

Anticipate what stakeholders need to know

Prepare metrics and insights to share

Prepare data visualizations

Present insights to stakeholders

Video: Create effective presentations

3 min

Reading: Best practices for presenting data

20 min

Practice Quiz: Activity: Present data insights to stakeholders

1 question

Reading: Activity Exemplar: Present data insights to stakeholders

10 min

Reading: Evaluate and improve presentations

20 min

Practice Quiz: Test your knowledge: Best practices to present data

4 questions

Review: Share metrics and insights with stakeholders

Course review: Assess for success: marketing analytics and measurement

Best practices for presenting data

In this course, a video about creating effective presentations suggested the following best practices when presenting data and insights to stakeholders:

- Progress from general to specific information
- State insights clearly and up front
- Repeat insights with data
- Introduce visualizations with insightful titles
- Allow time for questions
- End with a call to action

This reading provides tips and a sample layout to develop a presentation with these best practices in mind.

Tips for effective presentations

Use the following tips to create a presentation for stakeholders.

Tip 1: Know your flow: progress from general to specific information

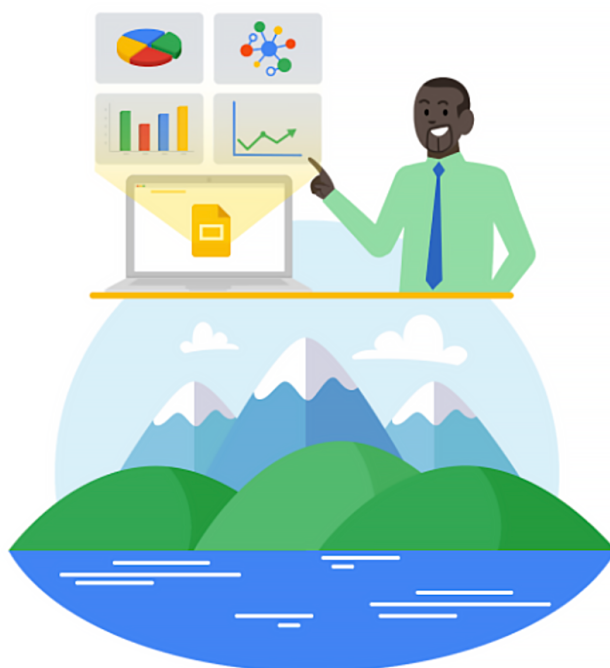
Just like in any good story, a presentation provides some background before going into the details. The amount of background or general information depends on your audience.

- If your intended audience is executives, your background can be kept at a high level and be brief. Executives tend to focus on forward thinking and improvement, so you'll want to spend most of the presentation on your results and recommendations.
- If your intended audience is managers, they might have more interest in background information. For example, be prepared with talking points about the performance and target audiences of previous campaigns and why these apply to your campaign.
- If your intended audience is other team members and individual contributors, you will have the most freedom—and perhaps the most time—to go more deeply into the background before presenting your insights.

Tip 2: State insights up front

Some people are tempted to skim-read a story's ending when they start reading a book. People in your audience could have the same inclination, so go ahead and satisfy it! You can gain their attention by stating insights up front. Then, keep their attention when you show them the data and metrics that support the insights. Another advantage of doing this is if people have to leave before the end of a presentation, they have already heard about your insights.

Tip 3: Introduce visualizations (and repeat insights with metrics)



Following up your stated insights with metrics and visualizations is like getting your audience to a mountaintop. It can be hard work, but showing visual representations of the metrics while repeating your insights will help your audience reach the same conclusions you have. The titles you choose for your visualizations ought to relate back to the insights and relay the main point immediately. For example, if you are presenting data about ad spend on YouTube compared with your competitors, instead of naming the slide "YouTube Spend by Competitors," name it "We're spending 200% less on YouTube than competitors."

Tip 4: Allow enough time for questions



Assume that everyone in your audience is busy. Keep your presentation as short as possible by:

- Being aware of your timing. This applies to the total number of slides and the time you spend on each slide.
- Presenting your data efficiently. If a slide isn't that distinct, think about combining the information on that slide with another slide. On the flip side, if a slide appears crowded because it has more than one insight or chart, create a separate slide for each.
- Saving enough time for questions at the end, or allowing enough time to answer questions throughout your presentation.

Tip 5: End with a call to action

Whether you're asking for a decision to be made, a process change, additional budget, or even recognition of a team that performed well, it's always a good practice to end a presentation with a call to action. Based on their understanding of the insights you presented, stakeholders will then be clear about what they need to do with that information. A call to action can include assignment of action items and deadlines for completion.

Sample layout for slides

The following is a sample layout for a slide presentation.

First slide: Agenda

Provide a high-level list of the topics you will cover and the amount of time you will spend on each. Every company's norms are different, but in general, most presentations run from 30 minutes to an hour at most. Here is an example of a 30-minute agenda:

- Team introductions (three minutes)
- Background (three minutes)
- Insights and recommendations (five minutes)
- Metrics and data (ten minutes)
- Call to action and next steps (five minutes)
- Questions (four minutes)

Note: You can alternately present insights and recommendations before the background. However, if the background information provides required context to understand the insights, it should come first.

Second slide: Background

Everyone might not be familiar with your campaign or marketing project or know why it is important. They didn't spend the last couple of weeks thinking about the metrics and results like you did. This slide summarizes the purpose or background of the campaign or project and its importance to the business.

Third slide: Insights and recommendations

First, it really is possible to tell the story in a single slide summarizing your insights. But in most cases, you'll include slides after this one with the metrics and data that support your insights.

To emphasize particular insights, you can:

- Fade in one bullet point at a time as you discuss each insight on a slide.
- Only display the bullet that is relevant to what you are talking about (fade out non-relevant bullets).
- Use arrows or callouts to point to a specific area of a slide that you are using.

Fourth slide: Metrics and data

Be ready to communicate how metrics support your insights in different ways. If including visualizations of your metrics, clearly label data points using annotations or chart legends. Also, prepare multiple ways to rephrase what is shown in them to help anyone who is having difficulty interpreting the data.

Note: It depends on how much data you're sharing, but you often won't be able to fit everything on one slide. You can create as many additional slides as you need after the fourth slide.

Last slide: Call to action and next steps

To complete your presentation, provide a simple, yet powerful summary, and a list of steps detailing what you are asking the audience to do next. If you list action items, provide a timeline for when everyone should complete their work.

Key takeaway

When you implement the best practices for effective presentations and create presentations with an organized flow, you'll be well on your way to clearly presenting the insights from your work as a marketing professional.

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