

## Basic Data Storytelling Design Checklist

This checklist is meant to be a reminder of some important considerations for your data storytelling. As you develop your own process, try to keep these points in mind. Not all of these considerations will apply to every project, so part of your job is to balance and prioritize these factors.<sup>1</sup>

### Identify and address the following:

#### Who

- **Stakeholders** - Define the goals, requirements, and resources for the data story that you want to tell
- **Audience** - Understand the level of detail, explanation, and format that will best communicate your story for the intended audience
- **Subject-Matter Experts** - Verify the logic and accuracy of your data story, whenever possible, with feedback and critiques from people who are familiar with the domain from which your data story comes

#### What

- **Data Sources** - Identify what data is available for you to use to tell your story
- **Data Quality** - Assess the cleanliness of the data
- **Data Timeliness** - Determine the recency or “freshness” of the data

#### Why

- **Business Case/Other Goals** – Concisely articulate the purpose of the story
- **Intended Outcome** – Set some goals for the outcome of the story and what the take-aways and next steps (if applicable) are for the audience

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<sup>1</sup> For example, the goals of the stakeholders or audiences may not be met by the available data, so either the story has to be presented in a different way or supplementary data needs to be found.

## How

- **Format(s)** - e.g., single page infographic, narrated dashboard, presentation slides, etc.
- **Presentation Vehicle** – e.g., Tablet, phone, desktop, slide deck, etc.

## A Few Data Storytelling Design *Do's* and *Don'ts*

### Data:

✓**Do** be mindful about potentially creating false narratives based on interesting but irrelevant patterns in data, such as spurious correlations.

✗ **Don't** be afraid to explore story ideas, just validate them through whatever means you may need, including additional research and input from subject-matter experts.

### Story Structure:

✓**Do** keep in mind the structure of your story with something such as the three c's (context, challenge, and conclusion). The story can change and evolve as you are working on it, but the fundamental structure will help keep clear, concise, and engaging.

✗ **Don't** assume your audience can look at a few charts in a dashboard and figure out what the story is that you want to tell.

### Presentation:

✓**Do** think about the appropriate level of detail that will be used for the presentation in relation to the intended audience.

✗ **Don't** over-complicate *or* over-simplify the information that you are presenting.

### Charts:

✓**Do** make sure that your stories and supporting charts are true to the data.

**✗ Don't** frame the story with potential misleading time intervals, or use axes that distort the impression of scale.

### Design Elements:

**✓ Do** employ design elements, such as color and language choices, that fit with the tone and tenor of the story and connect with the intended audience(s) needs, interests, and context.

**✗ Don't** ignore considerations such as language and color choices. Even if the data and charts are clear, your decisions about the descriptive wording and color palette for the story can have a big impact on what meaning is ultimately conveyed to the audiences.

### Simplicity:

**✓ Do** as much as you can to simplify, streamline, and sharpen your data story.

**✗ Don't** take away useful and appropriate details or design elements that can further your story to meet a generic idea of simplicity.