



THOUGHT LEADERSHIP

Storytelling with Experience Data

How to create dashboards that effectively communicate experience data, action steps, and opportunities to demonstrate tangible ROI.

Storytelling has been an integral part of society for thousands of years. In the early days, humans used experience data to create cave drawings to tell future generations where to focus their hunt efforts for the greatest amount of food. Today, we need to use modern experience data to pinpoint where businesses should focus for the highest ROI.

Although cave drawings have evolved into dashboards and PowerPoint presentations, the same principles apply to us as experience management professionals. It is also our job to communicate the insights that lead to business success.

Our brains are geared to learn through compelling, data-backed storytelling. It's proven that our brains engage when we listen to presentations with structured bullet points. In fact, the visual cortex does become activated when we start to process simple language and bullet points.

As humans we decode words into meaning, but that's it. When we listen to a story, however, not only is the language processing part of our brain engaged, but our larger brain is activated as if we were experiencing the story events ourselves. This is the secret to bringing data to life and inspiring your audience into action.

The Science Behind Storytelling

Oxytocin

Empathy is one of the most important abilities for us to develop—particularly in the realm of experience management—as it allows us to understand or feel what others are experiencing and how they would react to a situation.

Oxytocin is a neurochemical that enhances our sense of empathy. It's released in the brain when it's safe to approach others and it helps us bond. Oxytocin is also produced when we are trusted or shown kindness, and it motivates our sense of cooperation.

In a study conducted by Claremont Graduate University, neuroscientists discovered that story-telling causes oxytocin production in the brain. The amount of oxytocin released by the brain predicts how much people are willing to help. Oxytocin is key to triggering people to take action, and action is what drives tangible improvement.

Dopamine

Alongside empathy, stories make things memorable in a way that data alone cannot. There is also cognitive rationale as to why stories help you remove the noise and be more memorable.

Humans are programmed to argue over facts and figures, but not so with emotional stories. Data illuminates our prefrontal cortex and its high-level thinking. When you listen to an emotionally charged presentation, the brain releases a chemical called dopamine, which stimulates memory and helps us retain details more accurately and for longer.

How Does This Apply to Experience Management?

Fighting for the attention of our busy colleagues is hard enough, but inspiring them to change is even more difficult. As experience professionals, we need to find ways to connect emotionally with our colleagues, influence

stakeholders, and convince the greater culture to become customer centric. This is where we can use storytelling to our advantage.

In particular, simple dashboards become enriched when they incorporate storytelling, allowing readers to analyse customer feedback quickly and be alerted to priority areas. The ultimate goal of every dashboard is to allow its audience to locate the sources of customer pain points within 1 to 2 clicks as they happen, not 4 weeks later in a monthly report.

SO, WHAT MAKES A GOOD STORY?

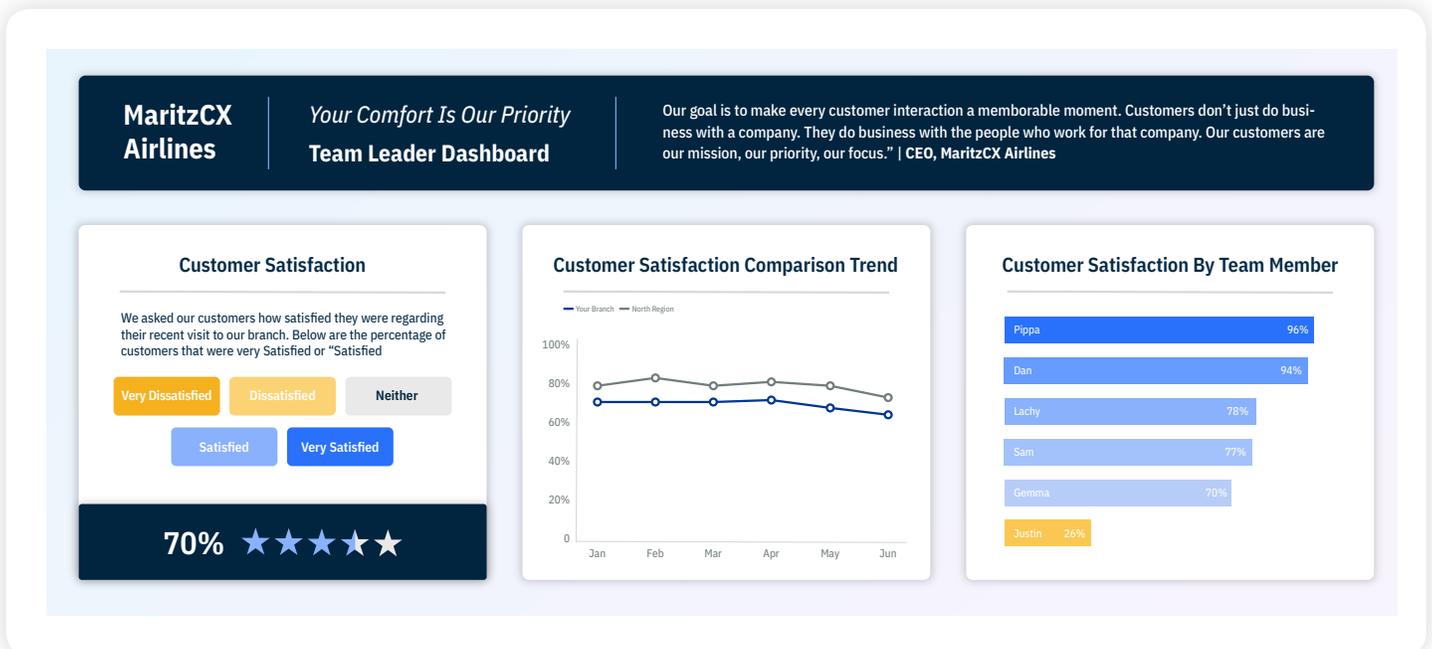
1. Start with one main character—this will always connect more than a group. We suggest you start every presentation with a customer or employee story.
2. Start with a story of human struggle and eventual triumph. It will capture people's hearts, first by engaging their brains. To motivate a desire to help others, a story must first sustain attention by developing tension during the narrative. If the story is able to create that tension, then it is likely that attentive listeners will come to share the emotions of the characters in it.
3. Use vivid descriptions. The language you use in a story can help activate the brain. Metaphors can evoke the sensory cortex and help the listener think in images rather than words. Using simple language and low complexity is the best way to activate the brain regions that make us relate to the happenings in the story—and avoid overused words or phrases where possible.

Here is an example of the top of a dashboard for a team leader. Three simple charts can answer the following questions, which will then determine what a team leader does next.

1. As a team where are we in relation to our target?
2. As a team where have we come from?
3. As a team how do we compare to the company?
4. Who do I need to focus on in my team?

TIP:

Create videos of customer and employee stories, or present improvement opportunities as story boards for maximum impact!



Three Tips for Successful Dashboards

1. Design the Dashboard for the Audience

A dashboard is rendered useless when it is not designed with an end user in mind. When designing the dashboard, make sure you answer two fundamental questions:

- I. Who will be using the dashboard?
- II. What is this end user trying to achieve?

It is always best to run a co-design workshop with the end users to flesh out their needs and priorities. A co-design workshop also allows everyone to voice their opinion and, more importantly, justify it. The collaboration will lead to an agreement on all parties. Before you start discussing how to solve those needs by different chart types.

Follow these four steps:

- I. Discuss audience needs
- II. Priorities audience needs
- III. Agree on metric calculations, time intervals
- IV. Discuss chart types to meet those needs

2. Create Purposeful Dashboard Flow

An effective dashboard is designed to guide the user, not overload the user with data. Consider grouping similar charts together. For example, if a big number chart is used to show NPS, then place the NPS trend chart next to it, not half-way down the dashboard. This helps a user understand where the business is and where it has come from.

Follow this design structure:

I. Main KPI - Where are we? How has our performance changed over time?

II. Main KPI & Main Segment - Who/what should we focus on?

III. Sub KPIs - What is contributing to our core metric?

IV. High Level Text Analytics - What overall are our customers telling us?

V. Verbatim - What are our customers actually saying about their experience?

VI. Deep Analysis - Splitting KPIs up by pre-pop data.

There is also no need to cram all of the charts onto one page. A navigation menu is a great way to guide a user throughout a dashboard by linking the user to additional pages.

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3. Focus Attention Toward a Story

The role of a dashboard is to direct user attention, so they can quickly locate customer insights.

Here are eight ways to focus attention:

- 1. Remove Chart Clutter:** Remove anything that does not contribute to insights - grid lines, axis titles, counts, axis.
- 2. Use Action Language for Chart Titles:** Title a chart to highlight the action you want the reader to take. For example, a chart showing negative text analytics categories should be titled 'Areas we need to focus on', instead of "Topics".
- 3. Colours:** Colours direct a user's eye. Use low shade colours throughout the dashboard and pick a colour palette to be consistent across all dashboards. Use conditional formatting selectively to highlight key areas.
- 4. White Space:** Placing white space between charts is a good way to make the dashboard look and feel less cluttered. This helps users find their insights quicker.
- 5. Descriptive Widgets:** Create descriptive widgets above charts so a user knows how a score is calculated and what the chart is showing.
- 6. Consistency:** Keep the same intervals, metric calculations and colours consistent so users from different departments can view other dashboards without confusion.
- 7. Financial Impact:** To help readers understand the financial impact of poor customer experience, it is best practice to show satisfaction scores split by customer financial information, such as lifetime value. It is a lot more powerful to show that 60% of customers that spend \$10 million annually would not recommend our business.

- 8. Text Analytics Emotions:** Probably the most under-utilised aspect of any dashboard is using text analytics and emotional analysis. People are great in determining what customers are saying, but not so great at quickly determining what has changed. A great way to counter this is to plot the percentage of negative sentiment per text analytics over time. This indicates to the reader if negative sentiment is increasing.

THREE KEY TAKEAWAYS:

- 1. Know Your Audience:** The story needs to be crafted to the person or group of people you are delivering the message too.
- 2. Harness the Power of Emotional Storytelling:** To grab attention, inspire, motivate and influence something to happen.
- 3. Don't Forget Your Data:** Make sure your stories are grounded in evidence and can be supported by your data.



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