

Data storytelling playbook

How to make your CEO care about insights



Foreword

Ever sent a research report to stakeholders and heard nothing but crickets in response? Ever watched leadership present a new strategy which completely ignores valuable insight about your customers that you had shared?

I talk to researchers regularly, and one thing that often comes up is a fear that we're not valued enough in our organizations. I've definitely felt it – early in my career, I used to joke that I was sending reports out into the abyss!

If you can relate to any of this, don't worry; in this playbook, I'm going to show you how to use the power of data storytelling to get your insights heard and used by executive leadership.

Using these steps, I routinely see my insights reflected in influential campaigns and business results. I'm excited to share my experience with Attest's audience. Attest is a great partner for insights teams, helping them get quality data and share insights effectively with a growing number of data storytelling tools.

Together we can make a big impact with our insights.



Bianca Johnston

Founder, Bianca Johnston Customer Research

About Bianca Johnston

Bianca Johnston has spent the last 13 years in research and marketing roles for big B2C and B2B brands like Shopify and AIR MILES. She now helps brands drive business growth through her customer research consultancy, BJCR. She also helps insights professionals and marketers avoid common research pitfalls and grow their careers through research coaching and digital products. www.biancajohnston.me

Introduction

This playbook stems from a question asked by an attendee at our Brand Growth Summit: How do I get my CEO to care about consumer insights?

Further discussions with other researchers and marketers suggested engaging the C-suite is a universal challenge, so we wanted to provide some practical advice on the topic. We teamed up with customer research expert Bianca Johnston to explain how to wow CEOs by using data storytelling techniques.

We believe wholeheartedly in the power of data storytelling. We've recently released a suite of new data storytelling tools on the Attest platform, ranging from editable branded charts through to generative AI survey summaries. If you want to learn more about them, turn to section 05. In the meantime, get ready to raise the bar on your communication and put consumer insights at the heart of your business.



Jeremy King

Founder and CEO, Attest

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01. The CEO Blueprint

The CEO blueprint is where it all begins. Building a CEO blueprint is a bit like carrying out a ‘Know Your Audience’ exercise (which marketers will be familiar with). It’s a vital first step. After all, we can’t start constructing compelling data stories until we know who our audience is.

So what goes into a CEO blueprint? This document contains intel about your CEO (or any executive) that will help you to communicate with them in a style that resonates. It outlines who they are and what their background is, as well as what they value, their priorities, and goals. These are factors that will influence their outlook and the decisions they make.

It will take you a bit of time to pull it all together – and will continue to evolve as you learn more about your business and CEO – but the blueprint is worth its weight in gold. You’ll be able to refer to it whenever you’re doing executive communications and, with this insight, you’ll enjoy far better results.

What goes into a CEO blueprint?

Part one

Who they are

- What is their professional background?
- What track did they take to become CEO?
- What is their discipline (engineering, finance, operations, marketing)?
- Were they a founder?

Part two

What they care about

- What is their strategic vision?
- What is their position on growth?
- What financial goals are they aiming for?
- How do they want to position the company?
- How are they managing risk?

Doing your research

You might be wondering where to find all the insight for your CEO blueprint – it could be tricky to secure an hour-long interview with your CEO, right? Don't worry, much of this information is already out there, you just need to know where to look for it.

A good place to start is LinkedIn. Look at where they have worked previously – can you find anything public on their reputation or legacy there? Next, search online – have they been featured in any trade titles or appeared on any podcasts? Perhaps they've even written a book, or given keynote speeches you can watch on YouTube. Interviews and talks are a fantastic place to find information, where you can hear insights directly from the source.

You can garner tons of information internally too. Begin by talking to colleagues – a lot of this is institutional knowledge and you can really gain from your colleagues' experiences. Ask around for examples of strong, executive communications within your company, such as letters to the board, annual reports, and earnings calls. Read between the lines to dissect what's being highlighted – what is your CEO talking to their stakeholders about? Don't forget to also check the metrics being tracked on your company's executive dashboard as these will be core to what your CEO is focused on.

Where to look for information about your CEO

- LinkedIn profile
- Strategy documents
- In the media
- Annual reports
- Talk to colleagues
- Executive dashboard



02. Helping your CEO to be excellent

Once you've compiled your CEO blueprint, you need to spend some time connecting the dots. It's only by aligning your consumer insights with the values and priorities of your CEO that you will be able to make them truly resonate.

If you want to explore the CEO mindset in more detail, management consulting firm McKinsey has developed a model for CEO excellence. It identifies mindsets and practices that are especially likely to help CEOs succeed at their particular duties.

The model highlights the six main elements of the CEO's job as well as 18 specific responsibilities that fall exclusively to the CEO. By understanding these, you can try thinking differently about your own work – how can your activities directly support your CEO? How can your personal KPIs ladder up into their broader ones? Helping your CEO to be excellent will not only elevate the importance of your insights, but also of you as an individual, paving the way for promotion.





What does this look like in practice?

To illustrate what a CEO blueprint might look like in action, let's create a fictional CEO to work with. We'll call her Sandra.

Sandra has an operations background and was formerly a chief operating officer at a telecoms company. She did Six Sigma training aimed at improving business processes by reducing defects and minimizing variation. Sandra is really keen on lean process and optimization. In terms of what she cares about, Sandra is focused on growth and scale without increasing costs. Product quality and customer satisfaction is also really important to her.

We now need to identify the metrics that matter to Sandra. As a CEO who cares about growth and scale without increasing costs, it could be metrics related to regular feature assessments to ensure the company isn't investing in product attributes that people

The CEO blueprint in action

Profile

Operations background

Former COO

Lean process and optimization expert

Priorities (values)

Growth and scale without increasing costs

Product quality and customer satisfaction

Efficiency and productivity

Connect

(metrics that matter)

Show how insights can be applied to reduce cost and complexity etc.

Feature assessment

CSAT scores over time

Communicate

Efficiently: get to the point quickly

Execution focused summary
(show feasibility of implementing insights)

aren't willing to pay for. Or as someone who cares about product quality and customer satisfaction, it might be surfacing CSAT and quality scores over time and identifying opportunities to improve.

Finally, given what we know about Sandra's profile, her priorities and the metrics that matter to her, we want to think about how to communicate with her. As someone whose top value is efficiency, we'll need to get to the point quickly. And because she has an operations background, Sandra will likely want an execution-focused summary.

But while we need to highlight the feasibility of implementing the insights we're presenting to Sandra, because her background is completely in operations, she might need more context on our areas of expertise, whether that's research or marketing.

Make it a team effort

For your best chance of success, take all of the information you've compiled and discuss it with your team and manager. Make sure you're aligned on what this means for your function and how you communicate as a team to the C-suite. Presenting a united front will amplify the impact of your department as a whole.

Ideally, you should also seek input from other teams where it can strengthen your communications. For example, CEOs tend to look at analytics data a lot, so you'd want to partner with the right team to bring that insight into your pitch. It's worth noting that leading with analytics can be a gateway to initiating dialogue if that's a challenge with your CEO.



03. The key question

CEOs are busy. A typical day might involve meetings, travel, leading teams, making decisions, and lots of reviewing and approving things. The list goes on and on. Because leaders are getting pulled in a multitude of different directions, when they're presented with any information, they're usually wondering this one key question: ***Why should I care?***

Within the first few seconds of any meeting or any document they're looking at, assume that this is what they're thinking. Implicit in this question of 'why should I care?' are several elements; your CEO will want to know these four things immediately:



- *Why should I pay attention to this?*
- *What does it mean for me?*
- *What do I need to do with this information?*
- *What action do I need to take?*

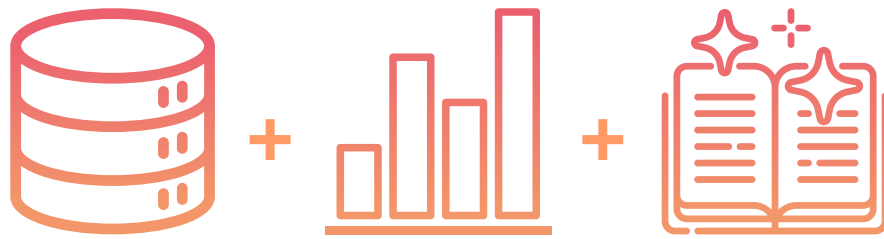
Our job as researchers is to quickly get to answering that one key question, and to keep it in mind with everything we put in front of the C-suite. We must get the information across swiftly and succinctly. And that's where data storytelling comes in.

Welcome to the stage, data storytelling

Data storytelling can be broken down into three elements: data, visuals, and the narrative. What this magic formula allows us to do is to turn raw data or numbers into a meaningful story that:



- Makes the results easy to understand.**
- Offers insight.**
- Drives action and decision making.**



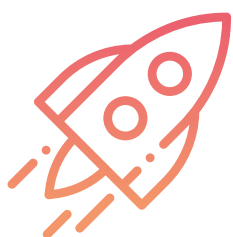
Telling your CEO a compelling a data story

Most of us have been taught to structure stories using a chronological sequence, meaning there's a beginning, middle and end. Fleshing this out, tropes like the Hero's Journey tell us to build a narrative framework in three main acts: the setup, the conflict/tension, and the resolution.

You've likely employed this in your own reports using frameworks such as What / So what / Now what? or Data / Insight / Action. But while these can be effective in general settings, when you're talking to the CEO audience, you want to flip that storytelling structure on its head.

Starting with the end (or leading with the action) lets you answer the question of 'why should I care' as quickly as possible – therefore keeping your audience's attention. Tell your CEO straight up what they need to do, whether that's adjusting pricing, innovating in a new category, or pursuing expansion into Europe. Then you can back it up with supporting arguments, add in any extra context that's needed, and make it pop with concise, tailored data visualization.

How to structure a data story



Lead with
the action



Explain
why



Add background
info



Support with
clear graphics

04. Lowering the cognitive load

A key objective when building out your data story is to make it easy for your audience to grasp. Simplicity should be at the forefront of your mind at every step of the way: the format, the slides, and the presentation.

“You should be prepared for everything from a 30-minute 10-slide meeting, to a 30-second ‘tell me what I need to know’ conversation with no slides.”

– Bianca Jonston

Firstly, what format should you use for a presentation or interaction with your CEO when you want to share insights? It’s important to be flexible because getting a fixed time slot with a CEO can be a challenge – they might be late to the meeting, have to dash off early, or could simply ask you to cut to the chase. That’s why it pays to have three formats ready:

- Slide deck – 10 slides max
- Executive summary – 1 slide
- Elevator pitch – 1-3 sentences

Before you get started on your slide deck, you might want to begin with writing the elevator pitch. It’s an incredibly helpful exercise, since it forces you to distill your data down into one main idea, expressed in a couple of sentences. This allows you to create a sound bite, which can be repeated throughout your presentation. And because sound bites get shared more, they have more impact.

You’re building this:



10 slide deck

But you’ll also need this:



Executive summary



Elevator pitch

Creating stand-out slides

For our CEO audience, we need to answer the ‘why should I care?’ question as quickly as possible, so the first step when creating your slides is to begin with a killer headline. Your headline needs to draw them in; get them hooked on the ‘what’ so they stick around for the ‘why’.

One way to check if you’re doing a good job with headlines is by applying the concept of horizontal reading. It means that anyone should be able to flip through your deck and just read the headlines to get the story.

When it comes to the body of your slides, get straight to the point; don’t wait to reveal the most critical information that’s needed to make the decision. In journalism this is referred to as ‘burying the lede’ i.e. hiding the most important and relevant pieces of a story within other distracting information.

Finally, don’t be afraid to have a point of view. As a researcher, you wear many hats, and one of those is being a consultant to the business. Having a well thought out, data-informed POV gives you credibility and gets your CEO to pay attention. By helping them figure out what to do, you’ll instill trust, make their job easier and, in turn, keep them coming back to you.

“Your CEO might want to go off on a tangent with others in the room and you’ll need to bring them back on track. Know your objective for the meeting and read the room to make sure it gets achieved.”

– Bianca Jonston

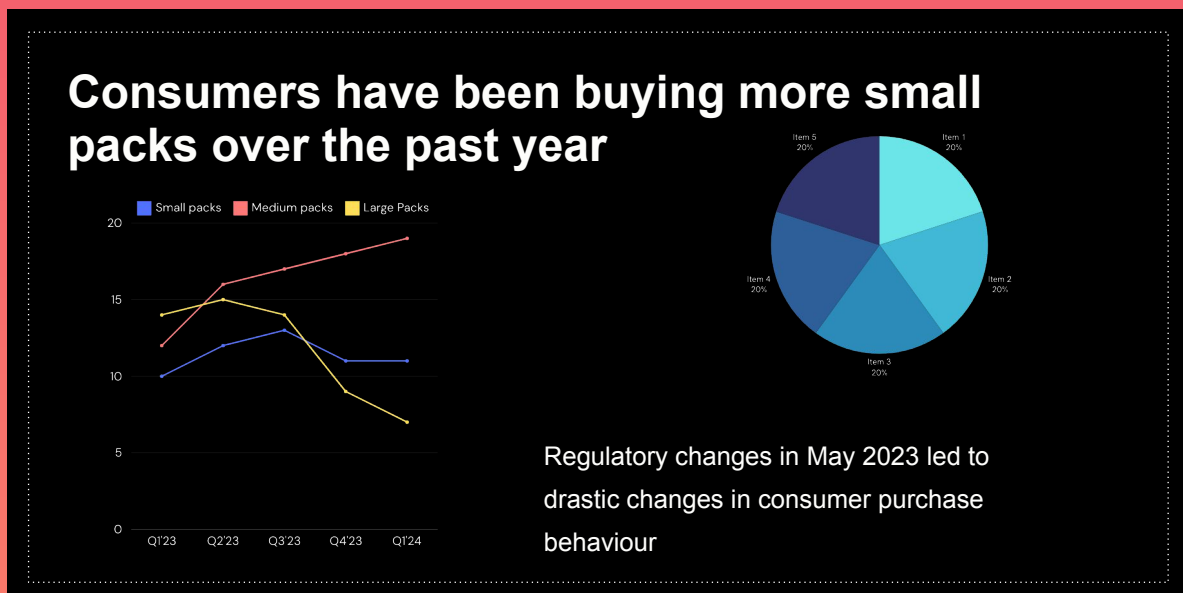


Getting it right with data visualizations

Charts and graphs with too much data can be confusing for anyone, so lowering the cognitive load visually is absolutely essential for your time-poor CEO.

As a rule of thumb, you want to make a single point per slide, and use color, design elements and text to draw the eye where you want it to go. There are a ton of great examples in the book 'Storytelling with Data by Cole Nussbaumer Knaflic'.

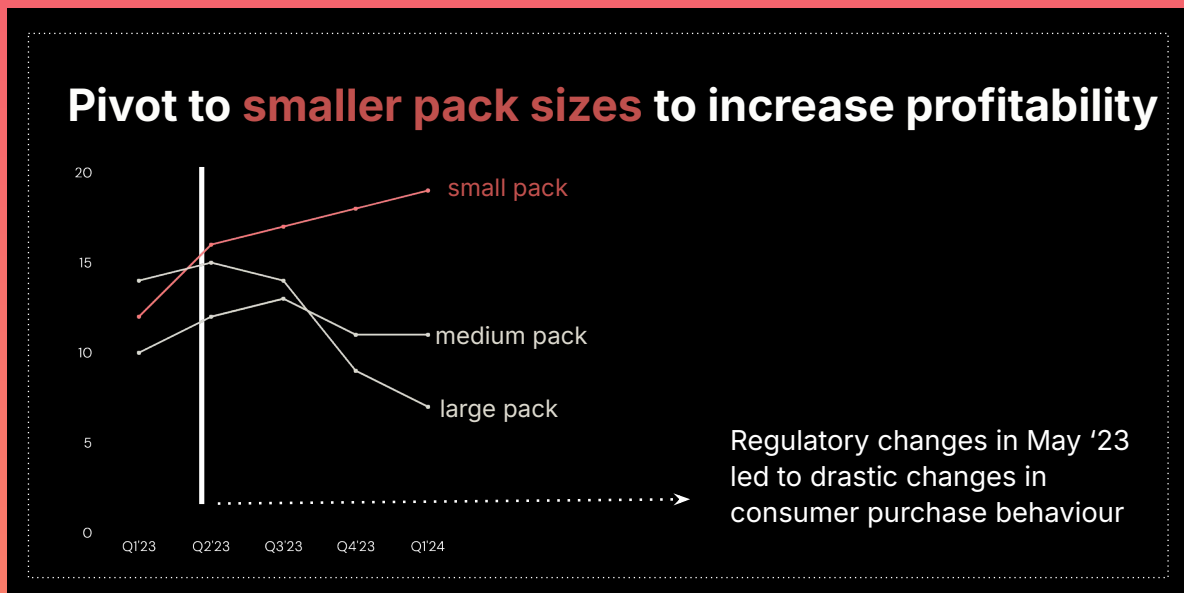
Let's look at some examples of what to do and what not to do with data visualizations...



Bad example

- ⊗ Descriptive headline telling us what we see in the data below.
- ⊗ Multiple charts competing for attention.
- ⊗ Lots of color in the charts making it unclear where to focus.
- ⊗ A random bullet point floating at the bottom.
- ⊗ A pie chart with no context on the right.

In summary, this slide is packed with data, but has no insight or story and it's hard for the viewer to understand the priority.



Good example

- ✓ The headline is an action – it tells the reader what to do.
- ✓ The color coding connects the headline to the data.
- ✓ Other data is grayed out helping to make one point per slide.
- ✓ The dotted line leads to relevant context (anticipates the question of ‘what happened here?’)

In summary, this slide contains only the data needed to tell the story and draws the eye to the key point, making it understandable at a glance.

Getting ready to present to your CEO

The secret to giving an engaging presentation is to be prepared, but not scripted. Delivering a scripted monologue makes it really difficult to respond to your CEO's questions, or ad lib where extra context might be needed.

Instead, you want to be able to look at a slide and know the main points you want to get across – this is where one visual per slide becomes really helpful. Be sure

to invite questions throughout but try to anticipate in advance what they might be so you can be prepared to answer them.

Knowing your CEO's blueprint, what questions might they have? What areas are they less familiar with? What objections might they have? A top tip is to have some additional slides available for the questions you're anticipating. This will help to ensure that you remain in control and can guide the direction of the presentation.

But remember, you must always be prepared to pivot; if your CEO suddenly has to rush off to another meeting, don't flap, simply switch to your TL;DR summary – that's what the three formats are for. By being able to deliver your insights concisely in any situation, you'll be able to get your CEO to listen to what you have to say, and, ultimately, get them to care.



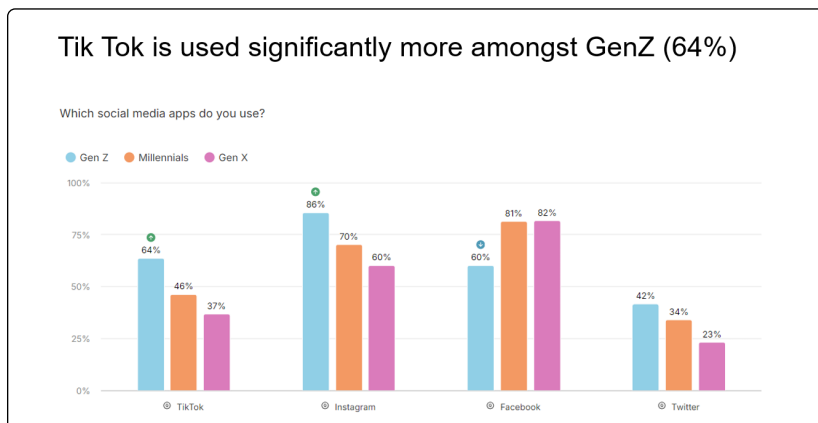
05. Use the right tools

One thing that can make your life easier when building out data stories for your CEO is using a consumer research platform with integrated tools for data storytelling. Attest has a number of features to help bring your presentation to life:

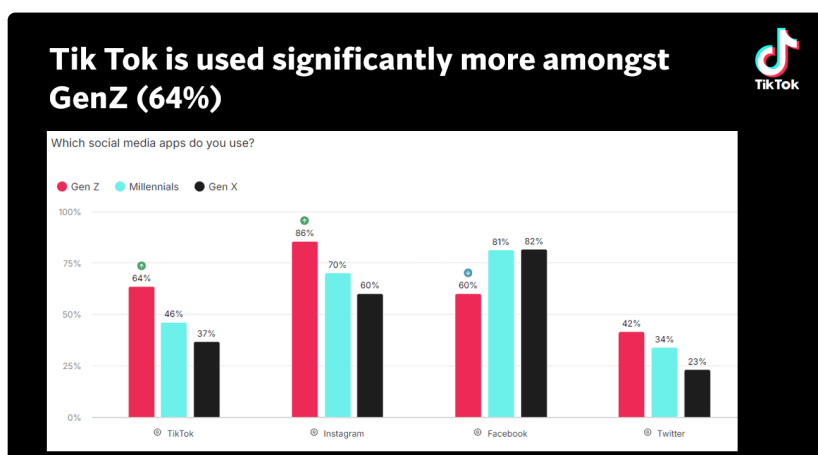
Custom charts

Attest makes it straightforward to not only identify your data story but to create compelling visuals. Use our suite of analysis tools, like crosstabs, segments and statistical significance to shape your narrative. Then choose what chart type and data you want to display or hide, to tell that particular story. You can also change the color scheme and even use your own HEX colors so you can create beautiful branded charts.

Non-branded

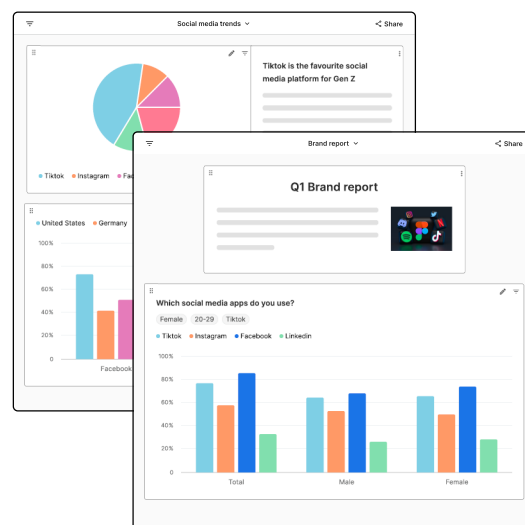


...VS branded



Shareable reports (coming Q1 2025)

With our shareable reports you can build out your story in an easily shareable format. Include customized charts that best tell your story and show insights from across different demographics, countries, and time periods. Complete your data storytelling by adding introductions, summaries and context throughout the report. Sharing with your CEO is simple: just share the report link so they only see your curated data and don't get distracted by any other noise.



AI summaries (coming 2025)

We are working on integrating generative AI throughout our platform. For qualitative surveys, this will allow you to get instant summaries of video responses and open text questions. We're also working on features that will do the heavy lifting analyzing quantitative surveys and brand trackers.

Using these features will not only make it easier for you to find the stories in your data, but also to communicate them to your C-suite. Combine this with Bianca's framework for data storytelling and you'll be able to show how insights can fuel business growth, making a lasting impression on your CEO.

Q4 ⓘ Short text response

Key words analysis ↗ ⋮

Which retailer are you most looking forward to shopping with on Black Friday?

Responses

Sentiment

☒ AI Summary

BETA

- Amazon is the most frequently mentioned retailer, with many respondents looking forward to shopping there on Black Friday
- Walmart is the second most popular retailer, also frequently cited by respondents
- Other commonly mentioned retailers include Target, Best Buy, and Kohl's
- Many respondents are looking forward to deals on electronics, clothing, and home goods
- Some respondents are undecided or plan to shop at multiple retailers to find the best deals

Was this helpful? 👍 🗨

Ready to wow your CEO with consumer insights?

Let us help you



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