chapter 7
lessons in storytelling

In my workshops, the lesson on storytelling often begins with a thought exercise. I ask participants to close their eyes and recall the story of *Red Riding Hood*, considering specifically the plot, the twists, and the ending. This exercise sometimes generates some laughs; people wonder about its relevance or gamely confuse it with *Three Little Pigs*. But I find that the majority of participants (typically around 80–90% based on a show of hands) are able to remember the high-level story—often a modified version of Grimms' macabre original.

Indulge me for a moment, while I tell you the version that resides in my head:

Grandma has fallen ill and Red Riding Hood sets out on a walk through the woods with a basket of goodies to deliver to her. On her way, she encounters a woodsman and a wolf. The wolf runs ahead, eats Grandma, and dresses up in her clothes. When Red arrives, she senses something is awry. She goes through a series of questions with the wolf (posing as Grandma), culminating in the observation: "Oh, Grandma, how big your teeth are!"—to which the wolf replies, "The better to eat you with!" and swallows Red whole. The woodsman walks by, and, seeing the door to Grandma's house ajar, decides to investigate. Inside, he finds the wolf dozing after his meal. The woodsman suspects what has happened and chops the wolf in half. Grandma and Red Riding Hood emerge—safe and sound! It is a happy ending for everyone (except the wolf).

Now let's turn back to the question that may be on the tip of your tongue: What could *Red Riding Hood* possibly have to do with communicating with data?

For me, this exercise is evidence of a couple of things. First is the power of repetition. You likely have heard some version of *Red Riding Hood* a number of times. Perhaps you've read or told a version of the story a number of times. This process of hearing, reading, and saying things numerous times helps to cement them in our long-term memory. Second, stories like *Red Riding Hood* employ this magical combination of plot-twists-ending (or, as we'll learn momentarily from Aristotle—beginning, middle, and end), which works to embed things in our memory in a way that we can later recall *and retell* the story to someone else.

In this chapter, we explore the magic of **story** and how we can use concepts of storytelling to communicate effectively with data.

The magic of story

When you see a great play, watch a captivating movie, or read a fantastic book, you've experienced the magic of story. A good story grabs your attention and takes you on a journey, evoking an emotional response. In the middle of it, you find yourself not wanting to turn away or put it down. After finishing it—a day, a week, or even a month later—you could easily

describe it to a friend.

Wouldn't it be great if we could ignite such energy and emotion in our audiences? Story is a time-tested structure; humans have been communicating with stories throughout history. We can leverage this powerful tool for our business communications. Let's look to the art forms of plays, movies, and books to understand what we can learn from master storytellers that will help us better tell our own stories with data.

Storytelling in plays

The notion of narrative structure was first described in ancient times by Greek philosophers such as Aristotle and Plato. Aristotle introduced a basic but profound idea: that story has a clear beginning, middle, and end. He proposed a three-act structure for plays. This concept has been refined over time and is commonly referred to as the setup, conflict, and resolution. Let's look briefly at each of these acts and what they contain, and then we'll consider what we can learn from this approach.

The first act sets up the story. It introduces the main character, or protagonist, their relationships, and the world in which they live. After this setup, the main character is confronted with an incident. The attempt to deal with this incident typically leads to a more dramatic situation. This is known as the first turning point. The first turning point ensures that life will never be the same for the main character and raises the dramatic question—framed in terms of the main character's call to action—to be answered in the climax of the play. This marks the end of the first act.

The second act makes up the bulk of the story. It depicts the main character's attempt to resolve the problem created through the first turning point. Often, the main character lacks the skills to deal with the problem he faces, and, as a result, finds himself encountering increasingly worsening situations. This is known as the character arc, where the main character goes through major changes in his life as a result of what is happening. He may have to learn new skills or reach a higher sense of awareness of who he is and what he is capable of in order to deal with his situation.

The third act resolves the story and its subplots. It includes a climax, where the tensions of the story reach the highest point of intensity. Finally, the dramatic question introduced in the first act is answered, leaving the protagonist and other characters with a new sense of who they really are.

There are a couple of lessons to be learned here. First, the three-act structure can serve as a model for us when it comes to communicating in general. Second, that **conflict** and **tension** are an integral part of story. We'll come back to these ideas shortly and explore some concrete applications. In the meantime, let's see what we can learn from an expert storyteller from the movies.

Storytelling and the cinema

Robert McKee is an award-winning writer and director and a well-respected screenwriting

lecturer (his former students include 63 Academy Award and 164 Emmy Award winners, and his book, *Story*, is required reading in many university cinema and film programs). In an interview for *Harvard Business Review*, he discusses persuasion through storytelling and examines how storytelling can be leveraged in a business setting. McKee says there are two ways to persuade people:

The first is conventional rhetoric. In the business world, this typically takes the form of PowerPoint slides filled with bulleted facts and statistics. It's an intellectual process. But it is problematic, because while you're trying to persuade your audience, they are arguing with you in their heads. McKee says, "If you do succeed in persuading them, you've only done so on an intellectual basis. That's not good enough, because people are not inspired to act by reason alone" (Fryer, 2003).

Think about what *Red Riding Hood* would look like if we reduced the story to conventional rhetoric. Libby Spears does an amusing version of this in her slide deck, *Little Red Riding Hood and the Day PowerPoint Came to Town.* Here is my take on it—bullets on a PowerPoint slide might look something like the following:

- Red Riding Hood (RRH) has to walk 0.54 mi from Point A (home) to Point B (Grandma's)
- RRH meets Wolf, who (1) runs ahead to Grandma's, (2) eats her, and (3) dresses in her clothes
- RRH arrives at Grandma's at 2PM, asks her three questions
- Identified problem: after third question, Wolf eats RRH
- Solution: vendor (Woodsman) employs tool (ax)
- Expected outcome: Grandma and RRH alive, wolf is not

When reduced to the facts, it's not so interesting, is it?

The second way to persuade, according to McKee, is through *story.* Stories unite an idea with an emotion, arousing the audience's attention and energy. Because it requires creativity, telling a compelling story is harder than conventional rhetoric. But delving into your creative recesses is worth it because story allows you to engage your audience on an entirely new level.

What exactly is *story*? At a fundamental level, a story expresses how and why life changes. Stories start with balance. Then something happens—an event that throws things out of balance. McKee describes this as "subjective expectation meets cruel reality." This is that same tension we discussed in the context of plays. The resulting struggle, conflict, and suspense are critical components of the story.

McKee goes on to say that stories can be revealed by asking a few key questions: *What does my protagonist want in order to restore balance in his or her life? What is the core need? What is keeping my protagonist from achieving his or her desire? How would my protagonist decide to act in order to achieve his or her desire in the face of those antagonistic forces?* After creating the story, McKee suggests leaning back to consider: *Do I believe this? Is it neither an exaggeration nor a soft-soaping of the struggle? Is this an*

honest telling, though heaven may fall?

What can we learn from McKee? The meta-lesson is that we can use stories to engage our audience emotionally in a way that goes beyond what facts can do. More specifically, we can use the questions he outlines to identify stories to frame our communications. We'll consider this further soon. First, let's see what we can learn about storytelling from a master storyteller when it comes to the written word.

Storytelling and the written word

When asked about writing a captivating story by *International Paper*, Kurt Vonnegut (author of novels such as *Slaughterhouse-Five* and *Breakfast of Champions*) outlined the following tips, which I've excerpted from his short article, "How to Write with Style" (a great quick read):

1. **Find a subject you care about.** It is this genuine caring, and not your games with language, which will be the most compelling and seductive element in your style.
2. **Do not ramble, though.**
3. **Keep it simple.** Great masters wrote sentences which were almost childlike when their subjects were most profound. "To be or not to be?" asks Shakespeare's Hamlet. The longest word is three letters.
4. **Have the guts to cut.** If a sentence, no matter how excellent, does not illuminate your subject in some new and useful way, scratch it out.
5. **Sound like yourself.** I myself find that I trust my own writing most, and others seem to trust it most, too, when I sound most like a person from Indianapolis, which is what I am.
6. **Say what you meant to say.** If I broke all the rules of punctuation, had words mean whatever I wanted them to mean, and strung them together higgledy-piggledy, I would simply not be understood.
7. **Pity the readers.** Our audience requires us to be sympathetic and patient teachers, ever willing to simplify and clarify.

This advice contains a number of gems that we can apply in the context of storytelling. Keep it simple. Edit ruthlessly. Be authentic. Don't communicate for yourself—communicate *for your audience*. The story is not for you; the story is for them.

Now that we've learned some lessons from the masters, let's consider how we can construct our stories.

Constructing the story

We introduced the foundations of a narrative in Chapter 1 with the Big Idea, 3-minute story, and storyboarding to outline content to include while starting to consider order and flow. We learned how important it is to identify our audience—both who they are and what we need them to do. In the interim, we also learned how to perform the data visualizations that we'll

include in our communication. Now that we're set on that front, it is time to turn back to the story. Story is what ties together information, giving our presentation or communication a framework for our audience to follow.

Perhaps Vonnegut appreciated Aristotle's simple yet profound observation that a story has a clear beginning, middle, and end. For a concrete example, think back to what we considered with *Red Riding Hood:* the magical combination of plot, twists, and ending. We can use this idea of beginning, middle, and end—taking inspiration from the three-act structure—to set up the stories that we want to communicate with data. Let's discuss each of these pieces and the specifics to consider when crafting your story.

The beginning

The first thing to do is introduce the **plot**, building the context for your audience. Consider this the first act. In this section, we set up the essential elements of story—the setting, main character, unresolved state of affairs, and desired outcome—getting everyone on common ground so the story can proceed. We should involve our audience, piquing their interest and answering the questions that are likely on their mind: *Why should I pay attention? What is in it for me?*

In his book, *Beyond Bullet Points*, Cliff Atkinson outlines the following questions to consider and address when it comes to setting up the story:

1. The setting: When and where does the story take place?
2. The main character: Who is driving the action? (This should be framed in terms of your audience!)
3. The imbalance: Why is it necessary, what has changed?
4. The balance: What do you want to see happen?
5. The solution: How will you bring about the changes?

Note the similarity between the questions above and those raised by McKee that we covered earlier.

Using PowerPoint to tell stories

Cliff Atkinson uses PowerPoint to tell stories, leveraging the basic architecture of the three-act structure. His book, *Beyond Bullet Points*, introduces a story template and offers practical advice using PowerPoint to help users create stories with their presentations. More on this and related resources can be found at beyondbulletpoints.com.

Another way to think about the imbalance-balance-solution in your communication is to frame it in terms of the problem and your recommended solution. If you find yourself thinking, *But I don't have a problem!*—you may want to reconsider. As we've discussed, conflict and dramatic tension are critical components of a story. A story where everything is rosy and is expected to continue to be is not so interesting, attention-grabbing, or action-inspiring. Think of

conflict and tension—between the imbalance and balance, or in terms of the problem on which you are focusing—as the storytelling tools that will help you to engage your audience. Frame your story in terms of their (your audience's) problem so that they immediately have a stake in the solution. Nancy Duarte calls this tension "the conflict between what *is* and what *could be*." There is always a story to tell. If it's worth communicating, it's worth spending the time necessary to frame your data in a story.

The middle

Once you've set the stage, so to speak, the bulk of your communication further develops "what could be," with the goal of convincing your audience of the need for action. You retain your audience's attention through this part of the story by addressing *how* they can solve the problem you introduced. You'll work to convince them *why* they should accept the solution you are proposing or act in the way you want them to.

The specific content will take different forms depending on your situation. The following are some ideas for content that might make sense to include as you build out your story and convince your audience to buy in:

- Further develop the situation or problem by covering relevant background.
- Incorporate external context or comparison points.
- Give examples that illustrate the issue.
- Include data that demonstrates the problem.
- Articulate what will happen if no action is taken or no change is made.
- Discuss potential options for addressing the problem.
- Illustrate the benefits of your recommended solution.
- Make it clear to your audience why they are in a unique position to make a decision or drive action.

When considering what to include in your communication, keep your audience top of mind. Think about what will resonate with them and motivate them. For example, will your audience be motivated to act by making money, beating the competition, gaining market share, saving a resource, eliminating excess, innovating, learning a skill, or something else? If you can identify what motivates your audience, consider framing your story and the need for action in terms of this. Also think about whether and when data will strengthen your story and integrate it as makes sense. Throughout your communication, make the information specific and relevant to your audience. The story should ultimately be about your audience, not about you.

Write the headlines first

When it comes to structuring the flow of your overall presentation or communication, one strategy is to create the headlines first. Think back to the storyboarding that we discussed in Chapter 1. Write each headline on a Post-it note. Play with the order to create a clear flow, connecting each idea to the next in a logical fashion. Establishing this sort of structure helps ensure that there is a logical order for your audience to follow. Make each headline the title of your presentation slides or the section title in a written report.

The end

Finally, the story must have an end. End with a **call to action**: make it totally clear to your audience what you want them to *do* with the new understanding or knowledge that you've imparted to them. One classic way to end a story is to tie it back to the beginning. At the beginning of our story, we set up the plot and introduced the dramatic tension. To wrap up, you can think about recapping this problem and the resulting need for action, reiterating any sense of urgency and sending your audience off ready to act.

When it comes to the order and telling of our story, another important consideration is the narrative structure, which we'll discuss next.

The narrative structure

In order to be successful, a narrative has to be central to the communication. These are words —written, spoken, or a combination of the two—that tell the story in an order that makes sense and convinces the audience why it's important or interesting and attention to it should be paid.

The most beautiful data visualization runs the risk of falling flat without a compelling narrative to go with it.

You've perhaps experienced this before if you've ever sat through a great presentation that used run-of-the-mill slides. A skilled presenter can overcome mediocre materials. A strong narrative can overcome less-than-ideal visuals. This is not to say that you shouldn't spend time making your data visualizations and visual communications great, but rather to underscore the importance of a compelling and robust narrative. Nirvana in communicating with data is reached when the effective visuals are combined with a powerful narrative.

Let's discuss some specific considerations when it comes to both the order of the story and the spoken and written narrative.

Narrative flow: the order of your story

Think about the order in which you want your audience to experience your story. Are they a busy audience who will appreciate if you lead with what you want from them? Or are they a new audience, with whom you need to establish credibility? Do they care about your process or just want the answer? Is it a collaborative process through which you need their input? Are