Introduction to Business Analytics:
Communicating with Data

Module 4

Professor Kevin Hartman

In This Module

Module 4: Getting Your Story Across
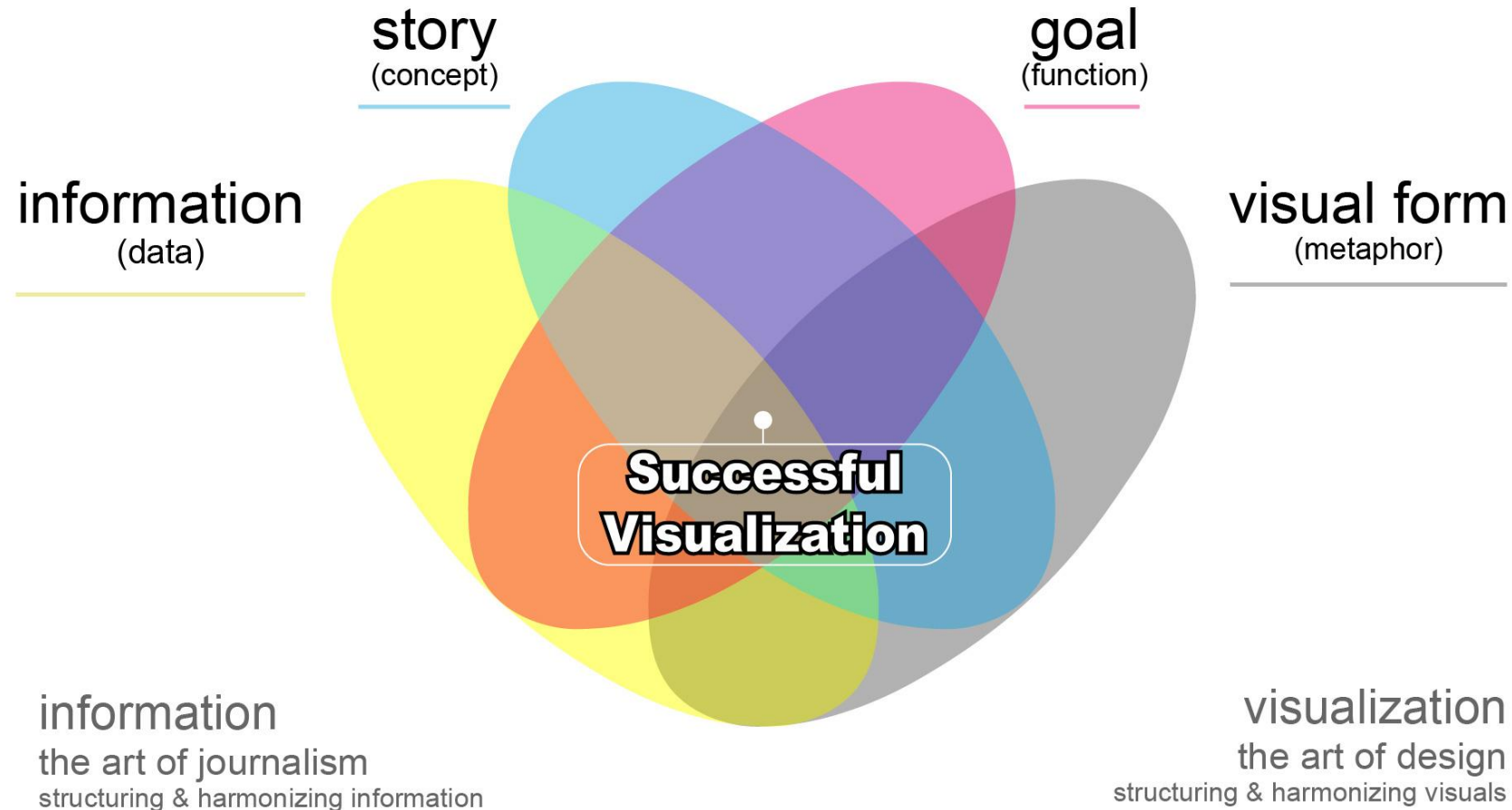
Key Concepts

Enriching content through contrast
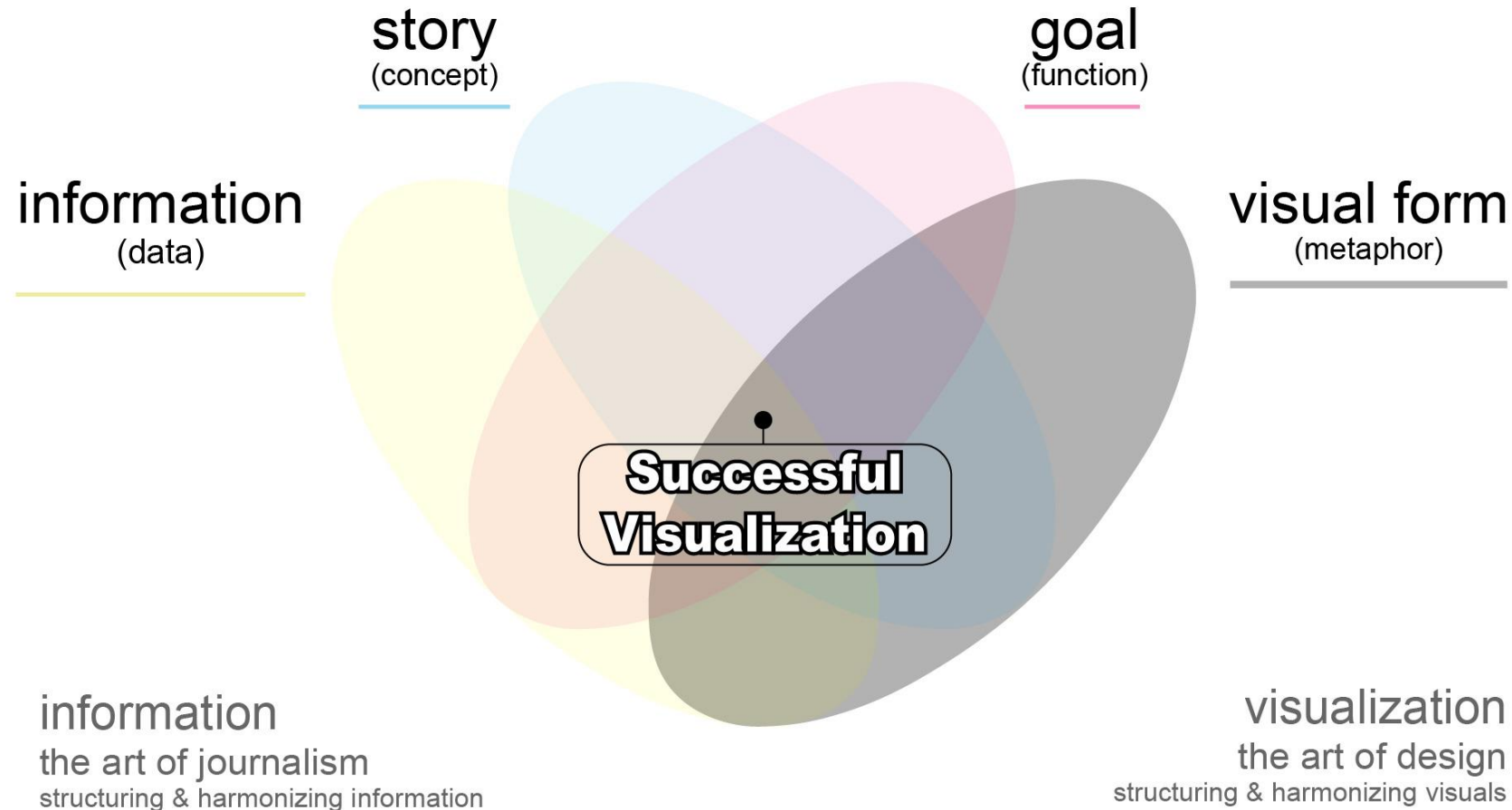
Bringing sophistication to charts

Improving chart legibility

Presenting dataviz with impact

McCandless Offers a Thorough Definition of Good Data Stories
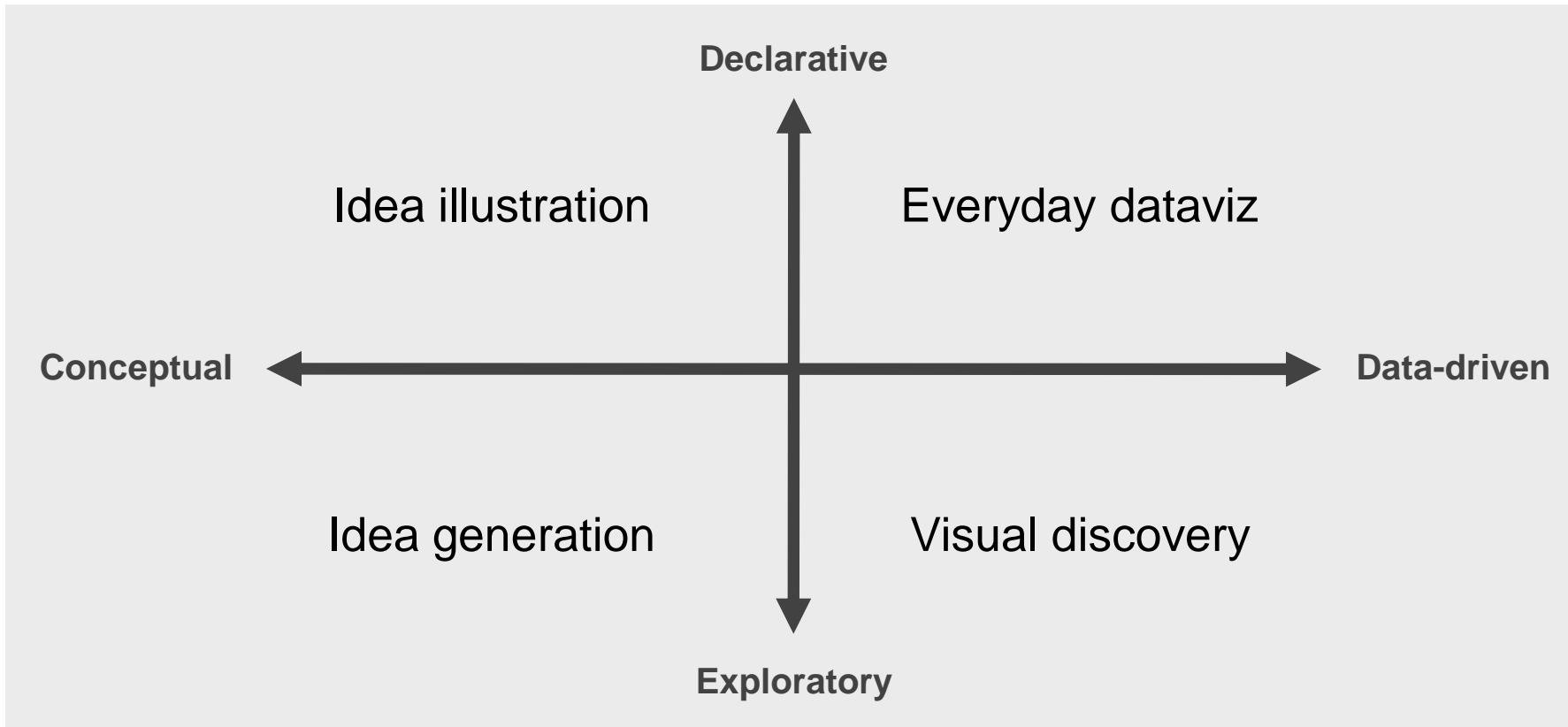

story
(concept)

goal
(function)

information
(data)

visual form
(metaphor)

Successful
Visualization

information
the art of journalism
structuring & harmonizing information

visualization
the art of design
structuring & harmonizing visuals

McCandless Offers a Thorough Definition of Good Data Stories
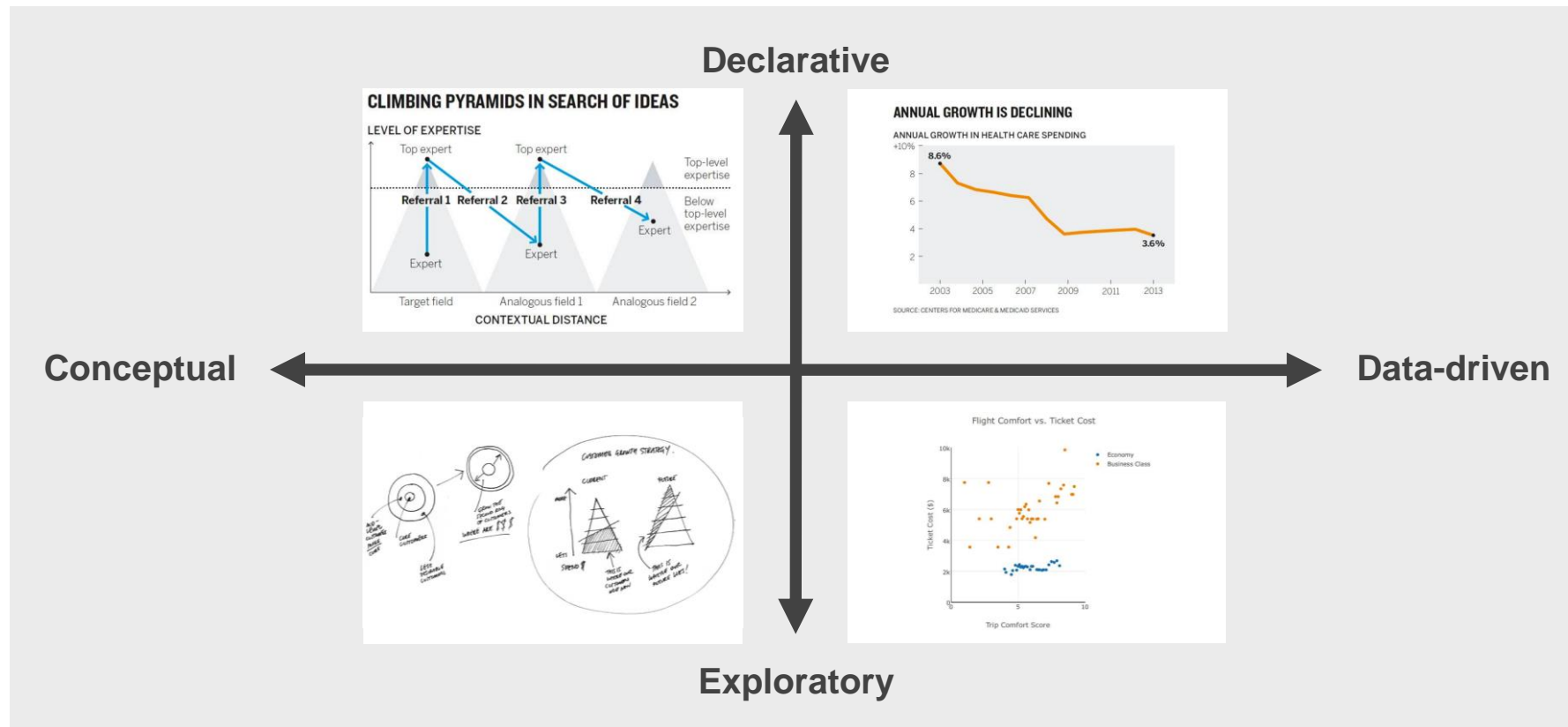
Each Quadrant Requires Different Forms of Visualization

The four types of charts

Declarative

Idea illustration   Everyday dataviz

Conceptual ←————————————————→ Data-driven

Idea generation   Visual discovery

Exploratory

Data Storytelling Is Best Done When Charts Are Involved

The four types of charts

Declarative

CLIMBING PYRAMIDS IN SEARCH OF IDEAS

LEVEL OF EXPERTISE

Top expert   Top expert   Top-level expertise

Referral 1 Referral 2 Referral 3   Referral 4   Below top-level expertise

Expert   Expert   Expert

Target field   Analogous field 1   Analogous field 2

CONTEXTUAL DISTANCE

ANNUAL GROWTH IS DECLINING

ANNUAL GROWTH IN HEALTH CARE SPENDING
+10%   8.6%
8
6
4   3.6%
2
2003   2005   2007   2009   2011   2013

SOURCE: CENTERS FOR MEDICARE & MEDICAID SERVICES

Conceptual   **Data-driven**

Flight Comfort vs. Ticket Cost

Economy
Business Class
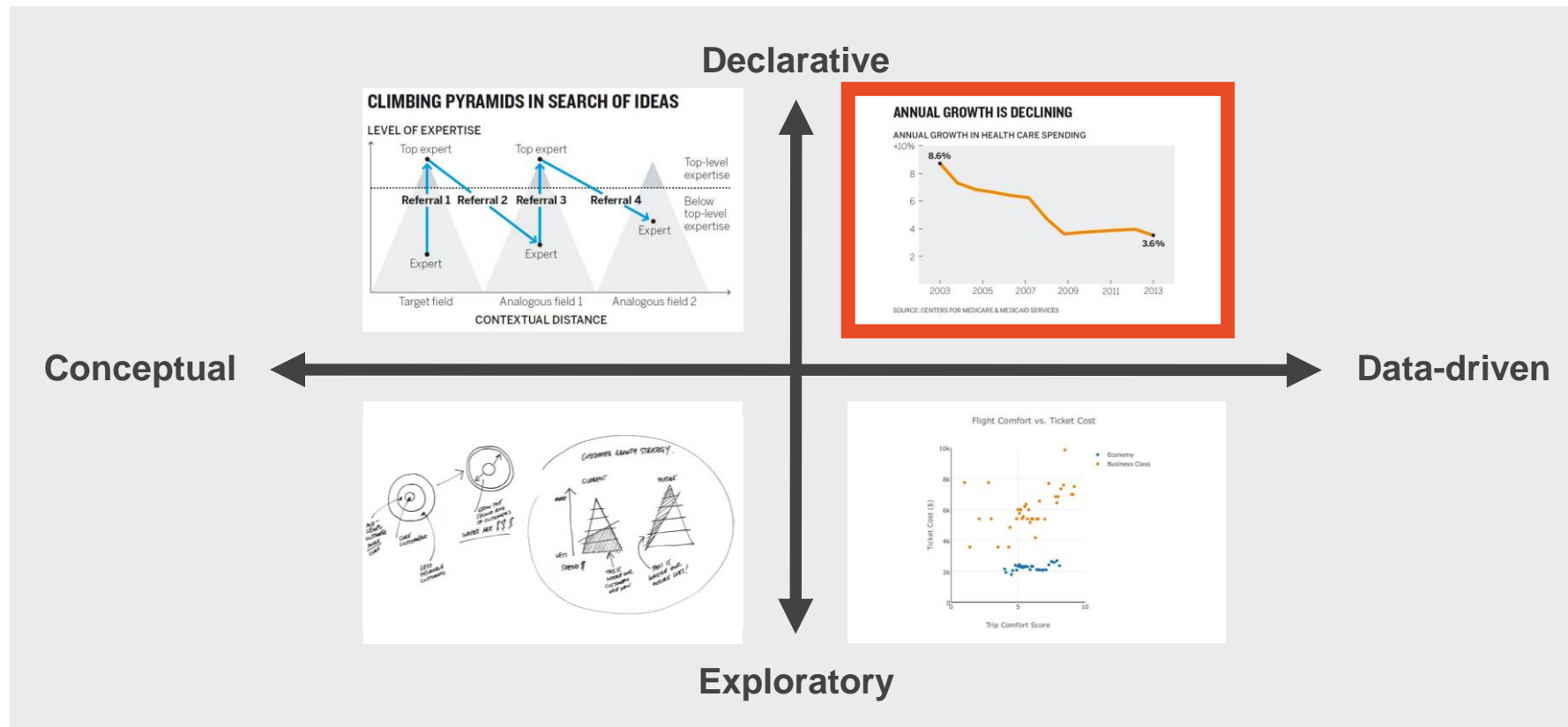
Ticket Cost ($)

Trip Comfort Score

Exploratory

Source: Adapted from Scott Berinato, "Good Charts: The HBR Guide to Making Smarter, More Persuasive Data Visualizations."
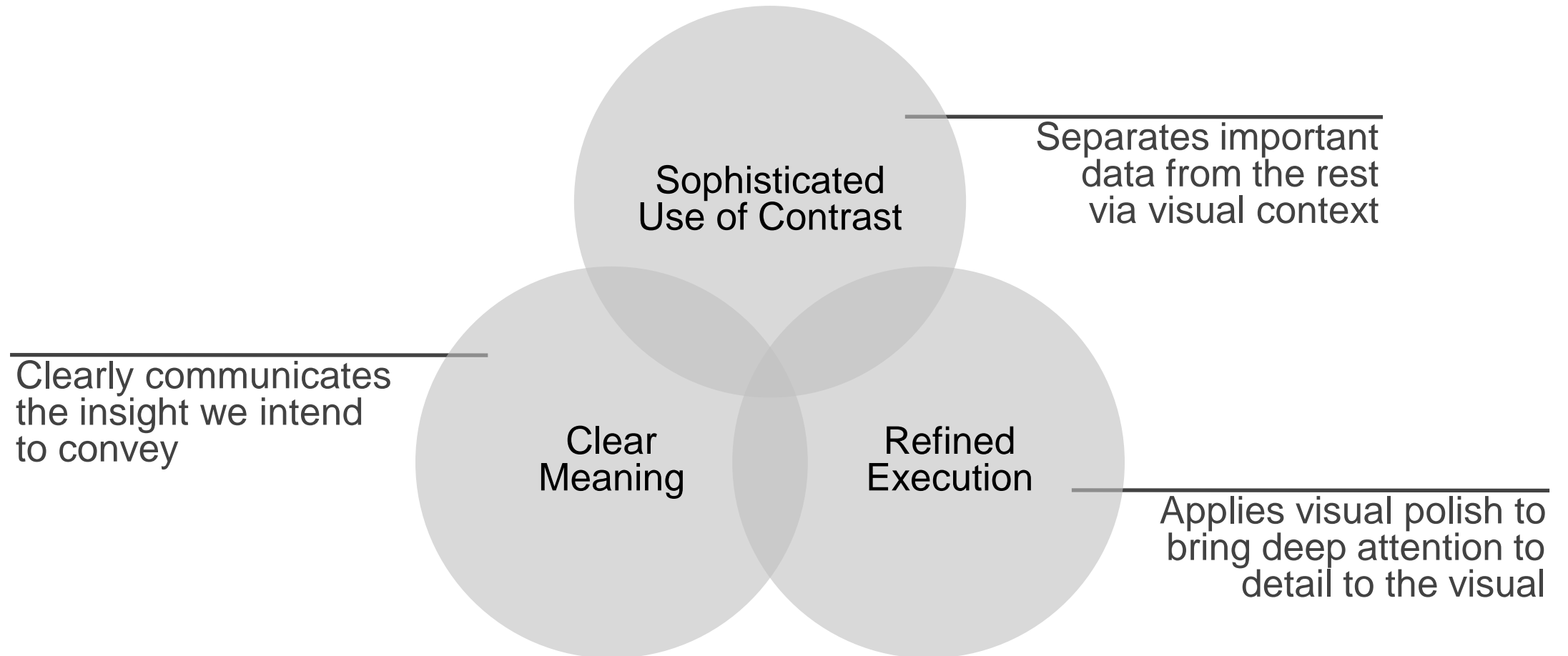
Data Storytelling Is Best Done When Charts Are Involved

The four types of charts

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Flight Comfort vs. Ticket Cost

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Source: Adapted from Scott Berinato, "Good Charts: The HBR Guide to Making Smarter, More Persuasive Data Visualizations."

Good Visual Form Has Three Essential Elements

Sophisticated Use of Contrast

Separates important data from the rest via visual context

Clearly communicates the insight we intend to convey

Clear Meaning

Refined Execution

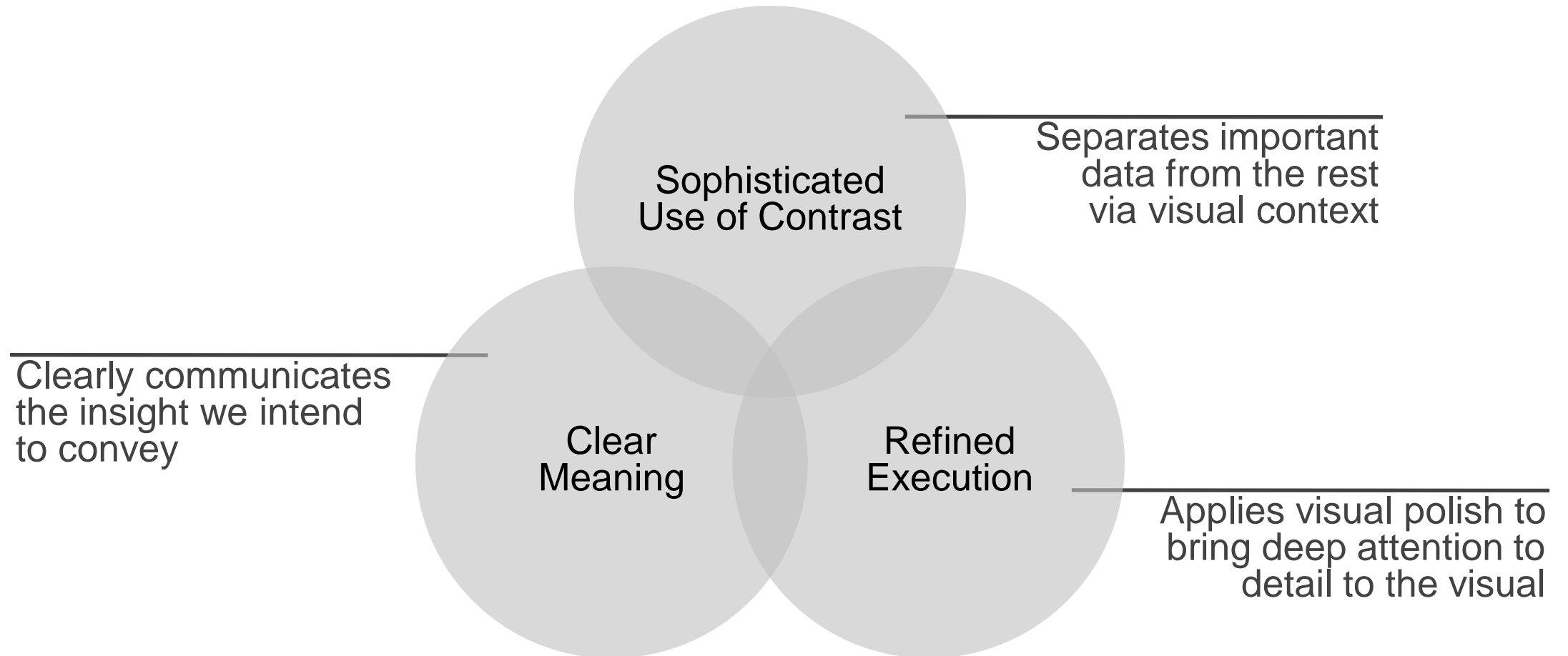Applies visual polish to bring deep attention to detail to the visual

Module 4 Lesson 1

Creating Inviting Dataviz

Creating Inviting Dataviz

A set of simple rules guide the creation of inviting dataviz, ensuring that a visualization's meaning is easily understood

# Good Visual Form Has Three Essential Elements

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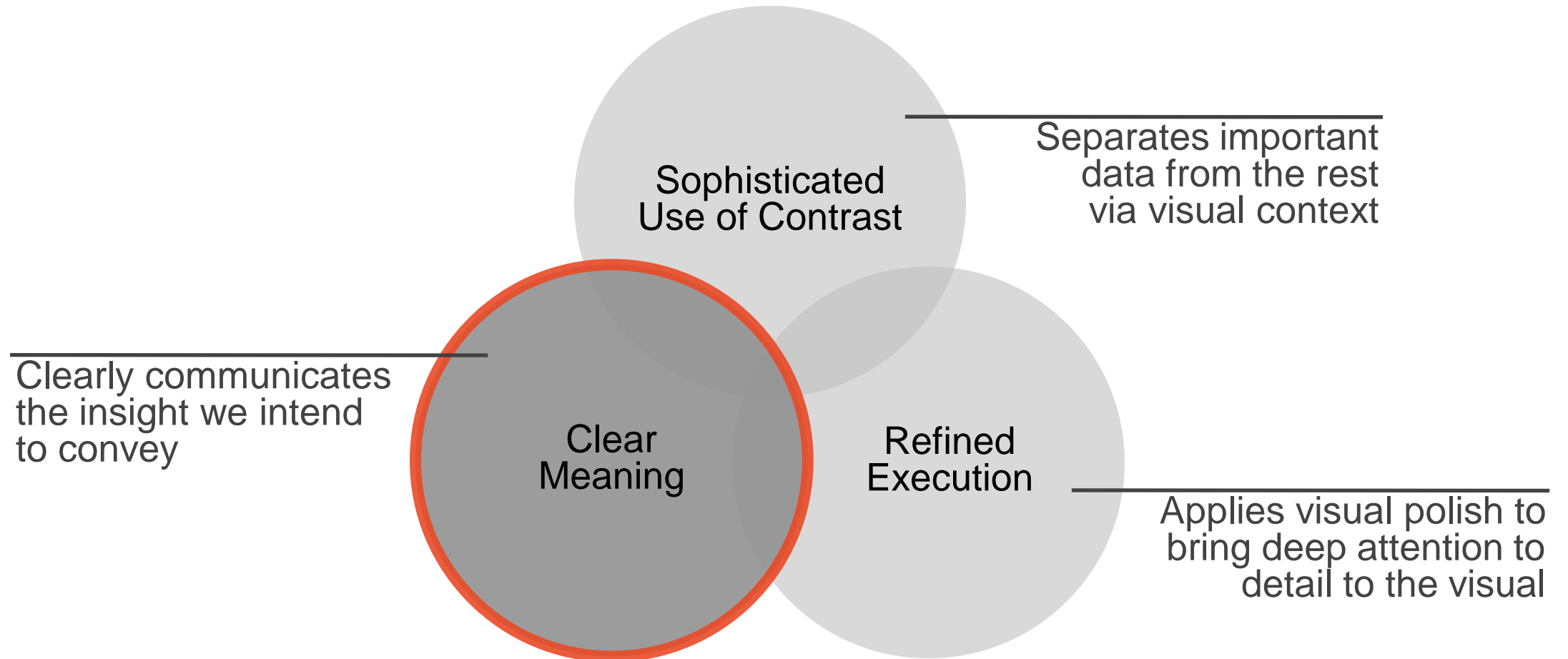
Follow These Rules When Creating Headlines for Data Visuals
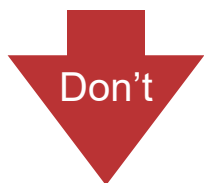
Don't Don't permit typography to oppress the underlying data

Do Keep the typography simple. The headline can be either bold or a couple of sizes larger
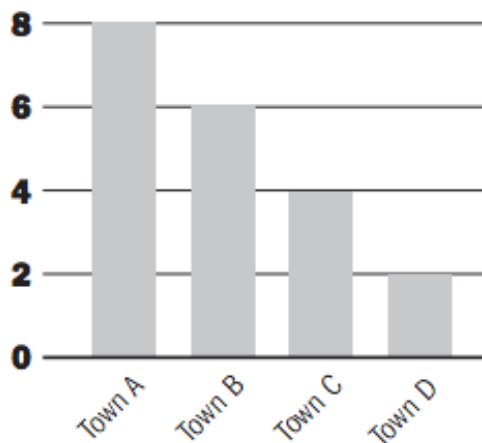
Don't use all caps or knock white type out of black.

Don't use bold italic.

Don't use bold for the numbers on the scale.
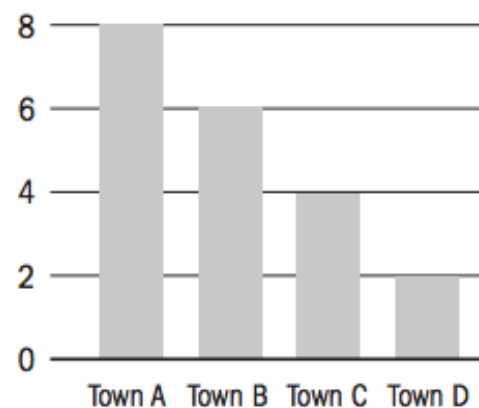
Don't set type at an angle.

HEADLINE OF THE CHART
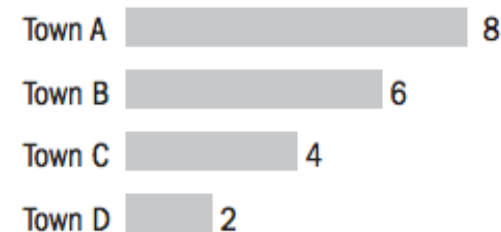
A brief description that outlines what the data shows

Town A, Town B, Town C, Town D

Headline of the chart

A brief description that outlines what the data shows

Town A Town B Town C Town D

Alternatively, chart the data as horizontal bars to accommodate long names.

Town A — 8
Town B — 6
Town C — 4
Town D — 2

Source: Adapted from Dona Wong, "The WSJ Guide to Information Graphics."

Follow These Rules When Creating Headlines for Data Visuals

Basic Guidelines

- Use clear, concise language in the headline

- Explain plainly and unambiguously what the chart presents

- Place the headline above the dataviz, aligned to the left side of the chart

- Print the headline horizontally, make it bold, and a few font sizes larger than other chart elements

Pro Tips

- Avoid using acronyms or abbreviations in your headline

- Avoid using clever headlines, regardless of how comfortable you are with the data (you can bring personality to your talk through your presentation style)

- Flip rapidly through the pages of your presentation, reading only the chart headlines. Did you include all the topics you intended to cover? Are they in the proper order?

Follow These Rules When Creating Subtitles for Data Visuals

Basic Guidelines

- Include a subtitle on every chart you make

- Write your subtitle in plain language that concisely conveys the insight the audience should take from your chart

- Avoid intellectually blank statements

- Place the subtitle directly below the headline, above the dataviz, and aligned to the left

- Print the subtitle in a "normal" (i.e., not bold) font a few sizes smaller than the headline
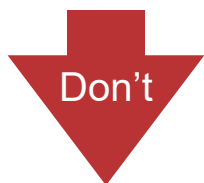
Pro Tips

- Avoid using acronyms or abbreviations in your subtitle

- Flip rapidly through the pages of your presentation reading only the chart subtitles. Did you include all of your insights? Are they in the proper order?

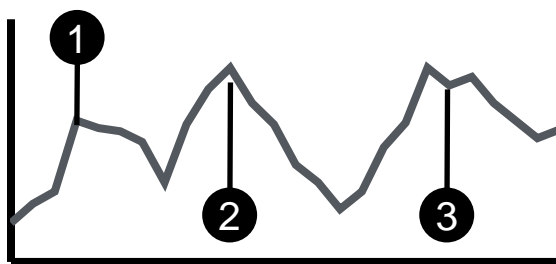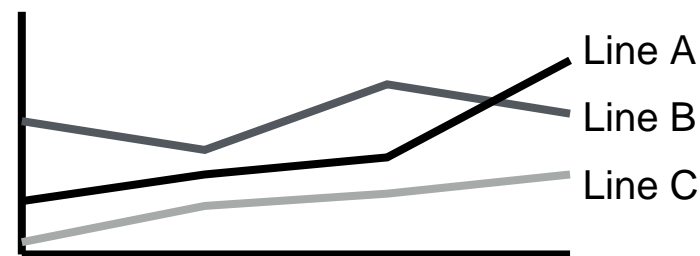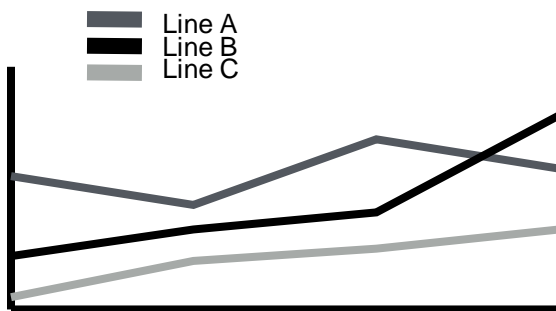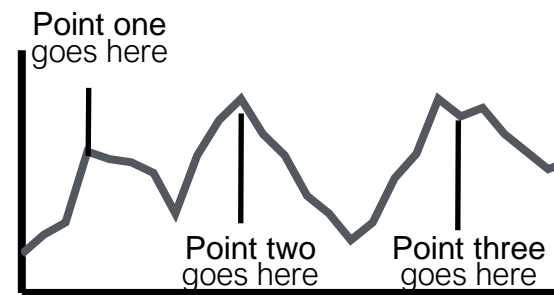# Legends and Labels Should Simplify, Not Complicate, Charts

Don't A legend or insight separated from the line requires readers to do extra work

Do Direct labeling allows the reader to identify data quickly and focus on patterns

Line A
Line B
Line C

Line A
Line B
Line C

1 Point one

2 Point two

3 Point three

Point one goes here

Point two goes here

Point three goes here

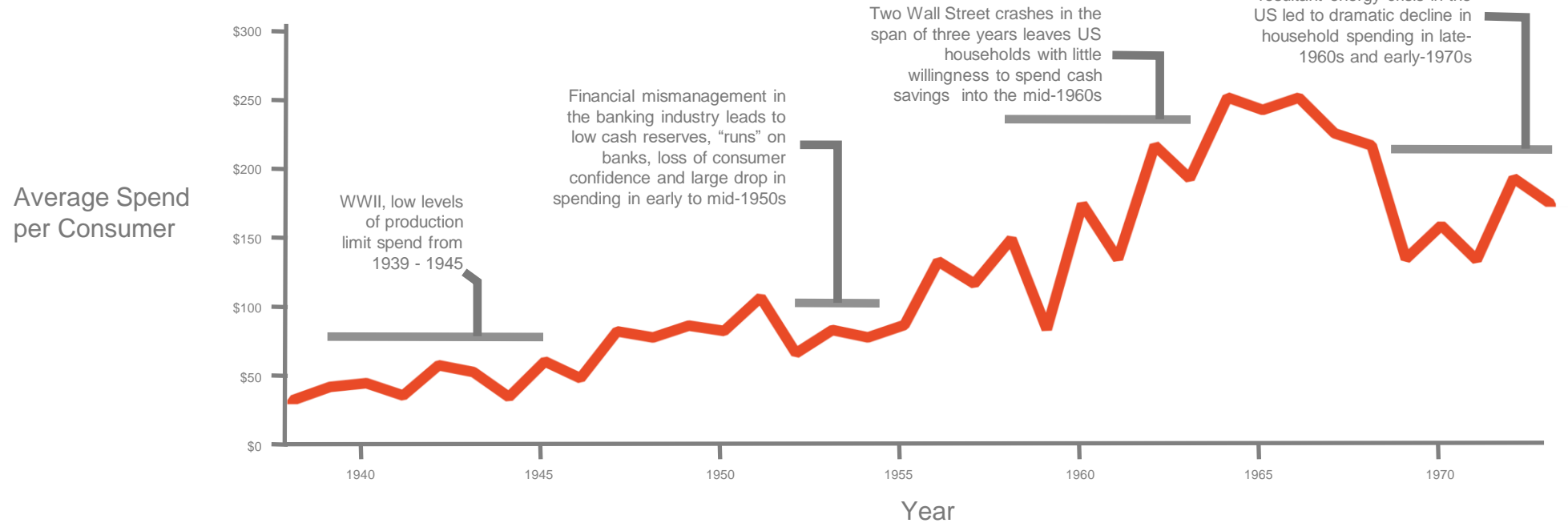Source: Adapted from Dona Wong, "The WSJ Guide to Information Graphics."

Annotations are tools that direct attention to important areas of a chart

Consumer Spending In The United States
Crisis in the economy significantly impacts spending

Social unrest, along with the OPEC oil price shock and resultant energy crisis in the US led to dramatic decline in household spending in late-1960s and early-1970s

Two Wall Street crashes in the span of three years leaves US households with little willingness to spend cash savings into the mid-1960s

Financial mismanagement in the banking industry leads to low cash reserves, "runs" on banks, loss of consumer confidence and large drop in spending in early to mid-1950s

Average Spend per Consumer

WWII, low levels of production limit spend from 1939 - 1945

$300
$250
$200
$150
$100
$50
$0

1940   1945   1950   1955   1960   1965   1970
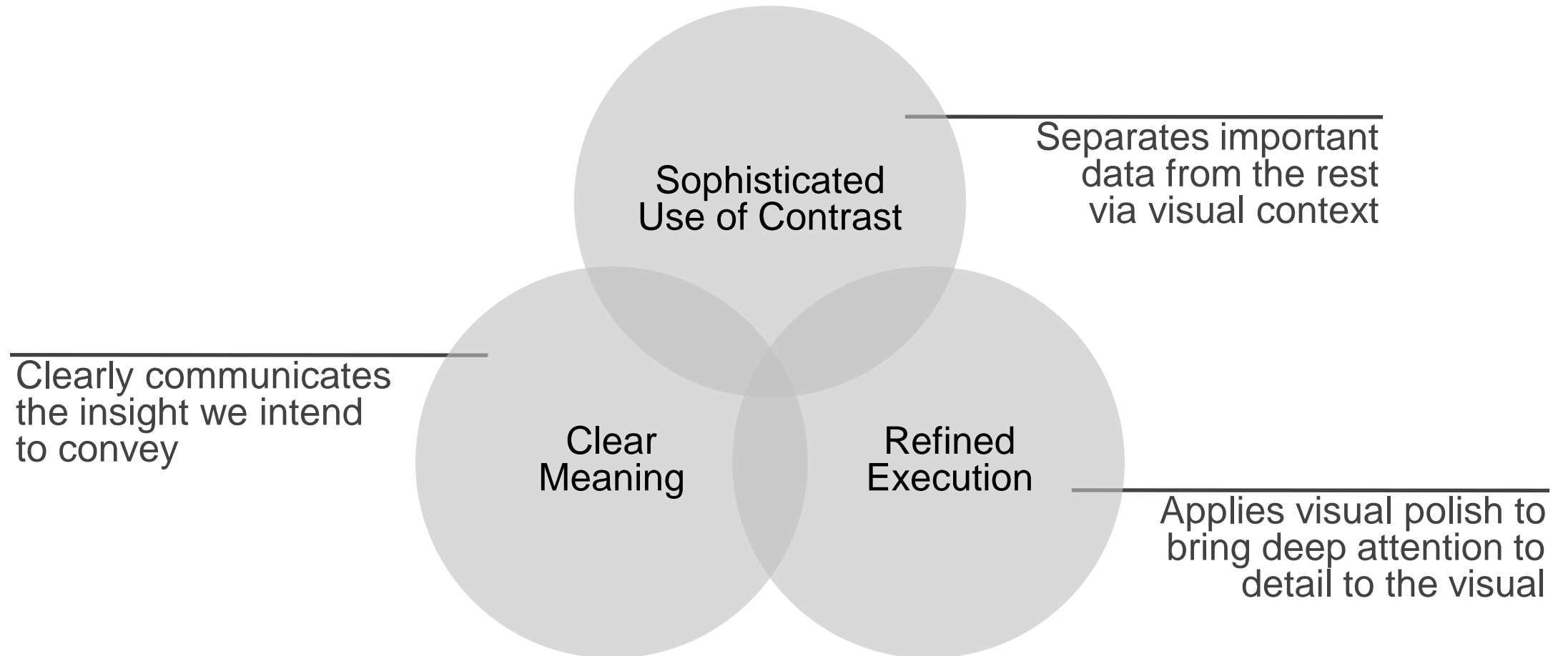
Year

Module 4 Lesson 2

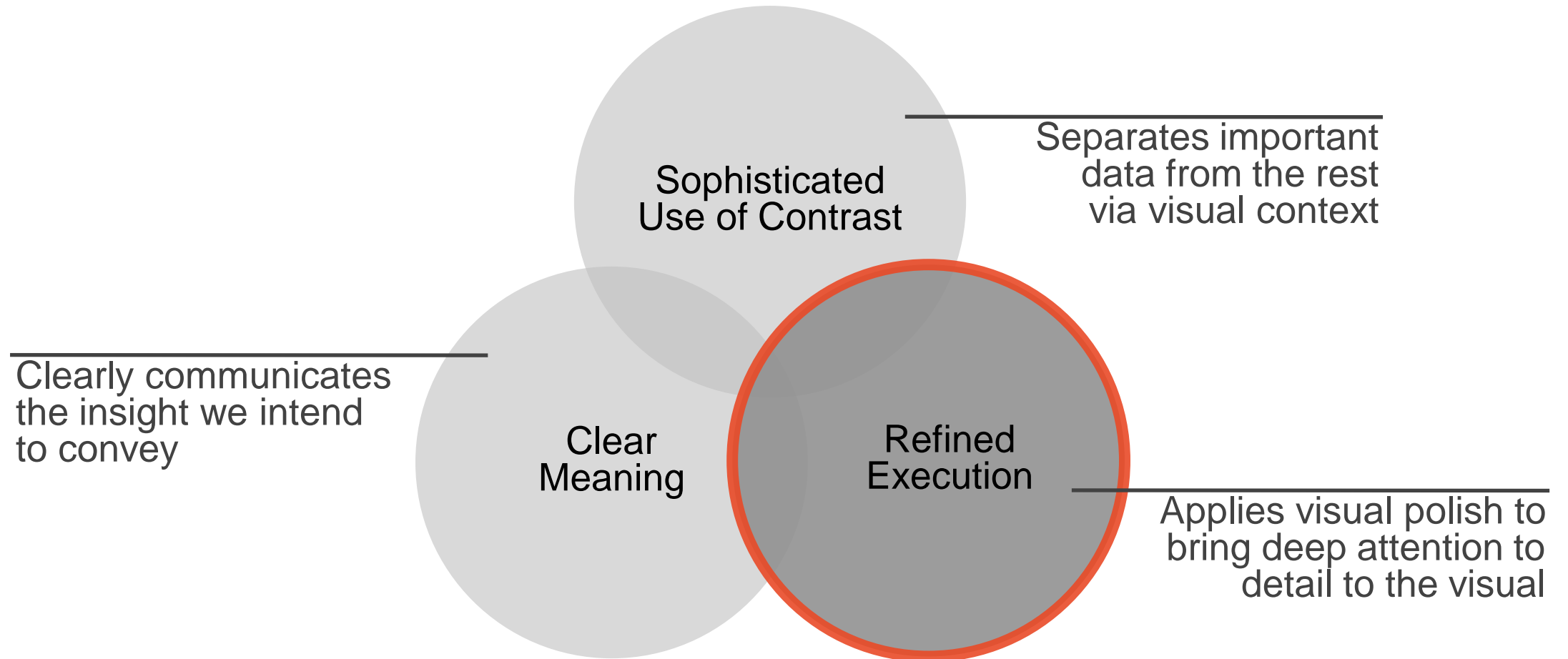# Bringing Sophistication to Charts

Bringing Sophistication to Charts

Careful attention to detail will ensure dataviz is effective and efficient in communicating insight

Good Visual Form Has Three Essential Elements

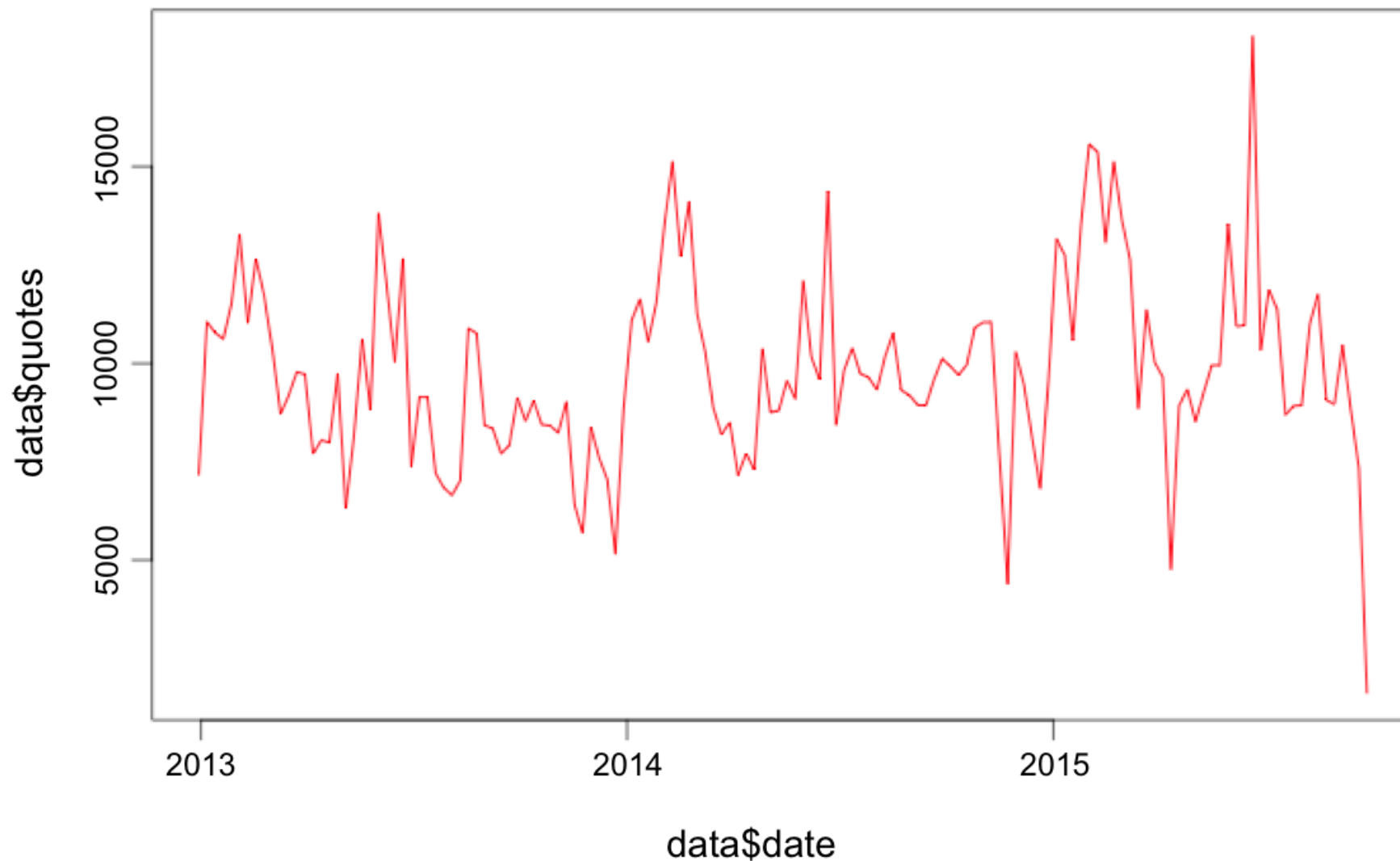Sophisticated Use of Contrast

Clear Meaning

Refined Execution

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Clearly communicates the insight we intend to convey

Applies visual polish to bring deep attention to detail to the visual

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Plot — Time Series

London Cycle Hire Journeys

Thicker, yellower lines mean more journeys

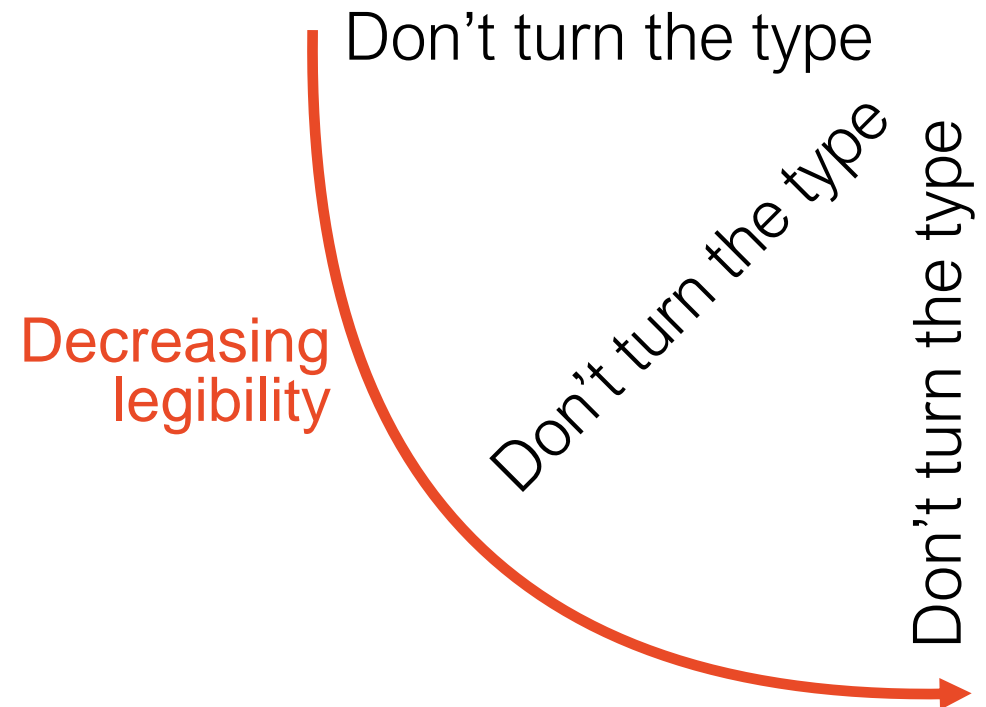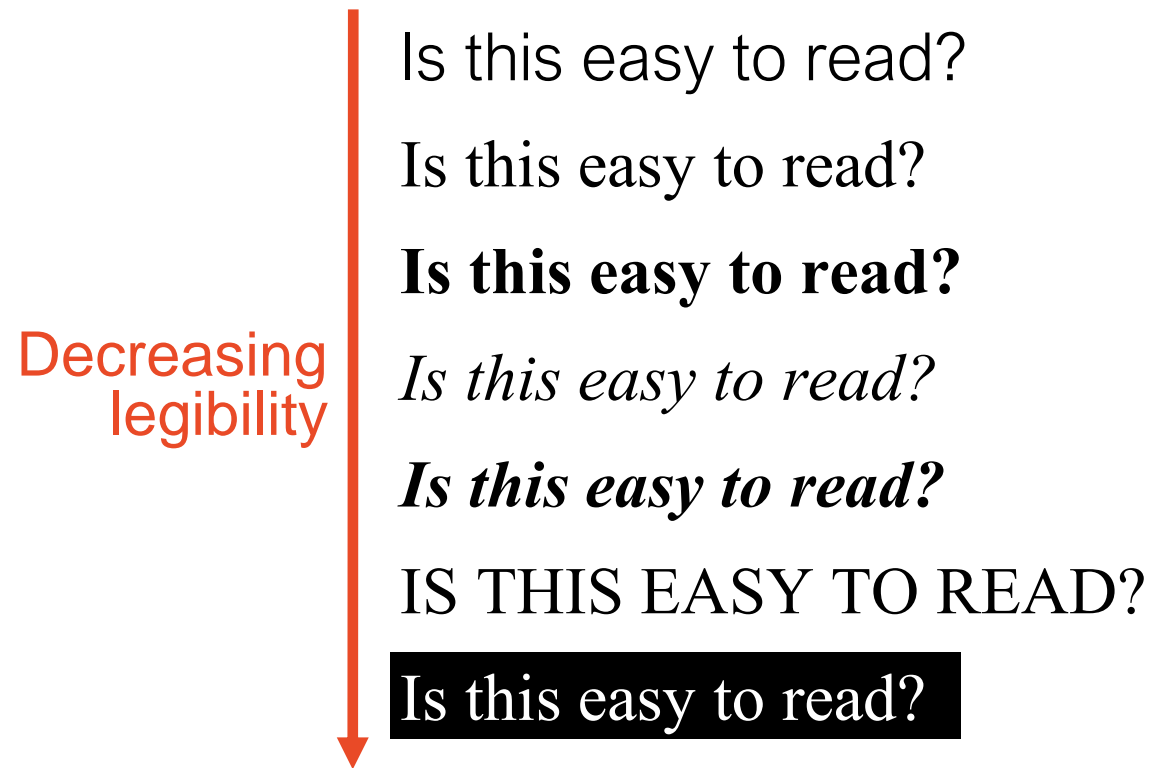http://spatialanalysis.co.uk/2012/02/great-maps-ggplot2/

"

We don't all start out writing editorials. We start by learning the alphabet

— Dona Wong

Follow a Few Basic Rules to Ensure Type Legibility in Charts

Is this easy to read?

Is this easy to read?

Is this easy to read?

Is this easy to read?

Is this easy to read?

IS THIS EASY TO READ?

Is this easy to read?

Decreasing legibility

Don't turn the type

Don't turn the type

Don't turn the type

Decreasing legibility

Line Charts Should Strive for Clean Lines and Clear Signals
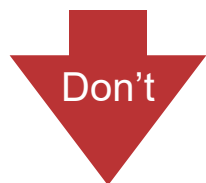
Don't It is tempting to try all the line styles and data symbols, but they only obscure the chart's information

Do Keep the maximum number of lines to three or possibly four and keep the style simple and uncomplicated

Source: Adapted from Dona Wong, "The WSJ Guide to Information Graphics."
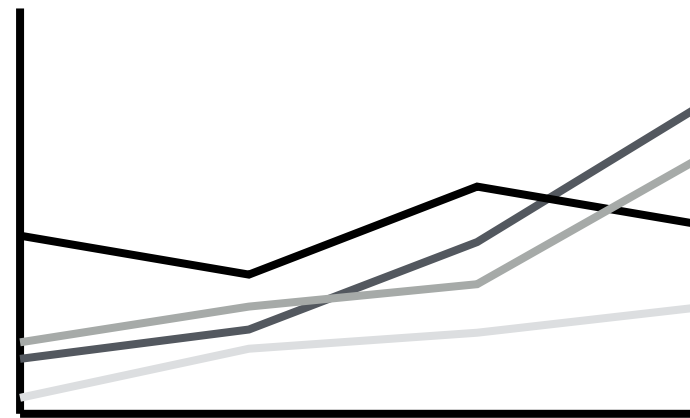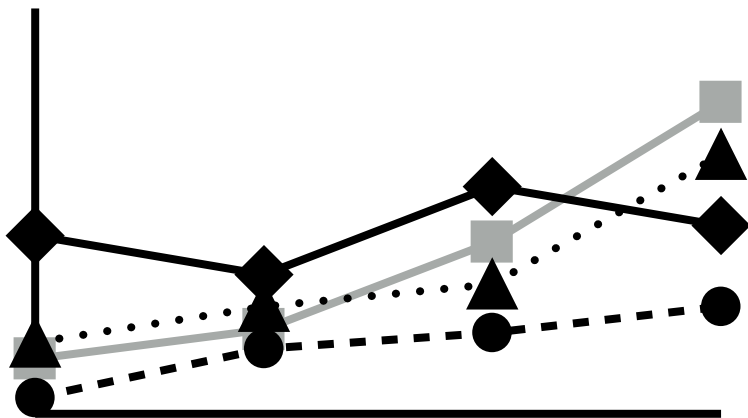
Sophisticated Execution of Dataviz Requires Attention to Detail

Careful attention to detail will ensure dataviz is effective and efficient in communicating insight

"Work product" graphics do not need to feature refined execution

Effort — and two or more applications — transforms visual discovery output into presentation-worthy graphics

Removal of clutter from a chart is the most impactful way to improve its readability

Module 4 Lesson 3

Improving Chart Legibility

Improving Chart Legibility

Taking a graphic from near meaningless to clear and insightful demonstrates the power of Wong's guidelines

Source: *New York Times,* Nicholas Felton

CONSUMPTION SPREADS FASTER TODAY

PERCENT OF U.S. HOUSEHOLDS

Labels: STOVE, REFRIGERATOR, ELECTRICITY, COLOR TV, CLOTHES WASHER, TELEPHONE, RADIO, AUTO, CLOTHES DRYER, AIR CONDITIONING, DISH-WASHER, COMPUTER, VCR, INTERNET, MICROWAVE, CELLPHONE

Technology Adoption

Years until used by one-quarter of American Population
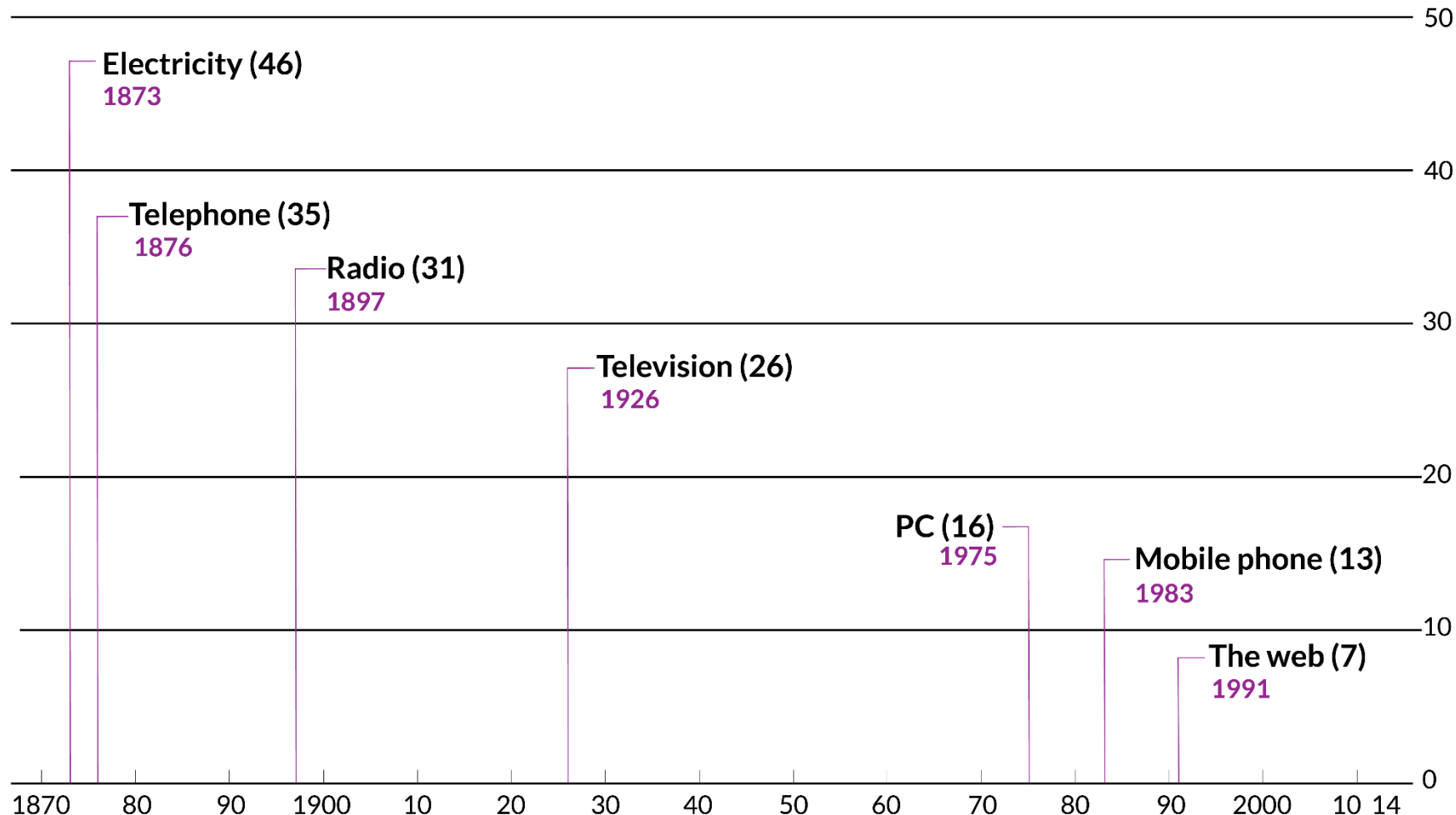
Electricity (46)
1873

Telephone (35)
1876

Radio (31)
1897

Television (26)
1926

PC (16)
1975

Mobile phone (13)
1983

The web (7)
1991

50

40

30

20

10

0

1870 80 90 1900 10 20 30 40 50 60 70 80 90 2000 10 14

First commercially available year

Source: Singularity.com

Years Needed For Technologies To Reach 25% Of US Households

Consumption of technology spreads faster today among Americans than in the past

Years before 25% household penetration

Electricity
46 Years

Telephone
35 Years

Radio
31 Years

Television
26 Years

PC
16 Years

Mobile phone
13 Years

The web
7 Years

First commercially available year
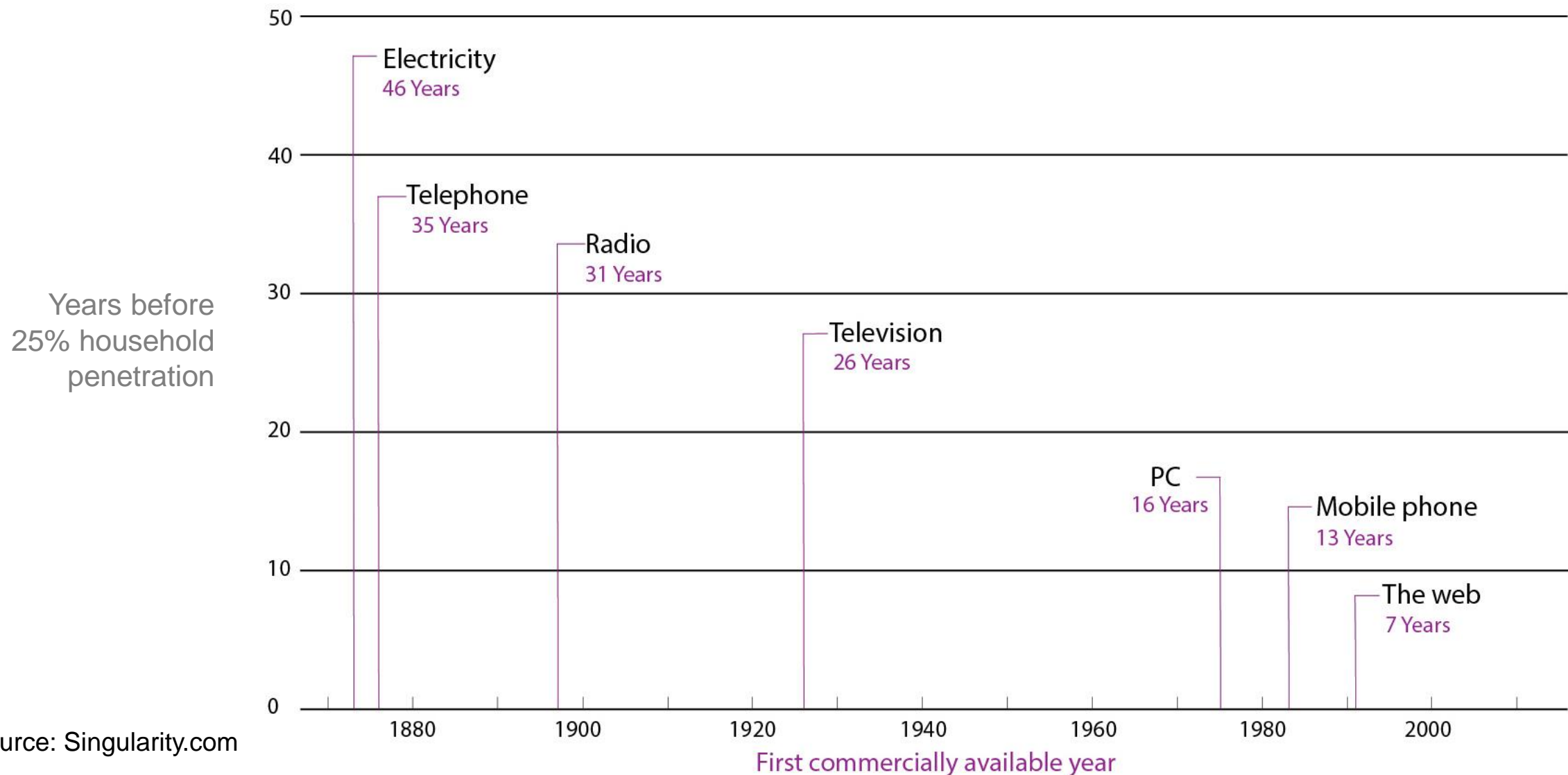
A bold, succinct chart title in title caps, bolded, and in a large font (but not too large) that plainly names the chart, with a subtitle written as a brief sentence that presents the key takeaway from the chart

A

Years Needed For Technologies To Reach 25% Of US Households
Consumption of technology spreads faster today among Americans than in the past

E

Data labels must be explicit so as not to distract or confuse an audience

Years before 25% household penetration

E

B

Vertical axis label is never rotated, is placed in the center of your axis, is succinct, in an unadorned font, and uses light color

Axis labels are expected to be on the left side of a chart; conform to convention to keep your labels unobtrusive

50						
	Electricity					
	46 Years					
40						
	Telephone					
	35 Years					
		Radio				
30		31 Years				
			Television			
			26 Years			
20						
				PC		
				16 Years	Mobile phone	
10					13 Years	
						The web
						7 Years
0						
	1880	1900	1920	1940	1960	1980	2000

First commercially available year

C

D

Axis units should be displayed in an unsurprising cadence

Horizontal axis label goes here, in the center of your data, and fewer labels reduces clutter

Use Tests to Improve Your Design

The Spartan test: Would eliminating this change anything? If the answer is no, get rid of it. Earn your reader's trust by giving them only what they need

The peek test: Where is your eye drawn? Look away from your visual for 5 seconds, then back to it. This is most likely the place your audience's eye will be drawn as well

The colleague test: Think your visual is perfect? Have a colleague take a look. Give them minimal context and 10–15 seconds to process and ask what they would take away

Module 4 Lesson 4

Presenting Dataviz with Impact

Presenting Dataviz with Impact

The style with which your visualizations are presented is just as, if not more, important as the content itself

Remember the McCandless Method When Presenting Dataviz

Step 1   Introduce the graphic by its name (and its story)

Step 2   Explain the graphic by answering your audience's questions

Step 3   State the insight your graphic produces

Step 4   Offer up examples that support the insight

Step 5   Tell them why the insight matters to them

(Creemers, 2010)

(Creemers, 2010)

McCandless Offers a Great Example of How to Present Data

This is the 'Billion-$Dollar-O-Gram' and this image arose out of frustration I had with the reporting of billion dollar amounts in the press. That is, they're meaningless without context. '$500 billion for this pipeline, $20 billion for this war' it doesn't make any sense. So the only way to understand is visually and relatively.

So I scraped a load of reported figures from various news outlets and then scaled the boxes according to those amounts. And the colors here represent the motivation behind the money: purple is fighting and red is giving money away and green is profiteering.

And what you can see straight away is you start to have a different relationship to the numbers. You can literally see them. But more importantly you start see patterns and connections between numbers that would otherwise be scattered across multiple news reports.

Let me point out some I really like:

OPEC's revenues green box here, $780 billion a year. And this little pixel in the corner of $3 billion? That's their climate change fund.

Americans are incredibly generous people. Over $300 billion-a-year donated to charity every year. Compared with the amount of foreign aid given by the top 17 industrialized nations at $120 billion.

And then of course the Iraq war predicted to cost just $60 billion back in 2003 and then mushroomed slightly after Afghanistan and Iraq now to $3,000 billion.

So now it's great because now we have this texture and we can add numbers to as well. So we say, 'well, a new figure comes out and, let's see, African debt…how much of this diagram might be taken up by the debt Africa owes to the West?' Let's take a look. So there it is: $227 billion is what Africa owes.

And the recent financial crisis, how much of this diagram might that figure take up? What did that cost the world? Let's take a look at that. Dooosh! I think is the appropriate sound effect from that much money: $11,900 billion.

So by visualizing this information we've turned it into a landscape that you can explore with your eyes. Kind of map, really. An 'Information Map'. And when you're lost in information, an Information Map is kind of useful.

(Macandless, 2010)

McCandless Offers a Great Example of How to Present Data

1 **Introduce the graphic by its name (and its story):** Begin the presentation of your graphic by establishing the visual as the star of the show

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McCandless Offers a Great Example of How to Present Data

2 **Explain the graphic by answering your audience's questions:** Acclimate your visual beginning at the highest level and working down to the lowest required detail, answering your audience's questions in simple, plain English before the questions are asked — and remember that less is more!

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McCandless Offers a Great Example of How to Present Data

3 **State the insight your graphic produces:** Give your audience the insight they will see before you dive into the supporting details of your data story

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4 Offer up examples that support the insight: Give as many interesting examples from your data as you can to substantiate your insight and wow your audience by saving the best for last

Let me point out some I really like:

OPEC's revenues green box here, $780 billion a year. And this little pixel in the corner of $3 billion? That's their climate change fund.

Americans are incredibly generous people. Over $300 billion-a-year donated to charity every year. Compared with the amount of foreign aid given by the top 17 industrialized nations at $120 billion.

And then of course the Iraq war predicted to cost just $60 billion back in 2003 and then mushroomed slightly after Afghanistan and Iraq now to $3,000 billion.

So now it's great because now we have this texture and we can add numbers to as well. So we say, 'well, a new figure comes out and, let's see, African debt…how much of this diagram might be taken up by the debt Africa owes to the West?' Let's take a look. So there it is: $227 billion is what Africa owes.

And the recent financial crisis, how much of this diagram might that figure take up? What did that cost the world? Let's take a look at that. Dooosh! I think is the appropriate sound effect from that much money: $11,900 billion.

So by visualizing this information we've turned it into a landscape that you can explore with your eyes. Kind of map, really. An 'Information Map'. And when you're lost in information, an Information Map is kind of useful.

(Macandless, 2010)

McCandless Offers a Great Example of How to Present Data

This is the 'Billion-$Dollar-O-Gram' and this image arose out of frustration I had with the reporting of billion dollar amounts in the press. That is, they're meaningless without context. '$500 billion for this pipeline, $20 billion for this war' it doesn't make any sense. So the only way to understand is visually and relatively.

So I scraped a load of reported figures from various news outlets and then scaled the boxes according to those amounts. And the colors here represent the motivation behind the money: purple is fighting and red is giving money away and green is profiteering.

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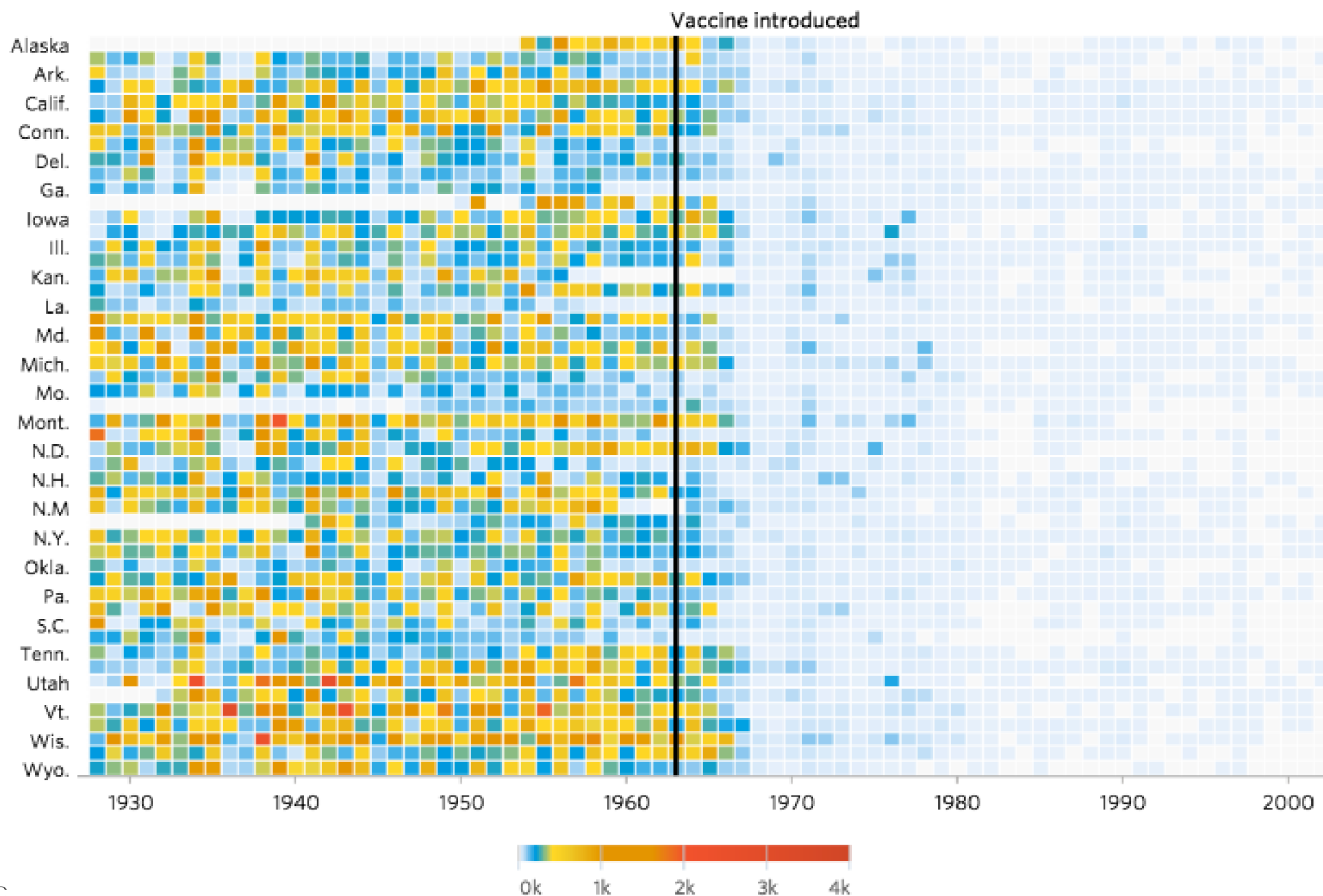
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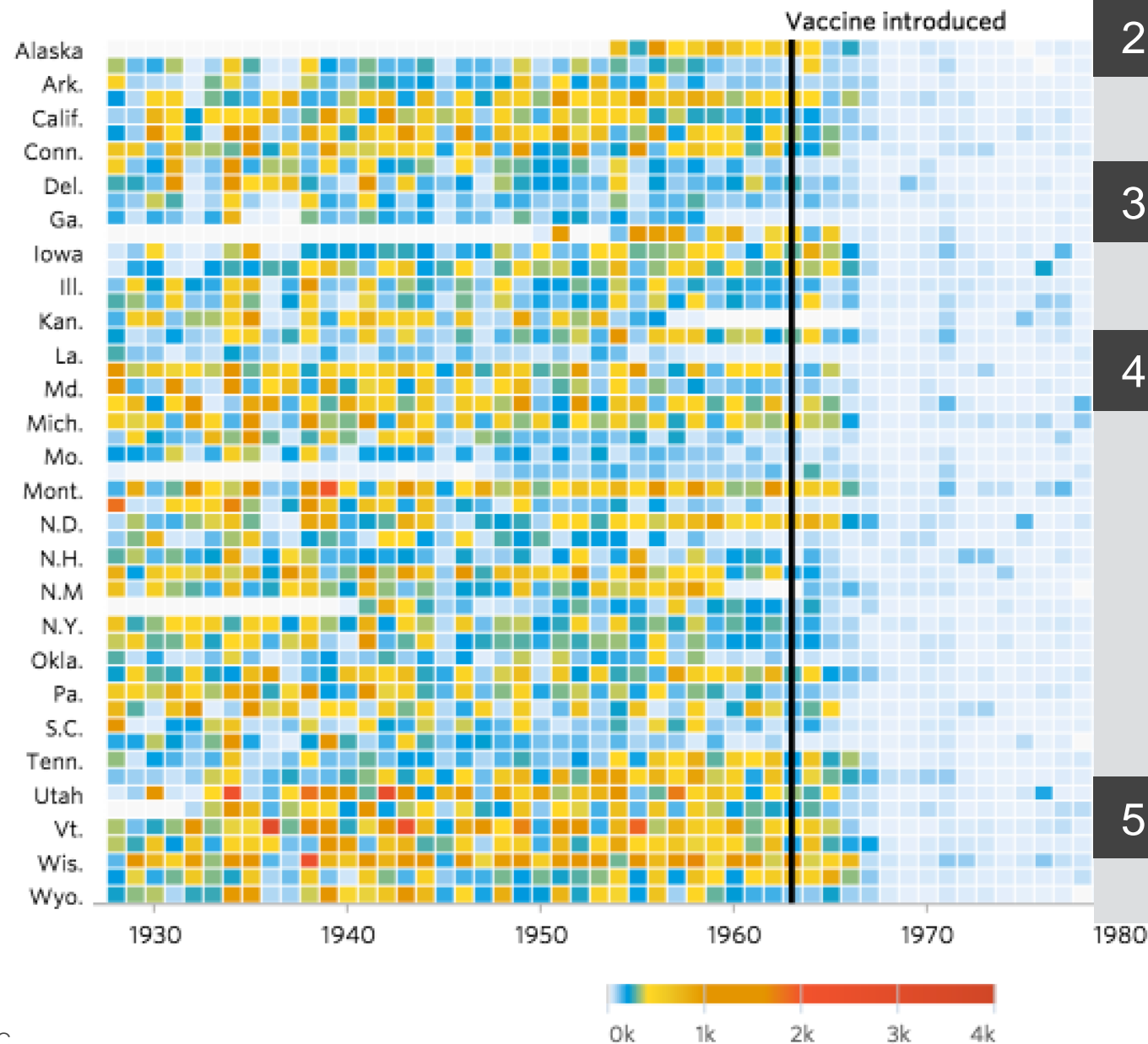
So by visualizing this information we've turned it into a landscape that you can explore with your eyes. Kind of map, really. An 'Information Map'. And when you're lost in information, an Information Map is kind of useful.

5 **Tell them why the insight matters to them:** Restate your insight and leave the visual by telling the audience **precisely what your insight means to them.**

(Macandless, 2010)

Measles

Source: CDC

Measles

Vaccine introduced

1 This is the number of cases of measles in the United States from 1928 to 2002

2 Every state is represented. Each box is equal to one year's worth of cases in a state. The color of the box indicates the number of measles cases, where the dark red boxes mean more cases and the lighter blue ones mean fewer cases

3 What this graphic reveals is that the introduction of the measles vaccine in 1963 had a dramatic impact on the occurrence of the disease in the United States, clearly demonstrating why vaccines are so vital to our nation's health

4 Nearly everyone in the United States got measles before there was a vaccine, and hundreds died from it each year. Today, most doctors have never seen a case of measles

An epidemic of German measles (rubella) in 1964–1965 infected 12½ million Americans, killed 2,000 babies, and caused 11,000 miscarriages. In 2012, 9 cases of rubella were reported to CDC
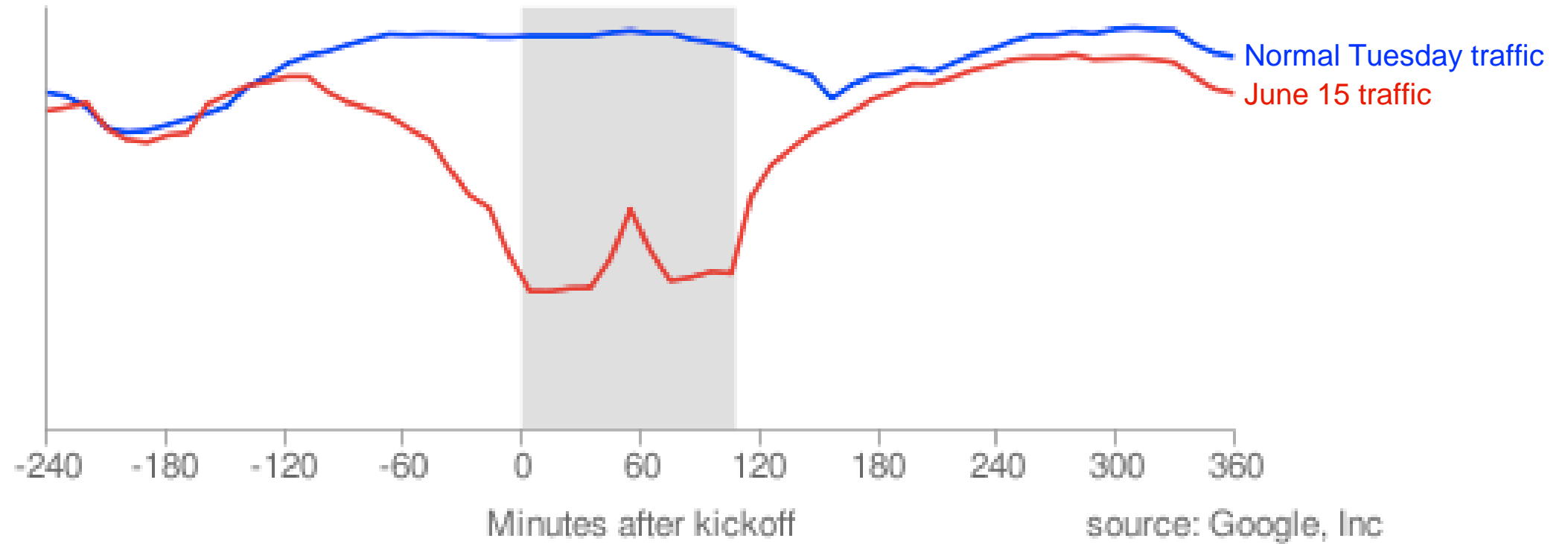
More than 350,000 cases of measles were reported from around the world in 2011, with outbreaks in the Pacific, Asia, Africa, and Europe. In that same year, 90% of measles cases in the United States were associated with cases imported from another country. Only the fact that most Americans are vaccinated against measles prevented these clusters of cases from becoming epidemics

5 Disease rates are low in the United States today. But if we let ourselves become vulnerable by not vaccinating, a case that could touch off an outbreak of some disease that is currently under control is just a plane ride away
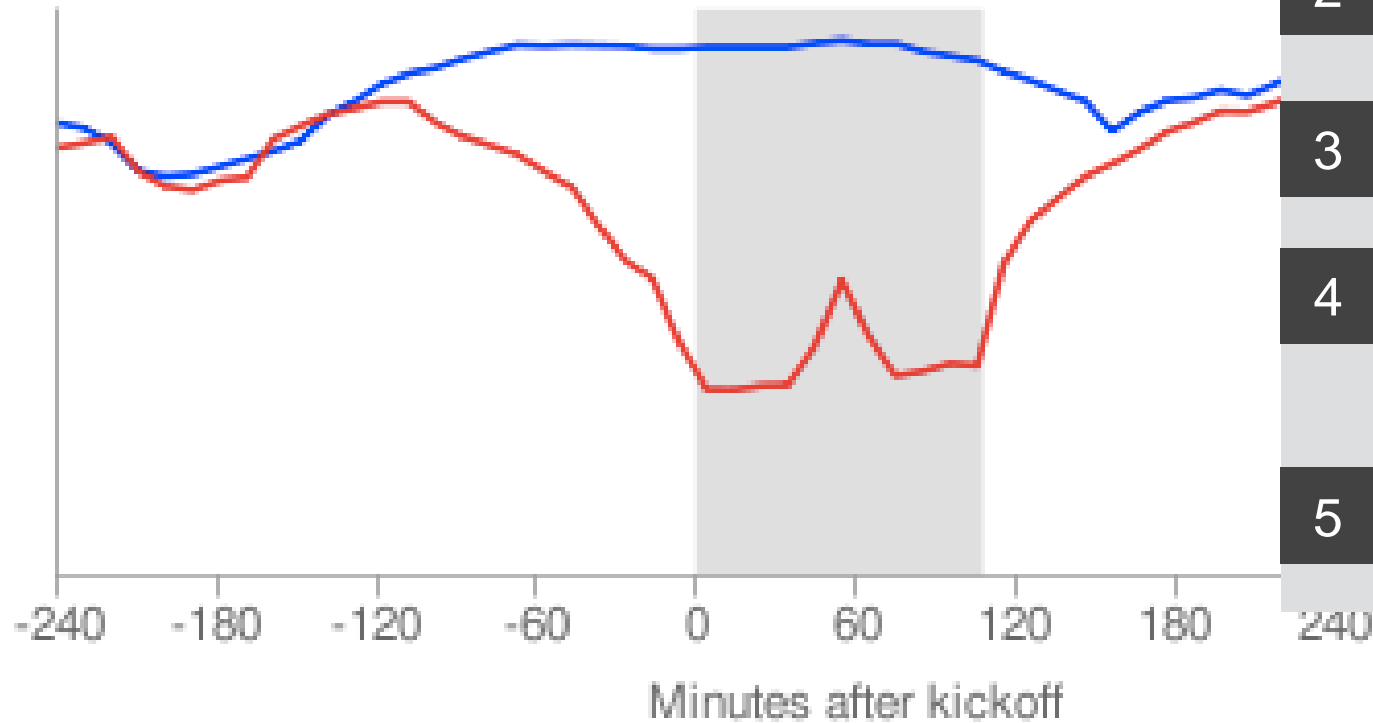
Source: CDC

Brazil's Google.com Query Volume
Interest in soccer outweighs interest in anything else

Normal Tuesday traffic
June 15 traffic

Minutes after kickoff

source: Google, Inc

Source: Google

Brazil's Google.com Query Volume

Interest in soccer outweighs interest in anything else

1	This is a graph of Google.com query volume in Brazil
2	The blue line represents traffic on a normal Tuesday. The red line represents traffic on June 15, 2010, the day Brazil played its first game of the 2010 World Cup against North Korea
3	The chart clearly demonstrates just how dedicated Brazilians are to supporting their national soccer team
4	The volume of queries plummeted when the match began, spiked during halftime, fell again when the match resumed, and then quickly rose after the match finished, which is very much in stark contrast to how Brazilians use Google.com on a typical, non-match day
5	Fans of many countries claim to have the best, most loyal supporters with great passion. But data such as these make a strong case that Brazil is home to the most devoted fans in the world

Minutes after kickoff

source: Google, Inc

Remember the McCandless Method When Presenting Dataviz

Step 1   Introduce the graphic by its name (and its story)

Step 2   Explain the graphic by answering your audience's questions

Step 3   State the insight your graphic produces

Step 4   Offer up examples that support the insight

Step 5   Tell them why the insight matters to them

Ensure the Impact of Your Dataviz Through Careful Presentation

The style with which you present your dataviz can have just as much impact as the graphic itself

Questions in your audience's mind distract from your presentation—eliminate them before they are asked

Insights should precede substantiating facts—eliminate tension from your story, as drama can distract

Five-step McCandless Method helps ensure your dataviz is presented the right way

In This Module

Module 4: Getting Your Story Across

Key Concepts

Creating inviting dataviz

Bringing sophistication to charts

Improving chart legibility

Presenting dataviz with impact

References

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