LESSON GUIDE 6:

How to Get Insight From Your Data and Earn a Seat at the Table

PAINE publishing

Measurement 101 Curriculum

This is **Lesson Guide 6** of Paine Publishing's Measurement 101 Curriculum Package. The entire package includes:

- a **Syllabus**,

- a **Reading and Resources List**,

- Six Measurement 101 **Video Lessons**,

- Six Measurement 101 **Lesson Guides** in pdf format to accompany the videos,

- Paine Publishing's **Standards Compliance Curriculum package**

- a subscription to *The Measurement Advisor* newsletter

- Access to **"Ask Katie Paine"** monthly online measurement hours

The six Measurement 101 Lessons include:

Lesson 1: **Why Measure?**

Lesson 2: **How to Set Measurable Goals**

Lesson 3: **How To Define And Prioritize Audiences**

Lesson 4: **How To Define The Right Metrics**

Lesson 5: **How To Select The Right Tools**

Lesson 6: **How to Get Insight From Your Data**

Introduction to Paine Publishing's Measurement 101 Curriculum

Hello! I'm Katie Paine, CEO of Paine Publishing. I've been helping people to design and implement communications measurement programs for more than 25 years. Consider this six-lesson Measurement 101 Curriculum your Personal Navigation System on the road to the perfect measurement program. We take you right through the measurement process—from setting goals to interpreting results.

Welcome to Lesson Guide 6...

How to get insight from your data and earn your seat at whatever table you want.

So you've established your objectives, defined your audience and metrics, set up your tools, and spent the last few months collecting data. Finally, it's red carpet time. You've been asked to present your results. Take a deep breath and read on.

First of all, resist the urge to show that your brilliant idea actually got brilliant results. What leadership wants to know is: How did you or did you not make the organization better and more successful? They haven't called you in to justify your existence. They've called you in to find out what worked, what didn't, and what you or they need to do to make it even better.

Start by asking "So what?" three times.

Look at your data from the perspective of the most hostile senior manager you can imagine. Chances are good that the first thing he or she will say upon seeing your data is "So what?" Remain firmly in the shoes of your Doubting Thomas or Thomasina and continue to ask "So what?" to dig into the implications of your data until you find how you impacted your organization's success.

For example, suppose your data shows that you shifted the tone of the conversation about your brand in social media from mostly neutral to decidedly positive. Here's how the conversation should go: The Doubting Thomas says, "So what if the conversation changed?" You point to increased levels of engagement, more comments, more favorites, and more shares. Once again DT says,"So what?" You look at donations, sign ups, or downloads for the same period and show that, in fact, there is a positive correlation between the higher level of engagement and actual requests for information, donations, or subscriptions.

Don't waste their time:
Get to the point, and make it a good one.

The dollar value of the time of your board members and leadership team or external shareholders is probably a pretty large number. This means that the first page of your report is some of the most expensive real estate in the world. If you can get people to pay attention to your report or your dashboard for more than a minute, consider it a victory. So, do not waste their time with numbers or graphics that do not tell your story.

How do I figure out what my story is?

Turn your charts upside down, look at them sideways. Do multiple cross tabs of the data to find the insights and the differences. Rank order the results from best to worst and figure out what went wrong with ones on the bottom of the list. Then tell how you're going to make them better going forward. Or how you're going to move resources from the ones that aren't working to the tactics that are.

## How do I make sure I don't waste their time?

Prepare your elevator speech, but remember, it's for a very short building. Whether you have five minutes or an hour to present your results you need to start with an elevator speech. The one thing that all senior leaders have in common is that they are busy, and their heads are very likely to already have been filled with lots of other interesting facts from your peers that presented before you, so you've got less than a minute to give the powers that be a reason to stay alert to what you are saying. Remember they are much more interested in what your data says than the data itself. They want to hear the exciting story of what your data has revealed. And therein lies the secret to a successful presentation: Give your listeners their own Aha! Moment. Make your results as exciting to them as they are to you. Distill all that data into no more than three points that you can get across in a minute or less.

How do I keep their attention past the elevator speech?

Rod Stewart was right: Every picture tells a story. Nothing makes a meeting go south faster than someone pointing to a PowerPoint slide and saying, "There's a big spike in June." Create the story that backs up those three points. Use a chart or a visual to support your message, but only to illustrate the story; don't explain every detail on the chart unless it will be meaningful to the CEO.

People want the story behind the conclusion illustrated by the chart. As in, "There was a big spike in online donations in June due to the effort we put into growing our follower base." These story statements are called *conclusionary headlines*, and every chart and PowerPoint slide you show should have one. Everyone can look at the chart you put up on the screen, and quite a few of them will understand what it says. But few people will get what it really means for your program unless you tell them.
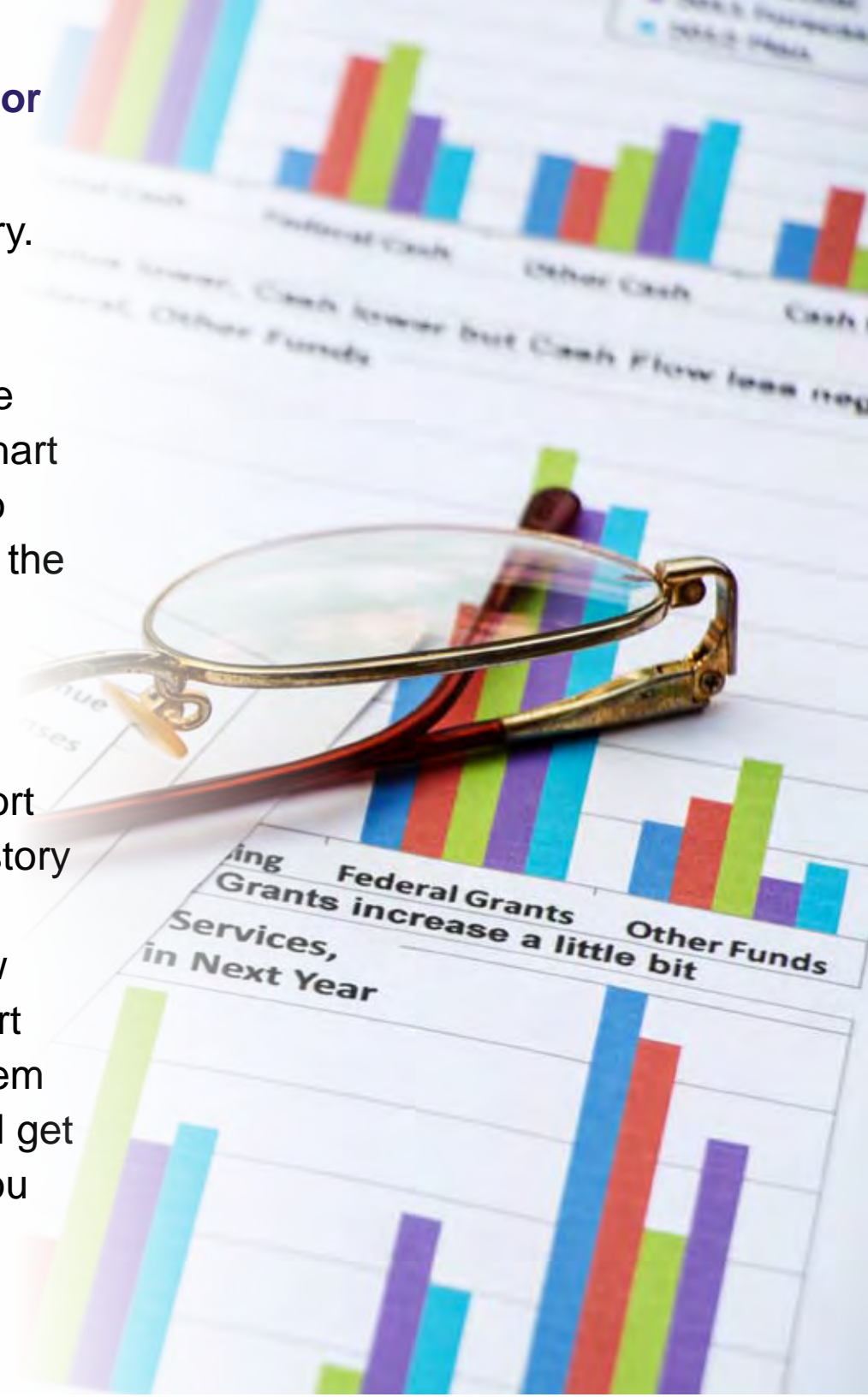
What's the best kind of chart to use?

The best kind of chart is the one that tells your story in the most dramatic fashion. The one below is a good example, as it clearly shows how PR intiatives made a difference (blue vs. orange):

PR presence drove better coverage across the board in Top Tier publications

Difference in Quality Coverage with and without PR initiatives
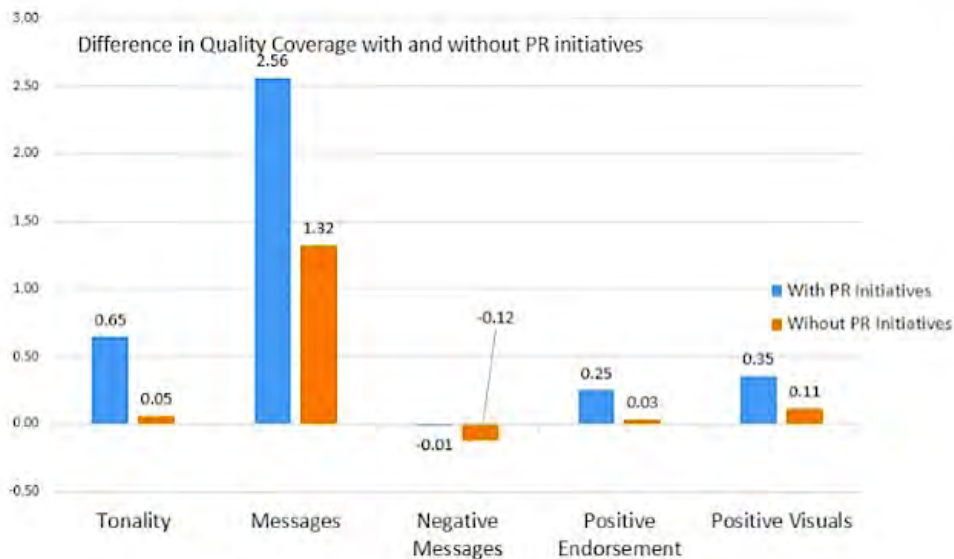
- If a PR Initiative was mentioned in a story it was:
  - Nearly ten times more likely to be desirable.
  - Twice as likely to contain a key message
  - Nearly ten times less likely to contain an incorrect or negative message
  - Thirteen times more likely to contain a positive endorsement
  - Ten times more likely to contain a desirable visual

You may need to generate a number of different cuts to the data until you find the one that best illustrates your message and tells your story. Present your data for five quarters so you accommodate any seasonal changes. If possible compare your data or your campaigns to those of your peers.

Beware the pie chart.

The *worst* kind of chart is a pie chart. You want to tell a story, and a story is something that happens over a period of time. Pie charts cannot show change over time, so they are not very informative. Get rid of them.

So how do I know if my activities are correlated with results?

The key point to remember is the difference between correlation and causality. A *correlation* between two things means only that they are interrelated. Which is a great thing to be able to show, but it doesn't prove which caused which—and both could be caused by something else. Claiming that you *caused* something to happen requires a much higher degree of statistical testing than correlation. In most cases showing a correlation will be sufficient.

To show correlation, you need to bring two or more sets of data together (for example, Facebook likes, positive mentions, and online donations). First create a scatter chart from your data to test the premise. If the dots are all over the map, there is no connection between your data. However if the data are clustered in some way, you may be able to show a correlation using the PEARSON function in Excel. If the Pearson number is negative, there is no correlation, if it is positive there is a connection between the data.

You can now show your data in a trend chart over time. Or you can use a chart like the one below to rank your programs based on how closely each one correlates to actual customer behavior.

|	
MLK	0.848
Get Involved	0.427
AmeriCorps	0.379
CNCS	0.355
SeniorCorps	0.156
Learn & Serve	0.133
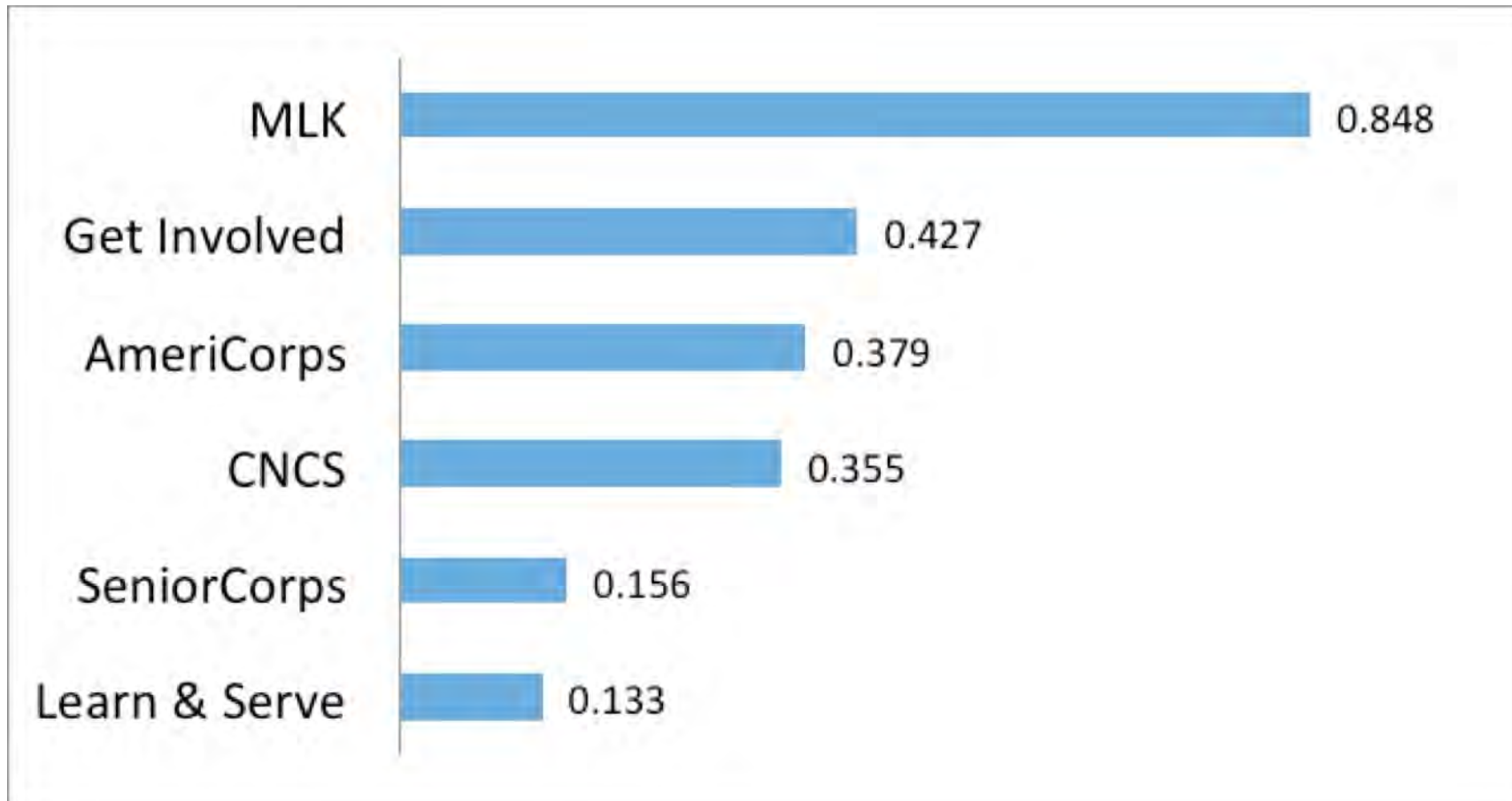
In this chart, the desired behavior was people registering as volunteers on a web site. You can quickly see from this chart that the MLK program was by far the most successful at getting people to volunteer, while the two at the bottom were almost useless in achieving the goal.

How do I use my data to figure out what to do next?

Rank order all of your programs or campaigns from best to worst based on the metrics you

agreed upon with senior management. Go back and review Lesson 4 again if you need help figuring out what metrics you should use. Then assign a relative "resource intensity score" to each program. It doesn't have to be an exact dollar figure, just bucket them by resources required: Low, medium, high, and very high (as in serious pain in the butt). Now create a chart like the one below in which the colors reflect the resources required and the vertical scale is relative success against the agreed upon metric.

Engagement vs. resource use
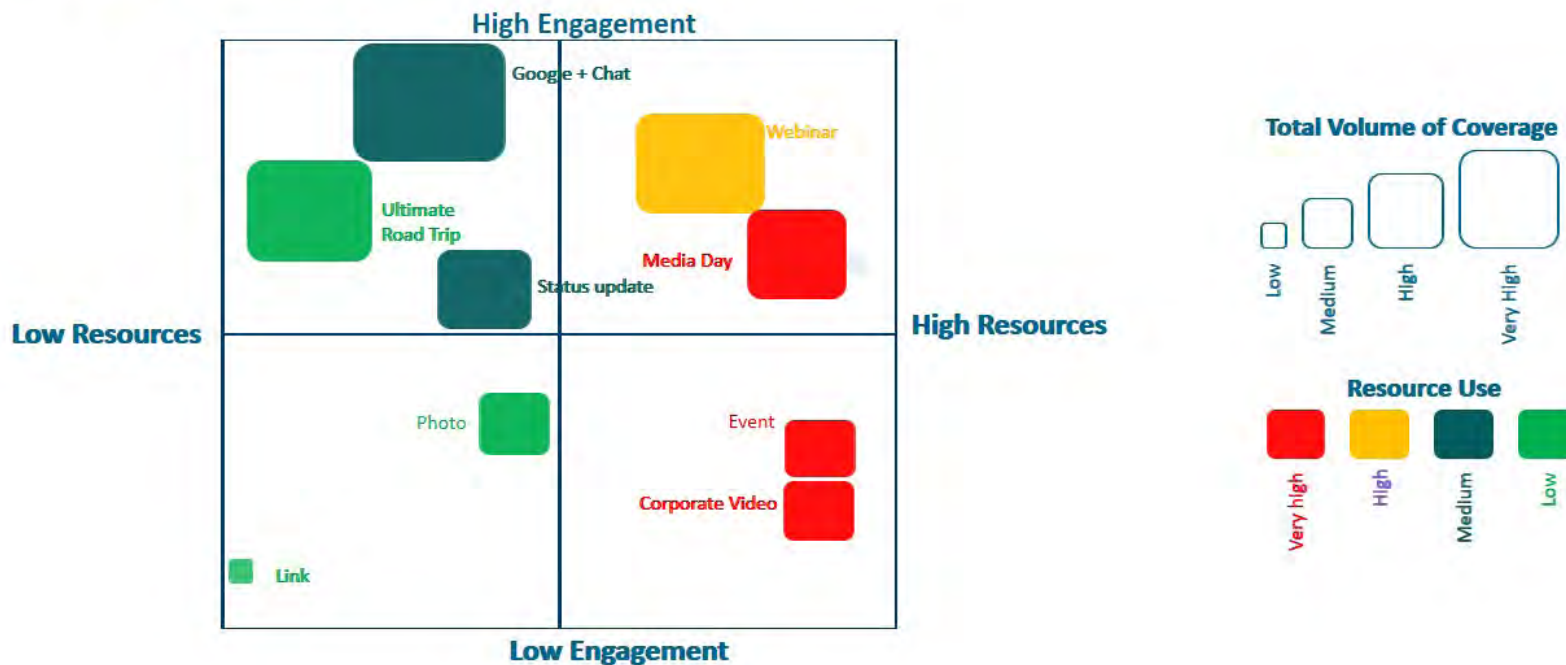
If you're using volume or reach you might want to make the size of the boxes reflect the volume of exposure.

What are some common mistakes that people make when reporting results?

1. Looking at the world from the wrong perspective.

One of my most memorable moments of 2013 was standing in a conference room of a very large well known consumer products company that is renowned for its marketing prowess. The room was packed with marketing analysts and research pros. We were looking at results of a worldwide customer satisfaction study. There were literally thousands of data points. The results had been summarized in a color-coded table organized by geographic region. Imagine it looked something like this:

	Ireland	Spain	Dubai	England	France	Japan	Phillipines	South Africa
On time delivery	5	6	7	8	9	10	9	8
Post-sale service	4	5	6	7	8	9	5	6
Ease of doing business	1	2	1	1.5	2	2	1	1
Willingness to recommend	5	4	6	5	7	6	8	9
Trustworthy	5	3	7	8	9	4	6	8
Good staff	9	9	10	8	6	7	5	4
Total	4.83	4.83	6.17	6.25	6.83	6.33	5.67	6.00

The discussion was focused on what was going wrong in Ireland and Spain, and they quickly concluded that the declining sales were due to the bad economic client in both countries.

After looking at the chart for a minute, I concluded something a bit different. Their biggest problem was that they were perceived as a company that was hard to do business with

everywhere in the world! In the chart below I've added color coding to illustrate the point.

	Ireland	Spain	Dubai	England	France	Japan	Phillipine	South Africa
On time delivery	5	6	7	8	9	10	9	8
Post-sale service	4	5	6	7	8	9	5	6
Ease of doing business	1	2	1	1.5	2	2	1	1
Willingness to recommend	5	4	6	5	7	6	8	9
Trustworthy	5	3	7	8	9	4	6	8
Good staff	9	9	10	8	6	7	5	4
Total	4.83	4.83	6.17	6.25	6.83	6.33	5.67	6.00

While both conclusions might be accurate, there was little the marketing team could do about the state of the economy in those two countries. They could, however, do something about the perceptions of the company as hard to do business with. They applauded my genius and wisdom, but, in fact, my insight had more to do with the fact that while they were concentrating on the vertical columns, I was looking at horizontal rows. This might seem like an incredibly simple difference, but too frequently that's all it takes.

2. Crosstab deficit disorder (CDD)

All the data in the world can't deliver insight if you haven't got the right cross tabs. Sometimes the problem is that the client doesn't know which cross tabs he/she needs or what to ask for. Other times the provider of the data is trying too hard prove or disprove their own beliefs. The solution is to make sure that you get cross tabs by gender, media source/type, and anything that you think might have influenced a key data point.

Below are the standard questions that I always ask when looking at a dataset. You should ask yourself these, and probably more that pertain to your particular project and audiences:

- Do women feel differently than men?

- Did seeing different types of media influence opinions differently?

- Did old people see things differently than younger?

- Does length of time with the company make a difference in the responses?

- Does physical location make a difference in the responses?

- Is there any seasonality to the data?

- Does the form/type of communication make a difference?

3. Data not connected to goals: Are you asking the right question with the right data?

Most reports these days are very long on data points, but they are frequently the *wrong* data points. The very
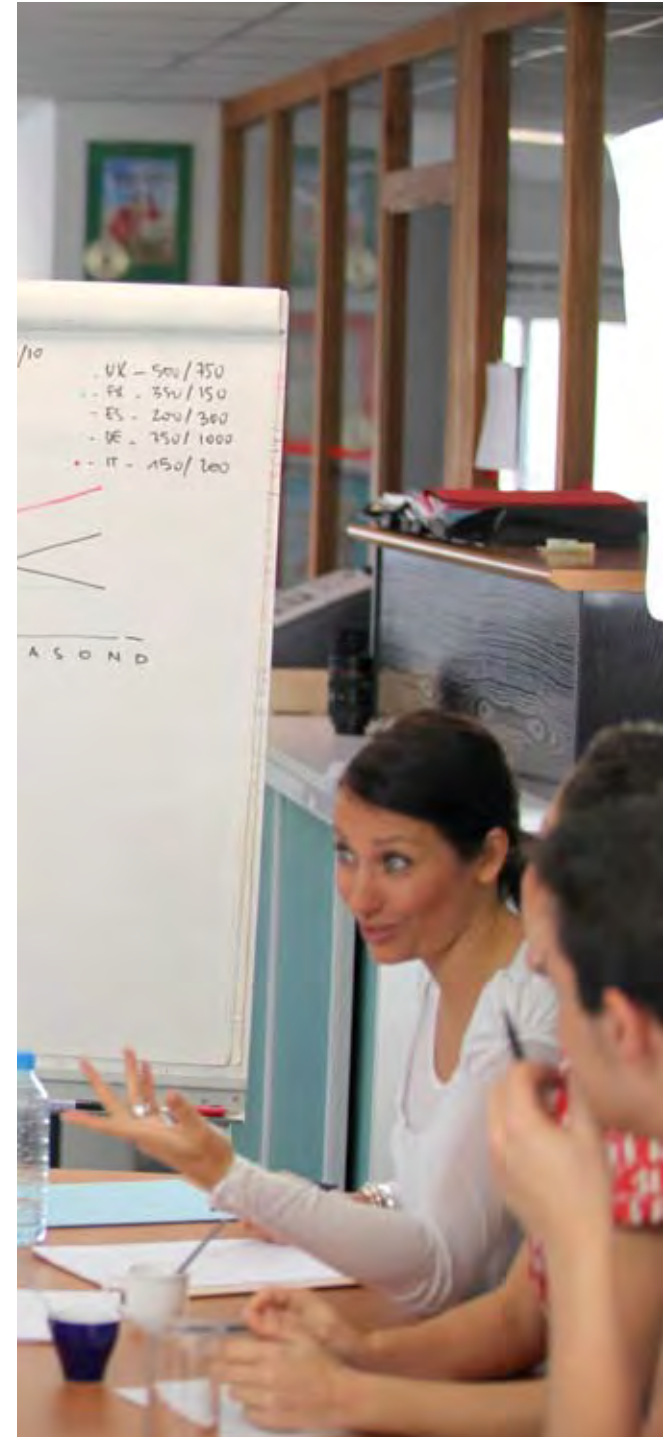
premise and purpose of the research is generally driven by a specific question or problem that needs to be solved. So an ad agency presents data that show their ads are effective, when in fact, buried in the data is proof that PR is actually more cost effective. Or in the internal survey to determine how effective a specific internal communications program is, the data shows that a specific department head has a problem, not the company newsletter.

What are some key points to keep in mind when producing a report?

- Start with **validated clean data** that you understand well enough to explain to a child. Because the attention span of the board is less than that of a two-year old.

- Make sure you have **at least three data points** to work with so can analyze the relationships between the data.

- Make sure you have **both qualitative and quantitative** data. You need to know the *why*

not just the *how many*.

- Always **transpose your data** and look at it from a variety of angles.

- Go back to the **purpose and goals of the research**. Have you answered all the questions in a way that your boss' boss will understand?

- Use color coding to **highlight key data points**.

- **Be consistent in color usage** and explain what the colors mean at the beginning of your report or presentation.

- Remember that **you are telling a story**. Find the three most salient points and use the data to make those points. Throw out any data that doesn't help tell the story.

Lesson 6 Study Questions

1. When you look at your data do you see failures as well as success?

2. How can your data help you make decisions? How can they help you generate ideas to improve your next campaign?

3. Does your organization have a structured and regular process for reviewing data and generating insights? How can you institute one? Who needs to be involved?

4. Is your organization missing learning and insight opportunities because data are confined to silos in different departments? How can you change this?

5. Using pivot tables, transpose your data. Does it tell you anything different?

6. Color code your data for good performance vs. bad. Do you learn anything from the color patterns?

Lesson 6 Suggested Readings

Chapter 2: Paine, K.D. (2011). *Measure what matters: Online tools for understanding customers, social media, engagement, and key relationships*. Wiley, 2011.
http://www.amazon.com/Measure-What-Matters-Understanding-Relationships/dp/0470920106/ref=sr_1_1?s=books&ie=UTF8&qid=1397600758&sr=1-1&keywords=Paine+Measure+What+Matters

Chapter 9: Kanter, B. & Paine, K.D. (2012). *Measuring the networked nonprofit: using data to change the world.* San Francisco: Jossey-Bass.
http://www.amazon.com/Measuring-Networked-Nonprofit-Using-Change/dp/1118137604/ref=sr_1_1?s=books&ie=UTF8&qid=1397600656&sr=1-1&keywords=kanter+and+paine

***How to Get a Seat at the Table in 5 Easy Steps**,* in *The Measurement Advisor*.
http://painepublishing.com/measurementadvisor/2014/02/25/how-to-get-a-seat-at-the-table-in-5-easy-steps/

***3 Real-life Measurement Charts Your Board Will Love**,* in *The Measurement Advisor*.
http://painepublishing.com/measurementadvisor/2014/02/25/three-real-life-measurement-charts-your-board-will-love/

Turn That Chart On Its Side, and 2 More Ways to Get New Insights From Your Data
http://painepublishing.com/measurementadvisor/2014/02/22/turn-that-chart-on-its-side-and-2-more-ways-to-get-new-insights-from-your-data/

What is Paine Publishing?

Paine Publishing is an educational publishing company that helps organizations establish effective, meaningful communications measurement programs that are in compliance with industry standards.

- We publish *The Measurement Advisor*, the newsletter for professional communicators who want data and information to continuously improve their measurement programs and bring standards into their organization.

- We offer measurement education packages that include specific case studies, white papers, presentations, and checklists, on the following topics:

    - Best Practices and Measurement Standards Compliance

    - Travel and Tourism Best Practices and Standards Compliance

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