

Storytelling with data

As a storytelling device, tension is powerful. It catches people's attention, makes them curious and invested in both what has happened before and what might be coming next. As the tension builds, so does their engagement, as the narrative drives towards a climactic moment. By then, the audience is desperate to know: how will this be resolved? What's going to be the outcome? Will the ending I hoped for actually come to pass?

You shouldn't need to manufacture false tension to accomplish this. "Tension" in this case refers to any kind of imbalance that we can make our audience aware of.

Sometimes, it might be tension of **knowledge**, e.g.:

- *Before we did our study, we thought that A was the optimal solution, but after we did our analysis, we realized that, actually, B would be preferable to A.*
- *We've built new models that predict a very concerning trend, and leadership needs to incorporate this into their strategic plan.*

Or perhaps, there may be tension of **importance**:

- *We've been treating Acme Corp as our primary competitor in this space, but our competitive intelligence tells us that new products will be entering the market soon.*
- *Our employee retention program has focused on improving professional development opportunities and profit sharing. In some parts of the organization, this is the preferred approach, but our retention challenges are now shifting to other areas, where employees value different benefits.*

There could be other kinds of tension, also: **action** (what, if anything, should we do about the information we now have?); **urgency** (how critical is it that we should act now?); **meaning** (what do these findings imply?); and many others.

Today, you'll explore different ways to incorporate tension into a specific data communication.

In this scenario, you work for a local manufacturing and wholesaling organization. Last year the company developed a brand new product with tremendous potential. It went on sale last year through retail partners, and the initial response from customers was quite positive. The original projection was for a steady increase in monthly sales volume throughout this year. Up through May, sales were growing roughly in line with expectations. From then until the end of Q3, growth has faltered and stagnated, requiring an update to projections for Q4.

Spend some time reviewing the data below, then complete the following steps.

QUARTER	MONTH	SALES VOLUME	ORIGINAL PROJECTION	UPDATED PROJECTION	COMPETITOR UNITS SOLD
Q1	JAN	2,200	2,400		
	FEB	3,700	4,000		
	MAR	5,000	5,100		
Q2	APR	6,000	6,900		
	MAY	7,400	7,900		
	JUN	6,400	9,300		500
Q3	JUL	5,400	10,800		1,100
	AUG	5,300	11,900		1,900
	SEP	5,700	13,400		3,600
Q4	OCT		14,500	6,400	5,300
	NOV		15,700	6,300	7,000
	DEC		17,100	6,500	8,300

Step 1: Prepare and visualise data

Download the data (swdexercise.xlsx) and graph it in whatever way you feel would most effectively communicate the key elements of this scenario.

For the remaining steps, you'll be using various techniques to incorporate tension into your data communication. To that end, you may want to include some or all of the following pieces of contextual information about this scenario:

Our product is available only in stores, from our retail partners.

Online reviews of the competitor product call it cheaply made but adequate.

Most of our advertising was co-branded with Regional Supply Company.

Customer feedback surveys describe our product as easy to use, feature-rich, and filling a gap in the market.

Our competitor launched a comparable product in June.

Our largest retail partner, Regional Supply Company, unexpectedly went bankrupt on May 31.

Original sales projections were based on the assumption that we were the only product in the marketplace.

We review our sales volume numbers monthly, but major changes in strategy are decided at a quarterly leadership meeting.

Our advertising budget was cut by 70% on June 1.

Our competitor has a partnership with The Depot, a national retailer.

Our product's suggested retail price is about 7% higher than our competitor's.

The competitor's product is available in stores and online through The Depot's marketplace.

Step 2: What outcome do you want?

Imagine that you are charged with developing a report about the status of our new product, to be presented at the quarterly leadership meeting in October. What would a successful outcome of that meeting be? What recommendations would you make to the leadership team? Make some notes for yourself.

Step 3: Create tension

Consider each additional piece of context above through the lens of how it might be used in your leadership meeting presentation. Is it essential, incidental, or irrelevant? How could it create tension? Should it be shown alongside/in contrast with something else, or can it be ignored entirely? Write down the information you plan to include in your final communication, and organize it into a storyboard or timeline. As you progress through the story, the tension should build, up until the point when you provide your resolution: the recommended actions the company should take to achieve the best possible outcome.

Step 4: Create a presentation

When you are satisfied with the story you've created, revisit the graph you created in Step 1. Using words, annotations, markers, labels, and/or animation, revise and augment your visual to include the elements of narrative tension you used in Step 3. The final, **single-slide** version of your communication should make the tension and your suggested resolution clear for the leadership team, even if you are not there to talk them through the narrative in person.

Be prepared to present your solution to the group!