

# Data Storytelling for Managers

- 1. Storytelling Frameworks: Creating Narratives, Structures, and Flows (35%)
- 2. Seven Visual Storytelling Strategies (15%)
- 3. Choosing the Right Chart for Your Story (25%)
- 4. Case Studies (25%)

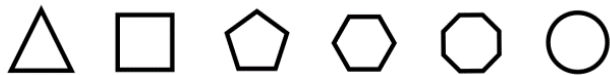
# Storytelling Frameworks for CXO-level presentations

Rishabh Pugalia | Dec 2024 | EY

# Why Frameworks?

3

SOLVE VIA ITERATION.



THEN GET PAID VIA REPETITION.




Illustration Source: [The Almanack of Naval Ravikant](#)

4

4

SOLVE VIA ITERATION.



ERP

Reverse flipping

Compliance

...

THEN GET PAID VIA REPETITION.





Illustration Source: [The Almanack of Naval Ravikant](#)

5

SOLVE VIA ITERATION.



ERP

Reverse flipping

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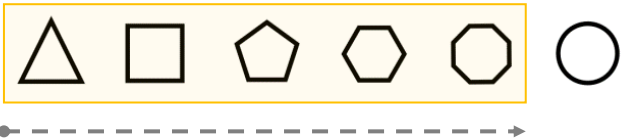


Illustration Source: [The Almanack of Naval Ravikant](#)

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SOLVE VIA ITERATION.



This Journey =  
Pain & Discomfort

THEN GET PAID VIA REPETITION.



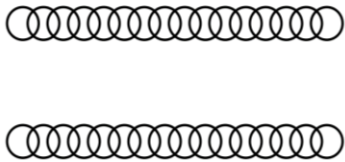
Illustration Source: [The Almanack of Naval Ravikant](#)

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Templated tools limit the need for customization  
aiding in faster implementation

To accelerate the SAP S/4HANA transformation, EY professionals tapped into the EY Energy Industry Cloud for SAP solutions, which seamlessly integrates pre-built, sector-specific ERP assets with the latest versions of SAP offerings. Leveraging over 3,000 EY-created SAP accelerators including processes, training, test scripts, data mapping templates, IT controls and security roles, the EY team helped Diamondback implement the ERP software within a timeline never thought possible. The EY team's leading-class Intelligent Transformation Platform toolset was also leveraged for the effective migration of data and integration of recently acquired companies.



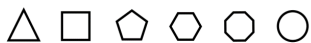
Source: [EY Report](#)

8

8

## Frameworks = Lens = A Way to Think

SOLVE VIA ITERATION.



Why am I experiencing this discomfort?

What can I do to reuse the learning?

THEN GET PAID VIA REPETITION.



How much of it is practically reusable?

What's the potential \$ value?

9

9

## Frameworks = Trained “Thought Process”

They provide a **structure to articulate a scenario** and a way to **shortlist the possible directions**.

Frameworks **aren't meant to be rigid theoretical rules**.

You can have your **own interpretation** based on your scenario.

**Know which one to apply and when.**

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**Truth #1:**  
**Not all frameworks are applicable all the time.**

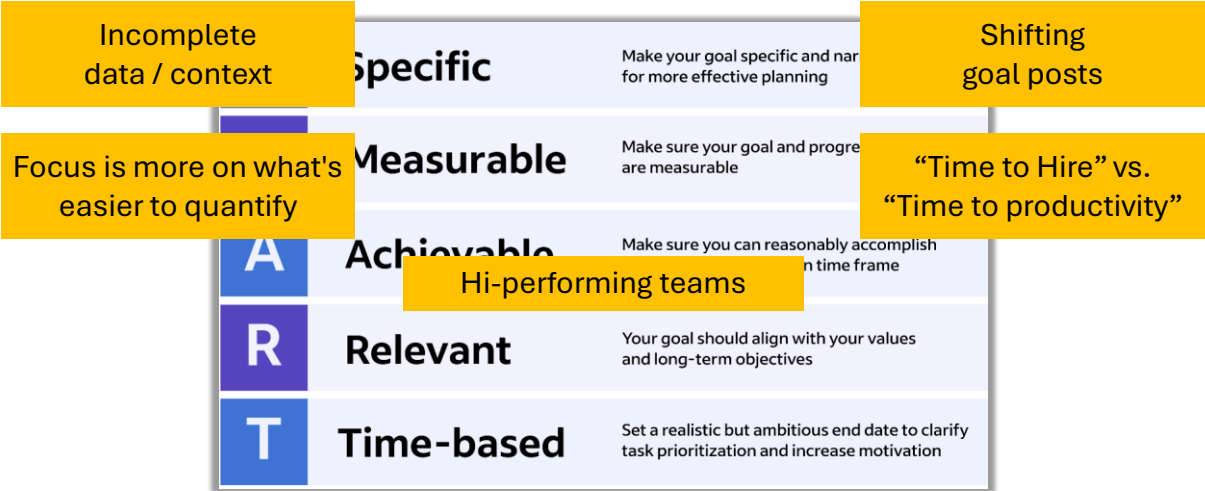
11

S	Specific	Make your goal specific and narrow for more effective planning
M	Measurable	Make sure your goal and progress are measurable
A	Achievable	Make sure you can reasonably accomplish your goal within a certain time frame
R	Relevant	Your goal should align with your values and long-term objectives
T	Time-based	Set a realistic but ambitious end date to clarify task prioritization and increase motivation

12

12

Not all frameworks are applicable all the time.



Goal-setting framework – Defined Process

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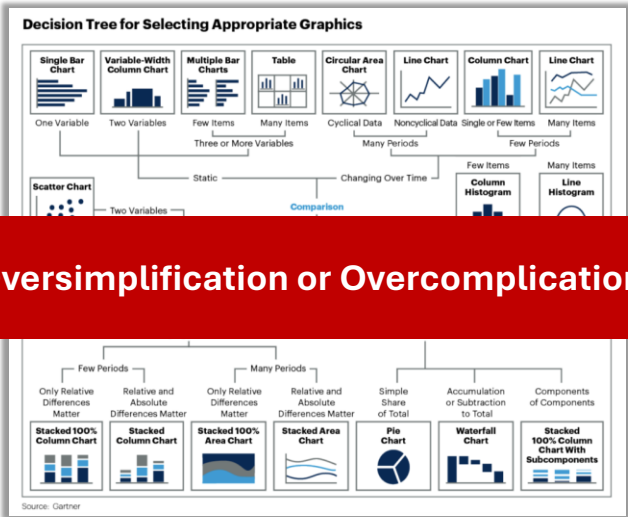
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Truth #2:

Some frameworks may look fancy, but they are often difficult to apply.

14

Some frameworks may look fancy, but they are often difficult to apply.



**Oversimplification or Overcomplication**

15

15

**Truth #3:**  
Frameworks that offer generic advice are best avoided.

16



This  
program is  
**NOT** about

**generic advice**  
that doesn't  
tell you  
**HOW**  
**EXACTLY** a  
work needs  
to be done



Be precise.  
Be concise.   
Keep it simple.  
Know your audience.  
Be objective.

17

17

## Expectation Setting

(Remember: This is a start.)

18

This program is **NOT** about

obvious stuff.



	URGENT	NOT URGENT
IMPORTANT	<b>DO</b> <i>Do it now.</i> Write article for today.	<b>DECIDE</b> <i>Schedule a time to do it.</i> Exercising. Calling family and friends. Researching articles. Long-term biz strategy.
NOT IMPORTANT	<b>DELEGATE</b> <i>Who can do it for you?</i> Scheduling interviews. Booking flights. Approving comments. Answering certain emails. Sharing articles.	<b>DELETE</b> <i>Eliminate it.</i> Watching television. Checking social media. Sorting through junk mail.

Image Source: <https://jamesclear.com/eisenhower-box>

Do you feel any of these? 1 Yes = 1 Point



- 1. I have already spent 15-20% of the allotted time, but I haven't figured out how or where to begin.
- 2. The client didn't share this upfront. I didn't ask enough questions. Now, new details come mid-project. This means more rework and delays.
- 3. I think I am not covering all the required points of view (POVs) in this proposal or response to the RFP.
- 4. How do I prioritize what to include in a presentation when there's too much to cover but not enough time?
- 5. How do I turn scattered inputs into a clear, compelling proposal? What's the best way to consolidate diverse inputs from the team?
- 6. It feels like I have to repeat myself in multiple meetings to get the same message across.
- 7. I'm constantly running out of time for final reviews before submission. How do I structure my workflow to allow for more quality checks (QC)?

Go to [SLIDO.com](https://www.slido.com) & use this code 3334444

Joining as a participant?

# Enter code here



21

21

## How will this workshop help you address these challenges?

### Strategic:

1. New ways to think using practical frameworks.
2. Ask better questions for scope, early on.
3. Articulate your POV better.

### Tactical:

1. Use frameworks with AI to build more effective reports.
2. Create better flows & narratives to present your ideas.
3. Understand which charts to use when.



22

22

# **What makes ME eligible to present today?**

(This is where I say a lot of good things about me.)

23

# **Excel, Power BI, PowerPoint & Financial Modeling**

24

24

# What makes me eligible?

Actively interacting with the **Big4 professionals** @ #YodaLearning -



- 2004 – 2005: CA Articleship
- 2006 – 2009: Trading Interest Rate Futures, IB Pitch Books
- 2010 – 2022: Training (90%) + Designing Learning Journey (10%)
- 2022 – 2024: Training (10%) + Designing Learning Journey (90%)

**Building distribution channels, teams, processes, and solving client problems @ #ContentBeta** – a Creative Design & Video Production Agency (150+ SaaS clients from the US). Content focus – GTM, Customer Education and Engagement Marketing. It's a 100% remote company, with ~43 members.

>50% of the time, I speak to founders / leaders (CMO, VPs).



25

25

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26

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**Let's start**

27

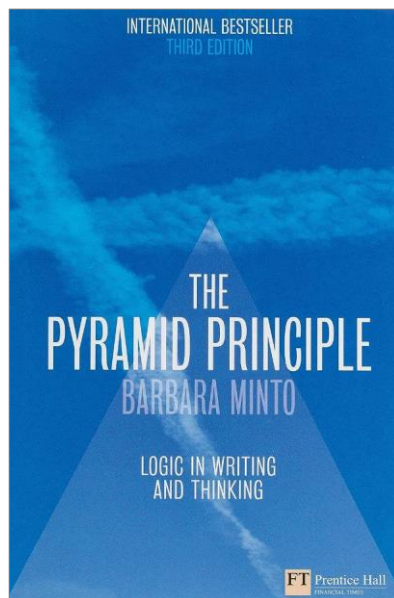
**SCQA**

28

28



**Barbara Minto, 90**  
McKinsey 1963 - 1973  
Best Known for - Minto Pyramid  
Principle, SCQ and MECE



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+

**Added my own interpretation based on  
my experience and wins**

30

30

# Understanding Minto's SCQA\*

S

Refer to an **event or a scenario for context.**

Q

**Be specific while framing the question(s).**  
  
++ Mention constraints and the options.

A

**++ Quantify the investment, resources and timeframe** of implementing the solution.  
  
**++ Quote successful precedents (projects), and comparables**

C

**So, what has changed? Quantify the problem** (time, money, delay, lost opportunity).  
  
**++ Is there any - loss due to inaction? Deadline?**

\*Situation, Complication, Question, Answer

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**“The regulator (SEBI) has introduced new compliance guidelines for storing customer data on a third-party cloud platform.”**

**“Change in law”**

**“A new revolutionary AI tech”**

\*Situation, Complication, Question, Answer



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**++ Quote successful precedents (projects), and comparables**

***“There is no automated inventory reconciliation system now. This means an opportunity loss of \$1.6 million every quarter.”***

\*Situation, Complication, Question, Answer

# Understanding Minto's SCQA\*

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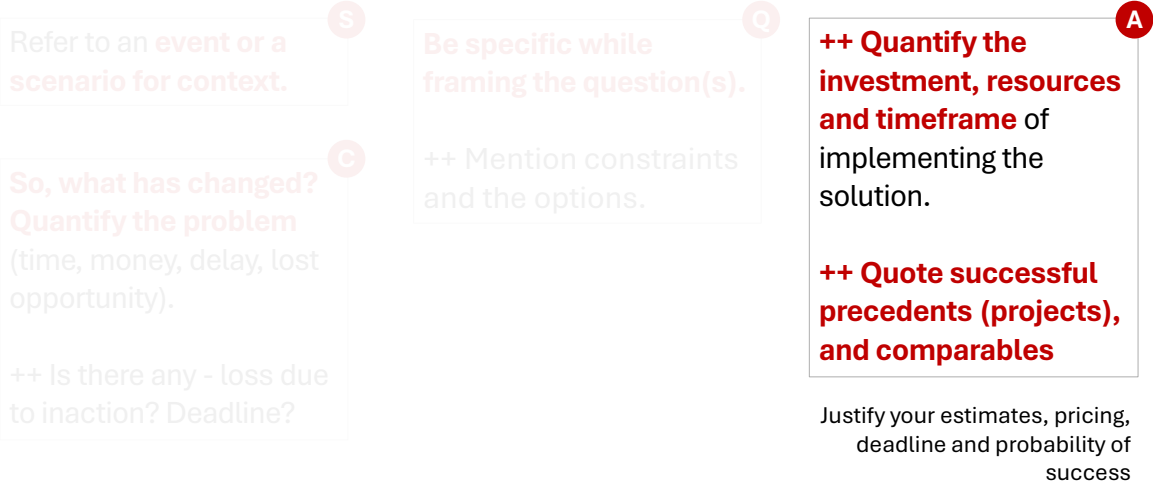
A

**++ Quantify the investment, resources and timeframe of implementing the solution.**  
  
**++ Quote successful precedents (projects), and comparables**

***“How can we integrate SAP with Enterprise Data Warehouse (EDW) within the next 45 days. The client department staff is pre-occupied with the US GAAP audit.”***

\*Situation, Complication, Question, Answer

# Understanding Minto's SCQA\*

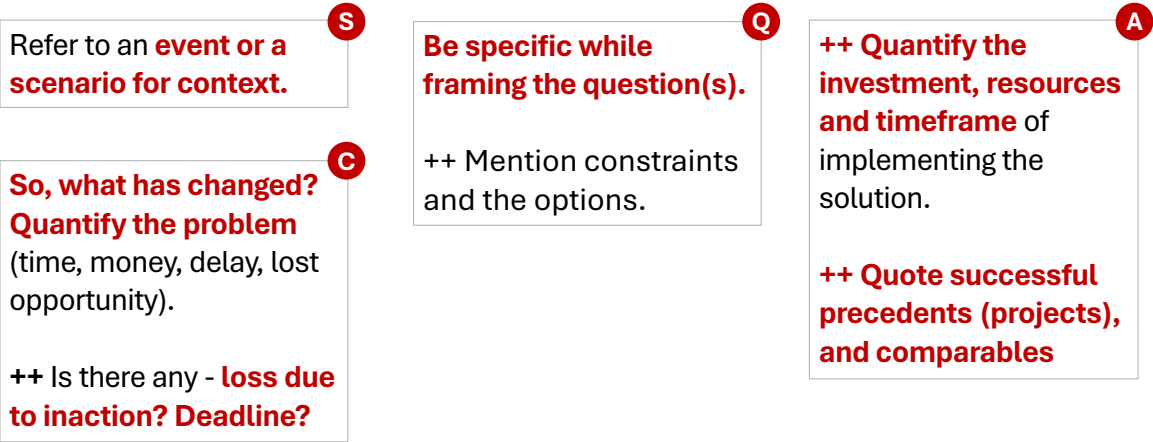


\*Situation, Complication, Question, Answer

35

35

# Understanding Minto's SCQA\*



\*Situation, Complication, Question, Answer

36

36

Let’s use a movie example to understand SCQA better



"Margin Call" is a 2011 drama that explores the **early stages of the 2008 financial crisis (MBS\*)**, focusing on a group of investment bankers who discover critical financial information that could lead to their firm's collapse. "Sell it all. Today."

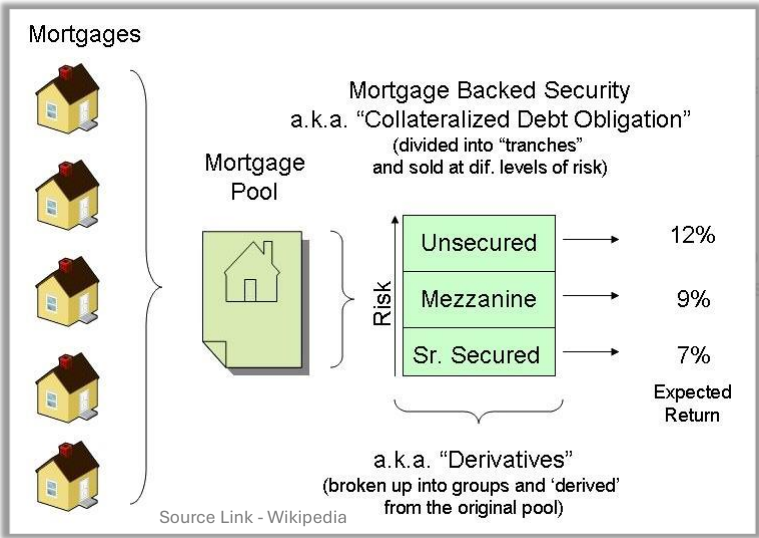
**MBS = Mortgaged-backed securities (bundle subprime retail housing loans that are prone to default)**

Source Link - <https://www.youtube.com/watch?v=ISDgcB-J4fQ>

37

37

Let’s use a movie example to understand SCQA better



Source Link - <https://www.youtube.com/watch?v=ISDgcB-J4fQ>

38

38

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MBS = Mortgaged-backed securities (bundle subprime retail housing loans that are prone to default)

Let's watch a 10-mins video

Source Link - <https://www.youtube.com/watch?v=ISDgcB-J4fQ>

39

39

Situation: S of SCQA

Figure at the top of the page 13.

Refer to an **event or a scenario for context.**

... Over the **last 30 to 40 months**, the firm has begun **packaging new MBS products** that combine several different tranches of rating classification in one tradable security. This has been **enormously profitable** as I imagined, you notice, I have while the firm is currently doing a **considerable amount of this business every day.**

Now the problem, which is I guess, why we are here tonight is that **it takes us the firm about a month to layer these products correctly**, thereby posing a challenge from a risk management standpoint.

MBS – Mortgage-backed securities

40

40

Situation: S of SCQA

...Figure at the top of the page 13.

... over the last 36 to 40 months, the firm has begun packaging new MBS products that combine several different tranches of rating classification in one tradable security. This has been enormously profitable as I imagined, you notice, I have while the firm is currently doing a considerable amount of this business every day.

Now the problem, which is I guess, why we are here tonight is that it takes us the firm about a month to layer these products correctly, thereby posing a challenge from a risk management standpoint.

MBS – Mortgage-backed securities

41

41

Complication: C of SCQA

We have to hold these assets on our books longer than we might ideally like to Yes, but the key factor here is these are essentially just mortgages. So that has allowed us to push the leverage considerably beyond what you had to do in any other circumstance, thereby pushing raising any red flags.

So, what has changed?  
Quantify the problem  
(time, money, delay, lost opportunity).

++ Is there any - loss due to inaction? Deadline?

42

42

### Complication: C of SCQA

We have to **hold these assets on our books longer** than we might ideally like to. Yes, but the key factor here is these are essentially just mortgages. So that has allowed us to **push the leverage** considerably beyond what you might be willing or allowed to do in any other circumstance, thereby **pushing the risk profile without raising any red flags.**

...

So, if those **assets decreased by just 25% and remain on our books, that loss** would be greater than the current market cap of this entire company.

43

43

### Question: Q of SCQA

There are **three ways** to make a question specific.

Be first. Be smarter, or cheat.

I don't cheat. And although I know there are pretty smart people in this building, it sure is a hell of a lot easier to be first.

**Q**  
Be specific while framing the question(s).

++ Mention constraints and the options.

44

44

Question: Q of SCQA

There are **three ways** to make a living in this business.

Be first. Be smarter, or cheat.

I don't cheat. And although I like to think we have some pretty smart people in this building, it sure is a hell of **a lot easier to just be first.**

45

45

Answer: A of SCQA

"Sell it all today." ... Well, you call the traders in for the normal 6:30 meeting and to **be honest with them**, because they're going to know it's the end either way, you have to **throw them a bone and a pretty big one.**

And then you've got to come out of the **gate storming, no swaps, no 1015, by 11 o'clock all your trades have to be gone** because by 11 o'clock you have to be out. And by two o'clock you're going to be **selling at 65 cents on the dollar.**

And then the **feds are going to slow you down.**

But John, even if we managed to pull that off and that's saying some things, is, **who are we selling this to?** Same people we've been selling it to and whoever else would buy it. But John, if you do this you will **kill the market for years** it's over and you're selling something that you know has no value.

We are selling to willing buyers at the current fair market price. **So that we may survive.**

**You will never sell anything to any of those people ever again.**

46

46

**A**

**++ Quantify the investment, resources and timeframe of implementing the solution.**

**++ Quote successful precedents (projects), and comparables**

Answer: A of SCQA

“Sell it all today.” ... Well, you call the traders in for the normal 6:30 meeting and to **be honest with them**, because they're going to know it's the end either way. So, you're gonna have to **throw them a bone and a pretty big one.**

And then you've got to come out of **the gate storming, no swaps, no nothing, 40% done by 1015, by 11 o'clock all your trades have to be gone** because by lunchtime words going to be out. And by two o'clock you're going to be **selling at 65 cents on the dollar** if you're lucky. And then the **feds are going to slow you down.**

But John, even if we managed to pull that off and that's saying something. The real question is, **who are we selling this to?** Same people we've been selling it to for the last two years and whoever else would buy it. But John, if you do this you will **kill the market for years** it's over and you're selling something that you know has no value.

We are selling to willing buyers at the current fair market price. **So that we may survive.**

**You will never sell anything to any of those people ever again.**

47

47

How did I get my first training assignment with EY?

Jun 2017  
Document attached.

	A	B	C	D	E
1					
2	Client Name	Amt. INR	Customer Name	Amt. INR	
3	Titan Industries Ltd.	128,700	Mysore Mill Paper	14,566	
4	The Mysore Paper Mills Ltd	52,600	katha M India	51,244	
5	Mail SeaNav Pvt. Ltd.	82,900	Apjay Business Centre	1,223	
6	A.J. Finance Pvt Ltd	76,200	Bharti Teletech	4,311	
7	Bokahola Tea Co Pvt Ltd	148,100	G.N.B. Motors Ltd.	137,400	
8	Katha Mediatix India Ltd.	83,400	SKP Securities Ltd.	123,500	

Customer Name	Amt. INR	Client Name	Amt. INR	Similarity
Mysore Mill Paper	14,566	The Mysore Paper Mills Ltd	52,600	0.9126
katha M India	51,244	Katha Mediatix India Ltd.	83,400	0.5238
Apjay Business Centre	1,223	Apeejay Business Centre	146,500	0.9269
Bharti Teletech	4,311			0.0000

**Situation:** Two tables with same names but with spelling variation

**Complexity:** Functions such VLOOKUP, INDEX etc. will not work as they need exact spelling match. Most users SORT the data set on both sides and compare them manually. Estimated time can be anywhere between 5s to 20s per match. Even then, this process doesn't ensure completeness of work.

**Question:** How do I solve this problem with 50,000 rows of data on each table set?

48



# FAQs on SCQA

1. Do I need to use the exact terms of - Situation, Complication, Question, Answer - in my presentation? **No.**
2. Can SCQA be used for business reporting or is it only for problem-solving? **Yes.**
  - S = Provide the context of the report, including the time period covered and key areas of focus. *"This report covers our department's performance for July 2024."*
  - C = Highlight any challenges, changes, or notable events that occurred during the reporting period.
  - Q = Frame the main question(s) the report aims to answer. *"How did our department perform given these challenges, and what are our next steps?"*
  - A = Summary of key results, insights, and proposed actions. *"Despite challenges, we met 90% of our hiring targets. We propose intensifying our employer branding efforts to attract quality applications and improve our offer-to-hire ratio."*

49

49

# Training the AI for SCQA -

Training the model

**Here are the Details of SCQA Framework to be used in the future –**

*Situation - Refer to an event or a scenario for context.*

*Complication - So, what has changed? Quantify the problem in terms of time, money, delay, lost opportunity. Is there any - loss due to inaction or a deadline?*

*Question - Be specific while framing the question(s). Mention constraints, alternatives/options and their consequences*

*Answer - What do we finally do? Quantify the investment, resources and timeframe of implementing the solution. Give successful precedents (projects), and comparable benchmarks to justify your final recommendations.*

Using

**"Now, use SCQA framework to summarize this report. Make it detailed."**

50

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## Exercise on using the SCQA framework

Choose the text / PDF from one link –

- **[28 page report]** - [www.ey.com/content/dam/ey-unified-site/ey-com/en-gl/insights/energy-resources/documents/ey-gl-top-10-business-risks-and-opportunities-for-mining-and-metals-in-2025-09-2024.pdf](https://www.ey.com/content/dam/ey-unified-site/ey-com/en-gl/insights/energy-resources/documents/ey-gl-top-10-business-risks-and-opportunities-for-mining-and-metals-in-2025-09-2024.pdf)
- **[Shorter Blog]** [https://www.ey.com/en\\_lu/insights/wealth-asset-management/the-future-of-family-offices-a-look-ahead-to-2024](https://www.ey.com/en_lu/insights/wealth-asset-management/the-future-of-family-offices-a-look-ahead-to-2024)

51

51

## Exercise on using the 80/20 framework

Based on the 80/20 Principle, what 20% of concepts would give me 80% of the overall understanding of this report? Use the POV of a CFO

52

52

**Key Learning:**  
**Start reading about different frameworks.**

Ask better questions  
by framing them with the right context and  
test them using GenAI.

[53](#)

53

**MECE**

[54](#)

54

# Understanding Barbara Minto's MECE\* Concept

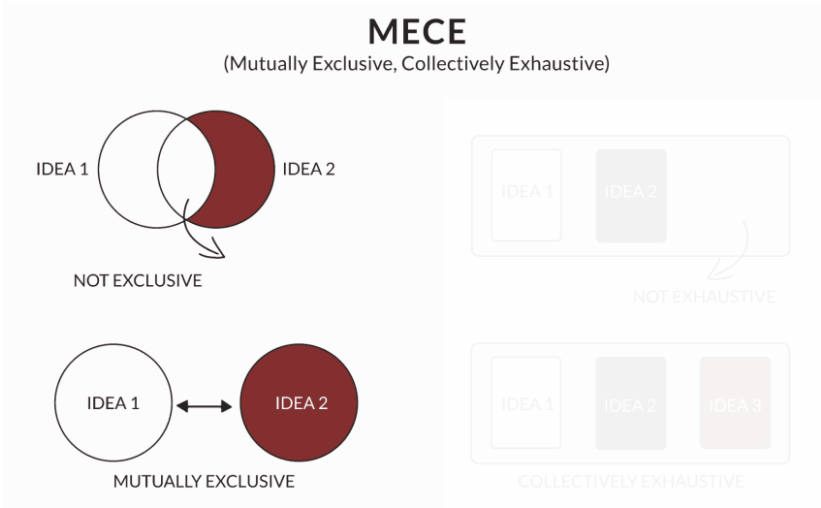


Image Source: [StrategyU](#)

**ME:** There is no overlap between sections that could cause ambiguity or confusion.

**Quick Practical Tip:** For an unavoidable overlap, declare the % of overlap.

**CE - Quick Practical Tip:** Collectively Exhaustive vs. Sufficiently Exhaustive

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55

# Understanding Barbara Minto's MECE\* Concept

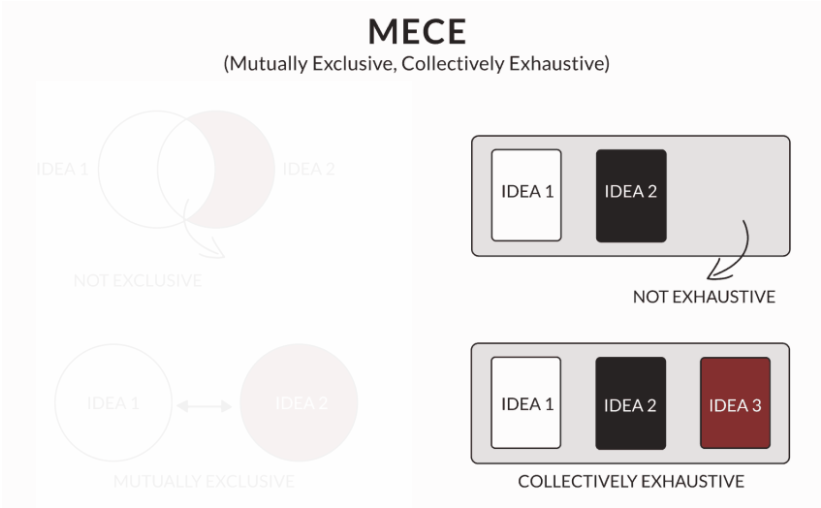


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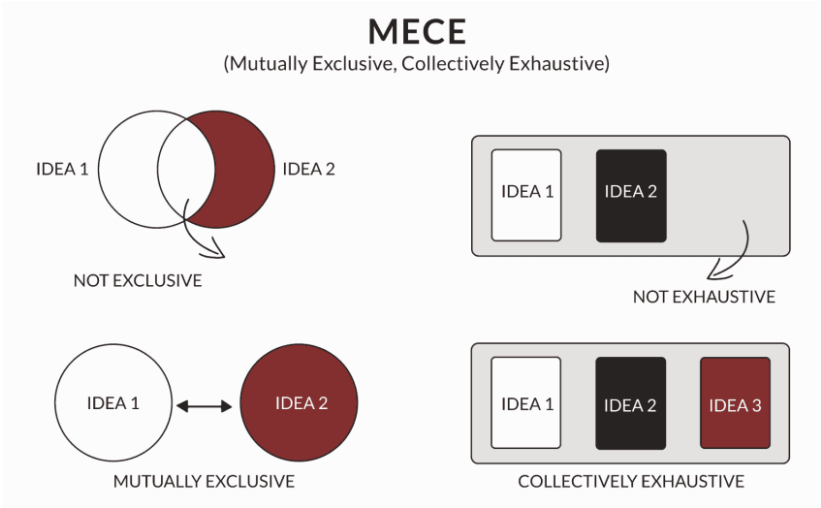


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**Quick Practical Tip:** For an unavoidable overlap, declare the % of overlap.

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57

## Exercise on MECE

Use MECE principle to Draft an SLA clause for a SAP HANA implementation project. Area: Response times.

Use MECE principle to draft an SLA clause for a SAP HANA implementation project. Area: Response times.

58

# Service Level Agreements (SLAs)

## Response Times:

*We will respond to any issues based on their severity, but critical issues will receive priority. Other issues will be handled as per the agreement.*

## versus Mutually Exclusive scenarios

*Critical issues (Priority 1) will have a **response time** of **30 minutes**. Priority 2, 3, and 4 issues will have respective response times of 1 hour, 4 hours, and 8 hours.*

***Priority 1 (P1)** is defined as "Complete system downtime."*

***Priority 2 (P2)** is defined as "Severe performance degradation impacting multiple users."*

***Priority 3 (P3)** is defined as "Moderate performance issues for a small group of users."*

***Priority 4 (P4)** is defined as "Minor issues that do not impact performance."*

59

59

# Service Level Agreements (SLAs)

**Priority 1 (P1)** is defined as "Complete system downtime."

**Priority 2 (P2)** is defined as "Severe performance degradation impacting multiple users."

**Priority 3 (P3)** is defined as "Moderate performance issues for a small group of users."

**Priority 4 (P4)** is defined as "Minor issues that do not impact performance."

But still, there could be **overlap**:

A **severe performance degradation (P2)** might be perceived by different teams as "almost system downtime" (P1), blurring the lines between these two categories.

A **moderate performance issue (P3)** affecting an entire department might be interpreted as a P2 issue, depending on how important the affected users are.

60

60

# Service Level Agreements (SLAs)

## Priority 1 (P1): Complete System Downtime

This is when the entire SAP HANA system is **completely inaccessible** to all users. It includes both planned and unplanned outages where the system is non-operational for any user across all locations.

## Priority 2 (P2): Significant Impact on Core Functions

This involves critical performance degradation that **significantly disrupts core business operations** for multiple users, but the system is still accessible (e.g., response time is unacceptably slow across key functions, but no total downtime). It applies only when the performance degradation affects more than 30% of users or key business functions such as finance, supply chain, or customer service.

## Priority 3 (P3): Moderate Impact on Secondary Functions

This is when there is performance degradation in **secondary business functions** (e.g., reporting tools, analytics) that affect a smaller group of users (less than 30%) or non-core business functions. It includes moderate delays or issues that hinder user experience but don't directly impact core processes or major business functions.

## Priority 4 (P4): Minor Issues with No Business Impact

This applies to **non-critical issues** (e.g., cosmetic errors in the UI, delayed report generation not affecting current operations) that **do not affect performance** or business continuity. It includes all minor bugs, usability issues, and requests for enhancements that do not disrupt business functions or operations.

61

61

# Using CE in day-to-day ops: Contract T&C

What's included in the scope?



What has not been considered, or **is out-of-scope**, or hasn't been **explicitly defined/discussed**?

The obvious is NOT obvious.



The realistic universe

**Additional Use Cases:** Terms & Conditions (T&C), Technical Proposals, Handbook

62

62

# Using MECE in giving brief or asking questions in the briefing stage

What's included in the scope?

+

What has not been considered, or **is out-of-scope**, or hasn't been **explicitly defined/discussed**?

The obvious is NOT obvious.

=

The realistic universe

63

63

# Without MECE

Your assertion.

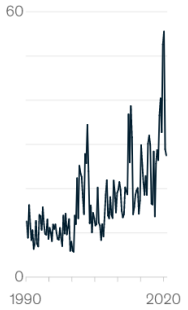


Disruption is becoming more frequent and more severe.

Why?



IMF World Uncertainty Index,<sup>1</sup> thousand



Global uncertainty has grown manifold since 2000

Source: McKinsey reports

64

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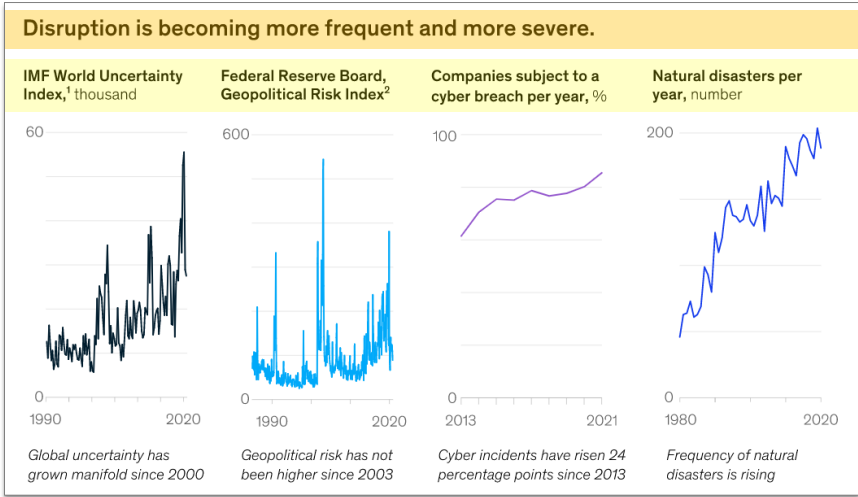
Using >1 perspectives to make a MECE argument

Your assertion.



Disruption is becoming more frequent and more severe.

Why? with >1 perspectives



Source: McKinsey reports

65

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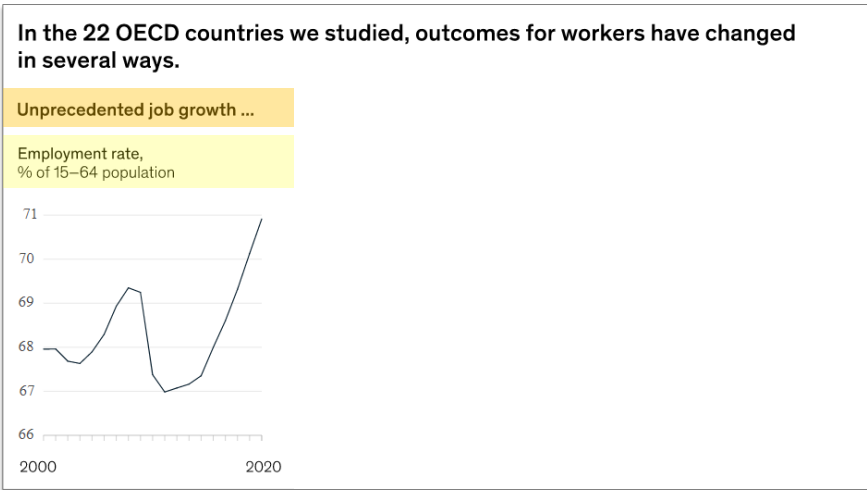
Using >1 perspectives to make a MECE argument

Your assertion.



Unprecedented job growth ...

Why?



Source: McKinsey reports

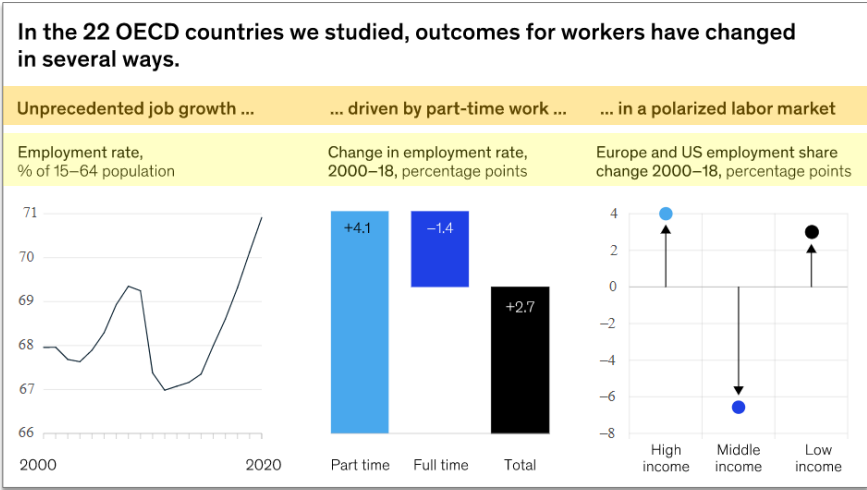
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# Using >1 perspectives to make a MECE argument

Your assertion. →

Why? with >1 perspectives →



67

67

# Using MECE in day-to-day ops: Chat / Emails

- [ME] One action = One Bullet point.
  - Add a sample action/option (e.g., \_\_\_) with a highlighted dash
- [MECE] Use sub-heading of [Pending from me] and [Pending from you] to list pending items

## Additional points:

1. Close-ended / With Condition vs. Open-ended asks
2. Context/Reason – Give the rationale or the impact of inaction
3. My understanding –
4. Not Urgent / Just FYI –

68

68

**Key Learning:**  
**Start reading about different frameworks.**

Ask better questions  
by framing them with the right context and  
test them using GenAI.

[69](#)

69

**Self Reference**

70

**Language is important too.**

71

**TACS**

Source: Wes Kao, Co-founder of Maven.com | [Link](#)

72

72

## The antidote to fluffy / generic content: Tactical, Actionable, Concrete, Specific (TACS)

- Tactical: "This isn't a generic idea I've heard a million times before"

- **Respect the intelligence of your audience.**
- Beware of the generic *"Shouldify"*
- Assume your audience understands, and quickly move on to the "how."
- If the "what" and "why" of your content isn't groundbreaking, you don't need to spend very long explaining it.

73

73

## The antidote to fluffy / generic content: Tactical, Actionable, Concrete, Specific (TACS)

- Tactical: "This isn't a generic idea I've heard a million times before"
- Actionable: "I can put it into practice and apply it to my own work"

- Your audience should learn something they can put into practice.
- See existing problems with a new lens / POV.
- Ask better questions, and in the right direction.

74

74

## The antidote to fluffy / generic content: Tactical, Actionable, Concrete, Specific (TACS)

- Tactical: "This isn't a generic idea I've heard a million times before"
- Actionable: "I can put it into practice and apply it to my own work"
- Concrete: "This can be observed and measured--not just theory"

- Give examples of precedents or show what "great" looks like.
- "See – it's already been done"

75

75

## The antidote to fluffy / generic content: Tactical, Actionable, Concrete, Specific (TACS)

- Tactical: "This isn't a generic idea I've heard a million times before"
- Actionable: "I can put it into practice and apply it to my own work"
- Concrete: "This can be observed and measured--not just theory"
- Specific: "This is precise advice for a particular situation"

- *"Communication skills are important for product managers"* - Super obvious, nothing new, and too vague. Instead...
- *"How to communicate when you don't have positional authority"*
- *"How to keep your CEO informed with the right level of detail"*

76

76



Storytelling Style vs. Direct (no-fillers)

In 2021, India was in the spotlight with its FinTech achievements that echoed the global momentum in this industry. India is the third largest FinTech market, following the US and the UK, with several FinTech unicorns, startups, and funding. EY and Chiratae's recent study shows that the next decade will record a 10x growth in the India FinTech market to achieve \$1 trillion in AUM and \$200 billion in revenues. Apart from the COVID-19 lockdowns as an unexpected but critical push for digital adoption in financial services, several other factors continue to contribute to the FinTech's growth story. These factors include reliable and fast computing power of handheld devices, faster and widespread internet access, and the government's push for a digital economy. In addition, increased demand for inclusive financial services, customer expectations, and hyper-competitive financial services market underpins the rise and growth of FinTech.

~140 words

In 2021, India became the world's third-largest FinTech market, behind the US and UK. This growth was driven by:

- 1. COVID-19 lockdowns pushing digital adoption
- 2. Improved smartphone capabilities
- 3. Faster, more widespread internet access
- 4. Government support for a digital economy
- 5. Demand for inclusive financial services
- 6. Changing customer expectations
- 7. Intense competition in financial services

A study by EY and Chiratae predicts India's FinTech market will grow tenfold in the next decade, reaching \$1 trillion in AUM and \$200 billion in revenue.

~80 words

Source: [https://assets.ey.com/content/dam/ey-sites/ey-com/en\\_in/topics/consulting/2022/ey-winds-of-change-india-fintech-report-2022.pdf](https://assets.ey.com/content/dam/ey-sites/ey-com/en_in/topics/consulting/2022/ey-winds-of-change-india-fintech-report-2022.pdf)

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77



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~140 words

**Simplify this writing. No fluff.**  
**Re-write this for busy online readers who skim.**  
**Improve the readability score.**

In 2021, India became the world's third-largest FinTech market, behind the US and UK. This growth was driven by:

- 1. COVID-19 lockdowns pushing digital adoption
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78

78

# Exercise on TACS

1. Train the Model with the TACS framework & Negative Word list –
  - <https://maven.com/resources/tacs-approach-to-engaging-content>
  - [medium.com/@rpugalia/how-observing-patterns-allowed-me-to-do-the-task-of-4-writers-b7cc068349e0](https://medium.com/@rpugalia/how-observing-patterns-allowed-me-to-do-the-task-of-4-writers-b7cc068349e0)
2. Go to this EY report link - [https://assets.ey.com/content/dam/ey-sites/ey-com/en\\_in/topics/consulting/2022/ey-winds-of-change-india-fintech-report-2022.pdf](https://assets.ey.com/content/dam/ey-sites/ey-com/en_in/topics/consulting/2022/ey-winds-of-change-india-fintech-report-2022.pdf)
3. Use the trained model on a selection of text.
4. Bonus Tip: Improve Readability Score, Word limit.

79

79

# Remember: GenAI is “context-hungry”. A few tips on Prompt-Framing -

## 1. Context – Why you need this or where will you use this?

*“The questions should be framed to **test the logical ability** of the test taker and IF he / she has really **applied those techniques**.”*

## 2. Inclusions –

*“Include different types of videos include but **are not restricted to** product demo, explainer, customer testimonials, software updates, podcast summary, user generated content, user reviews, event videos, expert interviews, etc.”*

## 3. Conditions –

*“Create a hook line that’s **controversial but not offensive** to the recipient.”*  
*“Keep the email length **within 100 words**.”*

## 4. Exclusions –

*“The questions should **not** focus on 1) Shortcuts, 2) Where is this button located.”*

C+C-

80

80



# 80-20

81

81

## Exercise on using the 80/20 framework

Tell me more about - ESG Reporting in India. The Target Audience is - listed companies CFO

Based on the 80/20 Principle, what 20% of concepts would give me 80% of the overall understanding? Topics - ESG Reporting in India and the Target Audience is - listed companies CFO

82

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# Reliability & Validity

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## What makes your data and its analysis - reliable? valid?

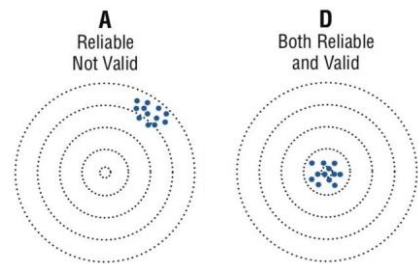


Image Source: Juice Analytics

**Reliability** refers to how consistently a method measures something. If the same result can be consistently achieved by using the same methods under the same circumstances, the measurement is considered reliable.

**Validity** refers to how accurately a method measures what it is intended to measure.

... AND WHY ARE WE DISCUSSING THIS?

84

84

**What makes your data and its analysis - reliable? valid?**

**INDICATIVE CHECKLIST TO DO SOME QUICK CHECKS-**

- 1. Reconcile the sum totals or count – Source(s) of Data vs. Report
- 2. Use two sources or/and methods to arrive at the same result
- 3. Check for any possible overlaps or double-counting? [Refer to Cartesian product]
- 4. Back-test the logic (from result to the original data points)
  
- 5. Compare with benchmarks and ratios (comparable and precedents)
  - a) Total break-up of cost of orientation per person per day – LY vs CY
- 6. Correlation such as Energy Units consumed vs. Production Nos.
- 7. Complex Correlation such as -
  - a) How many people who completed the "New Manager Programs" left within 6-12 months of the program?
  - b) Any correlation between assessment and engagement score of new recruits vs. them not joining on the first day?

**AIM: A central source of truth**

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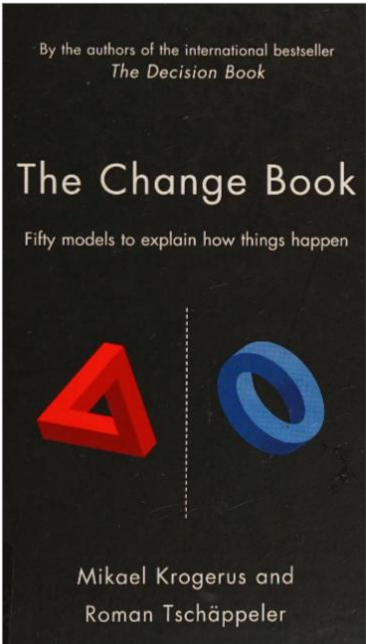
**Self Reference**

86

# Converting a few line strokes into simple frameworks

87

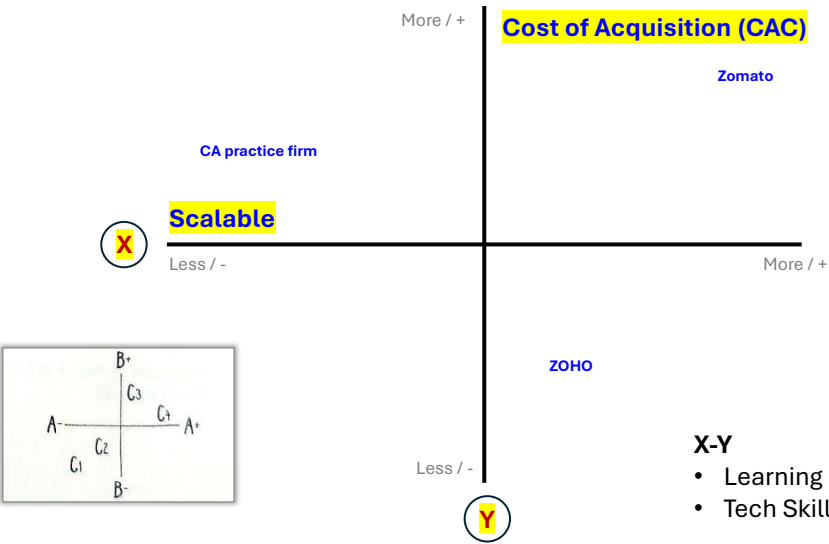
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Pole Model or X-Y (Scatter) for trade-off analysis



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Comparing solutions

	A	B
C	AC	BC
D	AD	BD

Parameters for comparison

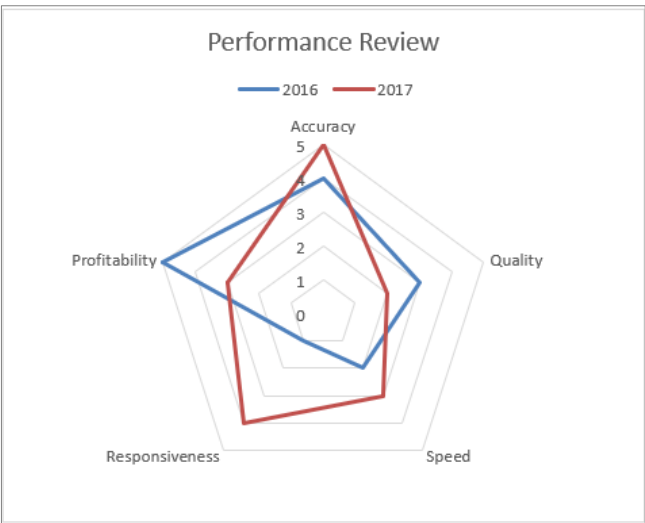
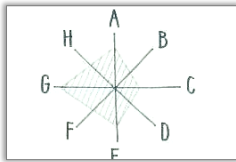
Compare Adobe Creative Suite 4 editions						
	Design Premium	Design Standard	Web Premium	Web Standard	Production Premium	Master Collection
	US\$1,799	US\$1,399	US\$1,699	US\$999	US\$1,699	US\$2,499
✓ COMPONENTS						
<input type="checkbox"/> Adobe® InDesign® CS4	•	•			•	•
<input type="checkbox"/> Adobe Photoshop® CS4 Extended	•		•		•	•
<input type="checkbox"/> Adobe Photoshop CS4		•				•
<input type="checkbox"/> Adobe Illustrator® CS4	•	•	•		•	•
<input type="checkbox"/> Adobe Acrobat® 9 Pro	•	•	•			•
<input type="checkbox"/> Adobe Flash® CS4 Professional	•		•	•	•	•
<input type="checkbox"/> Adobe Dreamweaver® CS4	•		•	•		•
<input type="checkbox"/> Adobe Fireworks® CS4	•		•	•		•
<input type="checkbox"/> Adobe Contribute® CS4			•	•		•
<input type="checkbox"/> Adobe After Effects® CS4					•	•
<input type="checkbox"/> Adobe Premiere® Pro CS4*					•	•
<input type="checkbox"/> Adobe Soundbooth® CS4			•		•	•
<input type="checkbox"/> Adobe OnLocation™ CS4*					•	•
<input type="checkbox"/> Adobe Encore® CS4*					•	•
						US\$699
						US\$999
						US\$699
						US\$699
						US\$449
						US\$699
						US\$399
						US\$299
						US\$199
						US\$999
						US\$799
						US\$199

(c) Yoda Learning Solutions

90

90

**Symbols: Comparing differences (law, solutions)**



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91

91

1. Triangle

How or why are A, B and C connected?

2. Pie chart

What proportions of A and B make C?

3. Circle diagram

A is followed by B is followed by C, then it starts again with A.

4. Cause-and-effect chain

Results from B and B from A.

5. Flowchart or family tree

Flowchart: If A, then B or C.  
Family tree: A results in B, and A results in C.

6. Mind map

From A, I think B and C.  
From B I think B1, B2, B3.

7. Concentric circles

A is part of B is part of C.

8. Venn diagram (set diagram)

Similarities between A and B, B and C, C and A and A, B and C.

9. Force-field analysis

A contradicts B. C agrees with B.

10. Line chart

The horizontal axis indicates time (t), the vertical axis value (A). B and C show progression (bell curve, exponential curve, hockey stick etc.)

92

92

### 11. Two-dimensional axis model (Cartesian coordinates)

The A and the B axes have different parameters. The C curve shows a possible relationship between the two. Alternative: 4-field matrix. In this case, positions are shown instead of curves.

	$C_2$	$C_1$
$A^+$		
$A^-$	$C_1$	$C_3$
	$B^-$	$B^+$

### 12. Three-dimensional axis model

A third parameter, the C axis, is added to the axes A and B. Different values can be entered in the coordinates system.

### 13. Pole model

The parameters oppose each other: black-white or right-left. Various positions can be represented.

### 14. Radar chart or 'spider'

Shows several parameters and their characteristics. Taken together, results in a distinctive shape. Good for comparisons.

### 15. Table

For lists and combinations of A, B, C and D.

	A	B
C	AC	BC
D	AD	BD

### 16. Funnel

A and B and C make ... ?

### 17. Bridge

How do we get from A to C if B is an obstacle?

### 18. Iceberg

What forms the basis of A? What is visible? What is invisible?

### 19. Pyramid

Who tells C what it has to do? Or how does A legitimise its position?

### 20. Tree

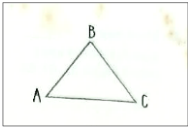
B and C grow out of A.

93

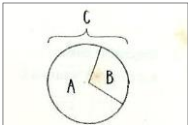
**Here's an explanation of each framework in about 50 words each -**

Group A -

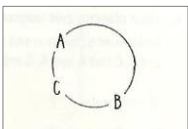
**Triangle:** Illustrates the relationship between three interconnected elements or concepts. It can show balance, trade-offs, or how three factors influence each other. Useful for analyzing situations where three key components are in play, such as project management's time-cost-quality triangle.



**Pie chart:** Visually represents proportions of a whole, divided into sectors. Each sector's size corresponds to its percentage of the total. Effective for showing composition of a dataset, market share, or budget allocation. Allows quick comparison of relative sizes.



**Circle diagram:** Depicts a cyclical process or recurring sequence of events. It shows how elements follow each other in a continuous loop, emphasizing the ongoing nature of a process. Useful for illustrating life cycles, continuous improvement processes, or recurring business operations.

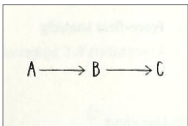


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Group B -

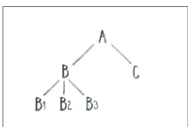
**Cause-and-effect chain:** Demonstrates how one event or action leads to another in a linear sequence. It shows the progression of consequences, helping to understand the flow of impacts in a system.



**Flowchart/Family tree:** Flowcharts show step-by-step processes or decision paths. Family trees represent hierarchical structures or relationships. Both use shapes and lines to illustrate connections and flows. Useful for mapping out procedures, organizational structures, or genealogical relationships.



**Mind map:** Organizes information visually around a central concept. Main ideas branch out from the center, with subtopics and details extending further. Facilitates brainstorming, note-taking, and understanding complex topics by showing relationships between ideas.



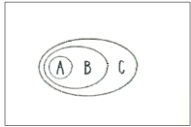
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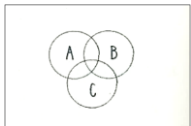


Group C -

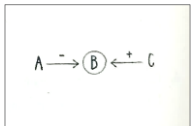
**Concentric circles:** Represents nested concepts, levels of influence, or hierarchical relationships. The innermost circle typically represents the core or most important element, with outer circles showing increasingly broader or less central concepts. Useful for illustrating organizational structures, market segmentation, or levels of impact. Alternatively, A is a subset of B, B is a subset of C.



**Venn diagram:** Uses overlapping circles to show relationships between different sets or categories. Areas of overlap represent shared characteristics or elements. Effective for comparing and contrasting and identifying commonalities and differences.



**Force-field analysis:** Compares factors driving change (helping forces) against factors resisting change (hindering forces). Helps in decision-making by visually balancing positive and negative influences. Useful for change management, problem-solving, and strategic planning by identifying areas to strengthen or weaken.

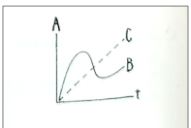


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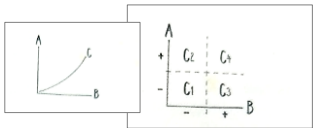
97

Group D -

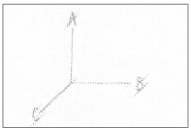
**Line chart:** Tracks changes in data over time or another continuous variable. Multiple lines can show comparisons between different data sets. Useful for visualizing trends, patterns, and relationships in quantitative data over a period, such as stock prices, temperature changes, or sales figures.



**Two-dimensional axis model:** Plots items or concepts based on two variables, typically using X and Y axes. Allows visualization of relationships, distributions, or comparisons across two dimensions. Useful for positioning analysis, scatter plots, or creating quadrant models for strategic decision-making.



**Three-dimensional axis model:** Extends the 2D model by adding a third axis, allowing for more complex analysis. Visualizes relationships across three variables simultaneously. Useful for advanced data analysis, product positioning, or illustrating complex interrelationships in strategy or science.

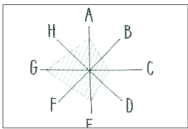
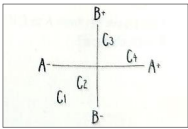


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Group E -

- Pole model:** Contrasts opposing concepts or extremes on a continuum. Positions items between two poles to show relative alignment or tension between contrasting ideas. Useful for analyzing trade-offs, comparing strategies, or illustrating spectrums of thought or action.
- Radar chart:** Compares multiple variables simultaneously by plotting them on axes starting from the same point. Creates a distinctive shape that allows quick visual comparison across several dimensions. Useful for performance analysis, comparing products, or assessing skills and competencies.
- Table:** Organizes information into rows and columns for easy reference and comparison. Can display numerical data, text, or a combination. Useful for presenting detailed information systematically, allowing for quick lookup and comparison across multiple categories or attributes.



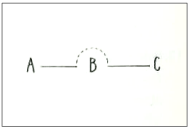
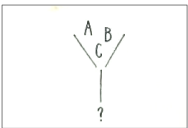
	A	B
C	AC	BC
D	AD	BD

99

99

Group F -

- Funnel:** A & B & C make ...
- Bridge:** Visualizes the transition between two states or concepts, highlighting the steps or challenges in moving from one to the other. Useful for change management, project planning, or illustrating how to overcome obstacles to reach a goal.
- Iceberg:** Contrasts visible aspects (above water) with hidden or underlying factors (below water). Emphasizes that what's easily observable may be only a small part of the whole picture. Useful for analyzing problems, cultures, or systems where significant factors are not immediately apparent.

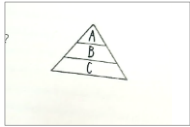


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# Group G -

**Pyramid:** Represents hierarchical structures or prioritized elements. Typically shows foundational elements at the base, with increasingly specific or important items towards the top. Useful for illustrating organizational structures, strategic priorities, or hierarchies of needs.



**Decision-Tree Tree (By-Products or Derivatives):** B & C grow out of A



101

101

What context is your audience operating from?

102

102

## Understand your audience better. Look for patterns -

### What is the user's context?

- Targets
- Constraints
- Need to stay updated
- Comparing X vs. Y / LY vs. CY
- Trade-offs

### What is the user's general direction?

- If no deviation, continue (All should be in order)
- Major overhaul or Clean Slate (Transformation)
- Are we missing something (FOMO)
- Continuous / Incremental Improvement

103

103

## Understand your audience better. Look for patterns – (...cont'd)

- Is everything in order?
- What-if analysis
- Looking for success areas to double-up?
- What are the micro-level activities that bring disproportionate outcomes? Any risk?
- What needs to decrease / increase?
- Am I missing something that I am not supposed to?
- What's the ongoing trend amongst our peers?

104

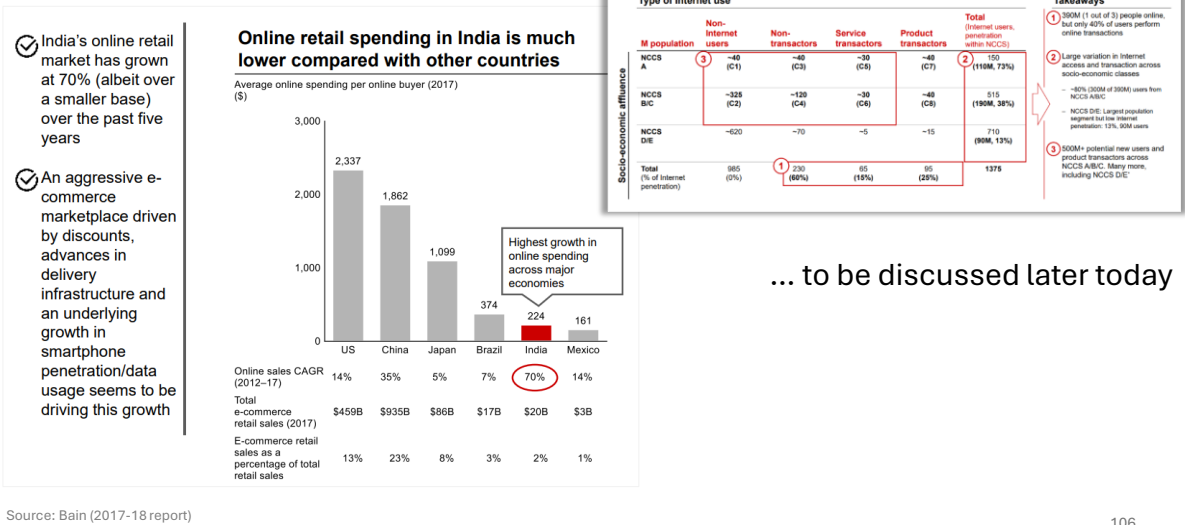
104

What do I compare it with?

- LY vs CY - This is what happened last time in similar situations.
- Planned vs. Actual
- Inter-buckets:
  - Time window,
  - Groups,
  - Location,
  - Division, etc.

105

Readers prefer a balance of all – Numbers, Visuals, & Narrative



106

**End of Slides**

107