

Storytelling with Data

Module 5: Analyze before you speak—audience analysis

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Columbia University

Agenda

Next deliverable, and today's objectives

Analyzing audiences: heuristics and biases

Communicating to lessen bias

Wearing shoes of the marketing executive

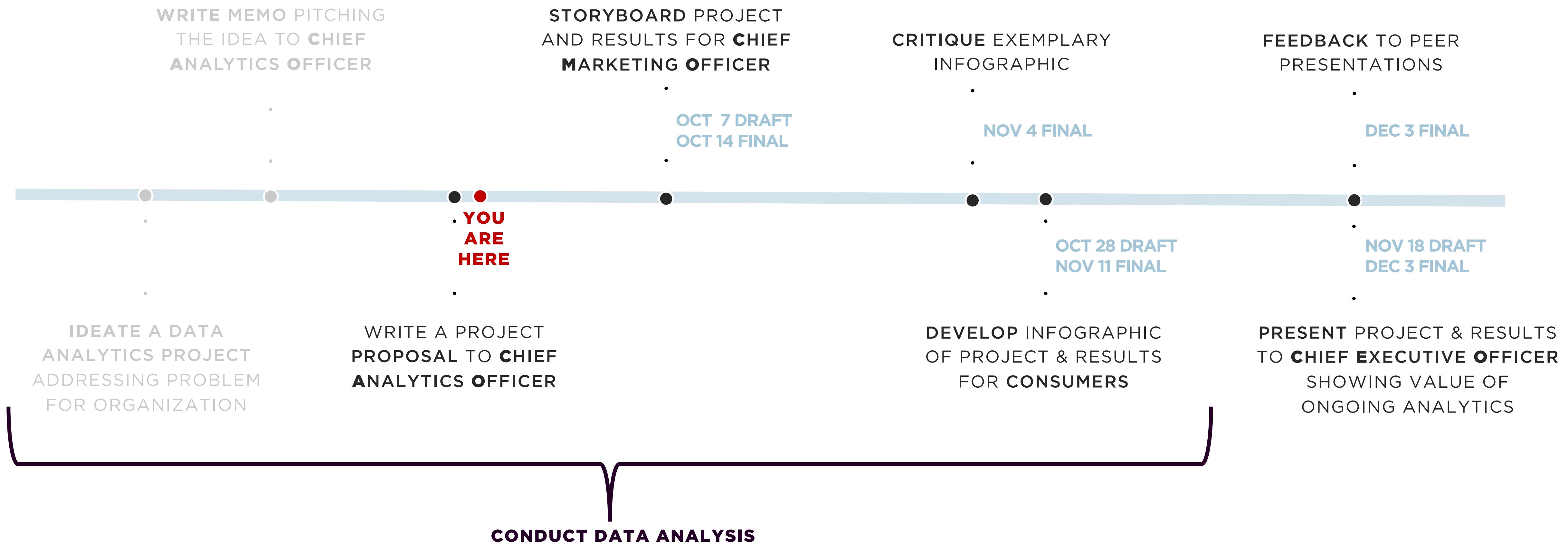
Comparison as narrative structure

Getting started with storyboards,
a tool for testing narrative structure

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.

Communicating analytics with marketing: who's the CMO?

“Technical” Chief Analytics Officer

Leads an organization’s data analytics strategy, driving data-related business changes to transform company into a more analytics-driven one.

“Less-Technical” Chief Marketing Officer

Leads responses to changing circumstances; shapes products, sales strategies, and marketing ideas, collaborating across the company.



David J Carr [Follow](#)

Strategy Director, ex-CD, Planning Director & Head of UX @ Digitas, DIG, Publicis, Chemistry & JWT, APG Gold & Google Planning Innovator of Year.

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Latest

David J Carr Jan 28 · 9 min read

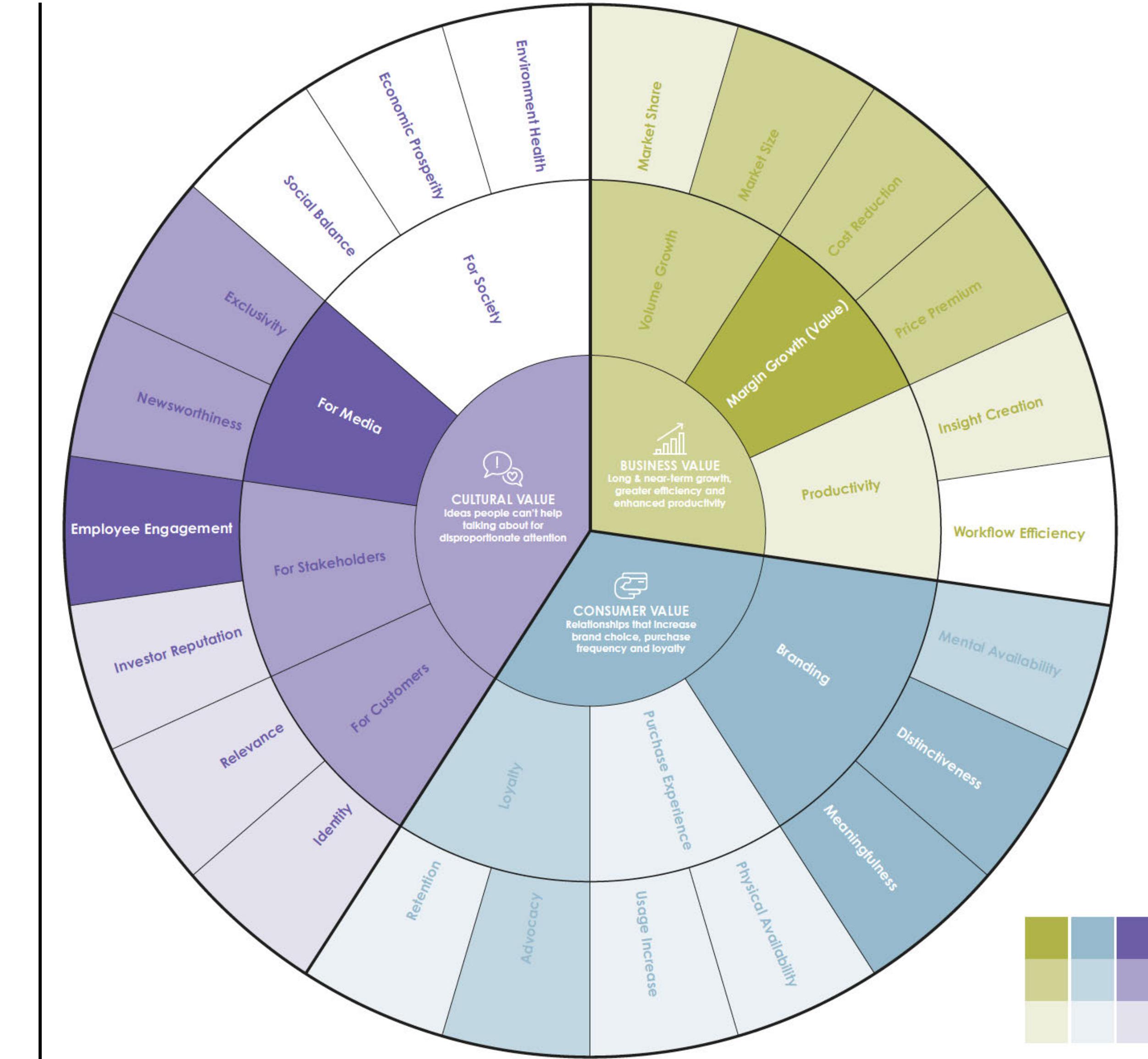
What Value do you Create? Marketing's 3 Types of Value

2.5K 13 responses

What Value do you Create? Marketing's 3 Types of Value.

Carr

David is Director of Marketing Strategy and Analysis at Digitas, a global marketing agency.





A Map of Modern Brand Building

Carr

David is Director of Marketing Strategy and Analysis at Digitas, a global marketing agency.

Storytelling with Data – Lecture 6



"First, it has to be a **coherent totality**, not a lot of bits. The physical product, the pack and all the elements of communication - name, style, advertising, pricing, promotions, and so on - **must be blended** into a single

A Problem with Purpose?

The popularity of Brand Purpose stems from Jim Stengel and Steve Wilh's TED talk and book *Brand Sense*. Stengel wrote that brands with a Brand Purpose or belief - that is, a rationale beyond profit - are more successful than those without. Despite its popularity, there is no proof that ideals deliver success. There was a positive correlation between having a purpose and sales, but this correlation dropped substantially when examined over a longer period. Purpose has been described as "marketers deluding themselves about their own effectiveness," and yet Brand Purpose has become a strong organising thought behind some of the most successful brands.

Brand Equity is the power of **a brand** is a set of **associations** that combine with **heuristics** in the mind of consumers to **shift demand** to reduce the effort in making a buying decision to a minimum.

personality."
Stephen King
What is a Brand?

Colours
Spokespeople
Graphic devices
Trade dress
Sounds
Tag-lines/Slogans
Media
Physical Availability
Identity
Context

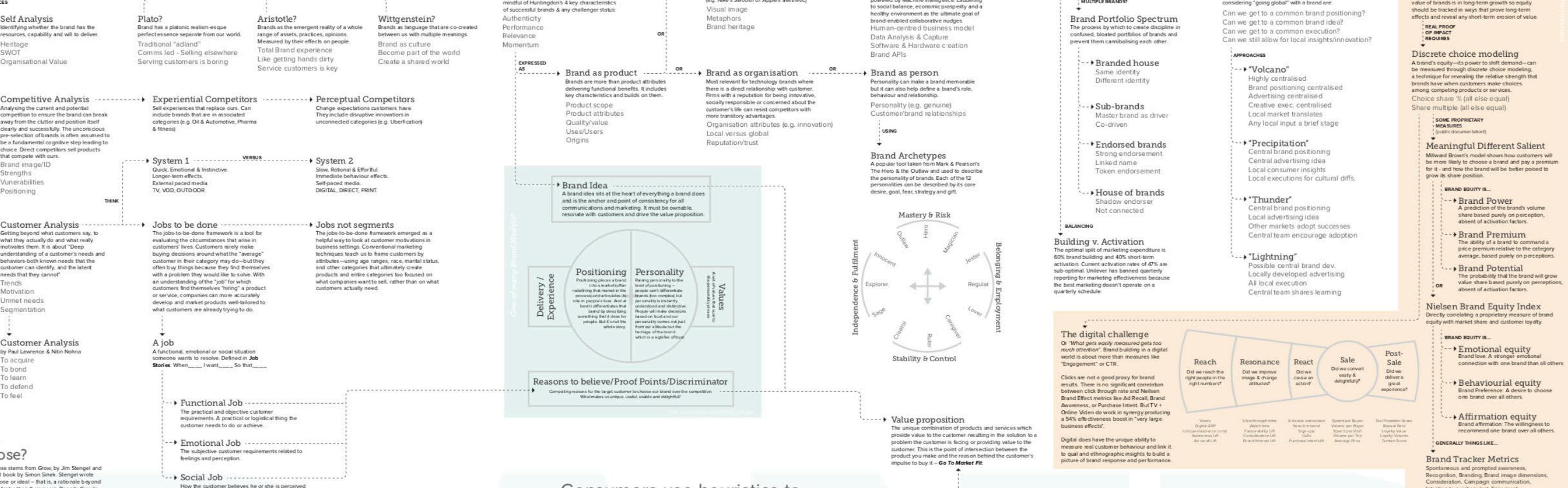
Symbols
Existing words
Coined words
Abbreviations
Naming
Car create associations, associations and meanings
Existing words
Coined words
Abbreviations
Consistency
so customers don't associate with those of a competitor
Prevalence
so the majority of customers link your brand to your brand elements
Frequency
Effectiveness is the number of messages that need to be delivered to generate a response
Reach
The total number of different people or households exposed, atleast once, to a medium during a given period. Broad reach media (TV) tends to be more effective. A media outlet's frequency is the number of messages required within a specific time span before purchase decision.

Behaviour
Gives attitude
Loyal
switchers
Deeply committed buyers
Involvement
Rational, thoughtful viewers
Attitudes
Gives behaviour
Brand loyalty
Brand switches
Deeply committed buyers
Involvement
Rational, thoughtful viewers
New World View
Behaviours
Gives attitude
Loyal
switchers
Deeply committed buyers
Involvement
Emotional, thoughtful viewers
Old World View
Behaviours
Gives attitude
Loyal
switchers
Deeply committed buyers
Involvement
Emotional, thoughtful viewers

Personal
Relevance
The right reason, at the right amount, at the right place. Meaningfulness has a very strong relationship with personal relevance
Trust
Reliable
Recommendable
Providing consumer with the feeling that they are doing the best
Affinity
Brands with excess emotional affinity are stronger brands with 20% higher sales than brands with excess affinity than those with weak affinity.
Meets needs
Gives consumer what they really expect to improve product perceptions. Meets specific needs and experience as well as appeal.

Contemplative ironic, Symbolic, Poetic, Beautiful, Creative, Liberating, Encouraging, Inspiring, Stimulating, Entertaining, Fun, Joyful, Delightful, Delightful
Proficient, Usable, Reliable, Functional
Emotion
How do customers feel about the experiences?
Success
How will do experiences need customer need?
Effort
How easy is it for customers to do what they want to do?

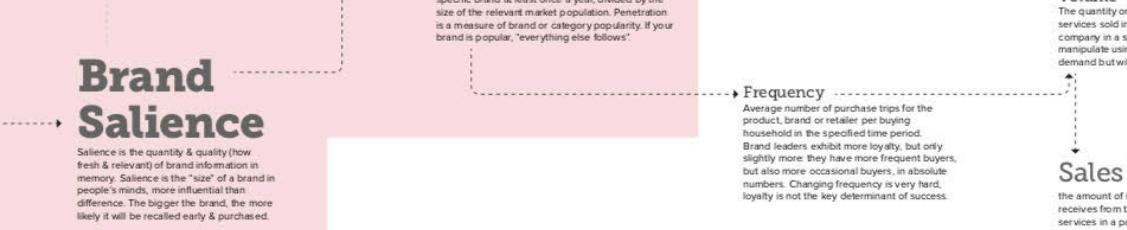
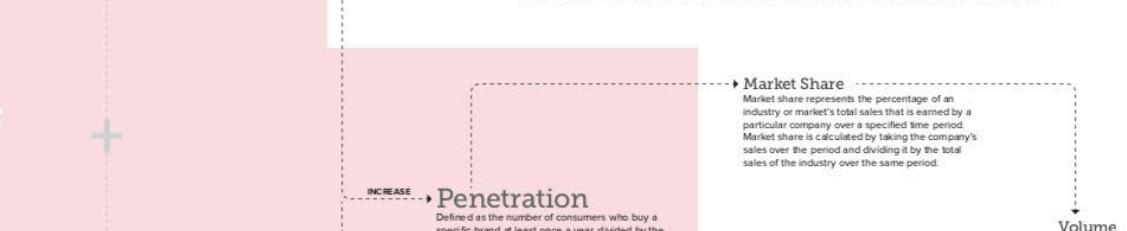
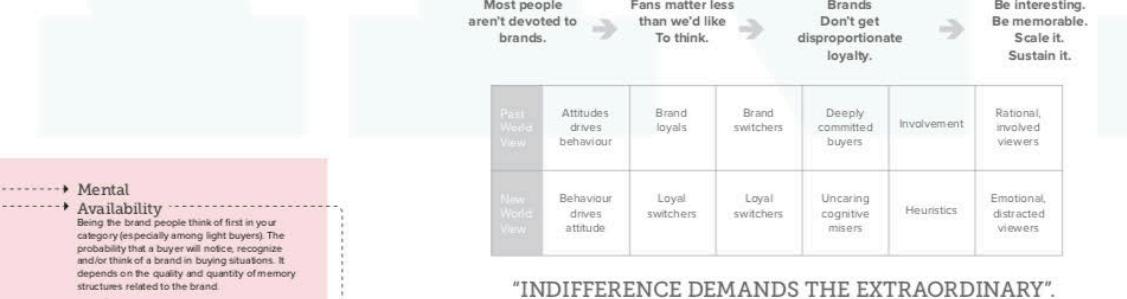
Service culture as brand building



Consumers use heuristics to make '**good enough**', not perfect, decisions. Consumers are not rational, involved and deeply committed buyers, but **uncaring cognitive misers** who rely upon

heuristics in the mind of consumers to **shift demand**

to reduce the effort in making a buying decision to a minimum.



"All of the words that we still use as common currency in planning advertising, concepts which even skilled professionals regard as self evident truths... come loaded with the baggage of a particular world view that we might or might not really want
Paul Feldwick, The Anatomy of Humbug

All models are wrong but some are useful
George E. P. Box

Marketing executives' understanding, and uses, of data



Data is the new oil: dirty, misunderstood, polluting the world & pulled from all the wrong places

Carr

David is Director of Marketing Strategy and Analysis at Digitas, a global marketing agency.

Data drives marketing, can reveal biases

Limitations in data need to be understood, addressed

Use of data is about truth and trust, requires openness about source and methodology

Data is an AND, not an OR

This marketing director knows that marketing is data-driven. Further, "Data can often show the basis for our biases and intuition."

He also understands issues with use of data:

Sources of unique data can be limited.

Data is often corrupted, unhygienic, or mis-transformed when converting to information.

Data is often guestimated, panel-skewed, inaccurate, and not proven, but at the same time "treated as gospel."

Measured data is only part of the story; things that go unmeasured are important and can change what the total information mean from a business standpoint.

"The debate about the use of data in marketing and communications is really a debate about truth and trust, the two biggest issues in the world today."

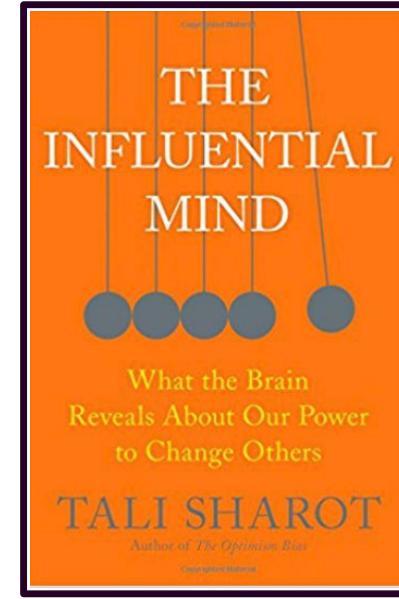
"Where data has been best used is where it combines with empathy and imagination to shift our way of thinking."

Analyzing audiences, heuristics and biases

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

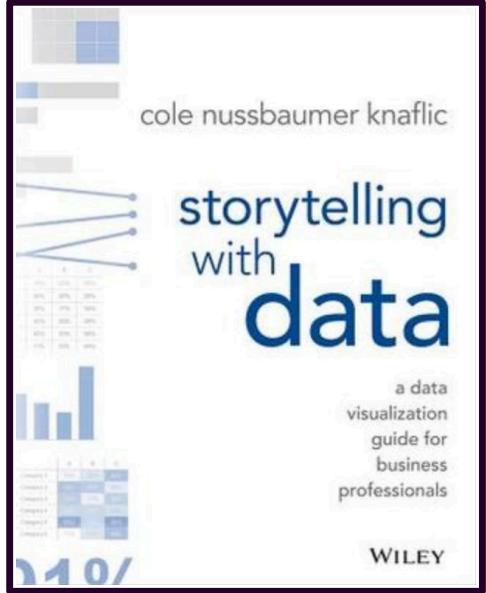
When you provide someone with new data, they **quickly accept evidence that confirms their preconceived notions** (what are known as prior beliefs) and **assess counterevidence with a critical eye**.

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

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?

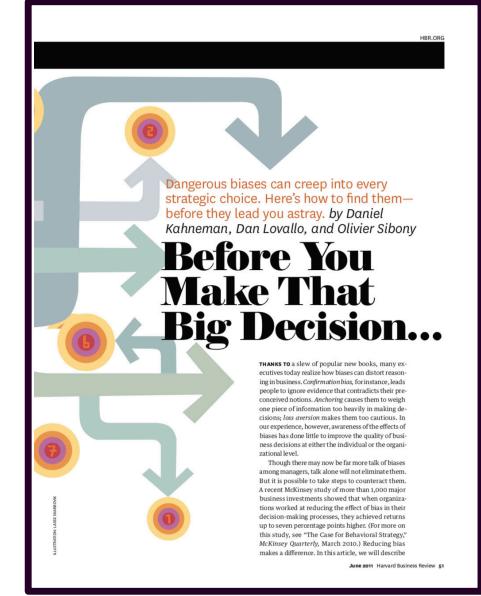
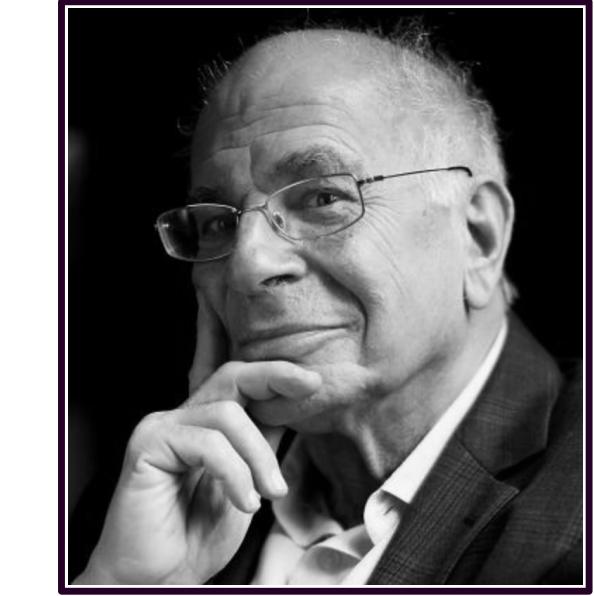
How will you communicate with them?

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.

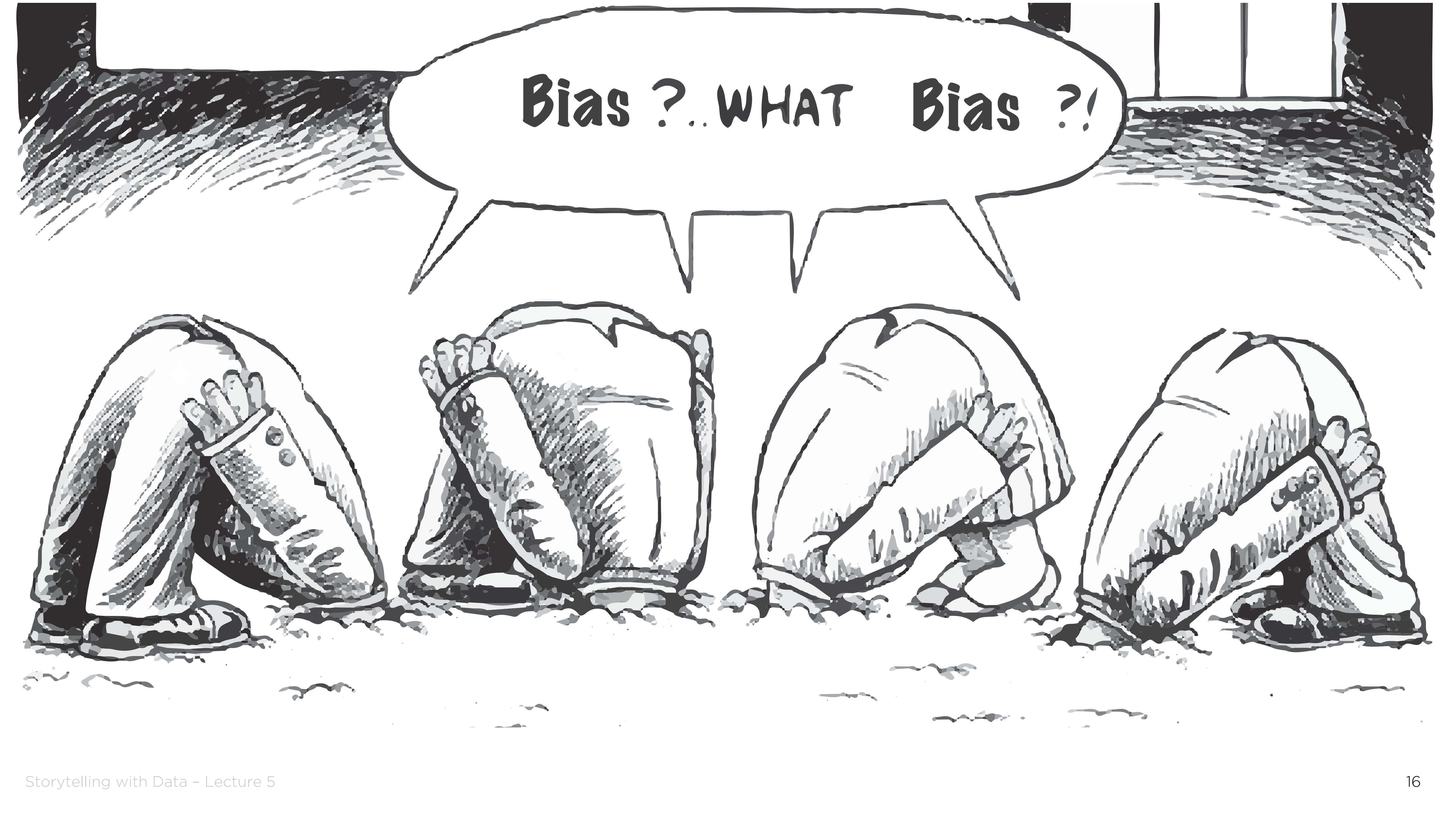
Two modes of thinking

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?

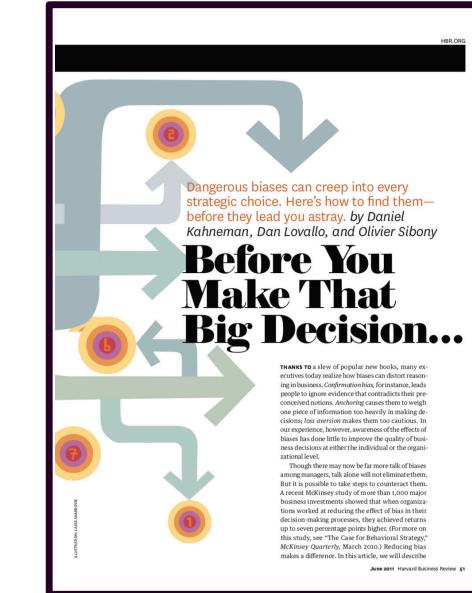
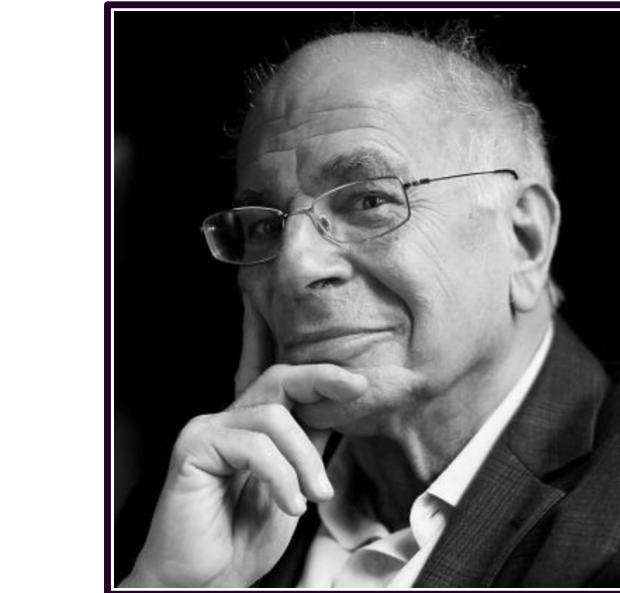
Have the team conduct a premortem: imaging that the worst has happened, and develop a story about the causes.

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...

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.

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.

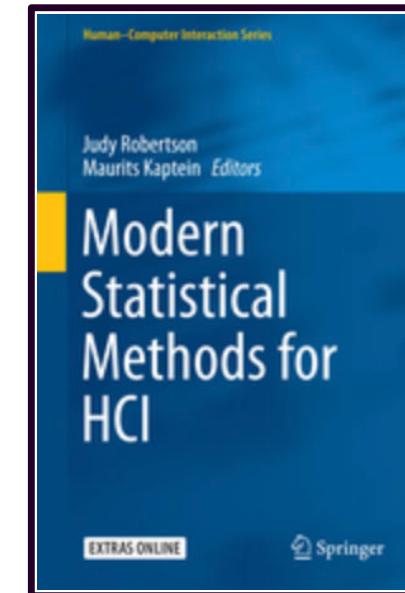
Consider **multiple anchors** in the proposal.

Comparing, and admitting uncertainty, with visuals and words

Ch. 13, Fair statistical communication in HCI

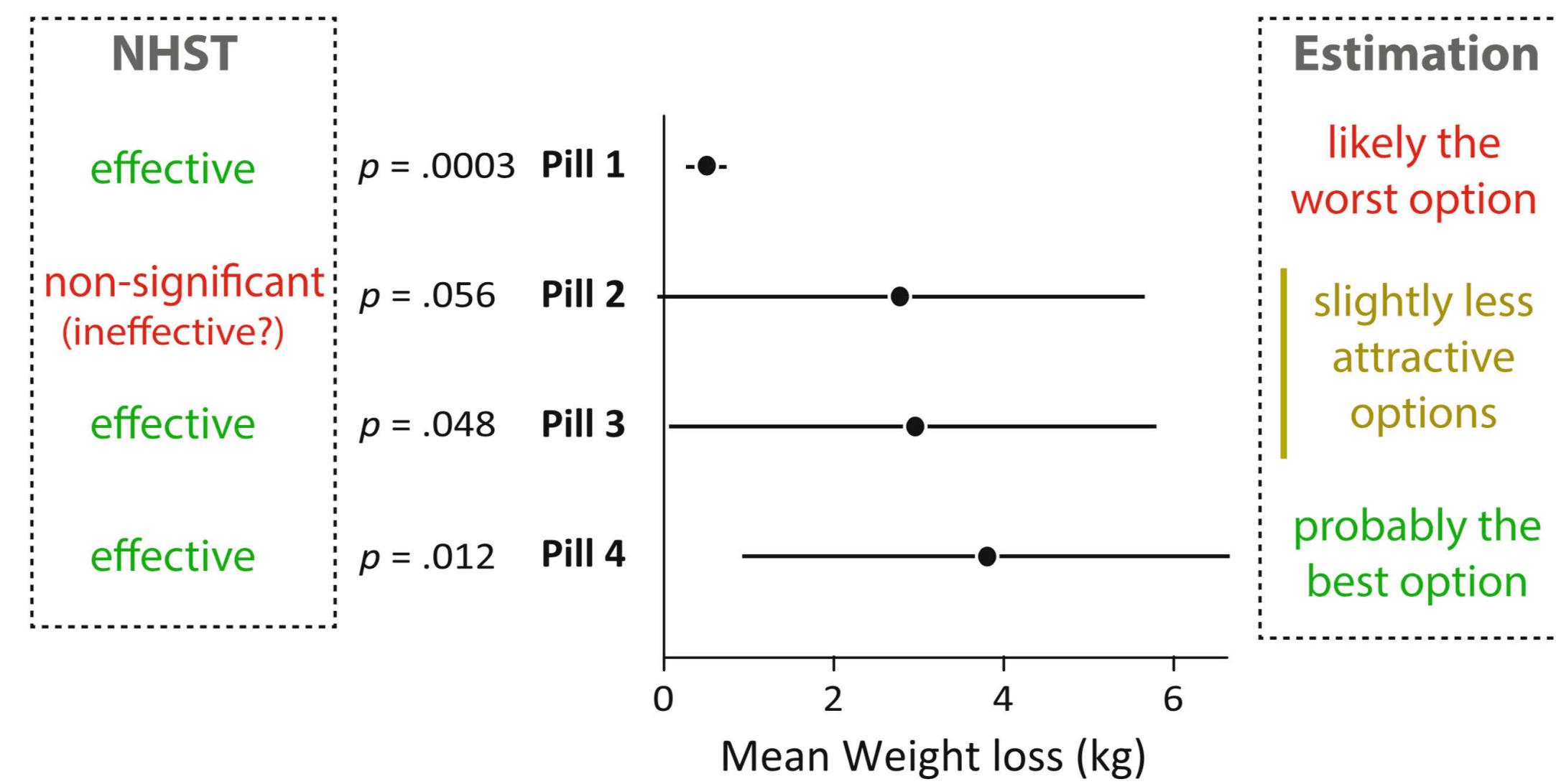
Dragicevic

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



He agrees with Abelson*, decisions are better informed by effect sizes and intervals

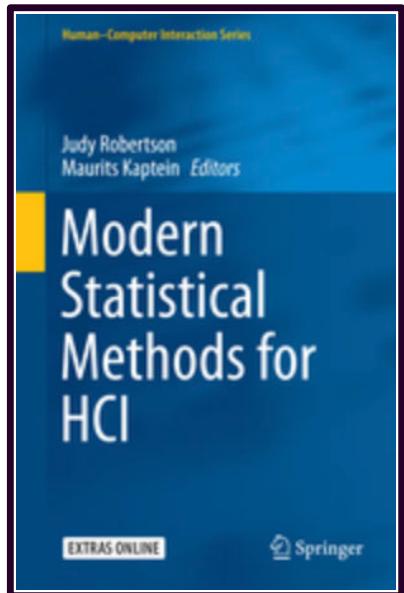
Whether exploring or confirming analyses, show results using an *estimation* approach — use graphs to show **effect sizes** and **interval estimates**, and offer **nuanced interpretations** of results. **Avoid the pitfalls of dichotomous tests and p-values.**



“ The notion of binary significance testing is a terrible idea for those who want to achieve fair statistical communication. ”

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.

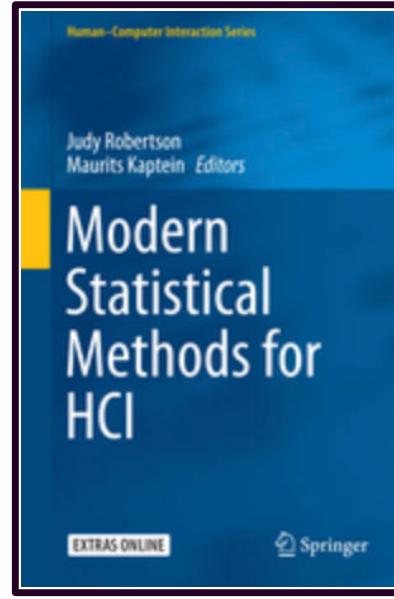


Ch. 13, Fair statistical communication in HCI

Dragicevic

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

TODO: Pull his examples of using appropriate vague language.



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.

General principle

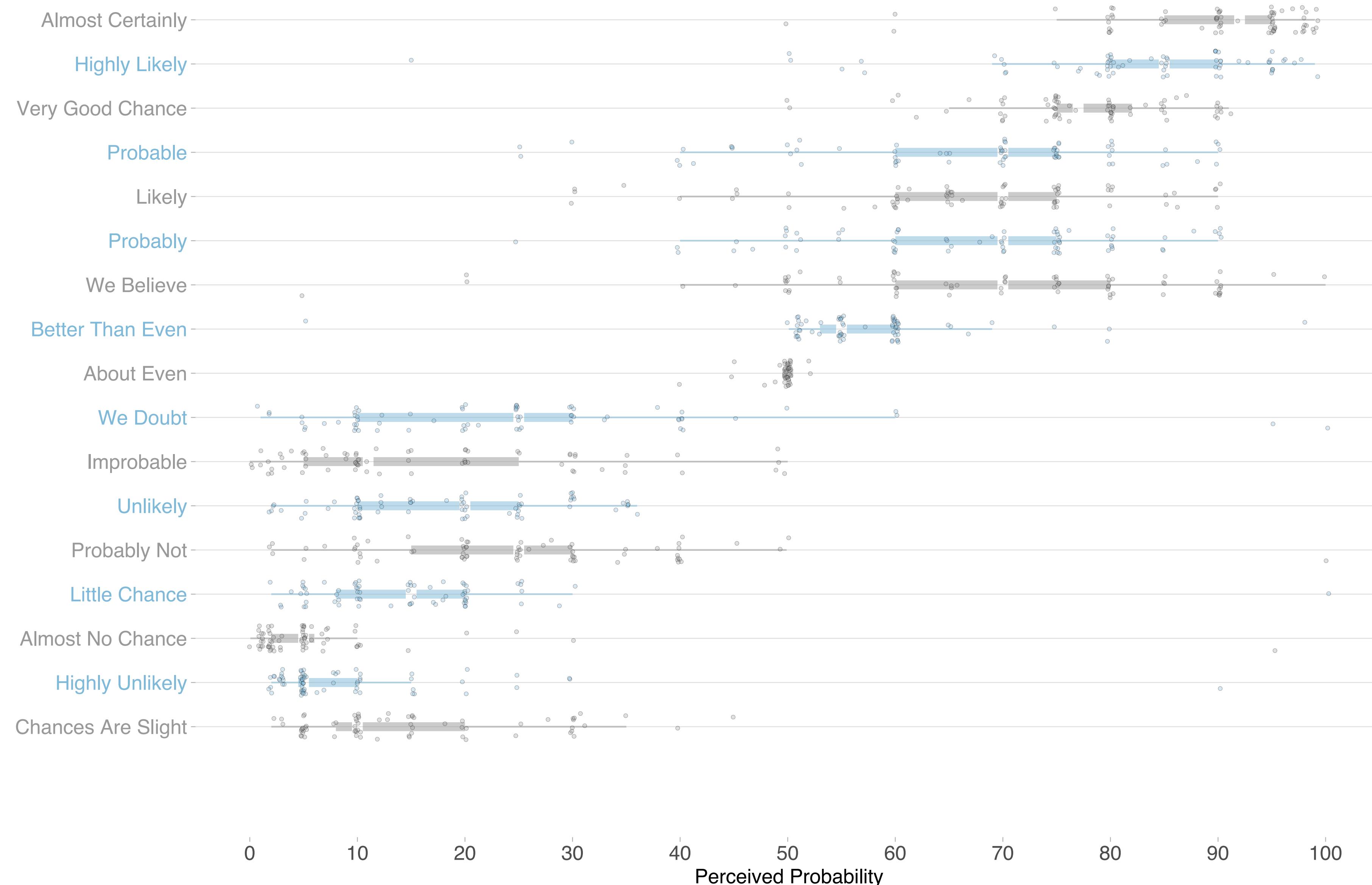
We have the duty of [...] communicating our conclusions in intelligible form, in recognition of the right of other free minds to utilize them in making their own decisions. — Fisher

**Clarity
Transparency
Simplicity
Robustness
Noncontingency
Precision**

Details.

TODO: develop this.

Language describing probability are imprecise, depend upon audience and context

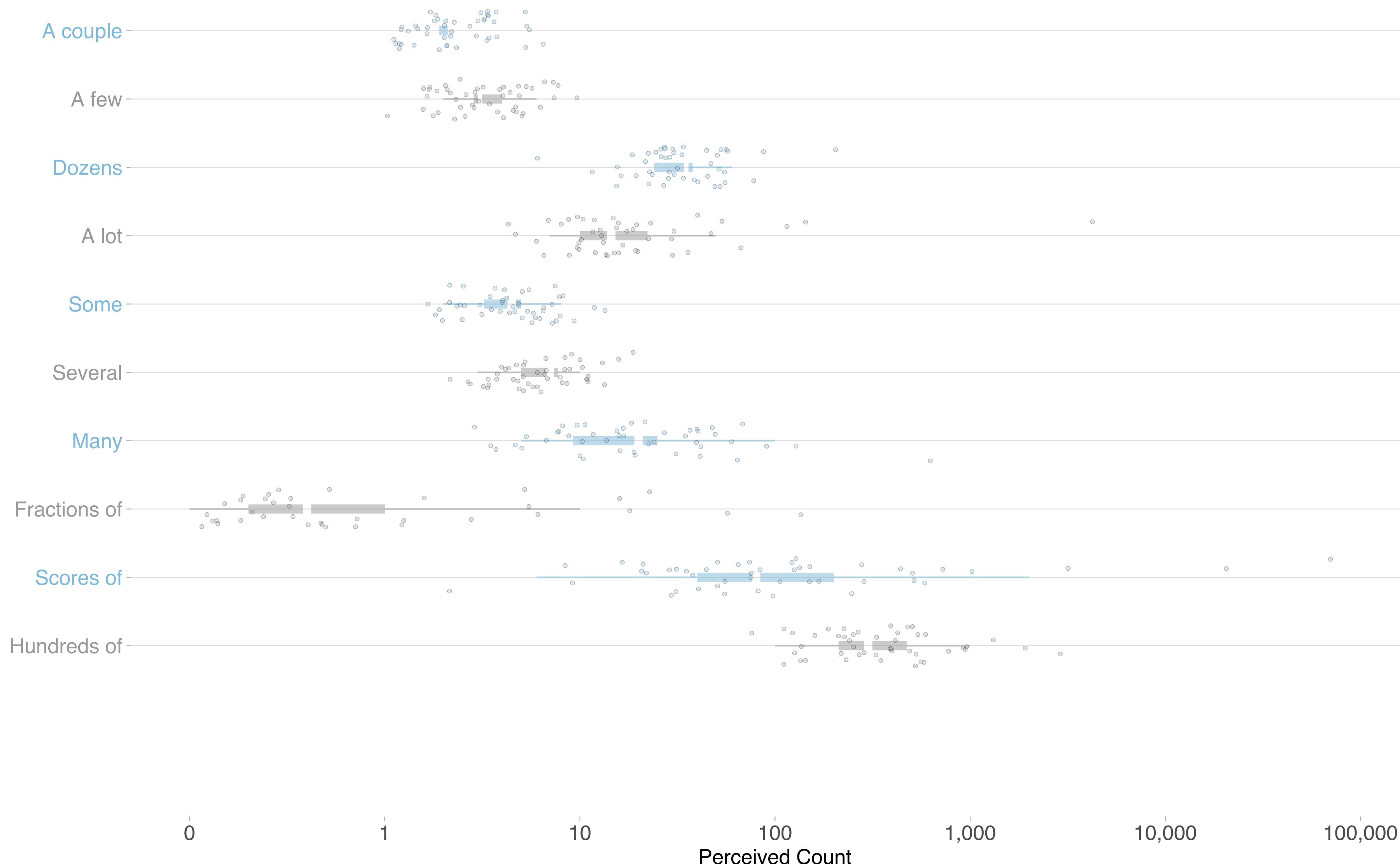


Spencer, Scott. *Quantitative persuasion amid uncertainty*. Forthcoming. Print.

Barclay, Scott et al. *Handbook for Decision Analysis*. Decisions and Designs, Inc., 1977. Print.

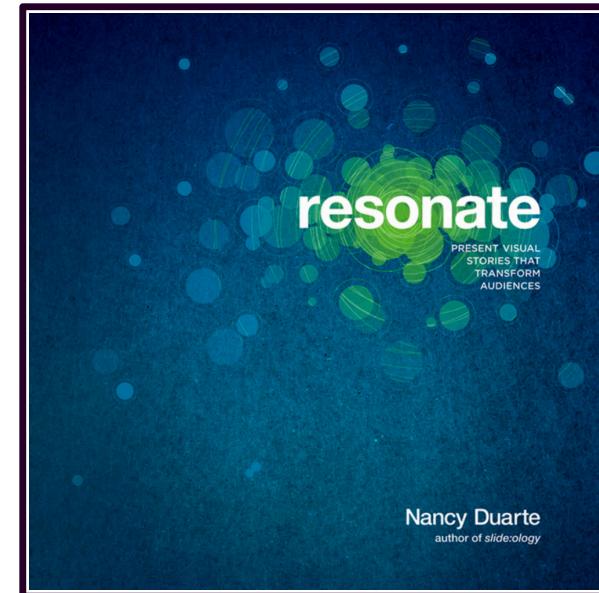
zonination. "Perceptions of Probability and Numbers." [github.github.com](https://github.com/githhub.github.com), 18 Aug. 2015. Web. 26 Dec. 2018.

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.

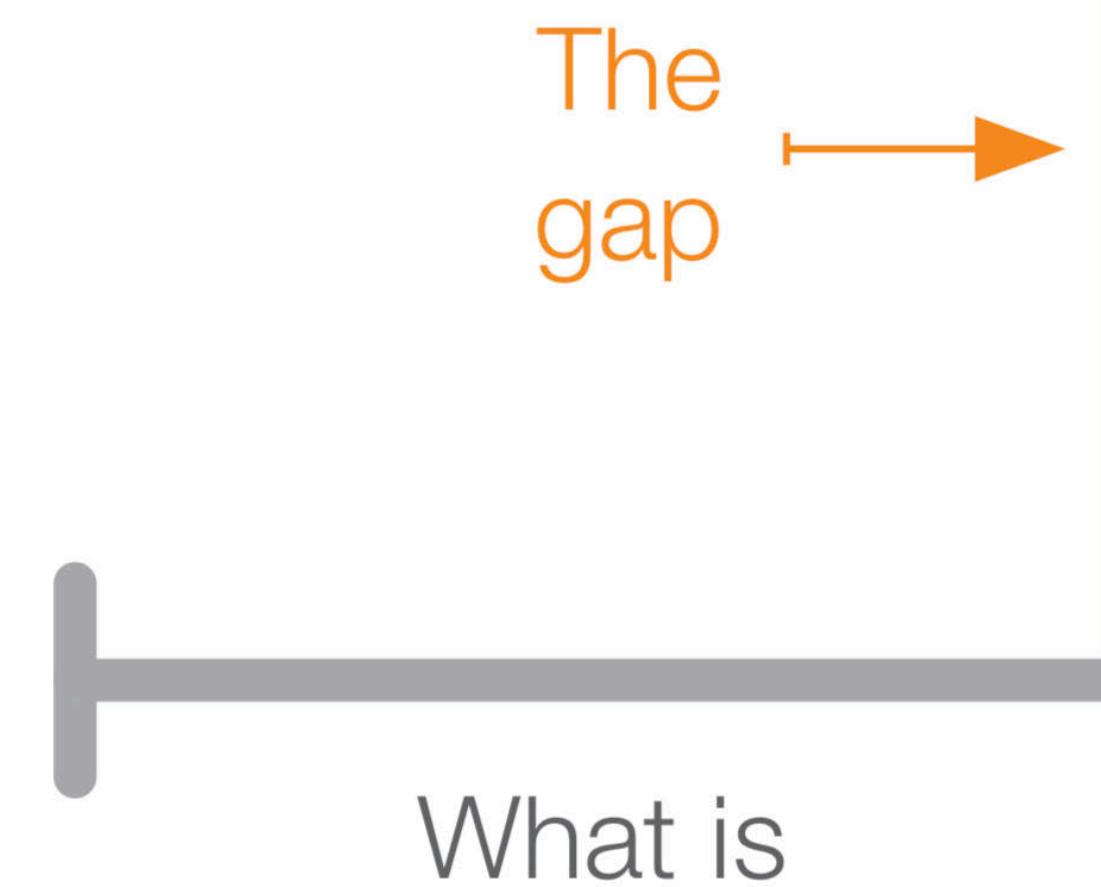
Comparison as narrative structure



The Contour of Communication

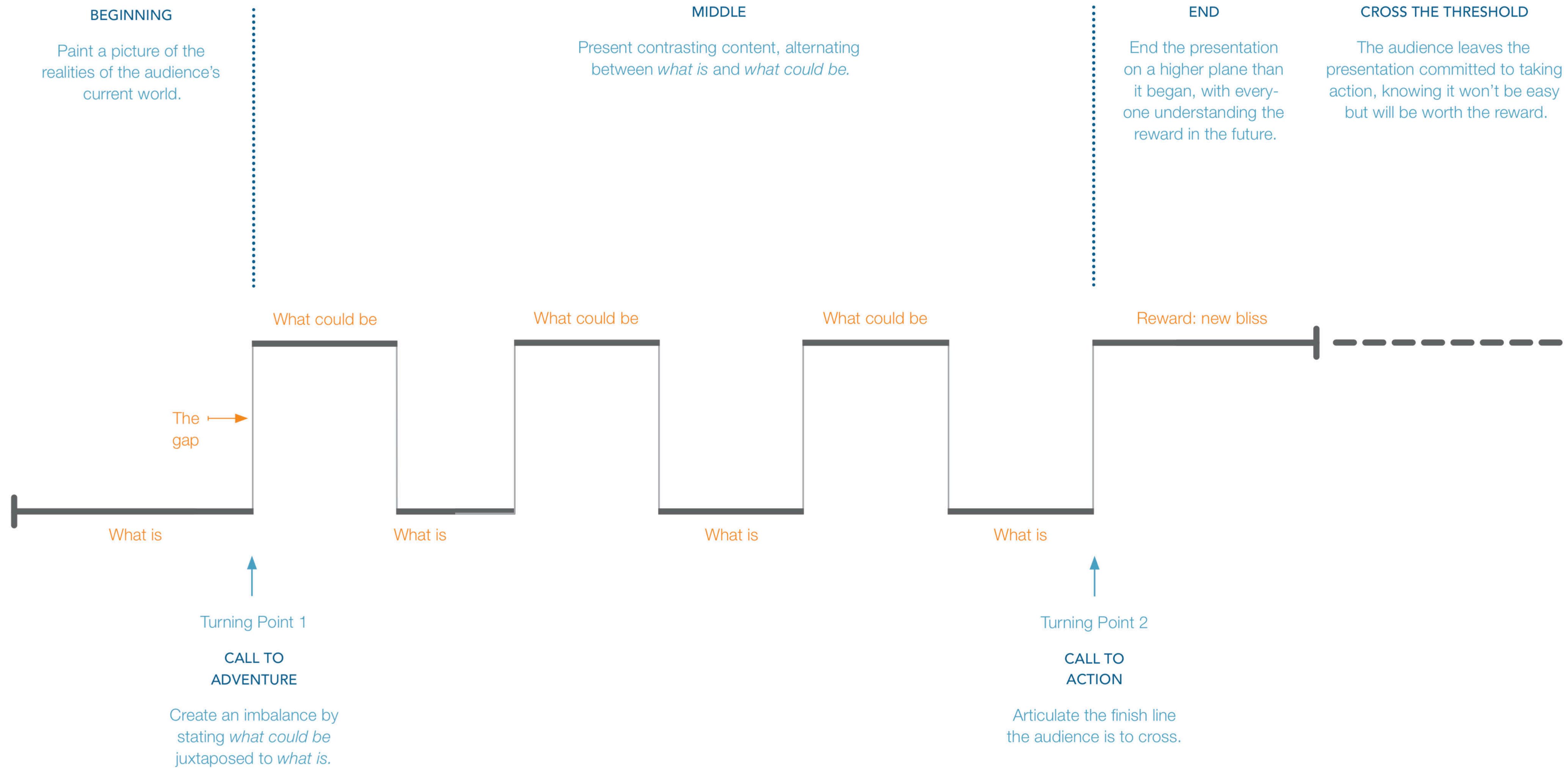
Duarte

Duarte is known for her work with Vice President Al Gore on the award-winning documentary slide show known as An Inconvenient Truth.



What
could be

Dramatic tension is created by contrasting the commonplace with the lofty.



Analyzing comparison as narrative structure

Recall some of our examples so far,

The Next Rembrandt (to general audience)

Jakarta analytics blog post and paper (to other data scientists)

Dodgers analytics project memo and proposal (to Director of Quantitative Analytics)

Citi Bike infographic (to general audience)

In each of these, can we identify a “**what is**”, a “**what could be**”, creating a “**gap**”?

Think, pair, and share

Applying comparison as narrative structure

Pair up.

In each of your analytics projects, identify a “what is”,
a “what could be”, creating a “gap” that you are bridging with your analytics project.

Get feedback from your peer for ideas on how you can make these stronger!

Consider how your projects are relevant to a marketing executive, and
how your narrative to the CAO needs to be changed for the CMO.

Sneak peek: storyboards, a tool for testing narrative

Oxford English Dictionary

Storyboard, *n.*

[View as: Outline](#) | [Full entry](#)

Pronunciation: Brit. /'stɔːrɪbɔ:d/, U.S. /'stɔri,bɔ(e)rd/

Frequency (in current use): ●●●●●

Origin: Formed within English, by compounding. **Etymons:** STORY *n.*, BOARD *n.*

Etymology: < STORY *n.* + BOARD *n.*

Film and Television.

A sequence of drawings or other images, typically with some directions and dialogue, representing the shots planned for a film, television programme, or advertisement. Also: a board on which such images are displayed.

- 1941 *Pop. Sci.* Mar. 109/2 Reese thinks nothing of sitting down in the morning prepared to fit sounds to 80 photographs of scenes laid out before him on a *story board*.
- 1965 *N.Y. Times Mag.* Apr. 21/3 They send out *story boards..*to their three or four favorite commercial producers, for bids.
- 1975 R. HILL *April Shroud* xii. 154 A huge sheet of card pinned to the wall. On it were pasted a series of drawings... ‘Yeah, that’s my *story board*.’
- 1999 *8 Days* 4 Dec. 34/4 (caption) A hand-drawn *storyboard* panel captures a moment with *Toy Story 2* characters.
- 2003 *Dreamwatch* Aug. 25/1 Not all the special effects were in, so at some points they would go to the *storyboards* to illustrate where the effects would be.

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.



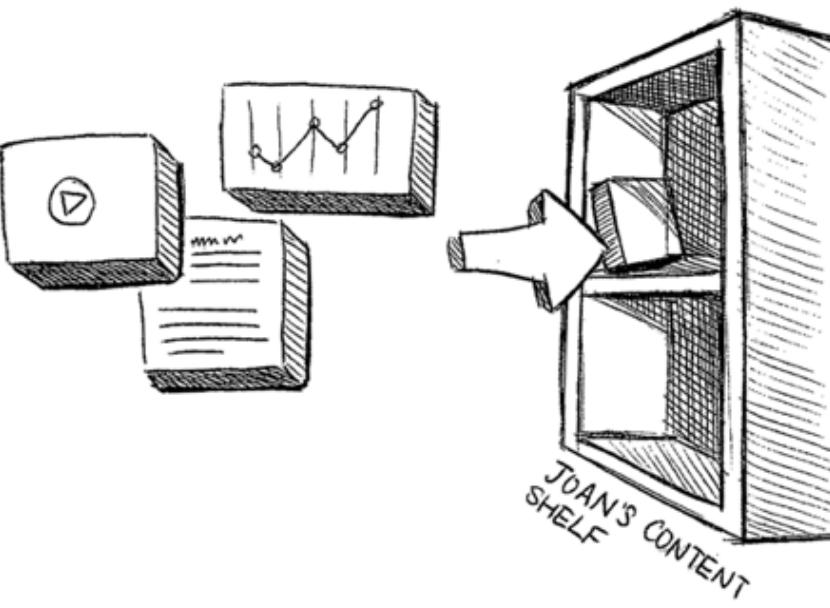
Joan, a Data Scientist at an enterprise company, is looking for resources to help her figure out how weather affects customer sales.



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



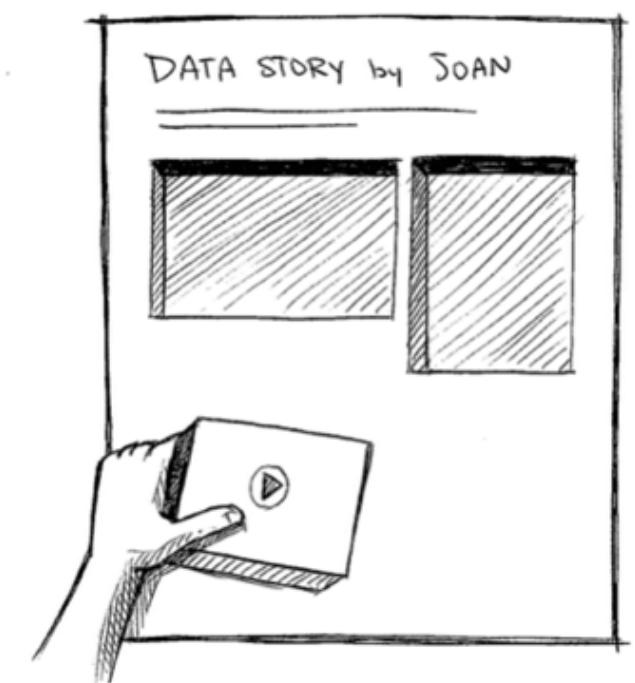
The paper presents a weather algorithm that Joan can use for her own project. She bookmarks the paper for later use.



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.



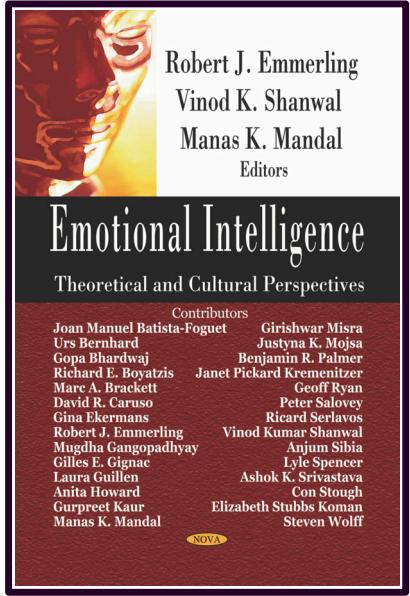
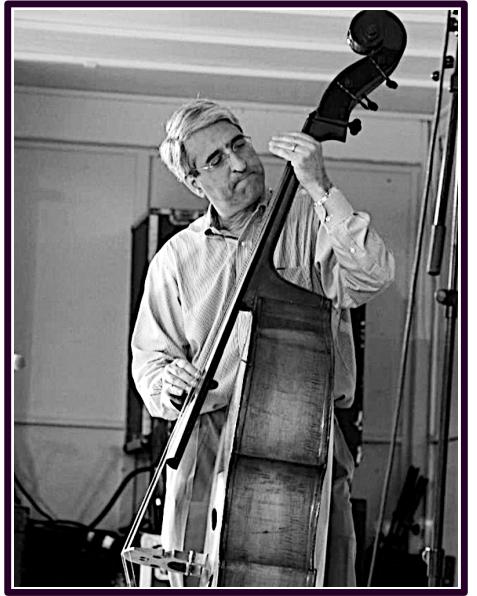
Once she has added a handful of resources to her bookmark list, Joan creates her own Data Story. She uses her bookmark content as a reference point.

Emotional tone of, and context for, 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**.

Going forward

For Next Week, Module 6:

Agenda next week

Next deliverable, **draft** storyboard
The storytelling process
As you review the material, think about how you might storyboard *The Next Rembrandt*.

The minimum

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!**

