Analytical Presentations: Do's and Dont's

Do

- Start by describing **business** and **modeling** objectives
- Overview data sources used
- Describe (visually) key tendencies in main variables
- Describe model accuracy / expected performance
  - In business (not technical) terms!
- Describe key model insights (drivers, correlates) – as visually as possible
- Make sure to circle back to the business objectives and discuss business implications of your results
- Follow clear logical flow - storytelling

Don't

- Focus on the details of techniques you applied / technical steps
- Present plots / charts with unclear message (avoid "ball of colored string" plots)
- Present technical plots (residuals, outlier diagnostics) *unless* these carry some *key insight* (that must be *carefully fleshed out*)
- Use terminology audience may not be familiar with (R-sq, t-test, etc. – explain what these mean if using; generally avoid)
- Forget about the original business problem: *you were not retained to build a model, but to solve a problem!*

Analytical Presentations: Do's

Do

- Start by describing **business** and **modeling** objectives

- Overview data sources used

- Describe (visually) key tendencies in main variables

- Describe model accuracy / expected performance
  - In business (not technical) terms!

- Describe key model insights (drivers, correlates) – as visually as possible

- Make sure to circle back to the business objectives and discuss business implications of your results

---

- What business problem(s) are you addressing?
- How did you translate this to specific analytical question(s)

Include source *and* dates (from xx to yy)

E.g. if the key issue is improving response rates, illustrate current trends in response in your data

---

- Good: our approach can be expected to increase response rate by 20%
- Bad: Out approach has RMSE of only 1.5

- Ideally, every insight should be illustrated visually
- E.g., if you believe Toronto is a better target than Montreal, show the difference in expected response between the two

---

- Talk about expected business impacts (what benefit can organization realize from your efforts) and next steps
- These may include testing, enhanced data collection, etc.

Analytical Presentations: Dont's

Don't

- Focus on the details of techniques you applied / technical steps

- Present plots / charts with unclear message (avoid "ball of colored string" plots)

- Present technical plots (residuals, outlier diagnostics) *unless* these carry some *key insight* (that must be *carefully fleshed out*)

- Use terminology audience may not be familiar with (R-sq, t-test, etc. – explain what these mean if using; generally avoid)

- Forget about the original business problem: *you were not retained to build a model, but to solve a problem!*

Avoid blow-by-blow description of your work

- Each plot should have a clear message and an expectation of what audience should get from it.

- When presenting technical plots, take time to explain what they mean (and make sure they add value to your message!)

Find the right balance of technical precision and clarity.

- Do NOT finish by describing your modeling accomplishments

- DO NOT have further analytical work as your main recommendation

Storytelling

- Follow clear logical flow

  First, say what you are going to say
  Then say it
  Then say why you said it

  Variously attributed to Aristotle, Dale Carnegie, Jesuit preachers, Irish lawyers, etc.