**Session 4 Handout Materials**

**Data Visualization for Executive Decision Making**

**Executive Dashboard Quality Checklist**

*Keep this handy for evaluating dashboards and reports*

**The 30-Second Assessment:**

**✓ Strategic Relevance Test**

* Does this connect to decisions I need to make this quarter?
* Are these strategic KPIs or operational metrics?

**✓ Exception Focus**

* Do I immediately see what requires my attention?
* Are performance issues highlighted with color/size/position?

**✓ Trend Clarity**

* Can I understand the direction and pace of change?
* Are trend lines clear with appropriate time horizons?

**✓ Context Provision**

* Do I have enough background to interpret these numbers?
* Are targets, benchmarks, and historical comparisons provided?

**✓ Action Enablement**

* Does this point toward specific next steps?
* Can I identify what decisions this analysis supports?

**Red Flags to Reject:**

* Operational metrics masquerading as strategic insights
* Charts without clear takeaways or implications
* Data dumps without narrative or prioritization
* Beautiful visualizations that don't answer business questions

**Executive Reading Method**

*Your 2-minute framework for consuming complex visualizations*

**Step 1: Scan for Exceptions (10 seconds)**

* What's performing unusually high or low?
* What immediately catches your attention?

**Step 2: Identify Trends (20 seconds)**

* What direction are key metrics moving?
* What's the pace of change?

**Step 3: Assess Implications (30 seconds)**

* What strategic questions does this raise?
* How does this connect to our strategic objectives?

**Step 4: Determine Actions (60 seconds)**

* What do I need my team to investigate?
* What decisions does this analysis support?
* What additional analysis should I commission?

**Remember:** Speed and strategic focus are more valuable than analytical perfection.

**Strategic Questioning Framework**

**Level 3 - Strategic Questions (Your Primary Focus):**

* "What decisions does this analysis support?"
* "How does this connect to our strategic objectives?"
* "What are we not seeing in this view?"
* "What strategic capabilities would we need to build?"
* "How does this change our competitive positioning?"

**Level 4 - Action Questions (Your Ultimate Goal):**

* "What are the implications if this trend continues?"
* "What scenarios should we model?"
* "What would change our interpretation of these results?"
* "What early indicators would tell us if our strategy is working?"
* "What competitive responses should we anticipate?"

**Questions to Avoid in Executive Settings:**

* "What does this metric measure?" (Level 1)
* "How current is this data?" (Level 1)
* "What methodology did you use?" (Level 2)
* "How reliable is this data?" (Level 2)

**Key Principle:** Your questions shape your team's analytical thinking. Strategic questions produce strategic analysis.

**Executive Brief Template**

*Use this framework to commission better analysis*

**Business Context:** [Why this analysis matters now - 1-2 sentences]

**Strategic Question:** [The specific decision this analysis should support - 1 clear sentence]

**Decision Timeline:**

* [Date]: Preliminary insights for [specific meeting/decision]
* [Date]: Complete analysis for [specific use]

**Success Criteria:** [What a successful analysis should deliver - bullet points]

**Analysis Boundaries:** [What to include and exclude - be specific]

**Resource Authorization:** [Team members, budget, external resources if needed]

**Example Opening:**

"Grace Kennedy's board will review our 2025 resource allocation strategy at the December meeting. We need to determine optimal investment distribution across divisions given our 2026 growth targets and current market dynamics..."

**Executive Narrative Framework**

*Your structure for strategic presentations*

**1. Context Setting (30 seconds)**

* Current strategic position
* Why this analysis matters now
* Connection to strategic objectives

**2. Key Strategic Insights (2 minutes)**

* The 2-3 most important findings
* What's different from expectations
* Critical patterns or exceptions

**3. Strategic Implications (2 minutes)**

* What this means for competitive position
* Impact on strategic objectives
* Resource allocation implications

**4. Recommended Actions (3 minutes)**

* Specific next steps with timeline
* Resource requirements
* Success criteria and metrics

**5. Expected Outcomes & Risk Mitigation (2 minutes)**

* Projected business impact
* Key risks and management strategies
* Monitoring and adjustment plan

**Total Time:** 10 minutes maximum for board presentations

**Board Communication Do's and Don'ts**

**DO:**

* **Lead with conclusions:** Start with your recommendation
* **Use data to support, not lead:** Data validates strategic thinking
* **Address uncertainty confidently:** "70% probability with mitigations for downside"
* **Connect to strategic priorities:** Link every insight to approved objectives
* **Drive to decisions:** End with clear next steps and commitments

**DON'T:**

* **Lead with methodology:** Board cares about implications, not process
* **Overwhelm with data:** Choose the most compelling evidence
* **Ignore uncertainty:** Acknowledge limitations and risk scenarios
* **Present without recommendations:** Strategic synthesis is your value-add
* **End without next steps:** Board expects clear action commitments

**Executive Development Action Plan**

**Immediate (Next 30 Days):**

* [ ] Apply dashboard checklist to all current reporting
* [ ] Rewrite one analytical brief using the executive framework
* [ ] Practice Level 3 and 4 questions with your analytical team
* [ ] Review one strategic presentation using the narrative framework

**Medium-term (Next 90 Days):**

* [ ] Establish quality standards for analysis presented to you
* [ ] Train your team on strategic communication expectations
* [ ] Implement executive reading method for all complex visualizations
* [ ] Practice board-level presentations with leadership team

**Long-term (Next 6 Months):**

* [ ] Build capability to rapidly assess analytical quality
* [ ] Develop reputation for sophisticated analytical leadership
* [ ] Create organizational standard for strategic analysis quality
* [ ] Mentor other executives in data-driven strategic communication

**Key Takeaways Summary**

**Your Role Transformation:**

* **From:** Passive consumer of whatever analysis you receive
* **To:** Active commander of analytical resources for strategic value

**Core Capabilities Developed:**

1. **Sophisticated Consumption:** Rapidly assess visualization quality and extract strategic insights
2. **Intelligent Direction:** Commission analysis that supports strategic decisions
3. **Strategic Synthesis:** Transform analytical insights into compelling executive narratives

**Competitive Advantage:**

Most executives accept whatever analysis their teams provide. You now actively direct analytical resources toward strategic value creation, transforming you from a consumer of reports into a commander of insights.

**Application Priority:**

Your financial and strategic expertise hasn't changed. Your ability to leverage analytical resources to enhance that expertise has been dramatically upgraded.

**Remember:** Speed, strategic focus, and confident decision-making are more valuable than analytical perfection.