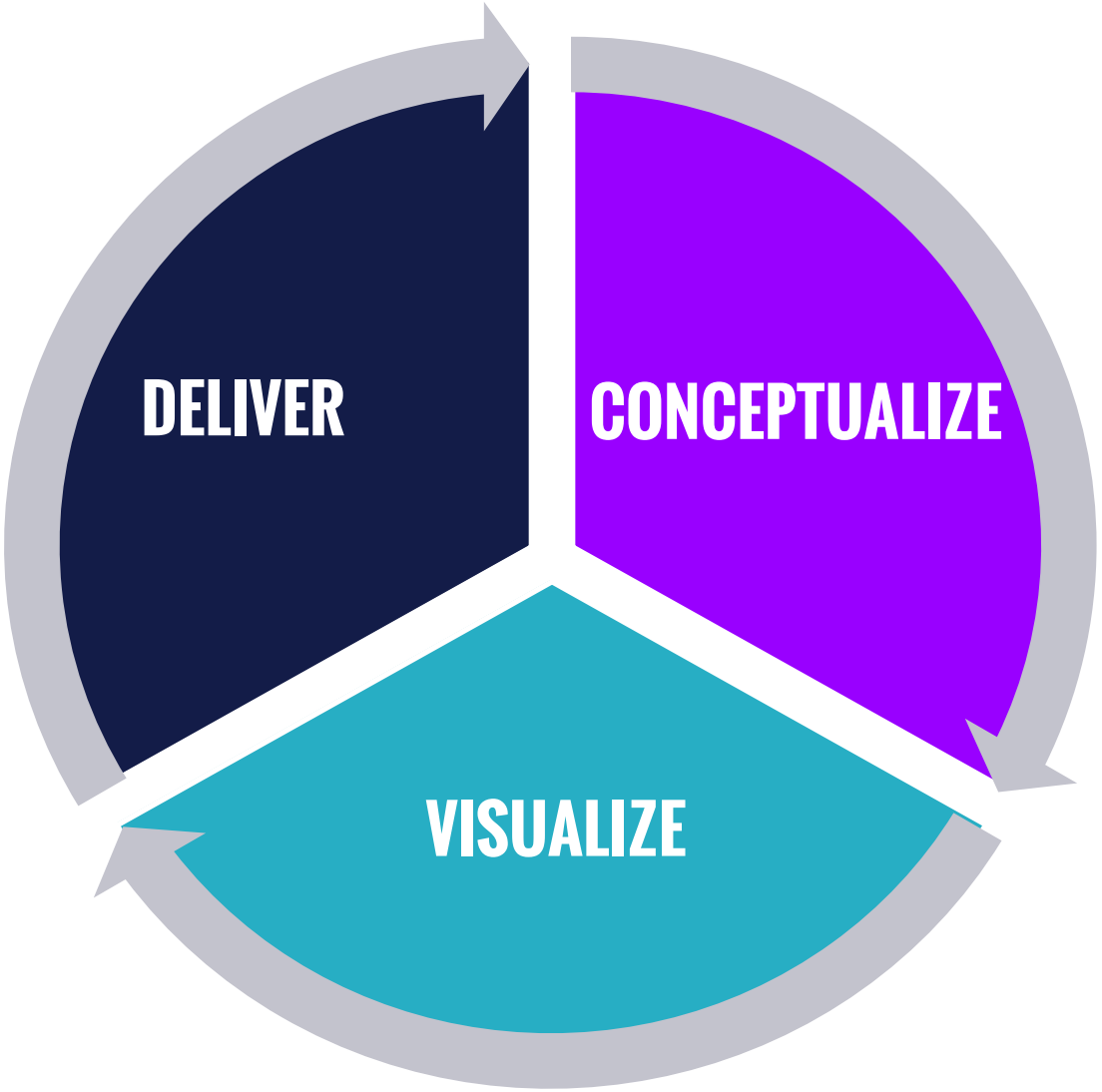
Inspiring Insights

DATA VIZ BOOT CAMP

// PRESENTED BY:
Lea Pica, Search Discovery
ConversionXL Analytics Course

THE HANDOUT

THREE COMPONENTS OF PRESENTATION



1 CONCEPTUALIZE

brainstorming like a boss

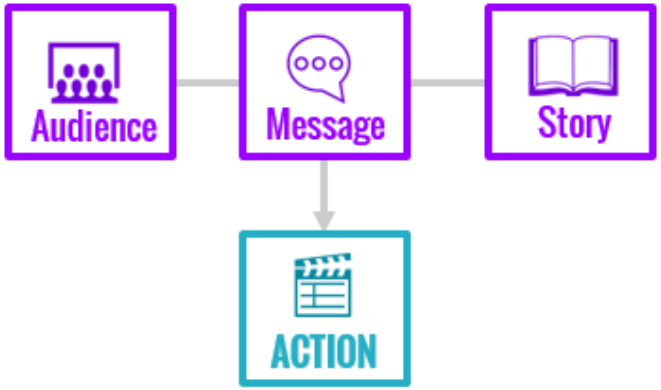
Brainstorming KEY POINTS

1. Think about what your audience wants
2. Put structure around your content with boxes
3. Brainstorm thoughts on Post-Its
4. Digitize your thoughts with Google Slides
5. Transform takeaways into insights
6. Create connected, accountable & time-based recommendations
7. Speak & record your thoughts

COMPONENTS OF CONCEPTUALIZING

Brainstorming Like A Boss

Every effective presentation contains these 4 components:



1. **AUDIENCE**: they're the reason you're there. They are king. Created to serve their needs, desires, and concerns
2. **MESSAGE**: What is the overarching story this presentation will tell?
3. **STORY**: This is the "meat" of the message, and works to support & reinforce your key message
4. **ACTION**: What do you want your audience to do at the end? Every presentation should close with a clear call-to-action

THE PRESENTING BY BOXES METHOD

INTRO: State Objective / Create Anticipation / Campaign & Test Detail Recap

MESSAGE: Big Story / Key Findings / Learning

Issue / Insight #1
2-3 recommendations
Possible consequences
Audience Objections
Ask for their thoughts

Issue / Insight #2
2-3 Recommendations
Possible consequences
Audience Objections
Ask for their thoughts

Issue / Insight #3
2-3 Recommendations
Possible consequences
Audience Objections
Ask for their thoughts

RECAP: Insights & Recommendations

ACTION: Identify & Assign Next Steps & Roles

THE PRESENTING BY BOXES METHOD: EXAMPLE

Purpose: Decide on Q3 digital marketing optimization plan

Message: Our Q2 optimizations did not meet our target goal increase of 20%

#1: Site A contributed to a higher Cost per Acquisition

Reduce Site A spend could improve our CPA by 15%.

But I like that site!

#2: Site B spent 40% of budget with only 5% conversions

Remove Site B from campaign

Not doing so could cost us $X

#3: Site C has the lowest CPA, but is 5th in volume.

Reallocate funds from Site B toward Site C.

Could lost estimated X sales by doing nothing.

RECAP: We didn't reach our goal because our Q2 optimizations fell short.

RECOMMEND: Reducing Site A by 10%, removing Site B & reallocating funds to Site C.

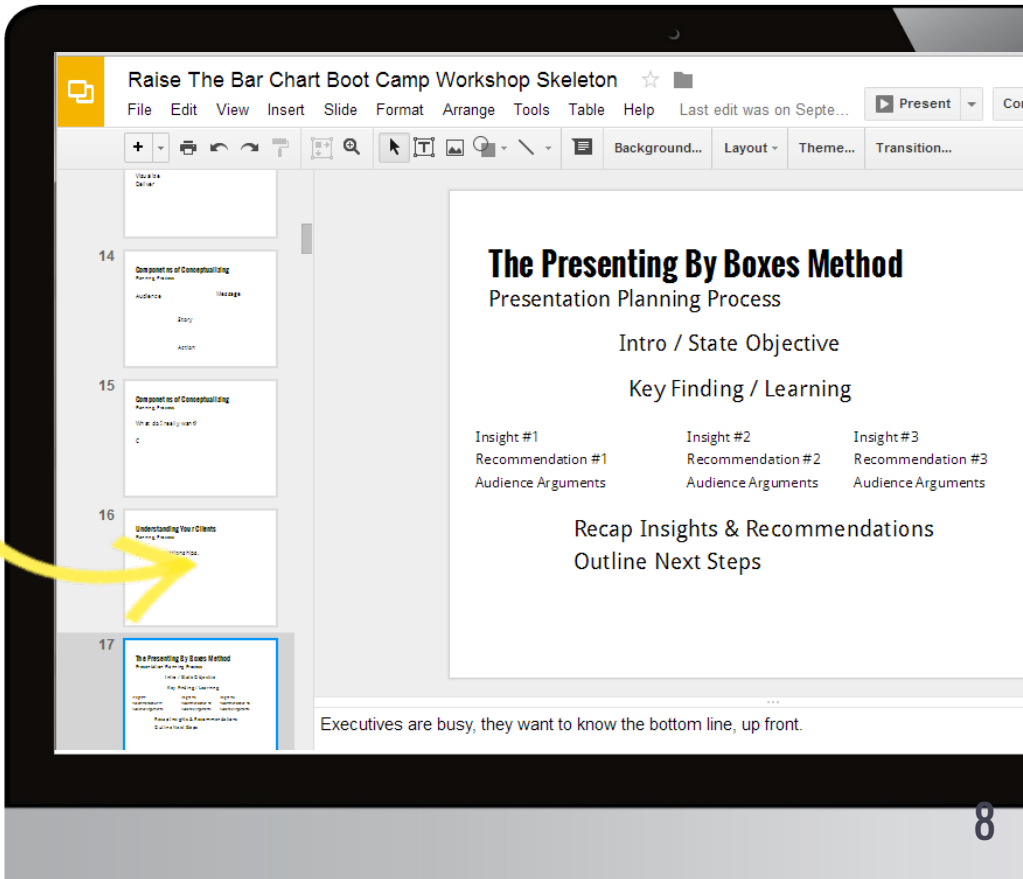
ACTION: VP to approve Q3 optimization plan by July 31st.

DIGITIZING YOUR PRESENTATION CONTENT

Once you have your content planned, digitize them using a simple presentation skeleton in PowerPoint or my preference, **Google Slides**.

Use this to collaboratively plan your presentation without distracting formatting

Mimic your PPT template in Google Slides for a smooth transition



LIGHT SCRIPTING

Practice writing down how you would speak through your presentation during the brainstorming process.

- Speak aloud what you would say
- Talk normally, almost to a friend
- Enter those into each slide's Notes
- Dictate notes into your iPhone w/ Google Slides or Evernote
- This will come in handy later…

FRAMING UP RECOMMENDATIONS

KEY LEARNINGS & OPPORTUNITIES

1. Leverage strategic partnerships to maximize limited media spend and to expand into adjacent media categories

2. Continue to consider talent and influencers within social that are a natural fit for the brand identity, increasing the likelihood of high engagement across platforms

3. Improve celebrity contract negotiations with cross-functional team to ensure on-brand messaging, strategy alignment and maximize ROI

4. Optimize campaign reach by identifying ideal launch timing that takes both media lead time and holidays into consideration

5. Maximize paid media impressions by shifting more spend from YouTube to Facebook (CPV was $.09 for YouTube vs. $.02 for Facebook)

6. Collaborate with internal legal team to streamline review process and better define ownership and responsibilities when working with agencies

Who will own this?

By when?

How much more spend?

Design Essentials
KEY POINTS

Better ~~bullet~~ story points

Rule of thirds

Embrace white space

Understand fonts & colors

Harness the power of imagery

Leverage your style guide

Learn shortcuts & the QAT to save time

Don’t let bullet points **expose all of your information** to your audience at once.

THE ONLY WAY I USE ~~BULLET~~ STORY POINTS

Keep the story point on **one line**

No more than **7 – 9 words**

No more than **5 story points** per slide

No more than 1 story point slide **per 5 slides**

Don’t use default bullet points!!

THE ONLY WAY I USE ~~BULLET~~ STORY POINTS

Animate the story points in **one at a time**

Dim the prior bullet to divert attention

Don’t dim the **last one**

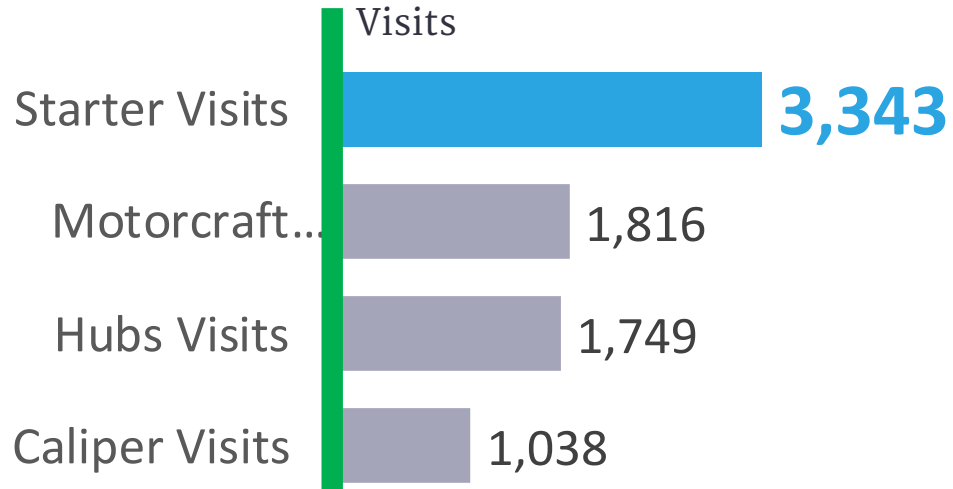
Include a **relevant image** to stimulate their brain

Watch your audience **not check out!**

SIMPLICITY THROUGH ALIGNMENT

OVER 3K VISITS ORIGINATE FROM STARTER PAGE

Visits by Landing Page – July 2017



Choose as few points of alignment as possible

October Comments

New:

- Didn't see the expected reaction to pricing campaign.
- Extended hosting to drive leads to NB, .05% increase in click rate, +3 direct INQ
- Launched nurturing campaign to 2017 non-converted INQ.
- ML continues to over perform, Dominic and Biebs working together to drive NB

Existing: High QC and AOV drove POS success. Hosting- 30 leads sent to Uptime

Renewals: Matching all renewals to CIC and NARS reps to incorporate into motion and drive connect rate

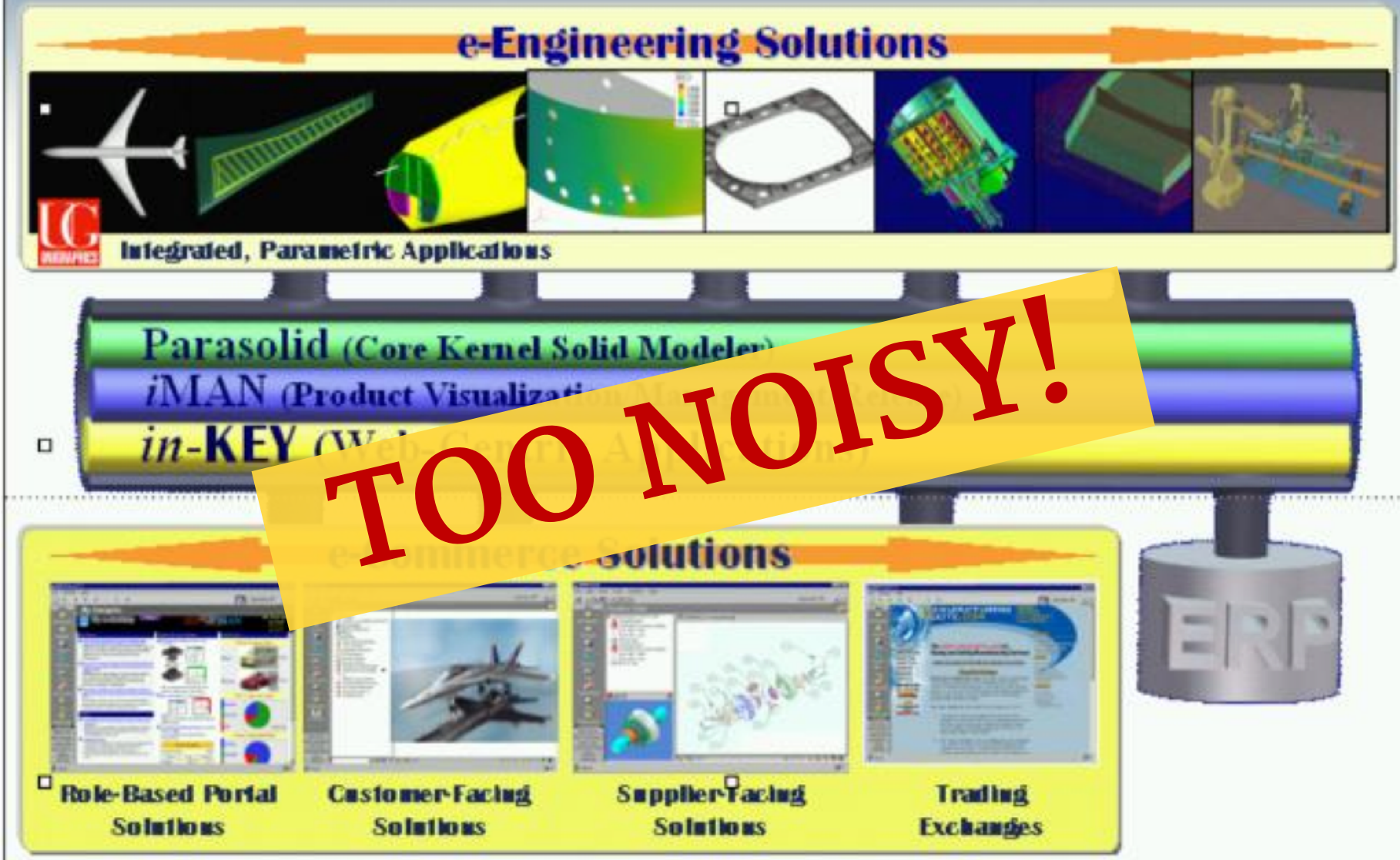
Adapted from "Good Charts" by Scott Berinato

The Rule of
THIRDS
Power corner

embrace white space.

let your content breathe

Foundation… Architecture and Applications



FANTASTIC FONTS - STANDARD BEST BETS

Slide Design Essentials

Segoe UI

Franklin Gothic

Lucida Sans

Gill Sans MT

Century Gothic

Helvetica (Mac)

FANTASTIC FONTS - NEVER USE THESE

Slide Design Essentials

Just say NO to…

Comic Sans

Times New Roman

Handwriting fonts

FANTASTIC FONTS - BONUS TIPS

Slide Design Essentials

- Always start at 20 pt
- View in Slide Sorter mode for readability
- Ensure good color contrast
- Replace all fonts at once (Home ribbon)

WORKING WITH COLOR - TOOLS

Slide Design Essentials

PPT / Excel Eyedropper Tool

ColorPic for Windows

ColorZilla Browser Extension

Adobe Kuler

Contrast Ratio Tool

Tip: Create a custom palette in PPT

NIP THE CLIPART

HARNESS THE POWER OF IMAGERY

No one likes a floater.

HARNESS THE POWER OF
IMAGERY

NO

Meet your client's
BRAIN

OK

Meet your client's
BRAIN

YES

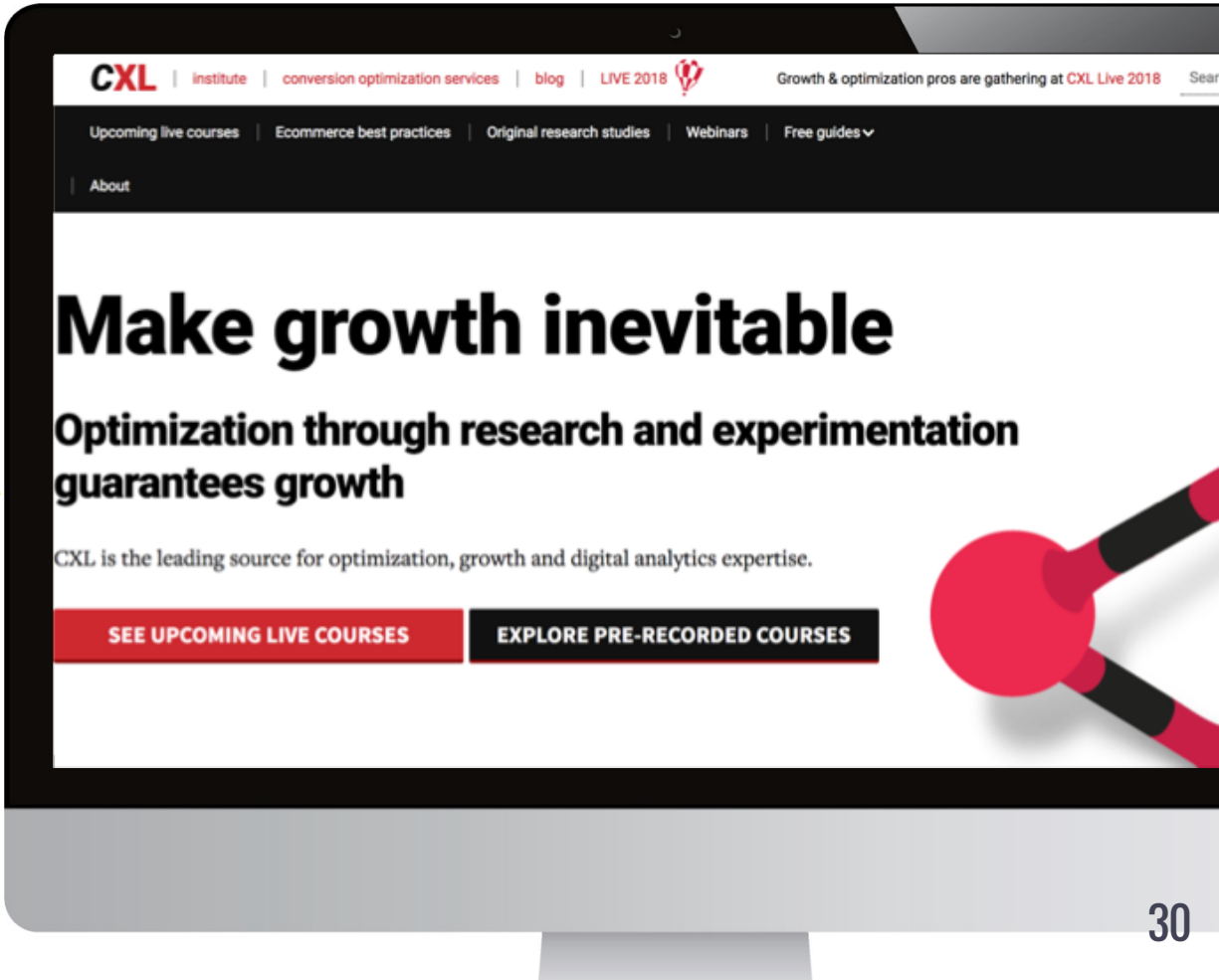
Meet your client's
BRAIN

YES

IMAGE CONTENT TIPS - SCREENSHOTS

Harnessing Imagery

Gives context



COMMUNICATE IDEAS WITH ICONOGRAPHY

The Top 4 Ways We Reach Our Customers

SOCIAL

EMAIL

SEARCH

VIDEO

WHAT WE'LL BE DISCUSSING TODAY

TARGET AUDIENCE

NEW IDEAS

STRATEGY

SOCIAL MEDIA

TEAMWORK

STATUS

FREE & PAID IMAGERY SOURCES

Harnessing Imagery

Unsplash – Free

Death to Stock Photo – Free

Pexels – Free

Pixabay – Free

Deposit Photos – Paid

The Noun Project for iconography

Your Creative department

TIP: Create an organized, shared imagery library

TIP: Upload photos to TinyPNG before importing to PPT to save file size

POWERPOINT KEYBOARD SHORTCUTS

Because Ain't Nobody Got Time For Dat

Ctrl Y – Redo last action

Ctrl Shift C – Apply previous format painter

Ctrl Alt V – Paste Special Dialog

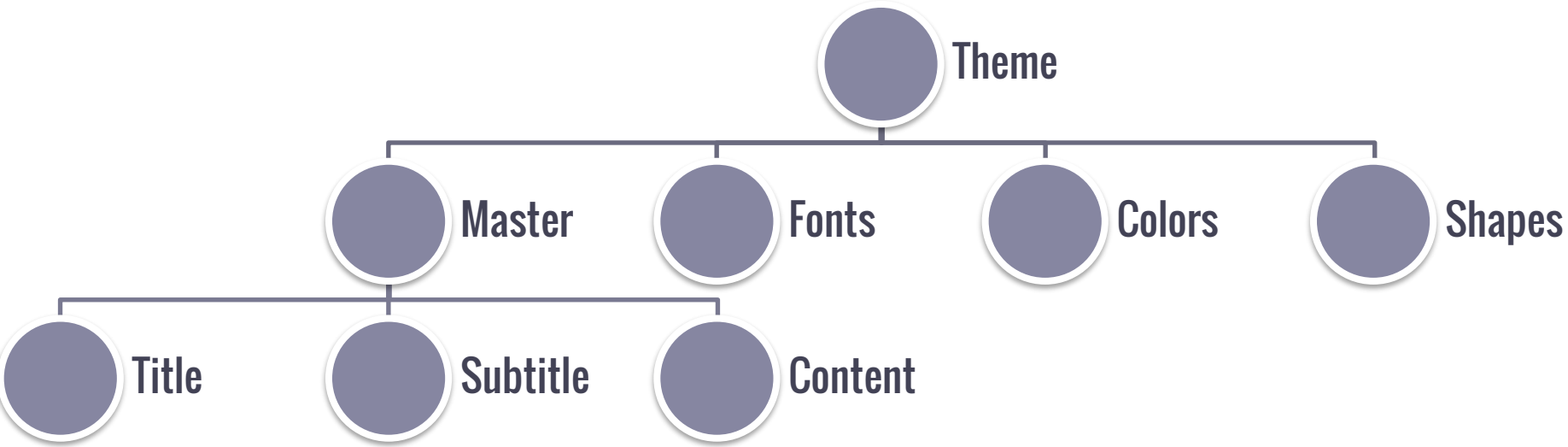
Ctrl 1 – Accesses chart format menu

Alignment – Enable Snap To Guides

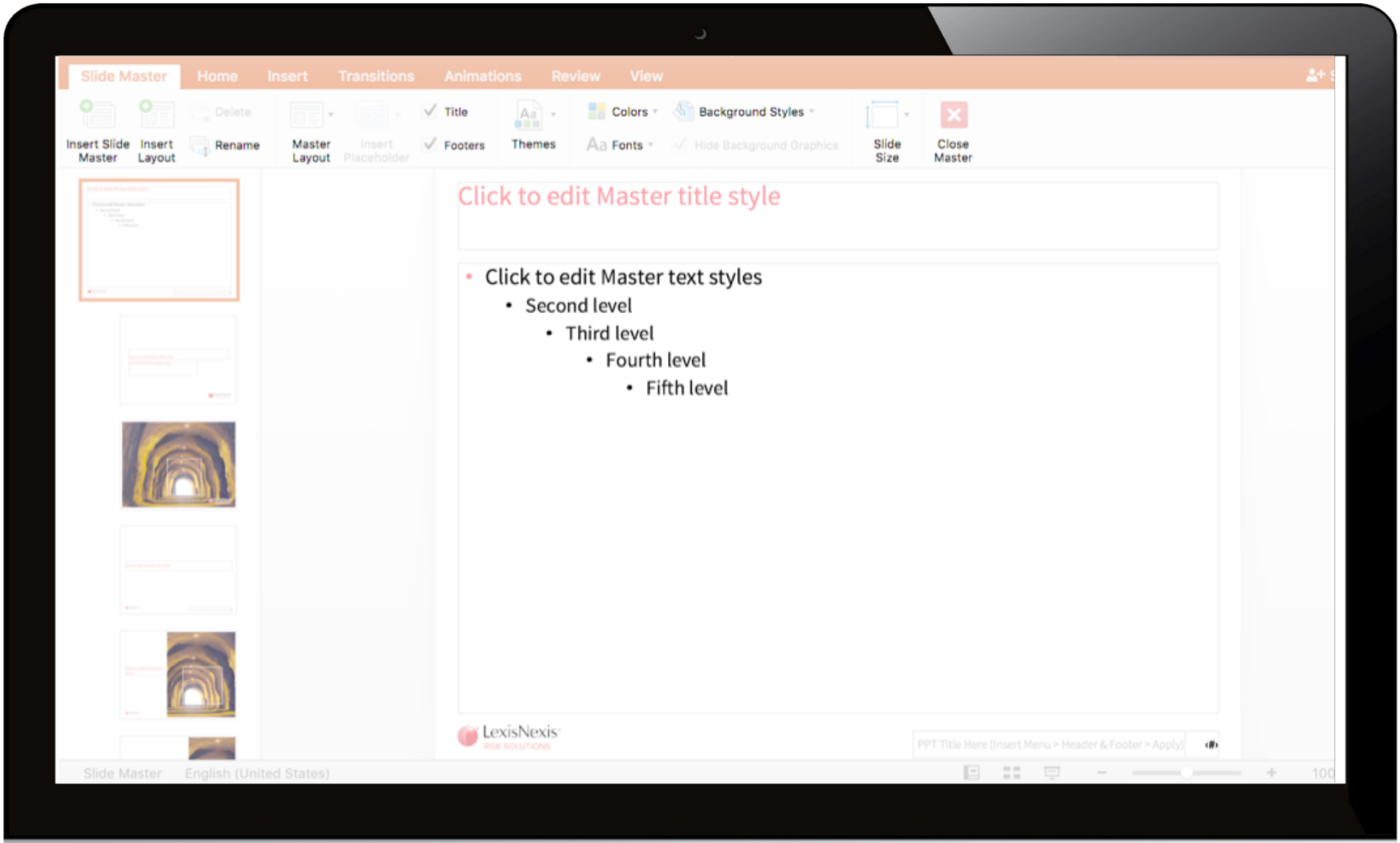
Customize your **Quick Access Toolbar**

THE POWERPOINT MASTER HIERARCHY

Mastering the Slide Master



MASTERING THE SLIDE MASTER



POWERPOINT KEYBOARD SHORTCUTS

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Customize your **Quick Access Toolbar**

DATA VISUALIZATION

Data Viz Essentials
RECAP

Detox your charts of clutter

Use color to strategically emphasize your message

Save formatting as templates to save time

Use animation to pace your audience through charts

Don’t aggregate calculated metrics

Use story points to walk through in Tableau

DATA - INK RATIO

Where Every Pixel Counts

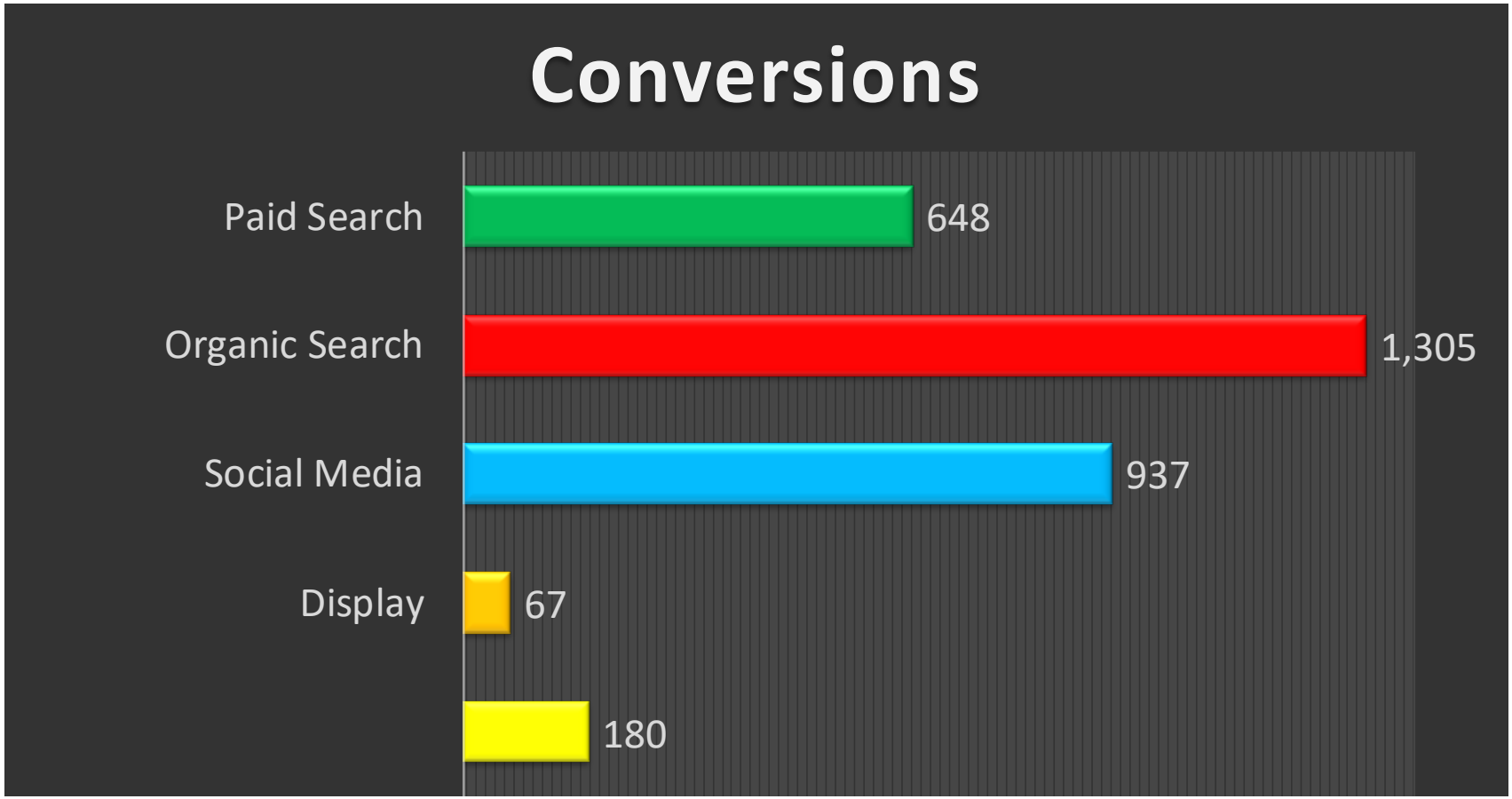
Our goal is to maximize data that communicates insight and minimize ancillary design elements (ink) that doesn't support the insight.

$$\text{data - ink ratio} = \frac{\text{data - ink}}{\text{total ink used to create the graphic}}$$

The **higher** the ratio, the better

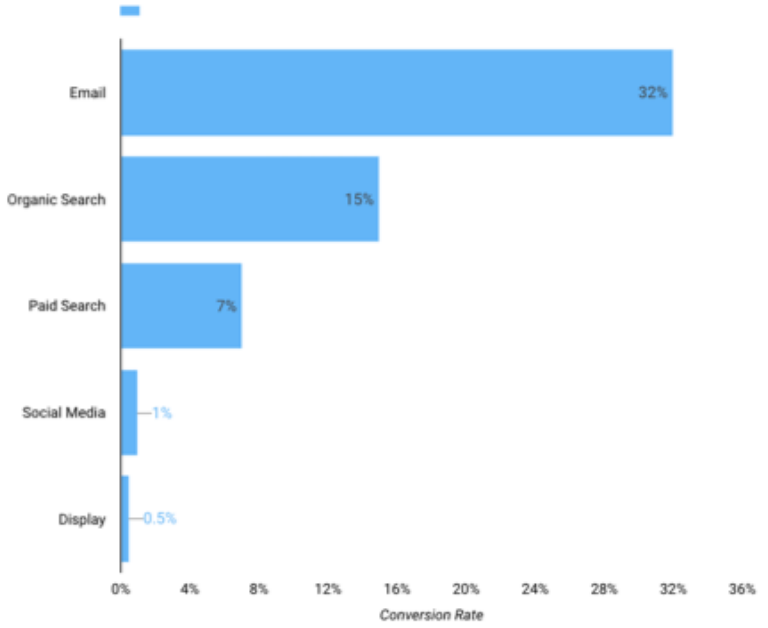
DETOXING YOUR CHARTS - DON'T DO THIS!

Effective Data Viz



DATA STUDIO BAR CHART DETOX CHECKLIST

- ❑ Click to add new bar chart (Horizontal bar for categories / ranking, vertical for time series)
- ❑ Remove chart border and background (click whole chart, right-click, Format – Border / Background)
- ❑ Remove gridlines: Style → Grid → Grid Color → Transparent
- ❑ Show value axis title
- ❑ Show data labels & format numbers
- ❑ At least 20pt font size (except axes)
- ❑ Use either neutral gray or blue for whole chart



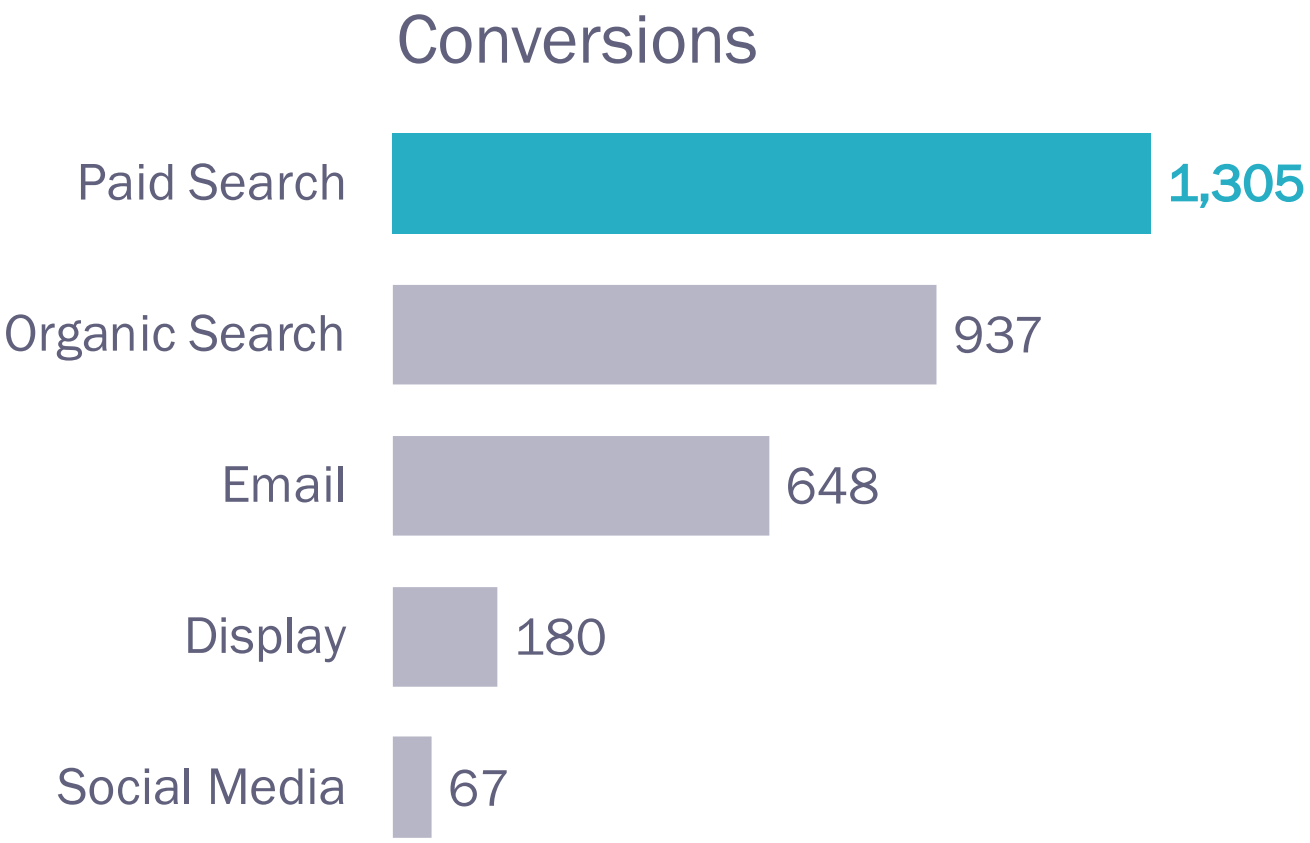
Google Data Studio

OFFICE BAR CHART DETOX CHECKLIST

- ❑ Sort data meaningfully (descending, except for time) then Insert bar chart
- ❑ Horizontal bar for categories / ranking, vertical for time lapse
- ❑ Remove chart border and background (click whole chart, right-click, Format – Border / Background)
- ❑ Change orientation if labels are long (NO diagonal labels!)
- ❑ Adjust bar gap width to 50%
- ❑ Remove gridlines
- ❑ Remove axes and axis line (click axis, Format Axis, Paint Can, Line)
- ❑ Add data labels & format numbers to show distinction
- ❑ At least 20pt font size (except axes)
- ❑ Use neutral gray for baseline color
- ❑ Use standout strategic color (blue)
- ❑ Resist using dual axes
- ❑ Save as a template to save time

DETOXING YOUR CHARTS

Effective Data Viz

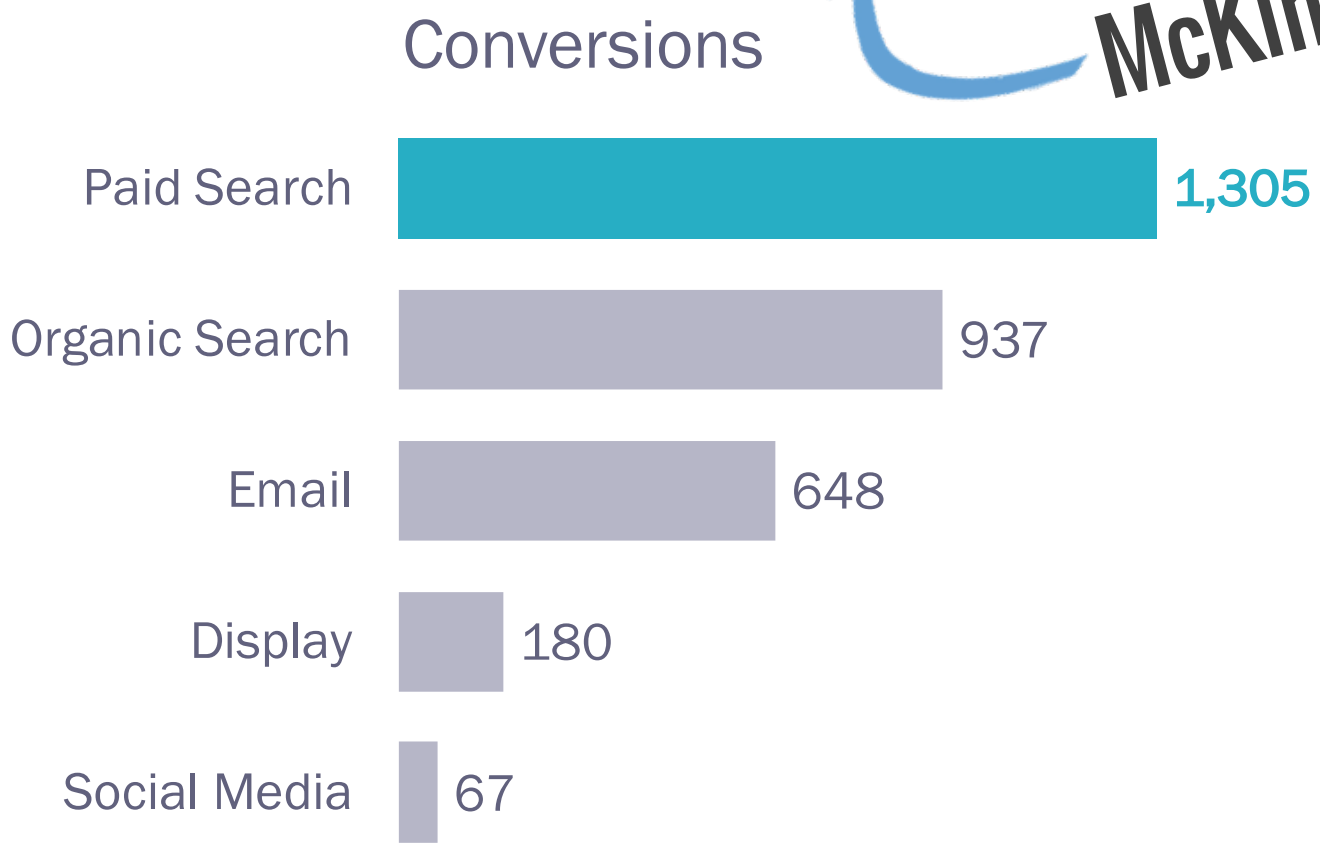


Source: Analytics Platform, 2016.

PAID SEARCH GENERATES THE MOST SALES

Conversions by Marketing Channel

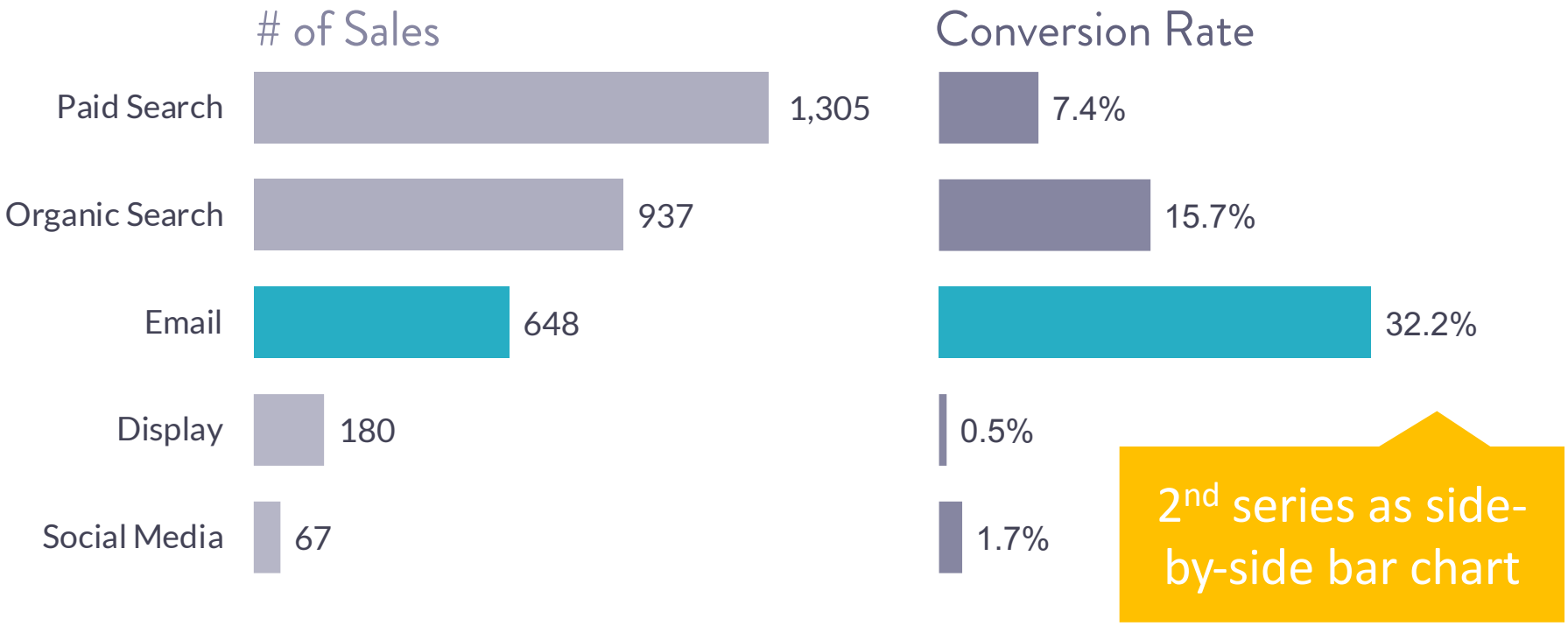
McKinsey Title



Source: Analytics Platform, 2016.

...BUT OUR OPPORTUNITY LIES WITH EMAIL.

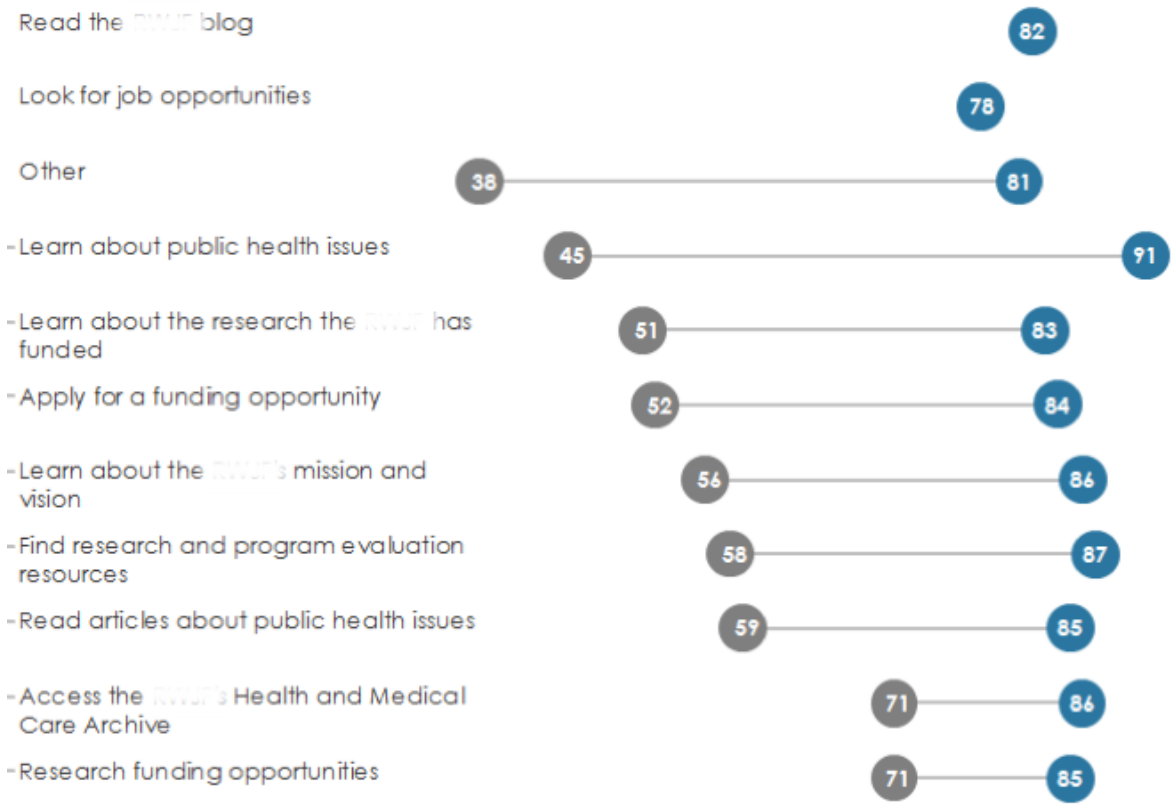
Campaign Channel Sales vs. Conversion Rate



Source: Analytics Inc, 2015.

ANIMATION: YOUR DATA VIZ BESTIE

Use reveal animation of white blocks to pace them through a challenging chart or a busy slide



MORE VIZ VIOLATIONS

COMMON DATA VIZ MISTAKES (VIZ-TAKES)

NO:

Averaging pre-calculated metrics from your analytics platforms

Dual axis charts on different scales (very misleading)

Stacked bar rainbows (use 100% stacked bar + 2nd volume bar)

Using patterns or images as bar fills

Starting axes above zero for bar/column charts

Line markers on time-series charts

Overlapping labels & legends on time-series charts

Neglecting to source your data

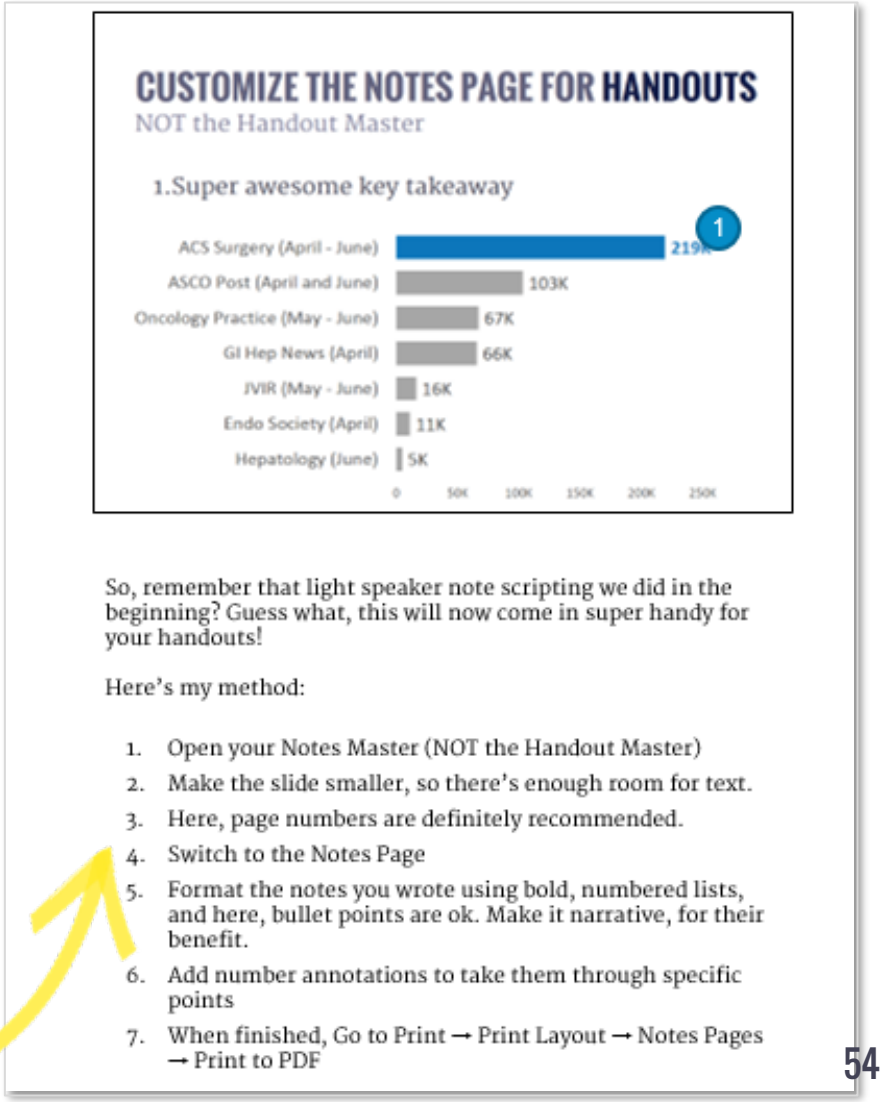
CUSTOMIZE THE NOTES PAGE FOR **HANDOUTS**

NOT the Handout Master

So, remember that light speaker note scripting we did in the beginning? Guess what, this will now come in super handy for your handouts!
Full blog post at LeaPica.com/Handouts

Here's my method:

1. Open your Notes Master (NOT the Handout Master)
2. Make the slide smaller, so there's enough room for text
3. Here, page numbers are definitely recommended
4. Switch to the Notes Page
5. Format the notes you wrote using bold, numbered lists, and here, bullet points are ok. Make it narrative, for their benefit
6. Add number annotations to take them through specific points
7. When finished, Go to Print → Print Layout → Notes Pages → Print to PDF

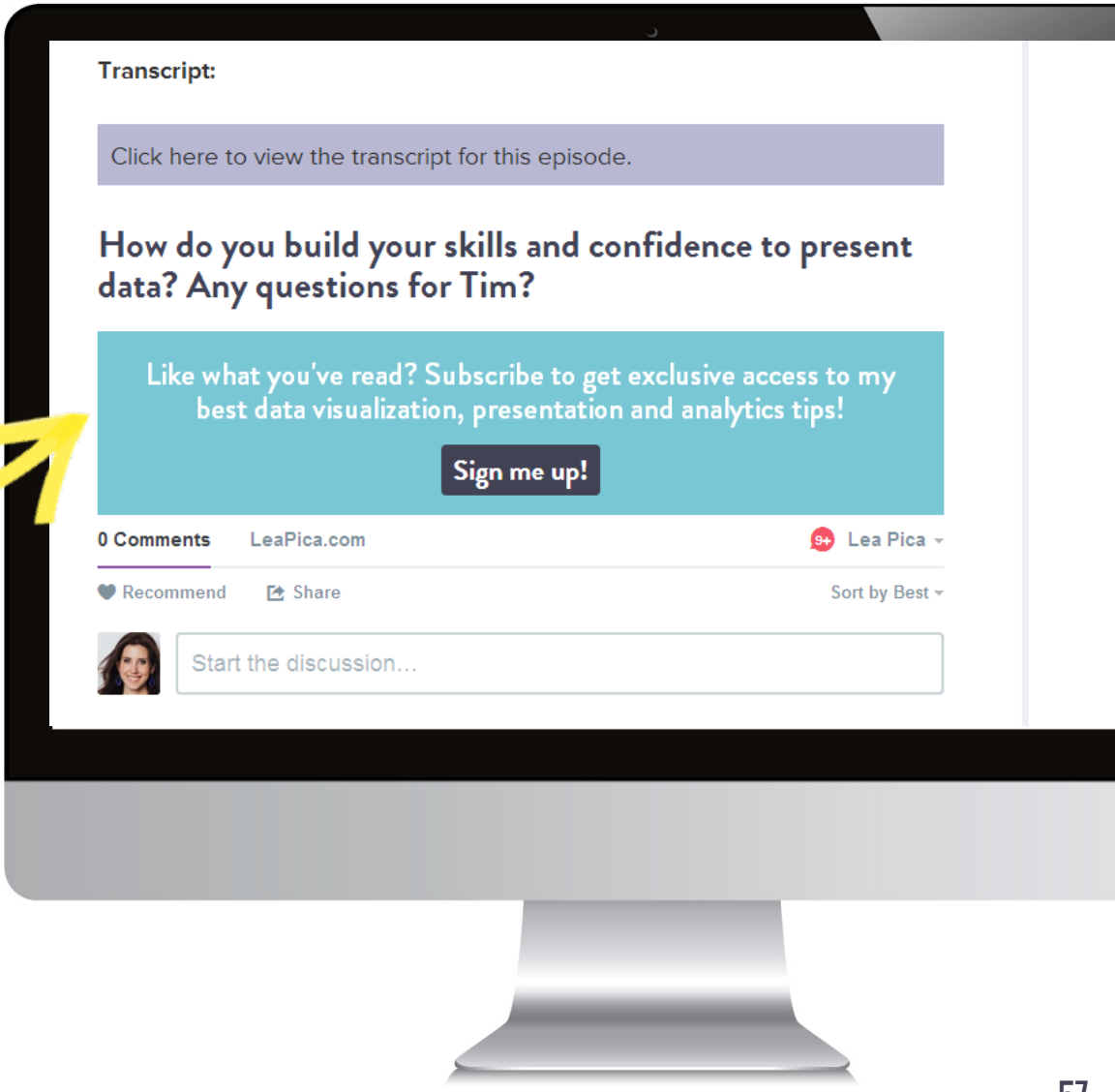


RESOURCES CHECKLIST

In your Quick Start Packet

- Interview questionnaire
- Brainstorming outline
- Presentation template w/color palette
- Chart detox checklist
- Keyboard shortcut cheat sheets
- Technical A/V Checklist
- My website & podcast

SIGN UP FOR MY NEWSLETTER



Remember…

You are
YOUR PRESENTATION

not your
POWERPOINT

THANK YOU!

I just want to take a moment to thank you for taking this journey with me. I spent many years struggling to get my stakeholders and clients act on the insights I worked so hard to find, and I know that you'll break through in a fraction of the time.

My goal for you is that you'll take these learnings with you throughout your professional life, creating true career satisfaction and personal brand definition through exceptional data presentation.

Namaste,

Lea