

Storytelling with Data

Module 4: Principles of persuasion and brief proposals

Scott Spencer

Faculty and Lecturer
Columbia University

What we've discussed so far

Knaflic's *Storytelling with data*

Understand data context
Choice of appropriate visual display
Eliminate clutter
Focus audience attention
Think like a designer
Tell a story

Technical audience, employee
Example 250-word memo
Dodgers, game decisions should optimize expectations
background > goals > problem > data > method > impact

Adapt to your audience
Doumont's *Trees, Maps, Theorems*
Messages, not just information

Identifying events,
Citi Bike, user behaviors
example case studies
Measurements of events and behaviors

be concise, every word tell
Strunk & White's
The Elements of style
overstatements diminish credibility

Columbia University
The Writing Center

TL;DR

Spencer's
Scoping a data analytics project
decisions > goals and actions >
methods > data

step into their shoes!
CAO, CMO, CEO

beyond the minimum

background > goals > problem > method > impact
Example **Jakarta** proposal
Improving traffic safety through video analysis
Technical audience, not employee

complexity last

Booth's
Revising style

old before new

ING's **General audience**
The Next Rembrandt

Getting to storytelling with data



Agenda

Next deliverable – brief proposal

Today's objectives

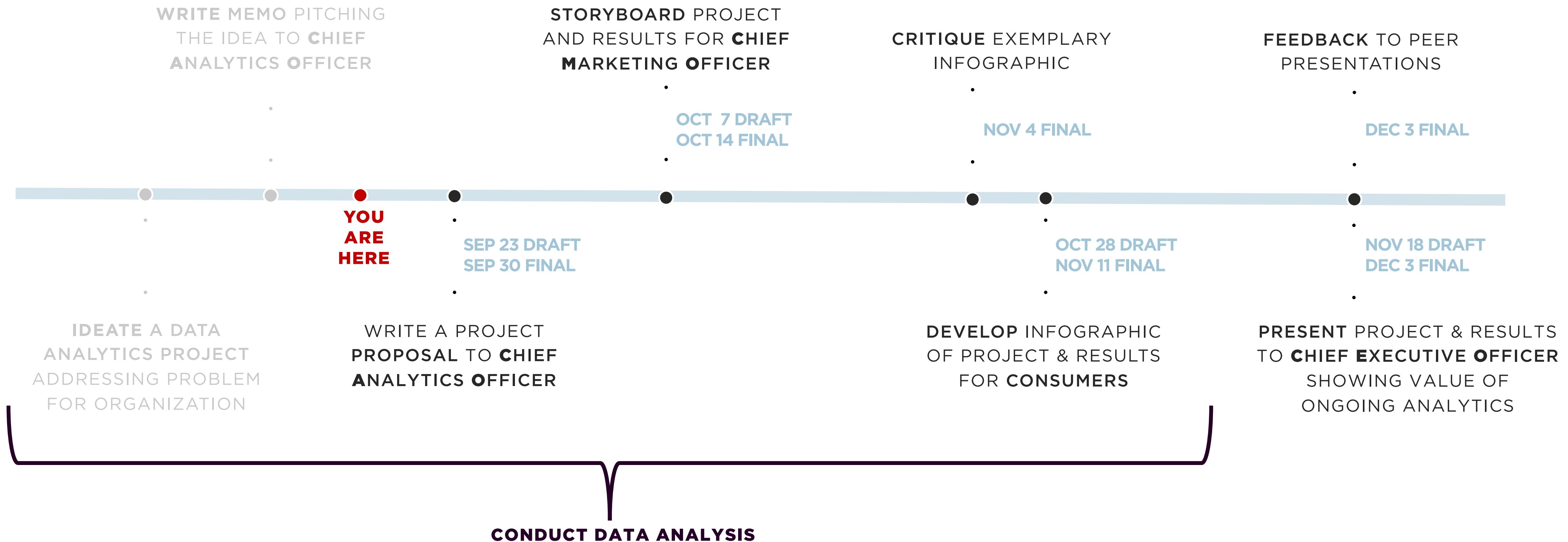
Perspectives on persuasion

Comparison, metaphor, patterns

Next deliverable

Upcoming deliverable

750-word brief proposal – Write a brief proposal to **CAO** detailing your proposed analytics project. Consider background context, problem, data, solution, and impact. At this point you should have data to start an analysis.



Today's Objectives

Objectives

1

Explain the role of persuasion in getting buy-in for analytics projects.

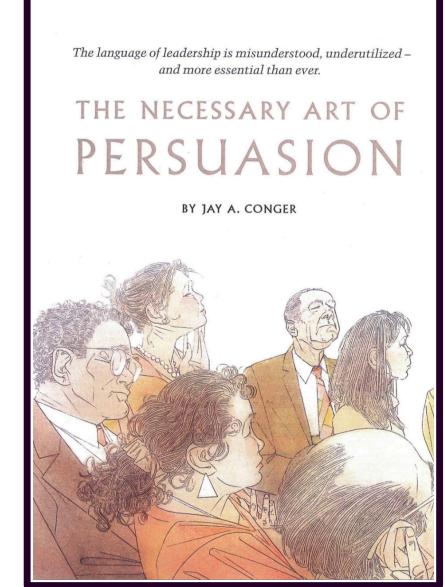
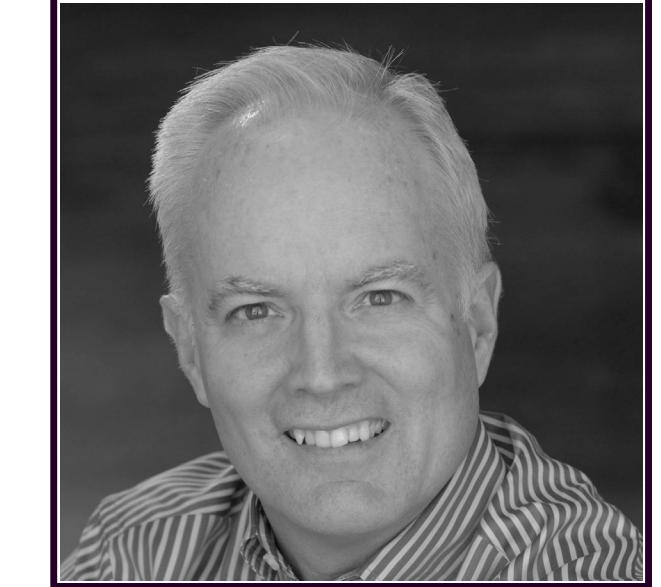
2

Explain the role of persuasion in implementing analytic insights.

3

Employ tools and techniques taught in class to persuade technical and non-technical audiences.

Perspectives on persuasion



Necessary art of persuasion

Conger

Conger is an executive educator, coach, and program designer who teaches leadership to companies and individuals.

Persuading involves four steps

Establish credibility

First assess your credibility—your knowledge about the strategy, product, or change proposed—by **self reflection** and **asking others**.

Fill in gaps: gain knowledge; cite outside sources; demonstrate the proposal by starting smaller.

Find common ground

Study the issues with colleagues; **think through their arguments, evidence, and perspectives**. Address or include them, making your proposal something shared.

Combine evidence with story, metaphor

Numerical evidence should be **supplemented with** “examples, stories, metaphors, and analogies” to enliven your proposal. This is particularly helpful when presenting **comparable situations** to the one under discussion.

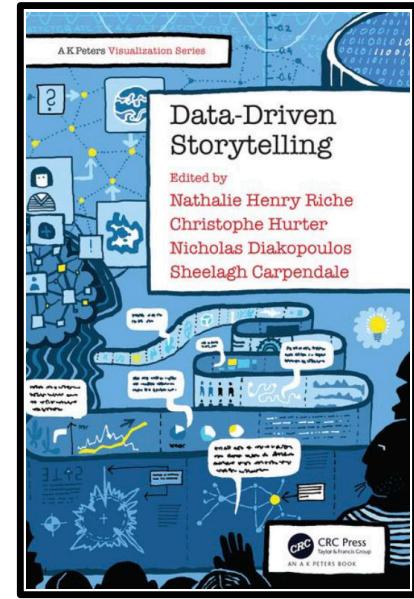
Connect emotionally

Understand how your audience feels on the issues, and recognize—even share—their feelings. Empathize.

Narrative Design Patterns for Data-Driven Storytelling

Riche, co-editors

The editors are researchers and professors with focuses on human-computer interaction and information visualization.



Classical devices of rhetoric

The classical devices of rhetoric involve **logos** (reason, word), **ethos** (character, ideal), and **pathos** (experience, emotion).

Rhetoric in data-driven stories aim for truth, connect

Though we believe the ultimate **goal of data-driven storytelling is to communicate truth** (most closely to logos), there are traces of both **pathos**, and **ethos in every story, which help connect the narrator with the audience.**

Patterns for argumentation

Argumentation is the action or process of reasoning systematically in support of an idea, action, or theory. Patterns for argumentation serve the intent of persuading and convincing audiences.

Narrative Design Patterns for Data-Driven Storytelling

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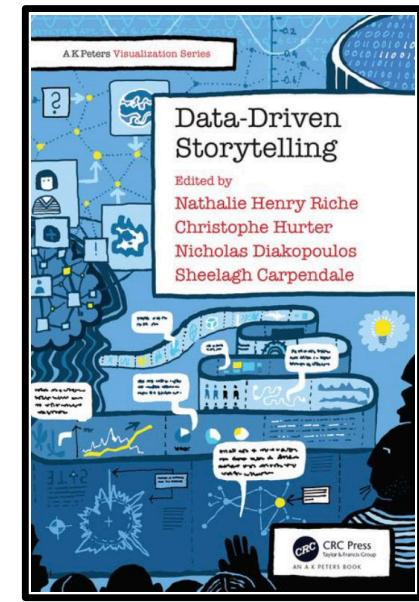
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Compare

Comparison allows the narrator to make the point about equality of both data sets, to explicitly highlight differences and similarities, or to give reasons for their difference.

TODO: Example



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Concretize

Shows abstract concepts with concrete objects. Concretization usually implies that each data point is represented by an individual visual object (e.g., a point or shape), making them less abstract than aggregated statistics.

TODO: Example

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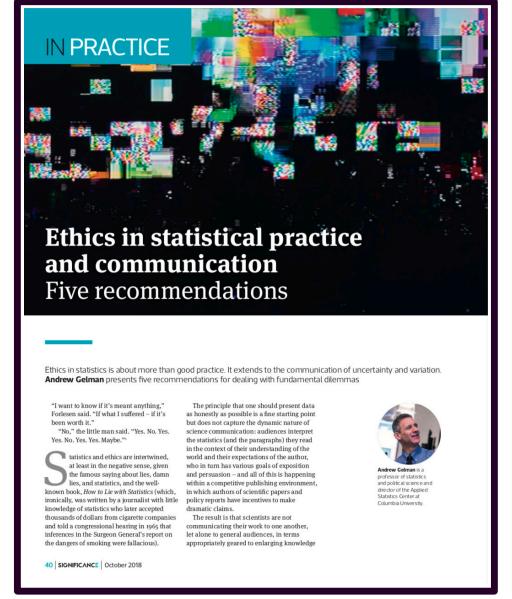


Repetition

Repetition can increase a message's importance and memorability, and can help tie together different arguments about a given data set. Repetition can be employed as a means to search for an answer in the data.

TODO: Example

Statistical persuasion



Ethics in Statistical Practice and Communication

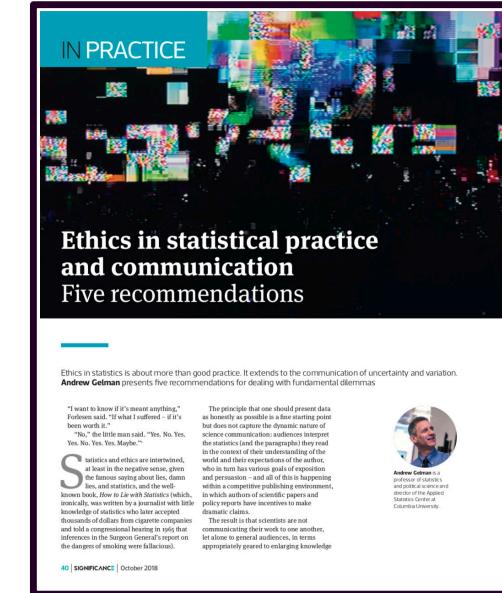
Gelman

Professor of Statistics and Political Science at Columbia University, he is known widely for his work in Bayesian statistics, and has authored several textbooks, including *Teaching Statistics*, and *Bayesian Data Analysis*.

Why statistics?

Consider this paradox: statistics is the science of uncertainty and variation, but data-based claims in the scientific literature tend to be stated deterministically (e.g. “We have discovered ... the effect of X on Y is ... hypothesis H is rejected”).

Is statistical communication about exploration and discovery of the unexpected, or is it about making a persuasive, data-based case to back up an argument?



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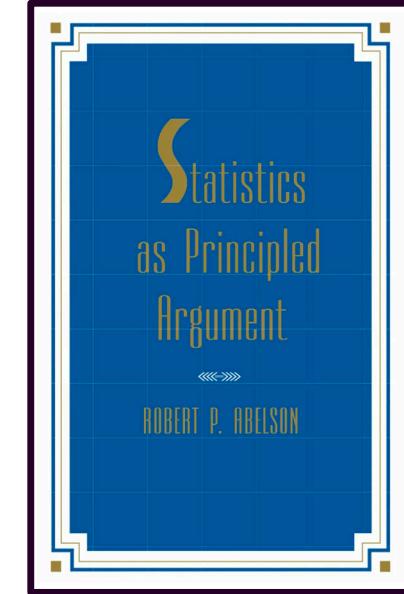
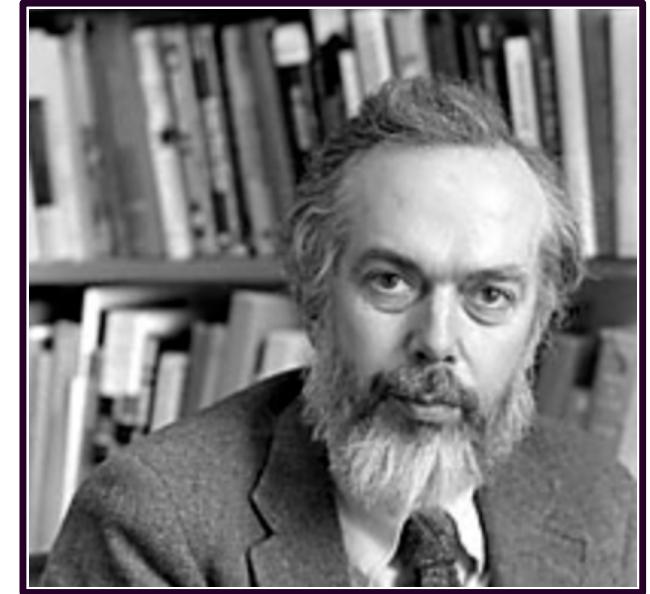
Exploring and persuading

The answer to this question is necessarily each at different times, and sometimes both at the same time.

Just as you write in part in order to figure out what you are trying to say, so you do statistics not just to learn from data but also to learn what you can learn from data, and to decide how to gather future data to help resolve key uncertainties.

Traditional advice on statistics and ethics focuses on professional integrity, accountability, and responsibility to collaborators and research subjects.

All these are important, but when considering ethics, statisticians must also wrestle with fundamental dilemmas regarding the analysis and communication of uncertainty and variation.



Statistics as principled argument

Abelson

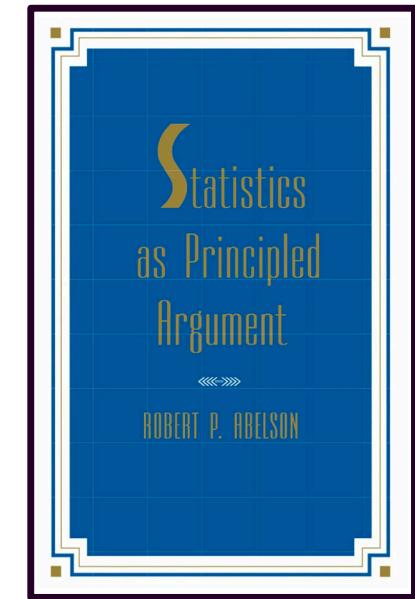
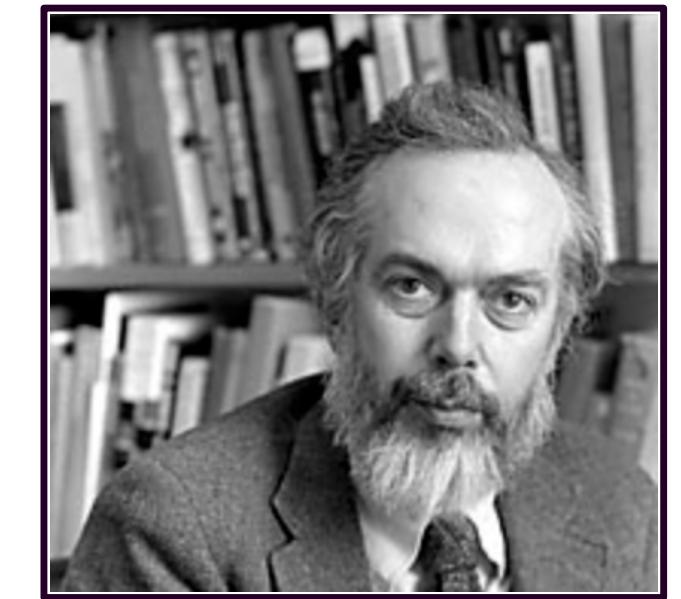
Educated at MIT and Princeton, the late professor of psychology and political science taught at Yale 42 years, consulted for NBC, and was an analyst for three presidential campaigns.

The purpose of statistics is persuasion

The purpose of statistics is to organize a useful argument from quantitative evidence, using a form of principled rhetoric ... that conveys an interesting and credible point.

To make statistical arguments, it helps to wear different hats

His “image of the ideal statistician, already conceived as a good (but honest!) lawyer and a good storyteller, also includes the virtues of a good detective.”



Statistics as principled argument

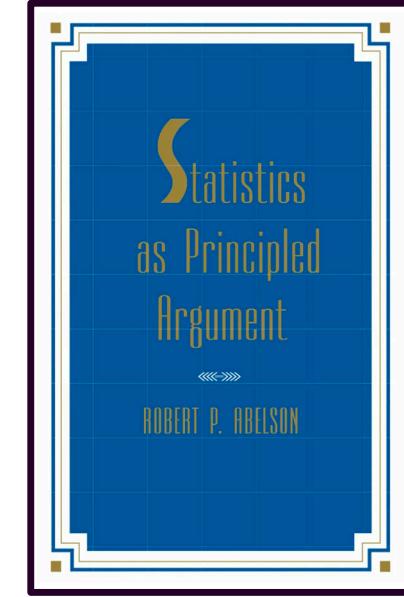
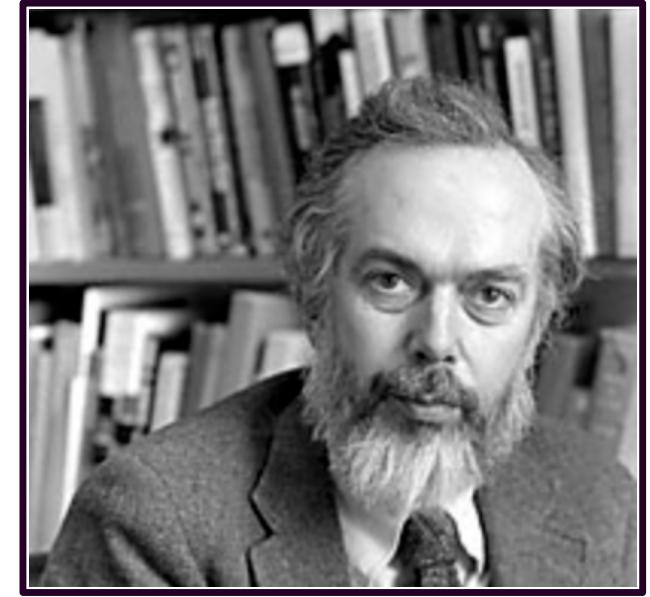
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Comparison gives meaning

"The idea of comparison is crucial. To make a point that is at all meaningful, statistical presentations must refer to differences between observation and expectation, or differences among observations."

TODO: Example



Statistics as principled argument

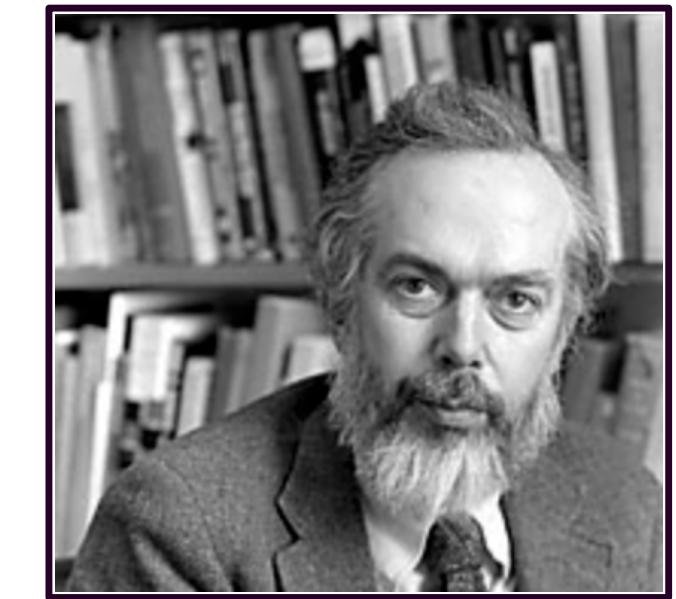
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Elements of statistical persuasion

Several properties of data, and its analysis and presentation, govern its persuasive force.

- M**agnitude of effects
- A**rticulation of results
- G**enerality of effects
- I**nterestingness of argument
- C**redibility of argument

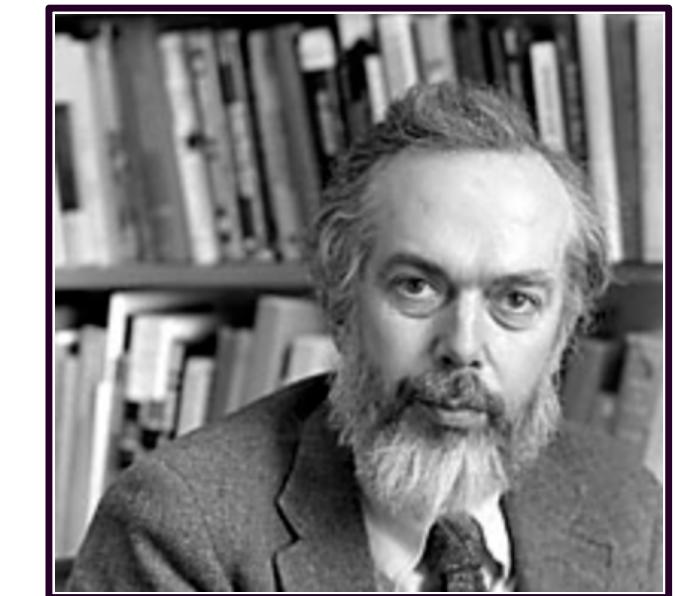


Statistics as principled argument

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- M **Magnitude of effects.** The strength of a statistical argument is enhanced in accord with the quantitative magnitude of support for its qualitative claim. Consider describing effect sizes like the difference between means, not dichotomous tests.
- A **Articulation of results.** The degree of comprehensible detail in which conclusions are phrased. This is a form of specificity. We want to honestly describe and frame our results to maximize clarity (minimizing exceptions or limitations to the result) and parsimony (focusing on consistent, connected claims).
- G **Generality of effects.** This is the breadth of applicability of the conclusions. Over what context can the results be replicated?
- I **Interestingness of argument.** For a statistical story to be theoretically interesting, it must have the potential, through empirical analysis, to **change what people believe about an important issue.**
- C **Credibility of argument.** Refers to the believability of a research claim, and requires both **methodological soundness** and theoretical **coherence**.



Statistics as principled argument

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MAGIC

p-values
say little,
can mislead

A p-value
less than
0.01 is not:

Instead,
it means:
 $P(D | H)$

Magnitude of effects. The strength of a statistical argument is enhanced in accord with the quantitative magnitude of support for its qualitative claim. Consider describing effect sizes like the difference between means, not dichotomous tests.

The information yield from null hypothesis tests is ordinarily quite modest, because **all one carries away is a possibly misleading accept-reject decision.**

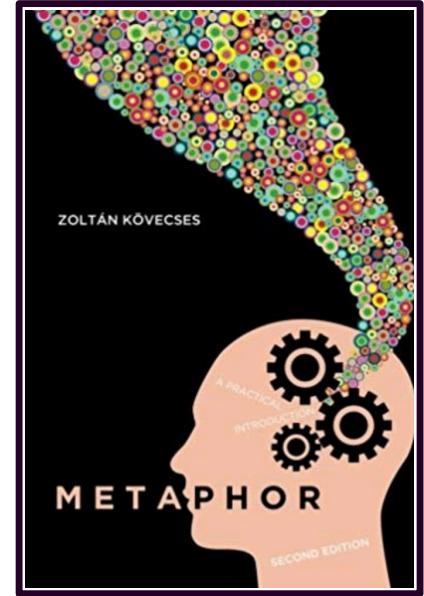
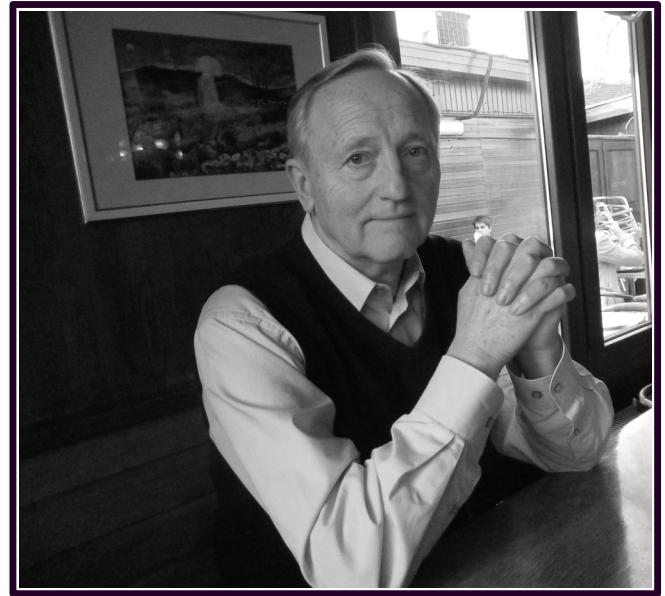
Having observed the data, the probability that the null hypothesis is true is less than one in a hundred.

If it were true that there were no systematic difference between the means in the populations from which the samples came, then the probability that the observed means would have been as different as they were, or more different, is less than one in a hundred.

This being strong grounds for doubting the viability of the null hypothesis, the null hypothesis is rejected.

$$P(H | D) = \frac{P(D | H) P(H)}{P(D | H) P(H) + P(D | \neg H) P(\neg H)}$$

Comparing abstract to familiar

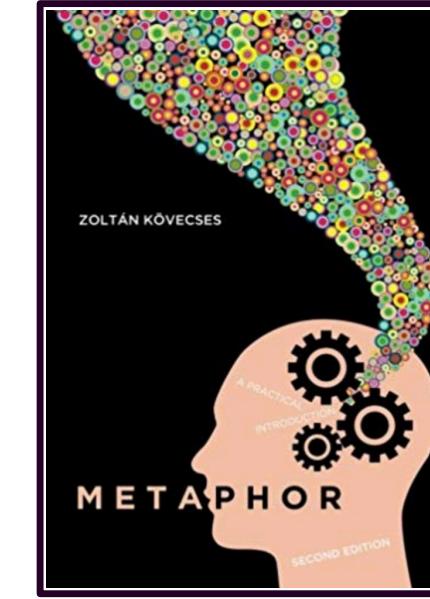


Metaphor: a practical introduction

Kővecses

He is professor of linguistics at Eötvös Loránd University, Budapest. He researches language and conceptualization of emotions, cross-cultural variation in metaphor, and the issue of the relationship between language, mind, and culture.

Metaphor adds to persuasiveness by **reforming abstract concepts into something more familiar to our senses**, signaling particular aspects of importance, memorializing the concept, or providing coherence throughout a writing.



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Mapping

Source Domain > Target Domain

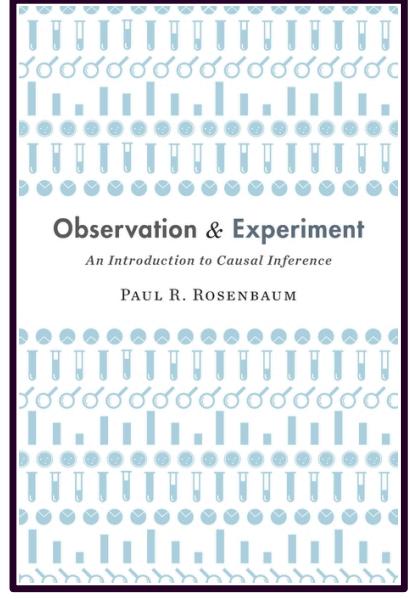
Target domains

The abstract concepts we need help explaining

Common source domains

- Human body
- Animals
- Plants
- Buildings and constructions
- Machines and tools
- Games and Sport
- Money
- Cooking and food
- Heat and cold
- Light and darkness
- Movement and direction

Example: uses poetry about travel (source domain) to explain the distinction between covariate and outcome (target domain):



Observation & Experiment

Rosenbaum

He is Professor of Statistics at the Wharton School and a Senior Fellow of the Leonard Davis Institute of Health Economics, University of Pennsylvania. His book epitomizes the idea that “the most important ideas in statistics can be clearly explained in plain English, with little or no math.”

If we accurately measure an outcome, we see one of its two potential values: the value that occurs under the treatment the patient actually received. **We can never see the outcome a patient would have exhibited under the treatment the patient did not receive.** . . . Perhaps the distinction between covariate and outcome is most vivid, most palpable, in Robert Frost’s poem “The Road Not Taken” (1916):

Two roads diverged in a yellow wood
And sorry I **could not travel both**
And be one traveler, long I stood
And looked down one as far as I could
To where it bent in the undergrowth

Frost creates the mood attending a decision, one whose full consequences we cannot see or anticipate: “Knowing how way leads on to way,” we will not see the road not taken. As it was for Frost in a **yellow wood**, so it is for a patient at risk of death in the ProCESS Trial, and so it will be in every causal question.



Ride against the flow

Spencer

For the past six springs, New Yorkers pedaled past colorful blossoms on their way to work, home, or just cruising.

Yet, some cruisers wearied whilst scouting a docking station [•]. And some on foot languished curbside without saddle to straddle.

Empty and full docking stations sprout like dandelions under the sun and moon, shown in 10 minute increments. Availability waxes and wanes by time and place.

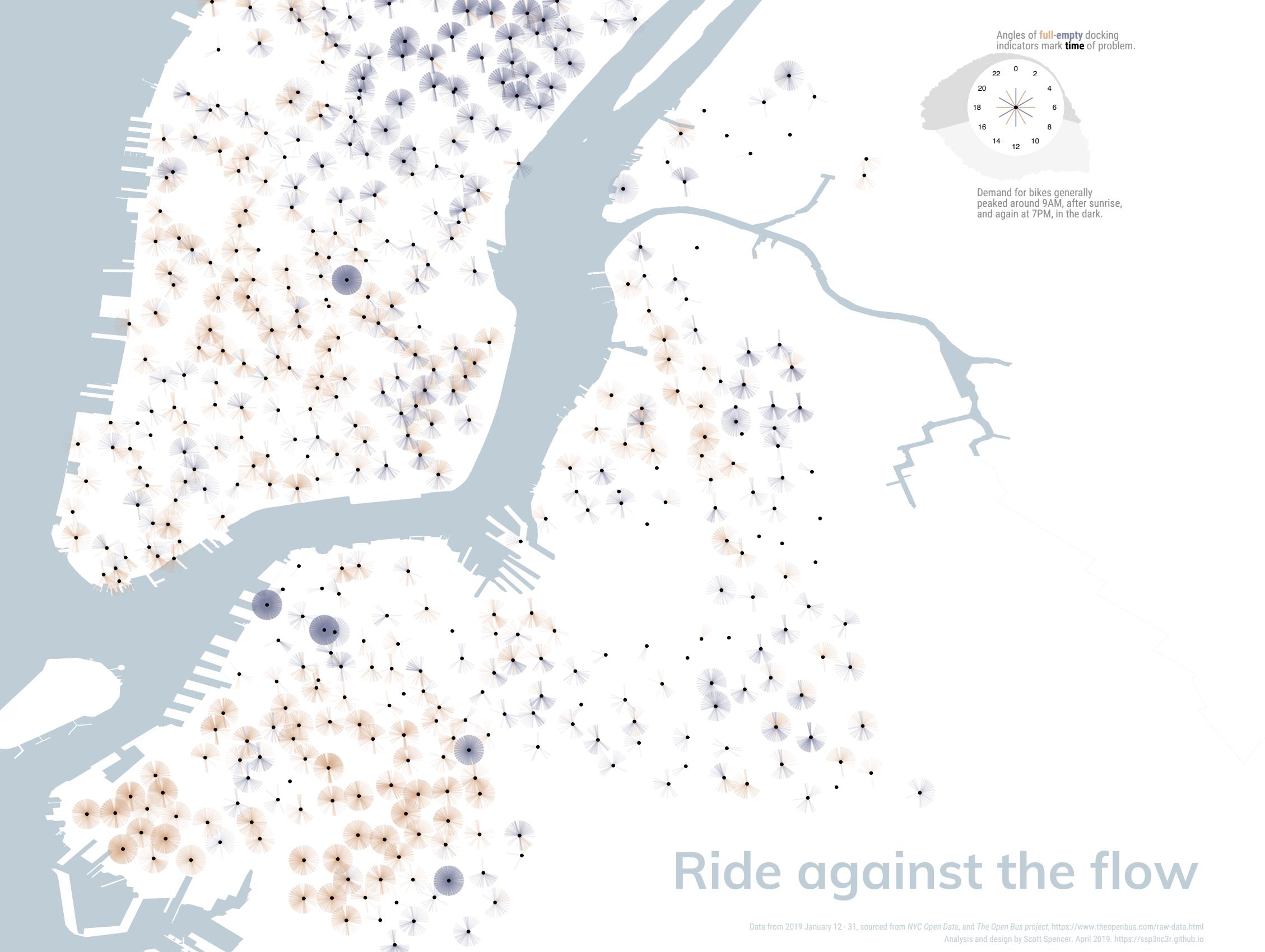
A ride against the flow is a joy ride for us all.

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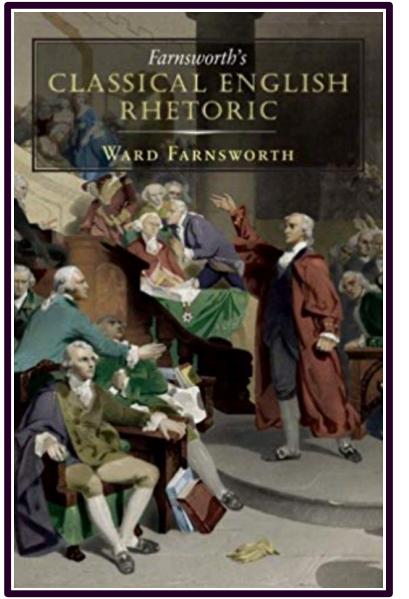
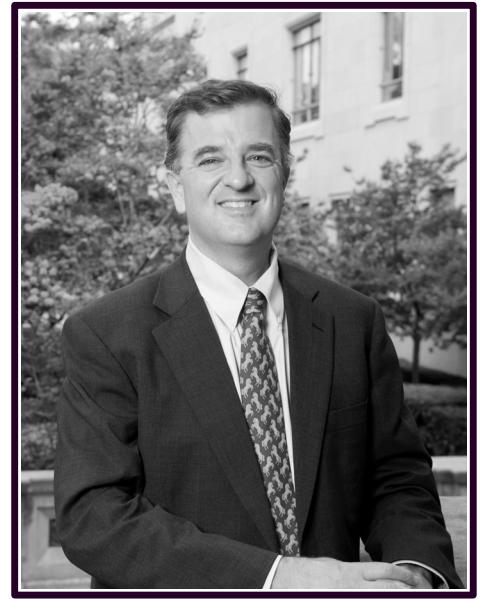
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Patterns that compare, organize, grab attention



Classical English Rhetoric

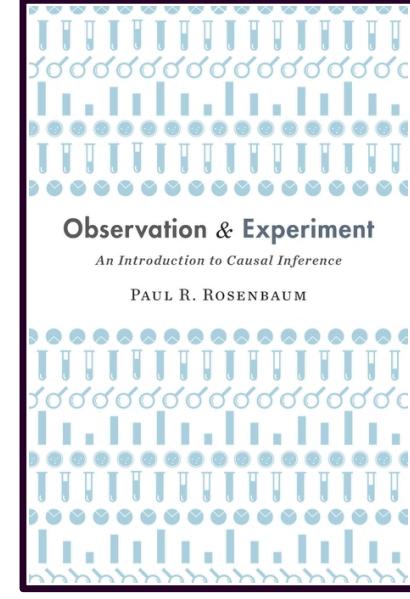
Farnsworth

He is dean and professor of the University of Texas School of Law. Before teaching, he graduated from University of Chicago Law School, clerked for Supreme Court Justice Kennedy, and served as advisor to an international tribunal in the Hague.

**Use patterns
to compare,
grab attention,
add emphasis**

We can use patterns to “make the words they arrange more emphatic or memorable or otherwise effective.” These patterns can be the most effective and efficient ways to show comparisons and contrasts.

Example: Reversal of structure, repetition at the end



Observation & Experiment

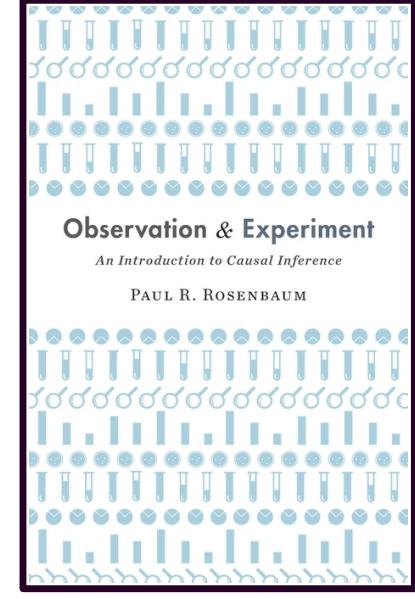
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“

A **covariate** is a quantity determined prior to treatment assignment. In the Pro-CESS Trial, the age of the patient at the time of admission to the emergency room **was a covariate**. The gender of the patient **was a covariate**. Whether the patient was admitted from a nursing home **was a covariate**.

Example: Repetition at the start, parallel structure



Observation & Experiment

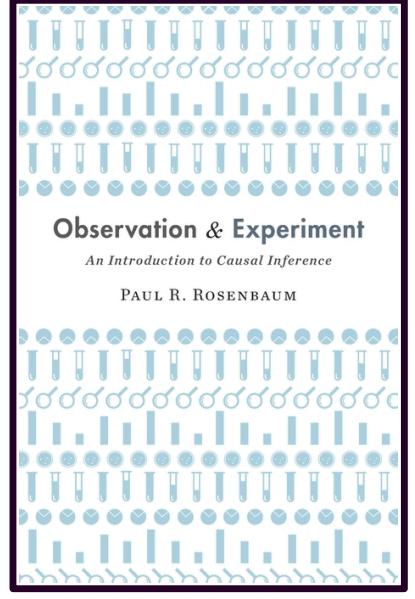
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One might hope that panel (a) of Figure 7.3 is analogous to a simple randomized experiment in which one child in each of 33 matched pairs was picked at random for exposure. **One might hope** that panel (b) of Figure 7.3 is analogous to a different simple randomized experiment in which levels of exposure were assigned to pairs at random. **One might hope** that panels (a) and (b) are jointly analogous to a randomized experiment in which both randomizations were done, within and among pairs. All three of **these hopes** may fail to be realized: there might be bias in treatment assignment within pairs or bias in assignment of levels of exposure to pairs.

Example: Asking questions and answering them



Observation & Experiment

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“

Where did Fisher’s null distribution come from?
From the coin in Fisher’s hand.

Example: Inversion of words



A screenshot of a blog post titled "The most important aspect of a statistical analysis is not what you do with the data, it's what data you use" (survey adjustment edition). The post discusses survey weighting and the importance of data quality over complex methods. It includes a sidebar with recent comments from other users.

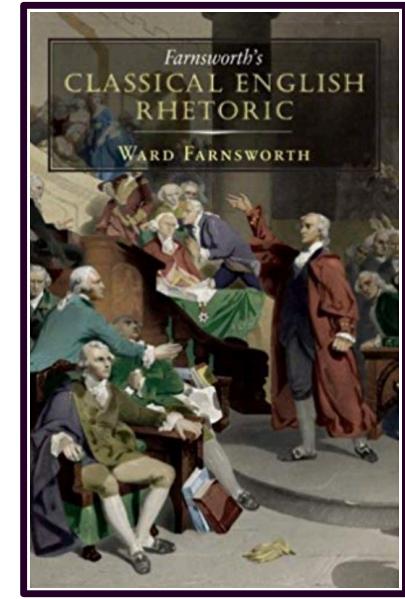
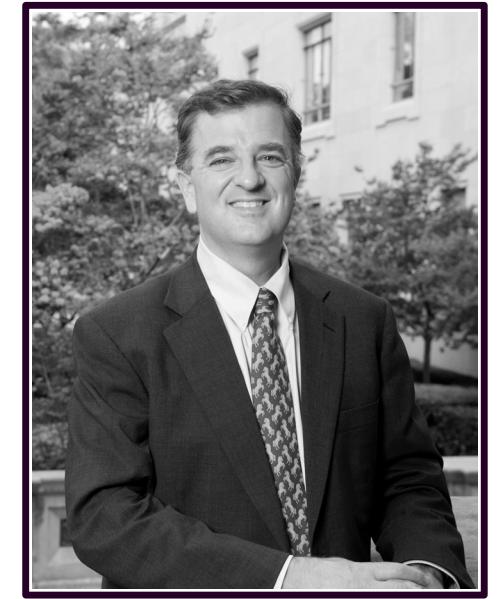
Statistical Modeling, Causal Inference, and Social Science

Gelman

Professor of Statistics and Political Science at Columbia University, he is known widely for his work in Bayesian statistics, and has authored several textbooks, including Teaching Statistics, and Bayesian Data Analysis.

“

The most important aspect of a statistical analysis is not what **you** do with the **data**, it's what **data you** use.



Classical English Rhetoric

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Repetition of words & phrases

simple repetition (*epizeuxis, epimone*)
repetition at the start (*anaphora*)
repetition at the end (*epistrophe*)
repetition at the start and end (*symploce*)
repeating the ending at the beginning (*anadiplosis*)
repetition of the root (*polyptoton*)

Structural matters

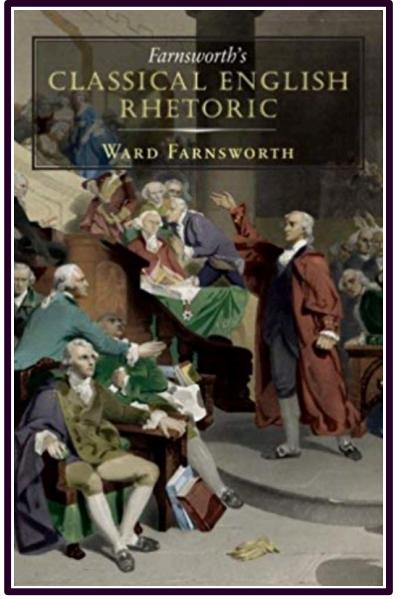
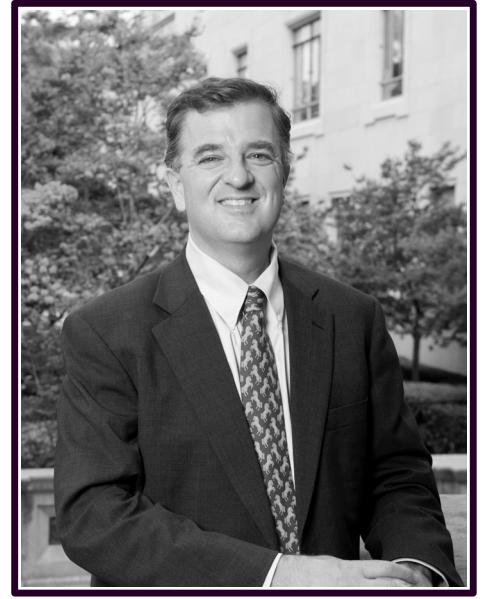
parallel structure (*isocolon*)
reversal of structure (*chiasmus*)
inversion of words (*anastrophe*)
leaving out words (*ellipsis*)

Dramatic devices

saying things by not saying them (*præteritio*)
correcting oneself (*metanoia*)
rhetorical uses of the negative (*litotes*)
rhetorical questions (*erotema*)
asking questions and answering them (*hypophora*)
anticipating objections and meeting them (*prolepsis*)

How unexpected patterns work

Unexpected word placement calls attention to them, creates emphasis by coming earlier than expected or violating the reader's expectations. Note that, to violate expectations necessarily means reserving a technique like inversion for just the point to be made, lest the reader come to expect it — **more is less, less is more.** Secondly, it can create an attractive rhythm. Thirdly, when the words that bring full meaning come later, it can add suspense, and finish more climactic.



Classical English Rhetoric

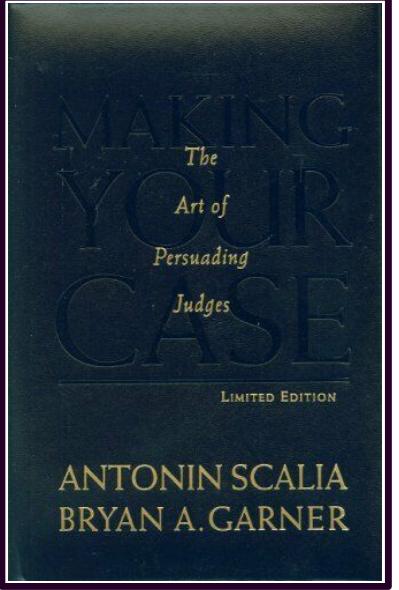
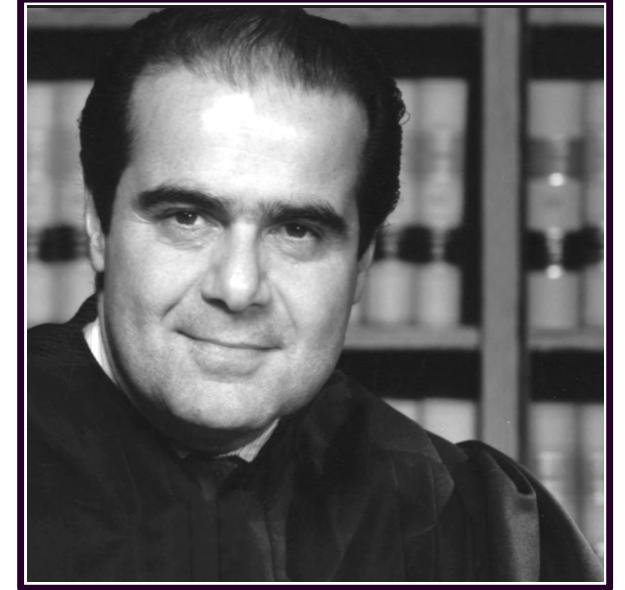
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Immersion precedes Implementation

“Seeing just a few examples invites direct imitation of them, which tends to be clumsy. Immersion in many examples allows them to do their work by way of a subtler process of influence, with a gentler and happier effect on the resulting style.”[†]

Point made



Making your Case

Scalia & Garner

The authors—a former Supreme Court Justice and renowned legal writer—have taught lawyers of the highest acclaim how to persuade judges and juries alike. The peculiarities of legal persuasion are slight compared with the principles it shares with persuasion more generally.

**Close powerfully,
state explicitly what
the audience should do**



Persuasive argument neither comes to an abrupt halt nor trails off in a grab-bag of minor points. The art of rhetoric features what is known as the peroration—the conclusion of argument, which is **meant to move the listener to act on** what the preceding argument has logically described.

Wrapping up

For Next Week, Module 5:

Agenda next week

The minimum

Next deliverable, draft 750-word (or less) proposal
Audience analysis

Kahneman, Daniel, Dan Lovallo, and Olivier Sibony.
Before You Make That Big Decision ... Harvard Business Review 89.6 (2011): 50–60. Print.

Read to understand common limitations and approaches to reasoning and making decisions amid uncertainty.

Dragicevic, Pierre. “Fair Statistical Communication in HCI.” *Modern Statistical Methods for HCI*. Springer International Publishing, 2016. 1–40.

Read to consider what may be important in communicating statistical analysis. Also, consider the graphical displays integrated into the writing.

Healy, Kieran. *Data Visualization*. Princeton University Press, 2019. Web. <https://socviz.co>

This is a great resource if you need help implementing visual displays in R.

Checking in,

**Turtles
and hares?**

**Keyboard
worn out?**

**Currently
reading?**

Of what we covered so far, what material or concept would you like further review? Or are you ready as a rabbit to get on with it?

Outside class assignments, how often do you practice writing? I recommend keeping a data science journal, writing something, anything on your mind about data science each week.

I've been reading Harari's *Sapiens*—well written! We learn to write by reading and, while reading, studying its structure. Not including class assigned readings, what are you reading?

**See you
next week!**

