Data learning series

Part 1: Storytelling
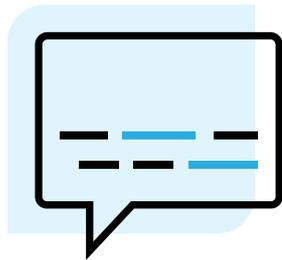
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Instructional Design

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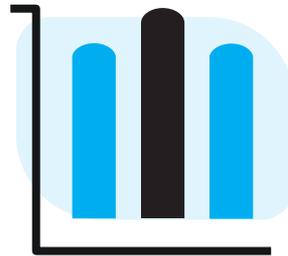# Data learning series - three one-hour sessions

Storytelling

Feb 21, 2023

Visualizing

Mar 19, 2023

Curiosity

Apr 23, 2023

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Learning objectives

- **Understand and craft a data story:**
  - Learn key storytelling components and how to organize data logically.
- **Focus on your audience:**
  - Tailor your data narrative to your audience with appropriate presentation methods.
- **Practical application:**
  - Apply a framework to analyze data and deliver a story through a relevant business case.

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Today's agenda

- What is data storytelling?

- Identifying your audience

- The three Ds framework

- A business case

- Next steps

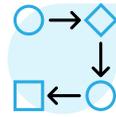espritEducate

What is data storytelling?

Data narratives aren't limited to major presentations.

Consider these **day-to-day applications** for data storytelling:

Presenting insights to your team

After analyzing, share your discoveries with internal team members.

Reporting on progress and outcomes

After beginning a project, it's essential to update your team on its advancement and next steps.

Engaging clients with data insights

After analysis, relay your data-guided suggestions to your clients effectively.

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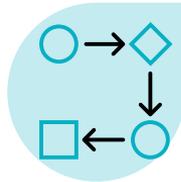# **Chat:** What data stories do you need to tell?

Type your answer in the chat...

A

Explain ideas to colleagues

B

Share update or recap with team

C

Communicate with clients

D

Something else?

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The three Ds. A simple framework

Collect and Analyze DATA

ESSENCE

Deliver your MESSAGE

Discover
Collect and analyze your data

Decide
Decide what matters and what your message is

Deliver
Deliver your message to your audience

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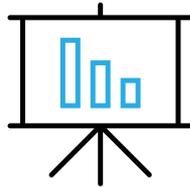- Identifying your audience

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Who is your audience?

How will you present the information?

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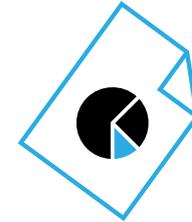# Choosing the right presentation format

Live presentation

Interactive, allows for real-time feedback.
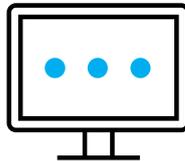
Written report

Detailed, can be reviewed at the audience's own pace.

Interactive dashboard

Hands-on data exploration.

Whiteboard & marker?

Simple and direct, great for spontaneous or iterative discussions.

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A customer support challenge

You're leading the Customer Experience team at a mid-sized e-commerce platform. Over the past quarter, you've noticed an increase in customer service inquiries following recent updates to the website and user interface. To address these issues effectively, you've gathered relevant data:

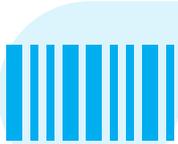- Customer contact reasons by category - last quarter

- Customer service agent coaching schedule - last quarter

- Website update logs - last quarter

- Key feature usage metrics - last quarter

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What assumptions can be made?

The problem is related to...

A A product update?

B Customer service training?

C Communication to customers?

D An ancillary feature?

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Understanding customer sentiment

After a thorough review of the customer interaction data, including a detailed analysis of customer service calls and website usage metrics, here are the critical insights we've gathered:

- A significant number of users have reported challenges with navigating the updated website structure, particularly with the new user account management features.
- Recent website updates, including the launch of new product pages and changes to the FAQ section, have led to an initial increase in support requests as users acquaint themselves with the new layout.
- Users have expressed difficulty in utilizing the search functionality effectively, citing issues with finding relevant product information quickly.

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Evaluating and communicating root causes

How do we determine the root causes of increased customer inquiries and effectively communicate our findings?

A

Difficulties in the checkout process

B

Complex account login process

C

Lack of clear product information

D

Unclear shipping policies

- Considering these potential root causes, which do you believe impacts the customer experience most significantly?
- Based on your selection, which metric should we focus on to communicate the issue to the product team?

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Next steps: Putting it all together

Creating a storyboard is a crucial step in ensuring that the narrative is clear, logical, and compelling.
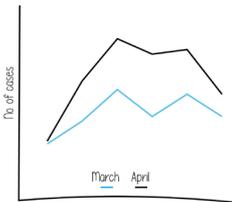
EXECUTIVE SUMMARY

TITLE: CRITICAL ISSUES/OVERVIEW
- Overview of customer experience
- Summary of increased inquiries and interface changes

1

(EXHIBIT A) A RISE IN CALLS

No. of cases

March April

TITLE: CUSTOMER INQUIRIES ARE ONE THE RISE
- Analyze contact reason trends.
- Correlate website updates with inquiry spikes

2

CUSTOMER SENTIMENT

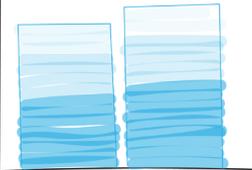navigation confused Design interface HELP difficult user Access

TITLE: WHAT OUR CUSTOMERS ARE TELLING US
- A quantitative analysis of customer feedback, highlighting the main points of frustration.

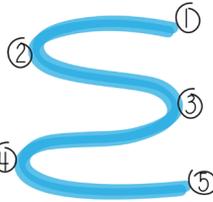**3**

EXHIBIT B: TRAINING HOURS

TITLE: AGENT READINESS
- Assess training focus pre- and post-website updates.
- Align agent preparation with identified customer challenges.

4

ACTION PLAN

① ② ③ ④ ⑤

TITLE: A PATH FORWARD
- Open up the floor to participants to brainstorm on solutions.
- Propose ideas for resolving navigation issues improving and agent training.

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Action plan example: Framing our problem-solving approach

Issues:

- **Checkout process:** Customers experience difficulties during the checkout phase.
- **Account management:** There is a noticeable volume of queries regarding account access.
- **Product discovery:** Users seek assistance with product-related inquiries, indicating potential navigation or information clarity issues.

Discussion Agenda:

- **User Interface Optimization:** What modifications can we implement to streamline the checkout process and account management based on customer feedback?
- **Agent Expertise:** How can we update the agent training program to cover recent website changes and new features thoroughly?
- **Feature Utilization**: How can we increase the visibility and usage of key website features to enhance customer self-service?

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Next steps: A three-act narrative

Now that you've **structured your data story**, you are ready for **Part two - Visualizing**

Step	Description	Data	Chart/Visual
SETUP	● Issue/Opportunity ● Data showing scale and urgency of problem	● Issue with product navigation post-update leading to increased customer support calls. ● Customer query volume by type before and after the product update.	**Line graph**
SOLUTION	● Proposed solution ● Data showing why it will be a success	● Correlation between the timing of product updates, customer feedback on usability, and agent training schedules.	**Comparison chart**
RESOLUTION	● Outcome predicted ● Data charting progress over time	● Predictive model showing expected decrease in query volume and increase in customer satisfaction scores.	**Line graph with dates**

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Exhibit A: Customer contact reasons

What trends do you observe? Does the the data suggest any underlying issues?

2024 (# of cases)	March	April
Week	1	2
Checkout Issues	25	45
Account Access	60	57
Product Inquiries	30	70
Shipping Queries	55	50
Other	30	25

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Exhibit B: Agent training schedule

What trends do you observe? Does the the data suggest any underlying issues?

Month	Training Topic	Duration (Hours)
March	Customer Service Best Practices	2.0
March	New Product Features	0.5
March	Returns and Refunds Policy	1.0
April	Advanced Troubleshooting	2.5
April	Upcoming Product Launch Overview	1.0
April	Handling Escalations	2.0

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Exhibit C: Website update logs

What trends do you observe? Does the the data suggest any underlying issues?

Month	Update Category	Details
March	Site Navigation	Added breadcrumb navigation; improved search bar
March	Content	Launched 4 new articles; updated homepage banner
April	User Interface	Refreshed color scheme; increased font readability
April	Security	Implemented two-factor authentication for user login

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Exhibit D: User engagement with website features

What trends do you observe? Does the the data suggest any underlying issues?

Month	Feature Usage (%)	User Feedback Volume	Navigation Error Reports	FAQ Page Visits
March	Tutorials - 60	Comments - 200	Errors reported - 35	Visits - 1,200
April	Tools - 70	Comments - 180	Errors reported - 25	Visits - 1,500

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