—and revolutionary—realization. As a good presenter, I could get others to invest in what I care about. Conversely, if I can't present my ideas effectively, there's no way I can drive the change I seek.

Over time, justly serving *storytelling with data's* mission to inspire positive change through the way people communicate with data meant I could use some help (it's a big job!). The company has grown to include a small group of

talented individuals. Each member must be adept at communicating, able to present skillfully, and capable of speaking in a way that makes others want to listen and engage. Sharing what I've learned, I've guided my team to become powerful presenters and inspiring storytellers. By practicing and implementing the lessons outlined in this book, you will become one, too.

Why you should be a better storyteller

Have you ever lost control of your audience before you could get your point across? Or had someone steer you in an unexpected direction or ask an unanticipated question that threw you off track? Or started talking, only to realize you were lacking credibility in the eyes of those listening? Or finished giving a presentation and wondered whether you had changed minds or if anyone would take action based on the information you shared?

Being a better storyteller or a better presenter doesn't keep these challenges from arising, but it can drastically reduce their frequency. You likely spend a ton of time on activities that happen behind the scenes, doing your work. Yet the communication of your project is typically the only part that others see. *This* is where all of your efforts succeed or fail. There is a tremendous amount of value to be obtained from work you are already doing that simply isn't being communicated as effectively as it could be.

By applying the lessons in this book, your chances for success improve. When we are effective, we capture our audience's attention, engage them, and—ultimately—inspire action.

Who this book is for

This book is written for anyone who prepares or delivers presentations. This can take the form of business meetings, conference presentations, and keynote speeches.

Given the focus on planning and practicing, the comprehensive lessons in this book will be most appropriate for situations where the stakes are higher than a weekly status meeting or monthly review, though you'll encounter tips that will help you in these instances as well. Employ the strategies you learn here in scenarios where you need to encourage someone to see something in a different light, take an action, or make a change.

What you'll find in this book

This book is organized into three sections: *plan*, *create*, and *deliver*. In the *plan* chapters, you'll learn the importance of taking time to consider your audience, carefully craft your message, and set your content. As part of this, we'll dive deep into story and discuss applications for storytelling in business presentations, both as an illustrative device and as a strategy for organizing content. In the *create* section, we'll explore how to build effective materials that will ensure that story gets across and is remembered. The *deliver* chapters will help prepare and develop you as the presenter, both when it comes to getting to know your content thoroughly as well as readying you to feel and exude confidence. Together, these sections will equip you with strategies to plan, create, and deliver stellar presentations, whether in a meeting or formally on stage.

Specific chapter summaries follow.

Chapter 1: consider your audience

You are not communicating for yourself—first and foremost, you are communicating for your audience. In this opening chapter, we analyze audience: who they are, how you will connect with them, and the action they should take.

By reflecting on your audience before doing anything else, you put yourself in the optimal position to communicate successfully.

Chapter 2: craft your message

What exactly do you need to communicate? While it sounds straightforward, being clear and concise in response to this critically important question is a common challenge. I introduce strategies for crafting your key message. You'll learn to articulate your point of view and convey what's at stake in a single sentence.

Chapter 3: compile the pieces

Once you know your audience and message, you can begin to plan content. We do this through brainstorming and then editing and arranging ideas into a storyboard, your low-tech plan of attack. I discuss the importance of intentional discard, getting feedback, and tips for doing all of this both on your own and in a collaborative team environment.

Chapter 4: form a story

Stories resonate and stay with us in ways that facts do not. In this final chapter of the planning section, I introduce the narrative arc and the importance of tension in communication. We examine different shapes of stories and ways to think about these concepts while revisiting your storyboard from the prior chapter. You'll learn how to use story in a business setting to gain attention and drive action.

Chapter 5: set the style & structure

This chapter marks the transition from planning your content to creating it. We begin with an overview of general design considerations, then establish the framework for your presentation. This includes a pragmatic process for transforming your low-tech preparation into slides.

Chapter 6: say it with words

Text plays an important role in visual communications, and in this chapter we look at several strategies for using words wisely. I introduce the takeaway title and illustrate how it can be employed effectively. We also explore the power of words on their own as slide content.

Chapter 7: show data in graphs

When communicating data to support your message, it often means you should visualize it. The best practices for using graphs in presentations I share in this chapter include an overview of data visualization design principles that will help ensure your data is easily understood.

Chapter 8: illustrate with images

Is a picture worth a thousand words? Not exactly, but images used well have an important place in presentation design. In this final chapter within the create section, we delve into the use of photographs, illustrations, and diagrams, including common pitfalls to avoid.

Chapter 9: refine through practice

Now that your content is created, we turn our attention to you, the presenter. I discuss strategies for mastering your content and ways to rehearse to ensure a smooth delivery. We also cover how to get meaningful feedback to refine and improve.

Chapter 10: build your confidence

Mastering your content is one thing, but commanding the attention of a room is another. In this chapter, we examine the importance of exuding confidence through what you do and say, including the effective use of body and voice to establish presence.

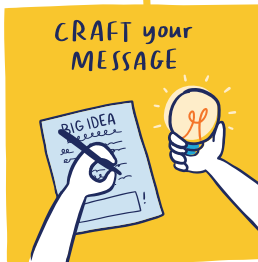
Chapter 11: introduce yourself

Whether a formal introduction or some brief context about who you are and why you're the one presenting, how you introduce yourself matters. In the penultimate chapter, we dive deep into the art of the introduction, outlining a process you can use to craft the story of *you*.

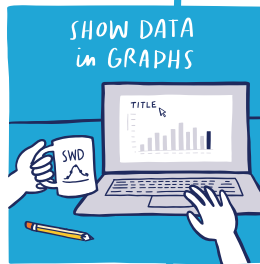
Chapter 12: have a stellar session

You've planned, created, and practiced—it's time to deliver. There are things you can do before, during, and after your important meeting or presentation that will help ensure success: an engaged audience that is inspired to act!

PLAN



DELIVER



CREATE

plan



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consider your audience

Your audience: these are the people you are going to inform, inspire, and incite to act. Ultimately, *everything you do* when you plan, create, and deliver content is for them.

Yet, this is a dramatic shift from how we typically operate.

Take me, for instance. The most natural way for me to communicate is for myself, from my perspective, and with my preferences in mind. I live in my head, so I'm pretty familiar with what goes on in there. This means it's quite easy—I don't have to give it much thought—for me to communicate for myself.

Communicating to others is more complex. It's harder, because we have to actively work to understand them. What compels people to do the things they do? When we can identify our audience's motivations and appeal to them, we can gain their attention and drive the action we seek. In other words, it's by being thoughtful about those we are communicating to that we can get our own needs met.

In this chapter, we'll begin by prioritizing our target audience and then explore how we can better appreciate their needs. We'll also cover strategies for

getting to know an unfamiliar audience. Once we have clarity on who they are, we can tailor a great number of aspects to our audience, setting the foundation to communicate effectively.

Prioritize your target audience

Who are you communicating to? When I pose this query to clients or workshop attendees, it's not uncommon for them to hold out their hands and begin counting on their fingers. They start listing groups generally: senior leadership, the board, peers, internal stakeholders, clients, customers, the public. If I allow this to go on for a bit, they get more specific: auditors, scientists, engineers, finance, store managers, regulators.

Consider your own list of audiences, the people you communicate to regularly. As you think about the various groups, note how they're each made up of different types of people who have varying requirements.

It's almost always the case—when you are communicating in the type of instances that we are focusing on here, a meeting or presentation—that you will have a number of individuals in your audience. But even given that, we often communicate too broadly and to more people than necessary. This is dangerous because it is harder to meet multiple different needs at the same time, and multiple people will almost always have different needs.

This doesn't mean that you can't communicate to more than one person at a time. It *does* highlight, however, the importance of actively prioritizing your target audience. Then you can think about them first and foremost when you craft your approach and content.

Let's explore this idea further, starting with the simplest situation. We'll ratchet up the sophistication and complexity of scenarios from there.