

Storytelling with Data

Module 5: Analyze before you speak—audience analysis

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Agenda

Upcoming deliverable

Today's objectives

Audience: questions, biases

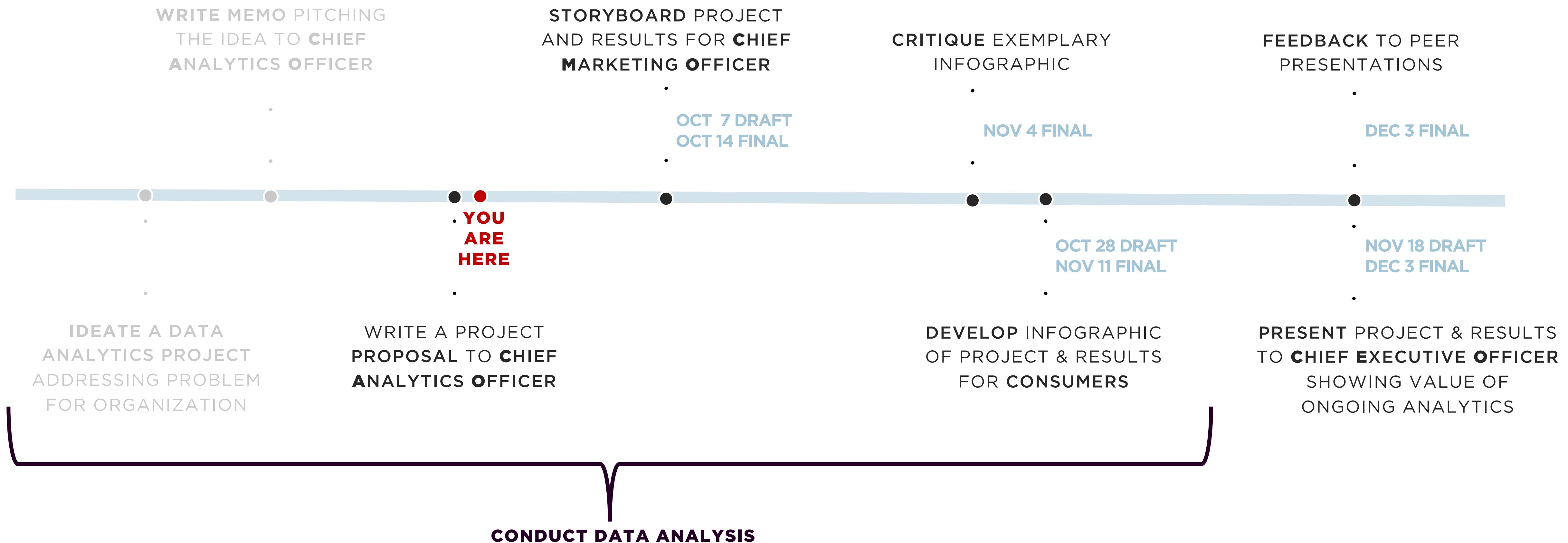
Audience: cultural cues, emotional display

Influential, fair communication

Upcoming deliverable

Upcoming deliverable

In **Storyboard** form – describe (1) your project, (2) preliminary results or insights so far, and (3) why those results are interesting for the marketing team. Use a distinct narrative arc (beginning, middle, and end), be clear and accessible for the **CMO**.



Today's Objectives

Objectives

1

Articulate the need for **audience analysis** and sensitivity in the applied analytics setting.

2

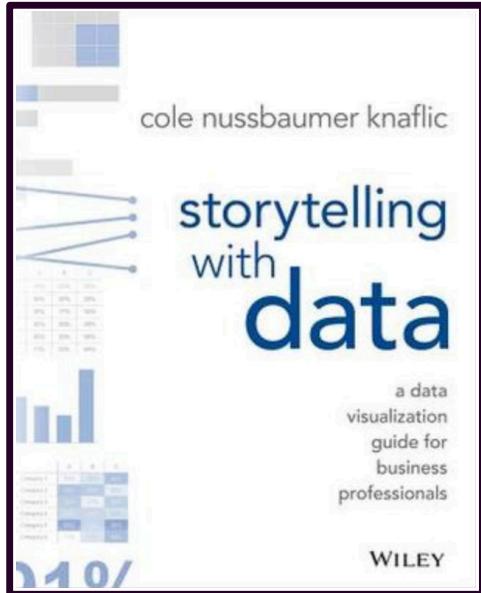
Consider **professional, demographic, cultural, and personal issues** when building, contributing to, or managing an analytics team or project.

Audience analysis, heuristics and biases

Storytelling with data

Knafllic

The author is a consultant focused on visual displays. Her experience arose from human resources in Google where she applied theory learned as a student of Yale's Edward Tufte.



Audience: questions to specifically answer

Who is the audience or decision maker?

What is your relationship with them?

What do you need them to know or do?

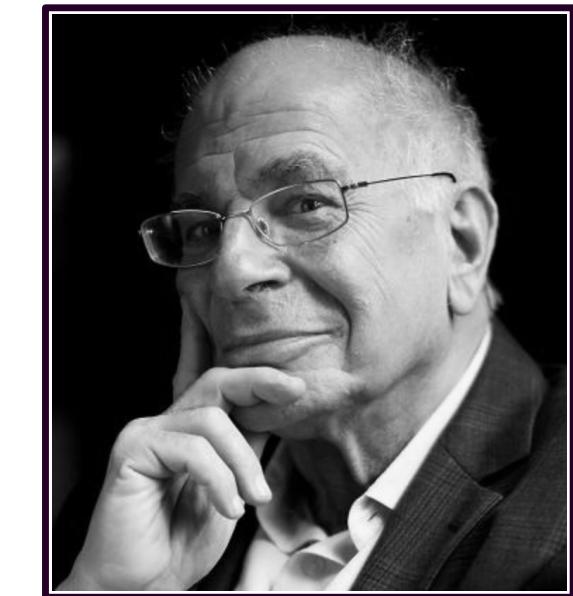
How will you communicate with them?

What tone do you want your communication to set?

What data are available to help make your point?

Is your audience familiar with these data?

What are audience biases as related to your messages?



Before you make that big decision...

Kahneman, co-authors

Awarded the Nobel-Prize in economics and senior scholar at Princeton, Kahneman introduced the idea of cognitive biases, and their impact on decision making.

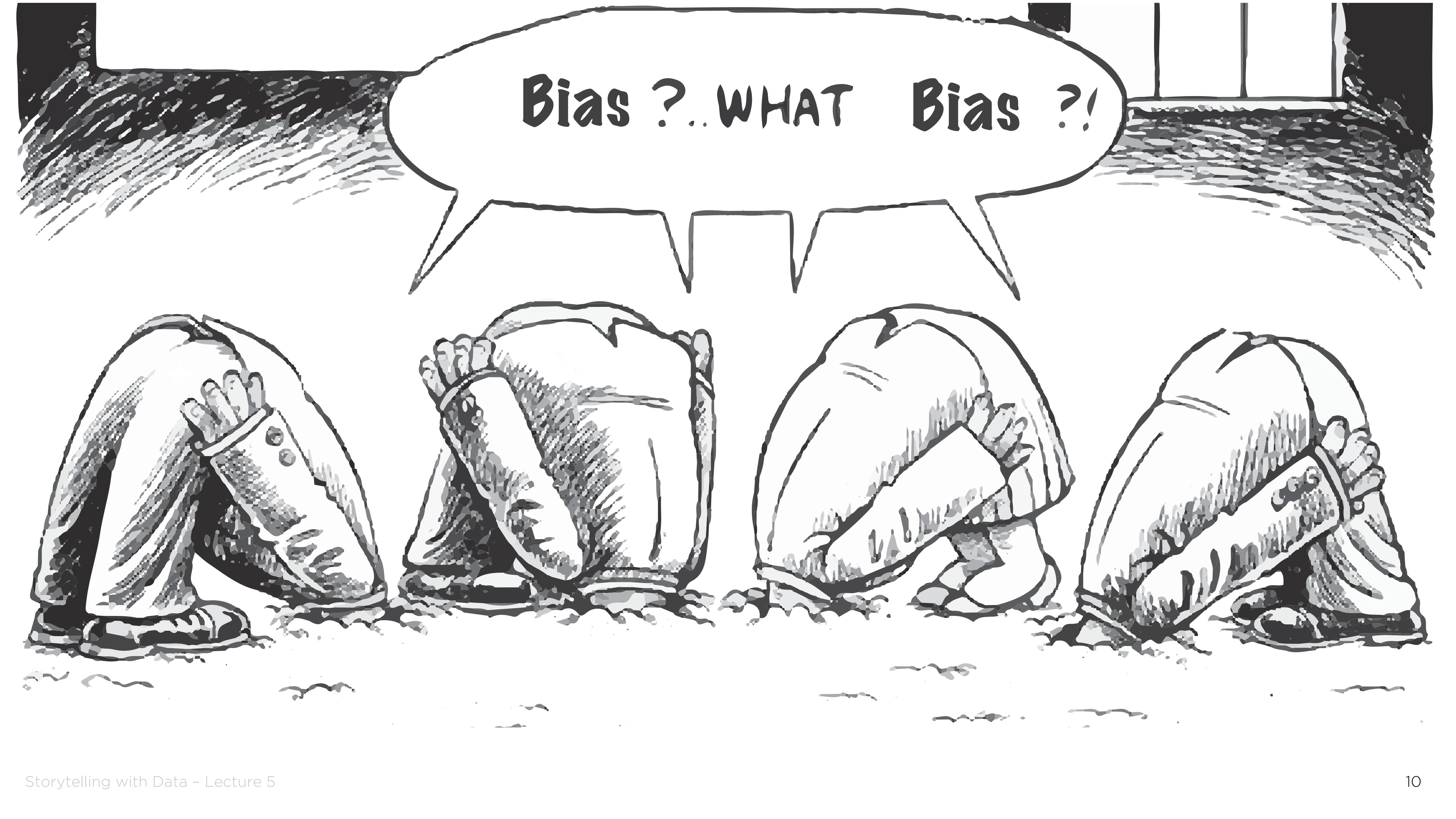
Two modes of thinking

Intuitive (system one) thinking, impressions, associations, feelings, intentions, and preparations for actions flow effortlessly. This system mostly determines our thoughts. System one uses **heuristics**, has **biases**.

Reflective (system two) thinking is slow, effortful, and deliberate.

Both are continuous, but system two typically monitors things, and only steps in when stakes are high, we detect an obvious error, or rule-based reasoning is required.

It's very hard to remain aware of our own biases, so we need to **develop processes** that identify them and, most importantly, get **feedback from others** to help protect against them.



Bias ?..WHAT Bias ?!

1

Check for self-interested biases

Is there any reason to suspect the team making the recommendation of errors motivated by self-interest?

Review the proposal with extra care, especially for over optimism.

2

Check for the affect heuristic

Has the team fallen in love with its proposal?

Rigorously apply all the quality controls on the checklist.

3

Check for groupthink

Were there dissenting opinions within the team? Were they explored adequately?

Solicit dissenting views, discreetly if necessary.

4

Check for saliency bias

Could the diagnosis be overly influenced by an analogy to a memorable success?

Ask for more analogies, and rigorously analyze their similarity to the current situation.



Check for confirmation bias

Are credible alternatives included along with the recommendation?

Request additional options.



Check for availability bias

If you had to make this decision in a year's time, what information would you want, and can you get more of it now?

Use checklists of the data needed for each kind of decision.



Check for anchoring bias

Where are the numbers from? Can there be ... unsubstantiated numbers? ... extrapolation from history? ... a motivation to use a certain anchor?

Re-anchor with data generated by other models or benchmarks, and request a new analysis.



Check for halo effect

Is the team assuming that a person, organization, or approach that is successful in one area will be just as successful in another?

Eliminate false inferences, and ask the team to seek additional comparable examples.

9

Check for sunk-cost fallacy, endowment effect

Are the recommenders overly attached to past decisions?

Consider the issue as if you are a new executive.

10

Check for overconfidence, optimistic biases, competitor neglect

Is the base case overly optimistic?

Have a team build a case taking an outside view: use war games.

11

Check for disaster neglect

Is the worst case bad enough?

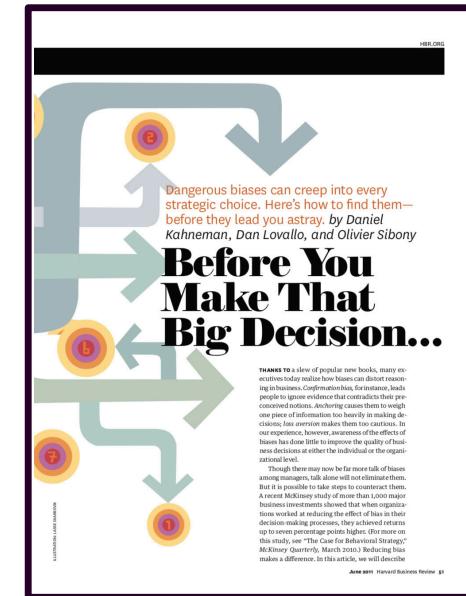
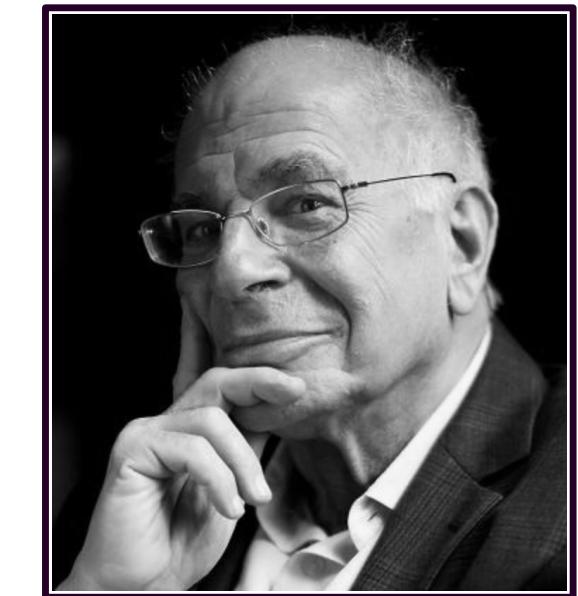
Have the team conduct a premortem: imaging that the worst has happened, and develop a story about the causes.

12

Check for loss aversion

Is the recommending team overly cautious?

Align incentives to share responsibility for the risk or to remove risk.



Before you make that big decision...

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Keeping out the appearance of bias

Present ideas from a **neutral perspective**. Becoming too emotional suggests bias.

Make **analogies and examples comparable** to the proposal.

Genuinely **admit uncertainty** in the proposal, and **recognize multiple options**.

Identify **additional data** that may provide new insight.

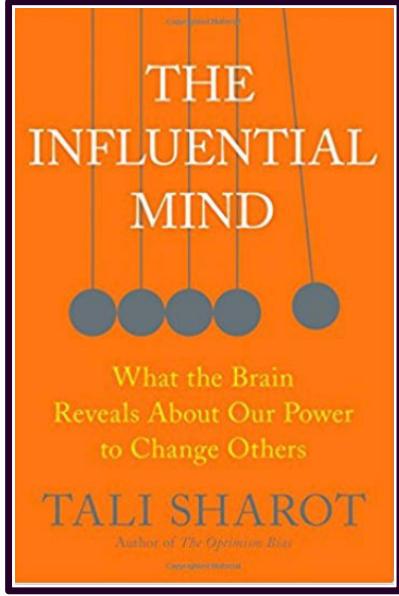
Consider **multiple anchors** in the proposal.

Influential, fair communication

The influential mind

Sharot

A London neuroscientist, her research focuses on decision-making, emotion, and influence.



Learn what your audience is thinking

If we want to affect the behaviors and beliefs of the person in front of us, we need to first understand what goes on inside their head.

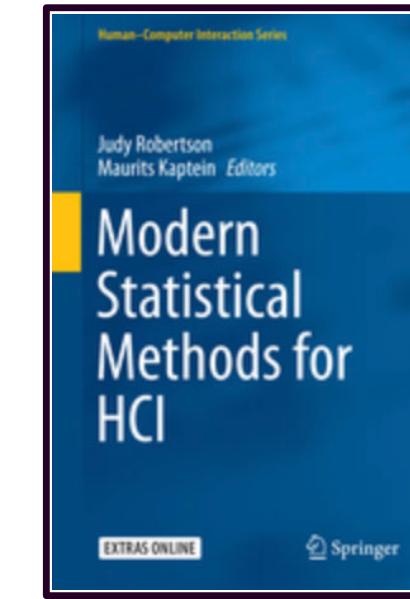
Formula for changing beliefs

Four factors come into play when we form a new belief: our **old belief** (this is technically known as the “prior”), our confidence in that old belief, the new evidence, and our confidence in that evidence.

Find common ground with audience's beliefs

When you provide someone with new data, they quickly accept evidence that confirms their preconceived notions (what are known as prior beliefs) and assess counterevidence with a critical eye.

Focusing on what you and your audience have in common, rather than what you disagree about, enables change.



TODO: TIE HEURISTIC DECISIONS WITH UNCERTAINTY.
START TO EXPLAIN HOW WE CAN COMMUNICATE ABOUT UNCERTAINTY.

Ch. 13, Fair statistical communication in HCI

Dragicevic

He is a researcher, focusing on psychology of data visualization for judgment and decision making, and on transparent statistical communication.

Report effect sizes, interval estimates, interpretations

Whether exploring or confirming analyses, show results using an *estimation* approach—use graphs to show **effect sizes** and **interval estimates**, and offer **nuanced interpretations** of results. *Avoid the pitfalls* of dichotomous tests and p-values.

Tip 19: be creative, use visuals

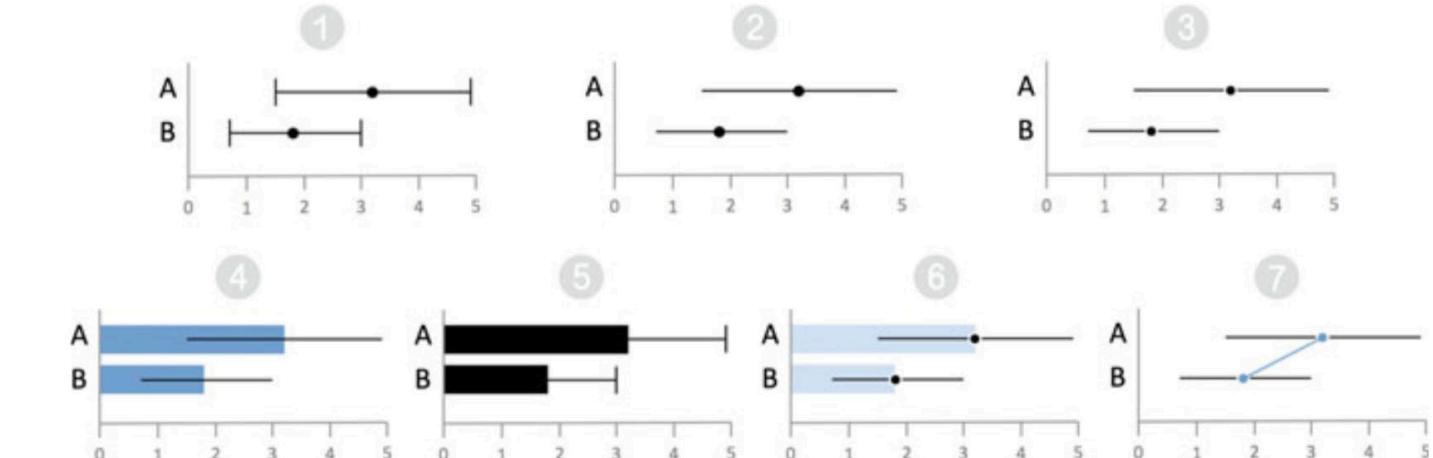
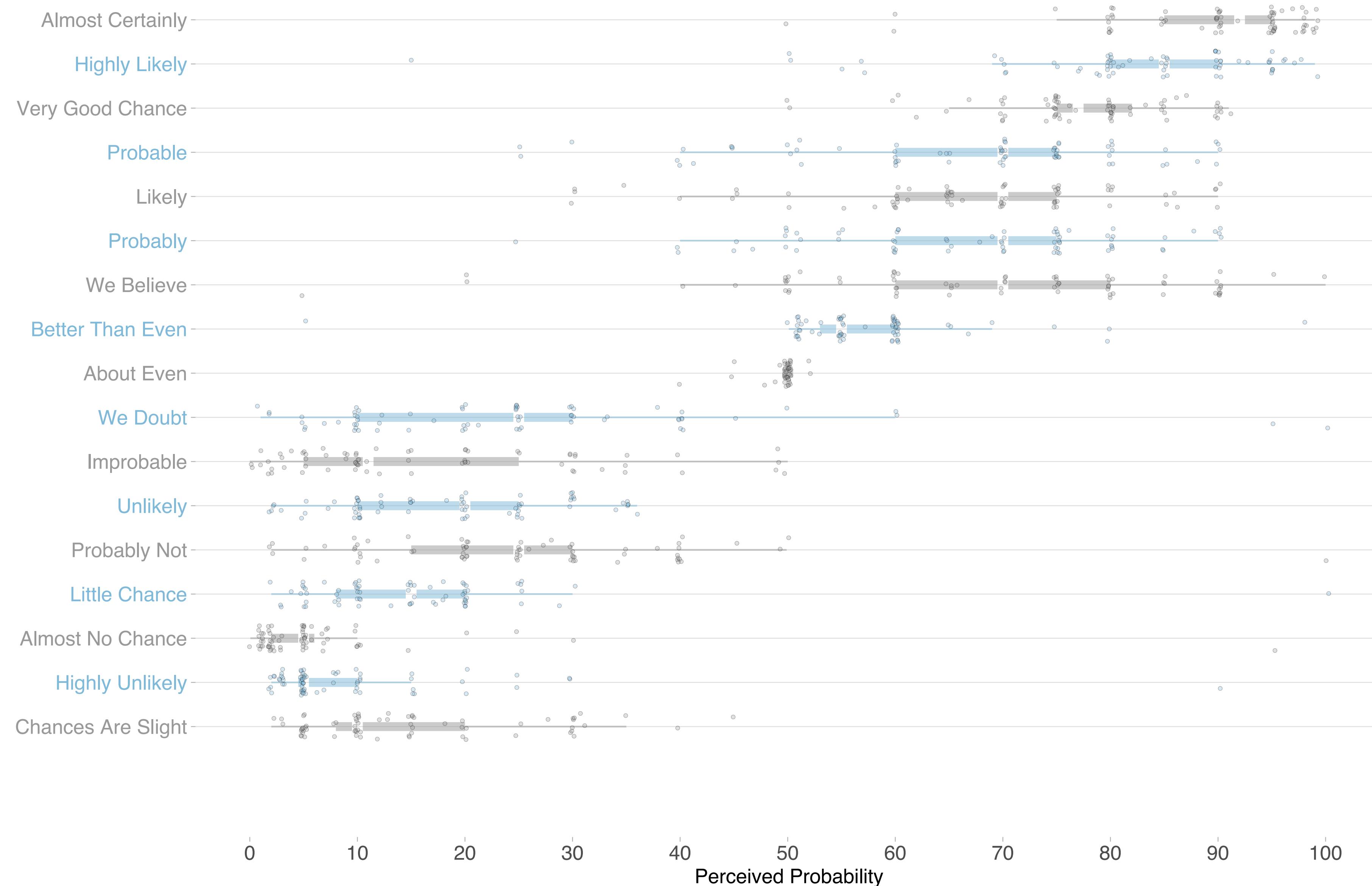


Fig. 13.9 Seven ways of plotting effect sizes with confidence intervals

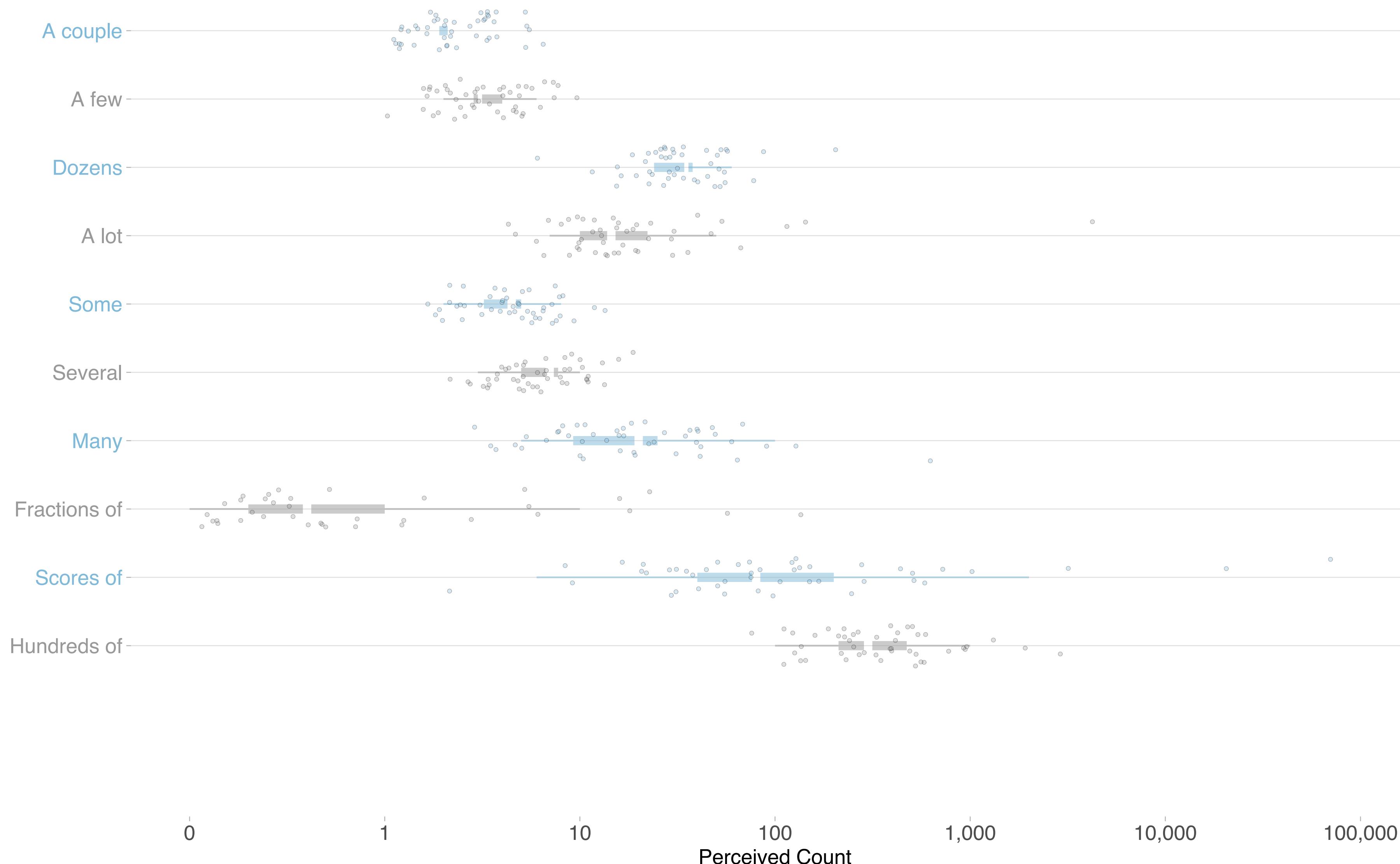
Tip 26: honestly convey uncertainty

The use of vague language is necessary for **acknowledging and honestly conveying the uncertainty present in effect size estimates**. Vague language — which is not the same as ambiguous language — plays a key role in reasoning.

Language describing probability are imprecise, depend upon audience and context



Language describing quantities are imprecise, depend upon audience and context



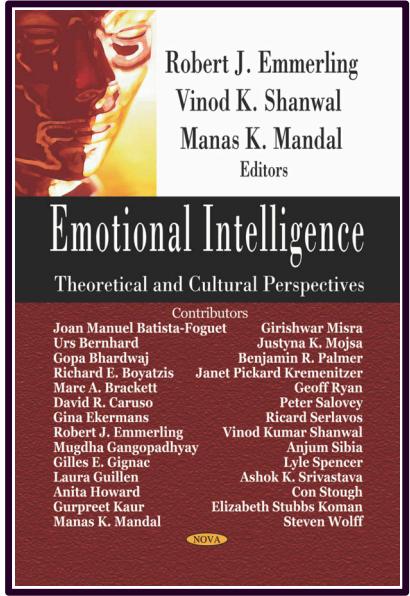
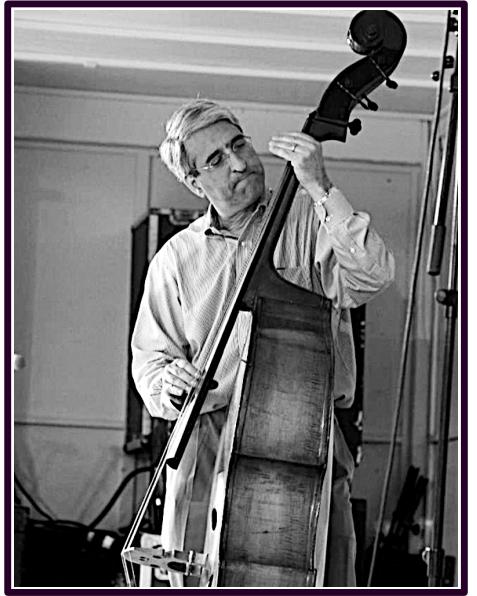
Spencer, Scott. *Quantitative persuasion amid uncertainty*. Forthcoming. Print.
Barclay, Scott et al. *Handbook for Decision Analysis*. Decisions and Designs, Inc., 1977. Print.
zonination. “Perceptions of Probability and Numbers.” github.com/18 Aug. 2015. Web. 26 Dec. 2018.

Cultural cues, emotion and communication

Emotional intelligence theoretical and cultural perspectives

Salovey, co-authors

Yale president (and double bassist), Salovey introduced the idea of emotional intelligence. This book collects numerous authors' perspectives, examining the **cross-cultural similarity of the concept of emotional intelligence**.



**Emotions are universal,
but expression
depends on culture**

**Emotional Intelligence
guides communication**

**Higher and lower
context cultures**

Basic emotions are **perceived similarly** across the world, but display rules for emotional **expression vary** from culture to culture. That is, the norms pertaining to how—and to what intensity—certain emotions should be expressed within social contexts.

“Emotional intelligence involves the ability to monitor one’s own and **others’ feelings and emotions**, to discriminate among them, and to use this information to **guide one’s thinking and actions**” including “our **ability to communicate effectively**.”

Caveat: much of the research in this field has originated from Western cultures. This reference includes other perspectives.

In **high context cultures**, unlike the US, the internal meaning of a message is usually embedded deeper in the information; **not everything is explicitly written**.

TODO: think through questions as prompts?

Questions for discussion

How have your experiences compared with or differed from what we have discussed so far?

If you were the decision maker for approval of a data analytics project, what **type of information** and what **form of communication** would you want to have?

**TODO: THIS SECTION NEEDS
DEVELOPMENT**

From CAO to CMO

A sneak peek: storyboards

**TODO: EXPLAIN
TRADITIONAL USE (E.G.,
MOVIES) AND HOW WE
CAN BORROW THE IDEA
FOR ANALYTICS
COMMUNICATIONS?**

A very simple example. Storyboard for IBM as part of making an end-to-end experience for data scientists to research, create, and collaborate.



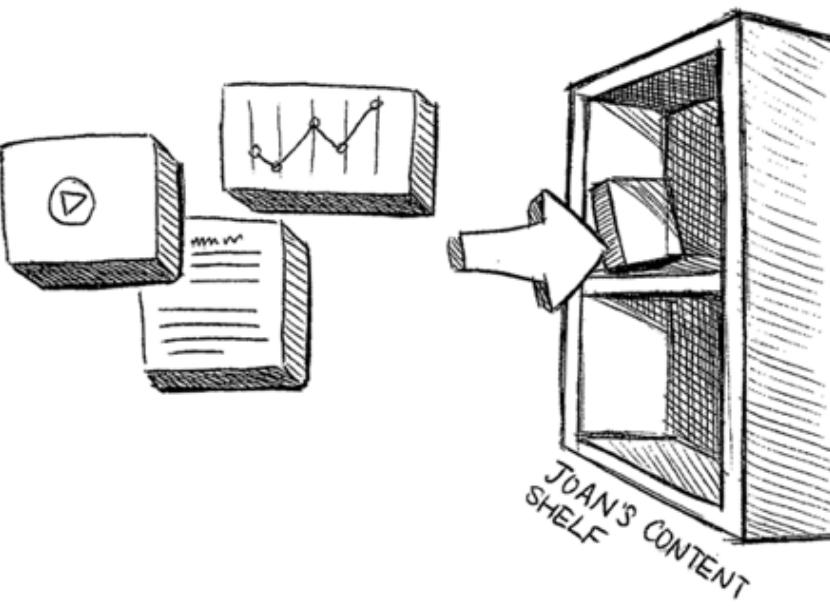
Joan, a Data Scientist at an enterprise company, is looking for resources to help her figure out how weather affects customer sales.



She turns to Google for help. The top search result shows a preview of an interesting paper from Project Miles.



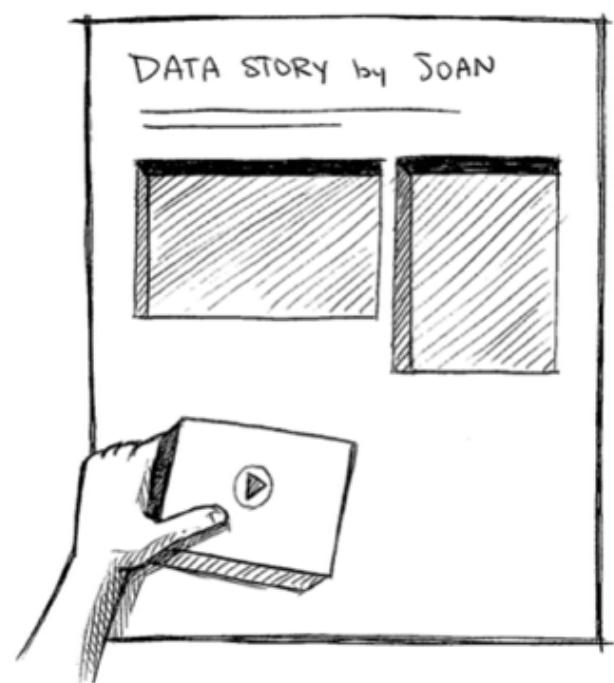
The paper presents a weather algorithm that Joan can use for her own project. She bookmarks the paper for later use.



Joan continues reading Paula's Data Story because she sees a wealth of relevant resources, e.g. videos, papers, talks, that she could use for her project.



Joan clicks on the search result where she sees the paper in context of a workflow, called a "Data Story." It was created by another user named Paula.



Once she has added a handful of resources to her bookmark list, Joan creates her own Data Story. She uses her bookmark content as a reference point.

Group help

Groupwork, feedback from peers

Pair up, share your proposal summary, and
practice giving feedback on your drafts
based on the requirements just discussed.

Going forward

For Next Week, Module 6:

Agenda next week

The minimum

Next deliverable, **final** 750-word (or less) proposal
The storytelling process
As you review the material, think about how you might storyboard *The Next Rembrandt*.

Riche, Nathalie Henry et al. Ch. 5 and 9. *Data-Driven Storytelling*. CRC Press, 2018. Print.

Read for more perspective on the process of data-driven, visual stories.

Lee, Bongshin et al. “*More Than Telling a Story: Transforming Data Into Visually Shared Stories*.” IEEE Computer Graphics and Applications 35.5 (2015): 84–90. Web.

Read for more perspective on the process of data-driven, visual stories.

McCloud, Scott. Ch. 6. Show and Tell. *Understanding Comics: the Invisible Art*. Kitchen Sink Press, 1993. Print.

Read for ideas about how words and pictures combine to tell stories.

Holtz, Yan, and Conor Healy. *From Data to Viz*. www.data-to-viz.com 2018: web.

Become familiar with common chart typologies, the types of data structures used for them, and how charts share common underlying attributes.

Q's in threes,

Q1

Question

Q2

Question

Q3

Question

**See you
next week!**

