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Reading: Best practices for communicating with stakeholders

As you have been learning, being able to communicate effectively with stakeholders and project partners is key to your success as a business intelligence professional. This field isn't just about building BI tools; it's about making those tools accessible to users to empower them with the data they need to make decisions. In this reading, you will review key communication strategies and discover new best practices that will help you in the future. You will also explore the importance of fairness and avoiding bias in BI.

Make BI accessible to stakeholders

So far, you have learned three key strategies for communication:

- Ask the right questions
- Define project deliverables
- Effectively share business intelligence

Sharing business intelligence can be complicated; you have to be able to simplify technical processes to make them feel straightforward and accessible to a variety of users who might not already understand the terms or concepts. Being able to present intelligence clearly and concisely is critical to making sure that stakeholders can actually use the systems you have created and act on those insights.

There are a few questions you can keep in mind to help guide your communications with stakeholders and partners:

- **Who is your audience?** When communicating with stakeholders and project partners, it's important to consider who you're working with. Consider all of the people who need to understand the BI tools and processes you build when communicating. The sales or marketing team has different goals and expertise than the data science team, for example.
- **What do they already know?** Because different users have different levels of knowledge and expertise, it can be useful to consider what they already know before communicating with them. This provides a baseline for your communications and prevents you from overexplaining yourself or skipping over any information they need to know.
- **What do they need to know?** Different stakeholders need different kinds of information. For instance, a user might want to understand how to access and use the data or any dashboards you create, but they probably aren't as interested in the nitty-gritty details about how the data was cleaned.

- **How can you best communicate what they need to know?** After you have considered your audience, what they already know, and what they need to know, you need to choose the best way to communicate that information to them. This might be an email report, a small meeting, or a cross-team presentation with a Q&A section.

In addition to these questions, there are a few other best practices for communicating with stakeholders.

Create realistic deadlines. Before you start a project, make a list of dependencies and potential roadblocks so you can assess how much extra time to give yourself when you discuss project expectations and timelines with your stakeholders.

Know your project. When you have a good understanding about why you are building a new BI tool, it can help you connect your work with larger initiatives and add meaning to the project. Keep track of your discussions about the project over email or meeting notes, and be ready to answer questions about how certain aspects are important for your organization. In short, it should be easy to understand and explain the value the project is bringing to the company.

Communicate often. Your stakeholders will want regular updates. Keep track of key project milestones, setbacks, and changes. Another great resource to use is a changelog, which can provide a chronologically ordered list of modifications. Then, use your notes to create a report in a document that you share with your stakeholders.

Prioritize fairness and avoid biased insights

Providing stakeholders with the data and tools they need to make informed, intelligent business decisions is what BI is all about. Part of that is making sure you are helping them make fair and inclusive decisions. Fairness in data analytics means that the analysis doesn't create or reinforce bias (a conscious or subconscious preference in favor of or against a person, group of people, or thing). In other words, you want to help create systems that are fair and inclusive to everyone.

As a BI professional, it's your responsibility to remain as objective as possible and try to recognize the many sides of an argument before drawing conclusions. The best thing you can do for the fairness and

accuracy of your data is to make sure you start with data that has been collected in the most appropriate, and objective way. Then you'll have facts that you can pass on to your team.

A big part of your job will be putting data into context. Context is the condition in which something exists or happens; basically, this is who, what, where, when, how, and why of the data. When presenting data, you'll want to make sure that you're providing information that answers these questions:

- WHO collected the data?
- WHAT is it about? What does the data represent in the world and how does it relate to other data?
- WHEN was the data collected?
- WHERE did the data come from?
- HOW was it collected? And how was it transformed for the destination?
- WHY was this data collected? Why is it useful or relevant to the business task?

One way to do this is by clarifying that any findings you share pertain to a specific dataset. This can help prevent unfair or inaccurate generalizations stakeholders might want to make based on your insights. For example, imagine you are analyzing a dataset of people's favorite activities from a particular city in Canada. The dataset was collected via phone surveys made to house phone numbers during daytime business hours. Immediately there is a bias here. Not everyone has a home phone, and not everyone is home during the day. Therefore, insights from this dataset cannot be generalized to represent the opinion of the entire population of that city. More research should be done to determine the demographic make-up of these individuals.

You also have to ensure that the way you present your data—whether in the form of visualizations, dashboards, or reports—promotes fair interpretations by stakeholders. For instance, you've learned about using color schemes that are accessible to individuals who are colorblind. Otherwise, your insights may be difficult to understand for these stakeholders.

Key takeaways

Being able to provide stakeholders with tools that will empower them to access data whenever they need it and the knowledge they need to use those tools is important for a BI professional. Your primary goal should always be to give stakeholders fair, contextualized insights about business processes and trends. Communicating effectively is how you can make sure that happens.