

4 KEY TIPS FOR EFFECTIVE

# ***Data storytelling for **FP&A** Leaders***



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# INTRODUCTION

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Welcome to our journey through Data Storytelling for FP&A! In today's fast-paced business world, data alone isn't enough. We need stories that captivate, explain, and drive action. Imagine blending the raw power of data with the compelling nature of stories. That's where magic happens – decisions become clearer, and strategies more impactful. Ready to unlock this potential? Let's dive in

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# ***THE IMPORTANCE OF DATA STORYTELLING***

## **WHY DATA STORYTELLING MATTERS**

Ever wonder why some data presentations stick and others just slide by? The secret is in the storytelling. Today, we're embarking on a journey to transform how you see and share data in FP&A.



**Data alone is just numbers**  
It needs a voice



**Stories without data lack depth**  
They need a backbone



## **Together, they're unstoppable**

Engaging, persuasive, action-driving

Understanding the synergy between data and stories paves the way for insights that truly resonate and compel action.

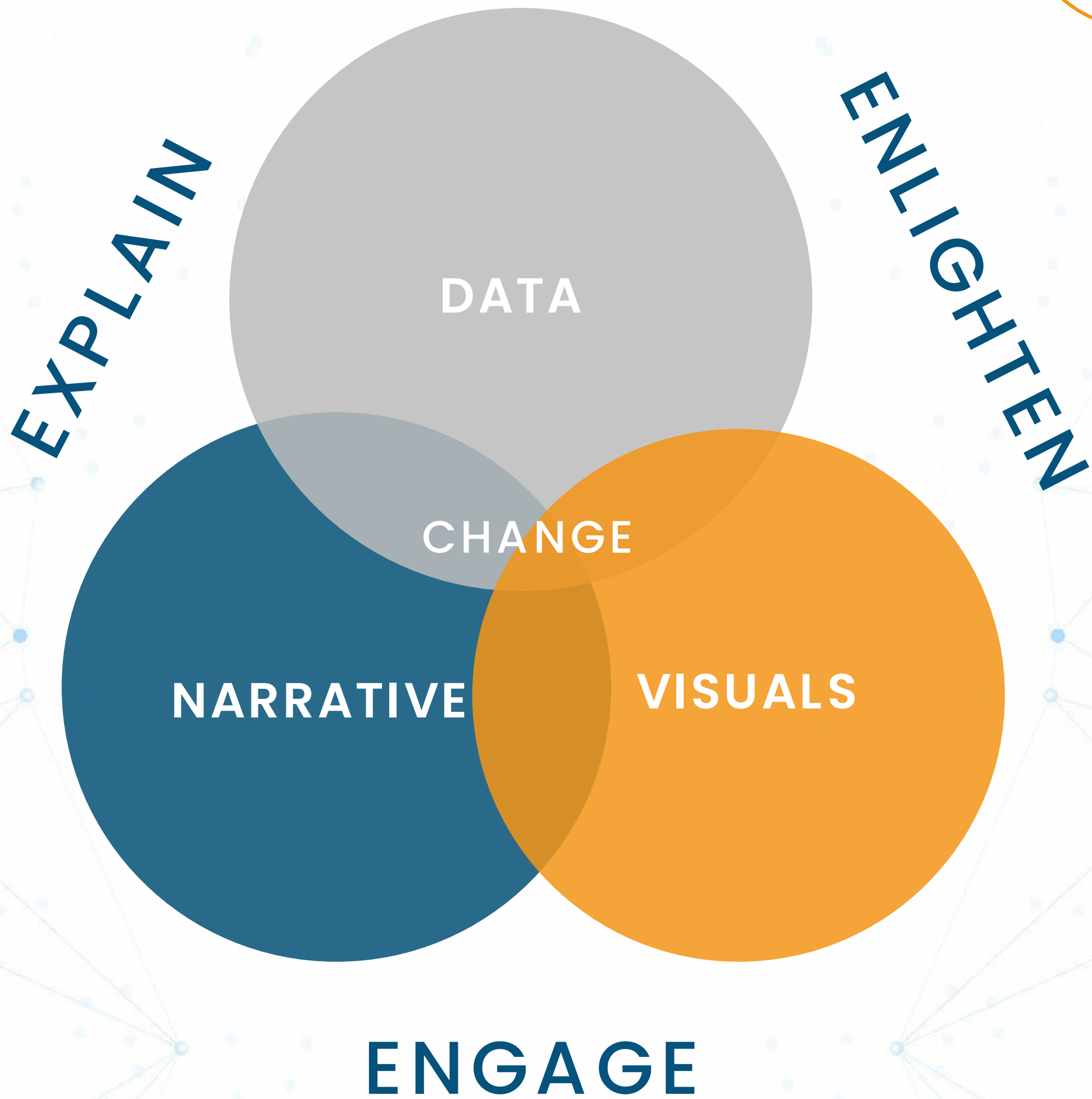
**CREDIBILITY**

**LOGIC**

**EMOTION**

**PERSUASION**







# 01

## **UNDERSTANDING YOUR AUDIENCE**

KNOWING YOUR AUDIENCE IS KEY

Before you dive into the numbers, take a moment. Who are you talking to? Understanding your audience is the first step in creating a narrative that resonates.

WHO?

### **Define Who**

Know their level and needs



### **Understand What**

What actions they should take



## Decide How

Tailor your presentation style and tone

Tailoring your narrative to your audience's needs ensures your data story not only engages but also inspires the right actions.



# 02 **CRAFTING YOUR MESSAGE**

## FINDING YOUR CORE MESSAGE

With your audience in mind, it's time to focus. What's your message? Selecting the right points is like choosing the right ingredients for a recipe.



### **Spot the BIG**

Look for impactful numbers



### **Seek Relevance**

What matters to your audience?





## Aim for Surprise

Share something new

Focusing your message sharpens your story. Up next, we dive into the art of visual storytelling – selecting visuals that speak volumes.



# 03 **SELECTING THE RIGHT VISUALS**

## VISUALS THAT SPEAK VOLUMES

A picture is worth a thousand words, and the right visual can turn your data into a compelling narrative.



### **Simple Text for Impact**

Highlight key figures



### **Power Dashboards**

Summarize your story at a glance



## Heatmaps & Bars

Show comparisons and distributions

Visuals bring your data to life, making complex information accessible at a glance. But how do you deliver this effectively? Let's find out.





# ***SIMPLE TEXT***

## CHART SELECTOR GUIDE

**-4.2%**

Sales this month £4.3m (2014 - £4.1m)

Website went down for 3 days

Due to overloaded servers

When you have one or two key numbers to share, simple text can be the best way to communicate.

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Make the value big enough to catch attention and standout, and then add supporting context to clearly make your point

# POWER DASHBOARD

## CHART SELECTOR GUIDE

SHOULD WE CONTINUE THE INVESTMENT?	
<p><b>BOOKINGS</b> <b>+8,000</b></p> <p>Due to new marketing campaign</p> <p>That's <b>\$4m</b> extra sales vs. last year</p>	<p><b>PRICE</b> <b>-\$60/</b> person</p> <p>Due to price promotions for new clients</p> <p>That's <b>2.2bp</b> lower margin, but <b>\$1.4m</b> higher \$</p>
<p><b>PROFIT</b> <b>+\$1m</b></p> <p>After marketing investment of <b>\$0.4m</b></p> <p>That's a <b>3.5x</b> return on investment</p>	<p><b>QUESTIONS</b></p> <p>How do we maintain the strong bookings trend?</p> <p>What other campaigns are we planning for?</p> <p>Are we ok with the volume/margin balance?</p> <p></p>

Used in the beginning of your presentation answering the questions of “what happened?” “Why that happened?” and “So What?” using the rule of 3

It summarizes the story in 1 slide



# TABLE

## CHART SELECTOR GUIDE

Region	Product A	Product B	Product C	Product D
East	800	640	480	440
North	650	520	390	357.5
South	540	432	324	297
West	330	264	198	181.5
Central	210	168	126	115.5

Tables are great for communicating with a mixed audience whose numbers will each look for their particular row of interest.

If you need to communicate multiple different units of measure, this is also typically easier with a Table than a graph.

Arrange your items to start with the most important ones and use table light borders or simply white space to keep the attention on data.



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# HEATMAP

## CHART SELECTOR GUIDE

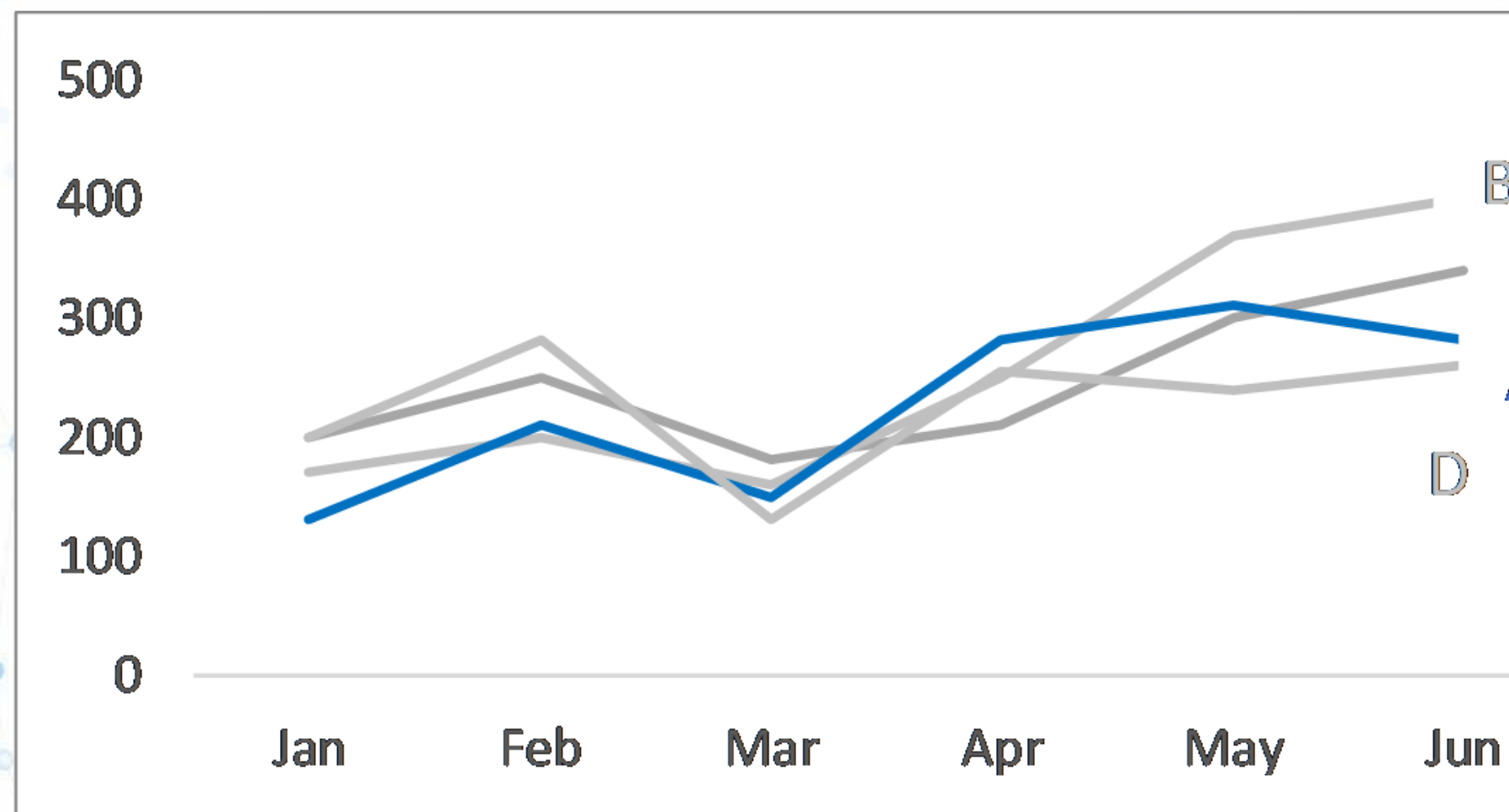
Region	Product A	Product B	Product C	Product D
East	100	200	250	400
North	120	350	580	810
South	140	430	720	1010
West	115	280	445	610
Central	260	510	760	1010

You can use them when you want to leverage coloured cells to convey relative magnitude of the numbers data.



# LINEGRAPH

## CHART SELECTOR GUIDE



When you have to show a single, two series, or multiple series of data over a certain period of time, line graph is a great option.

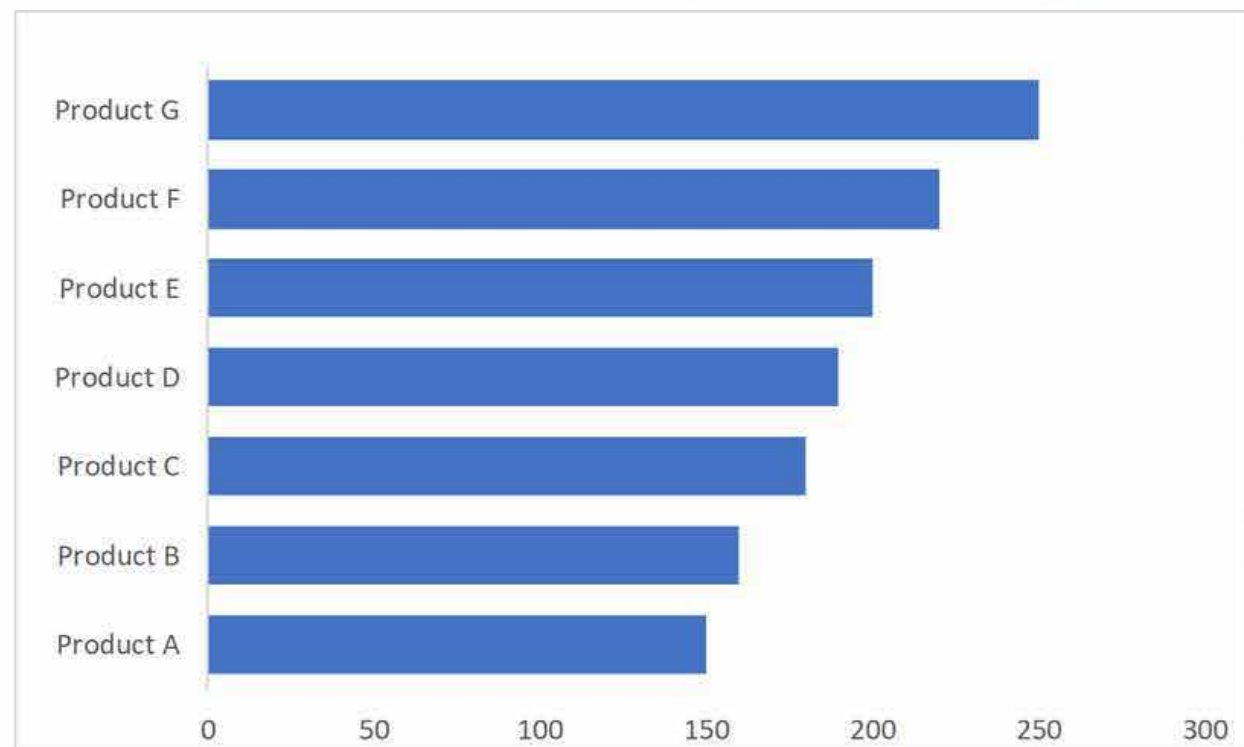
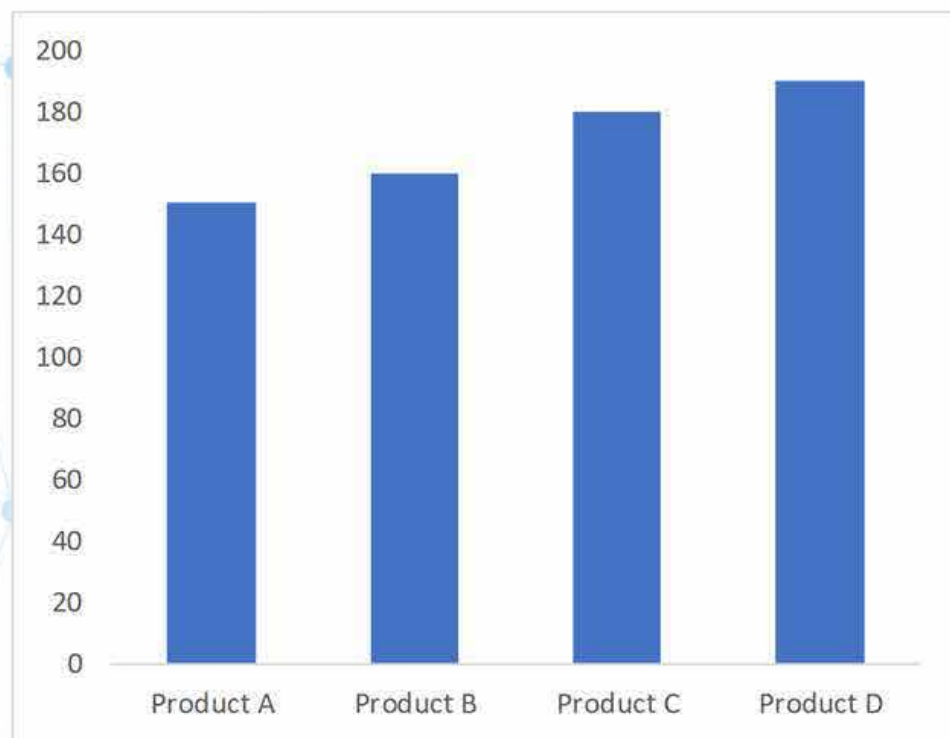
Avoid comparing more than 5 lines in the chart data.

Colour the focused line differently than others.



# BAR

## CHART SELECTOR GUIDE



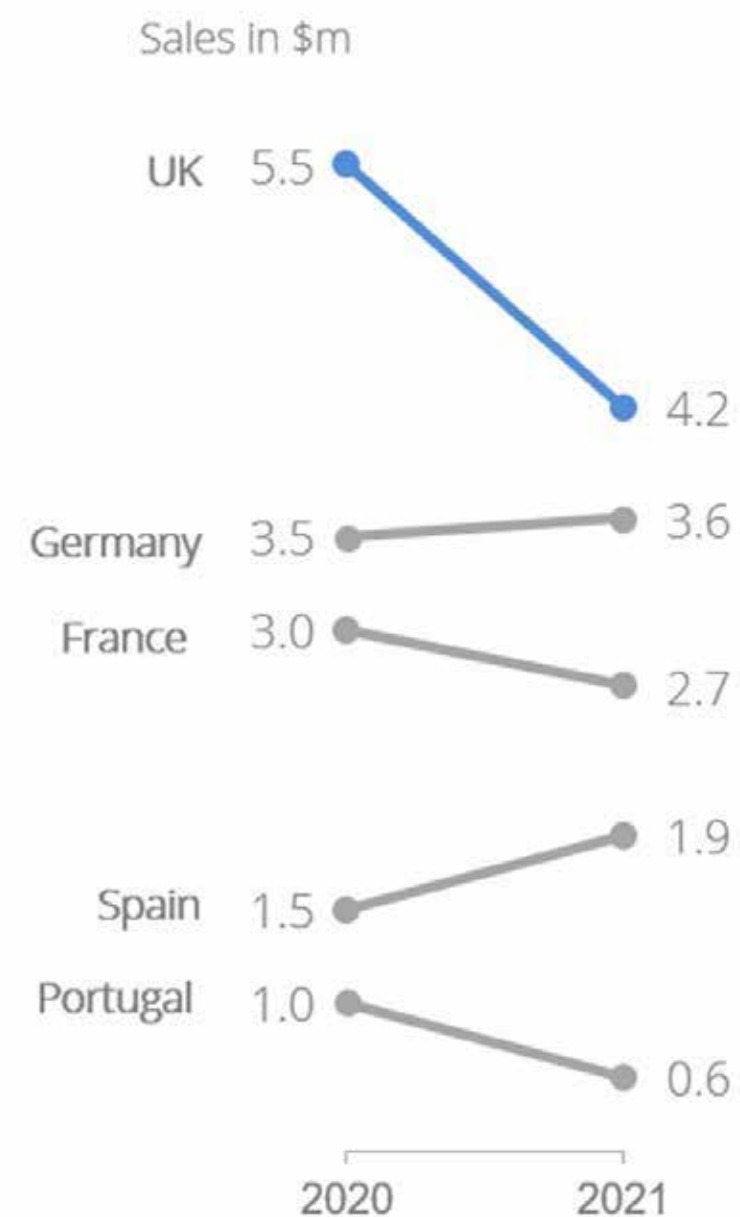
When you want to show comparisons among discrete categories, you show quickly which category is the biggest, which one is smallest and the incremental difference between categories, bar chart is a great option

Use horizontal bar charts when the category names are long or when you have many categories

# SLOPE GRAPH

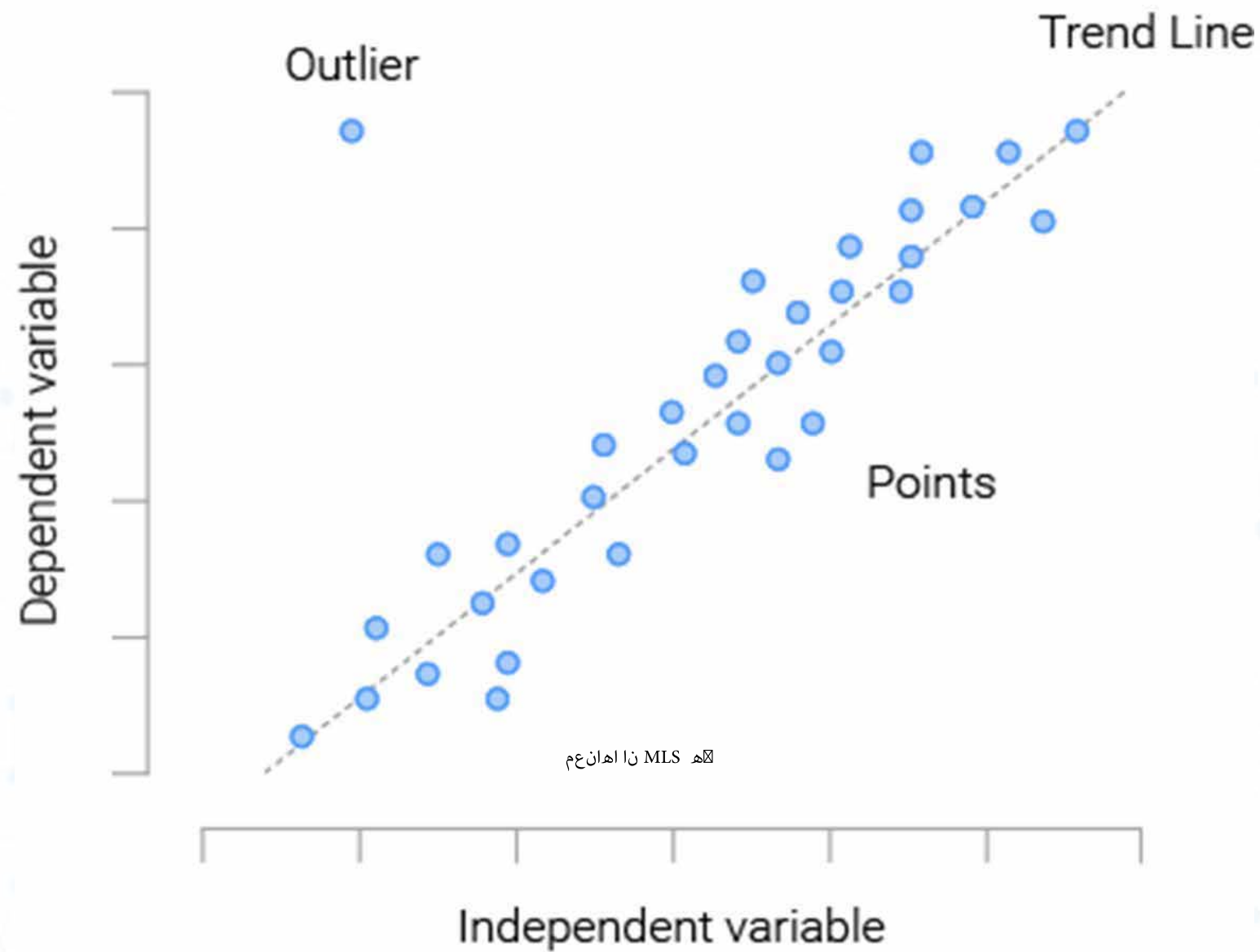
## CHART SELECTOR GUIDE

Slope graphs can be useful when you have two time periods or points of comparison and want to quickly show relative increases and decreases or differences across various categories between the two data points



# SCATTERPLOT

## CHART SELECTOR GUIDE



Scatterplots can be useful for showing the relationship between two variables.

It helps to identify outliers.



# **WATERFALL**

## **CHART SELECTOR GUIDE**



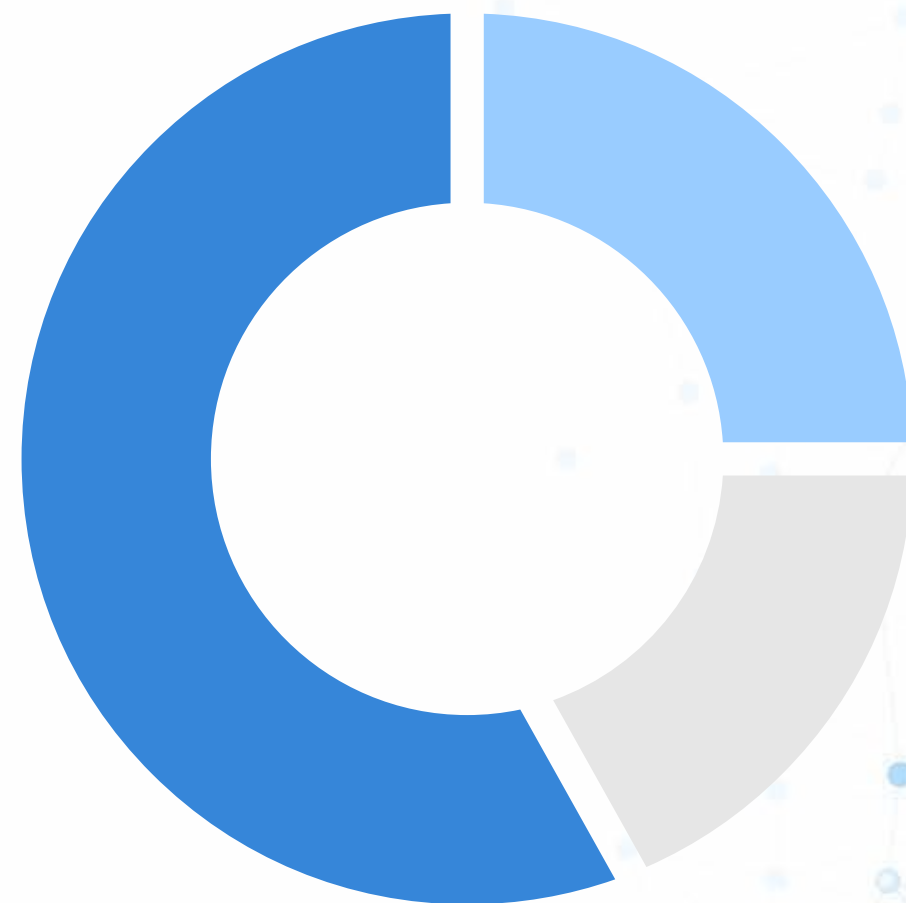
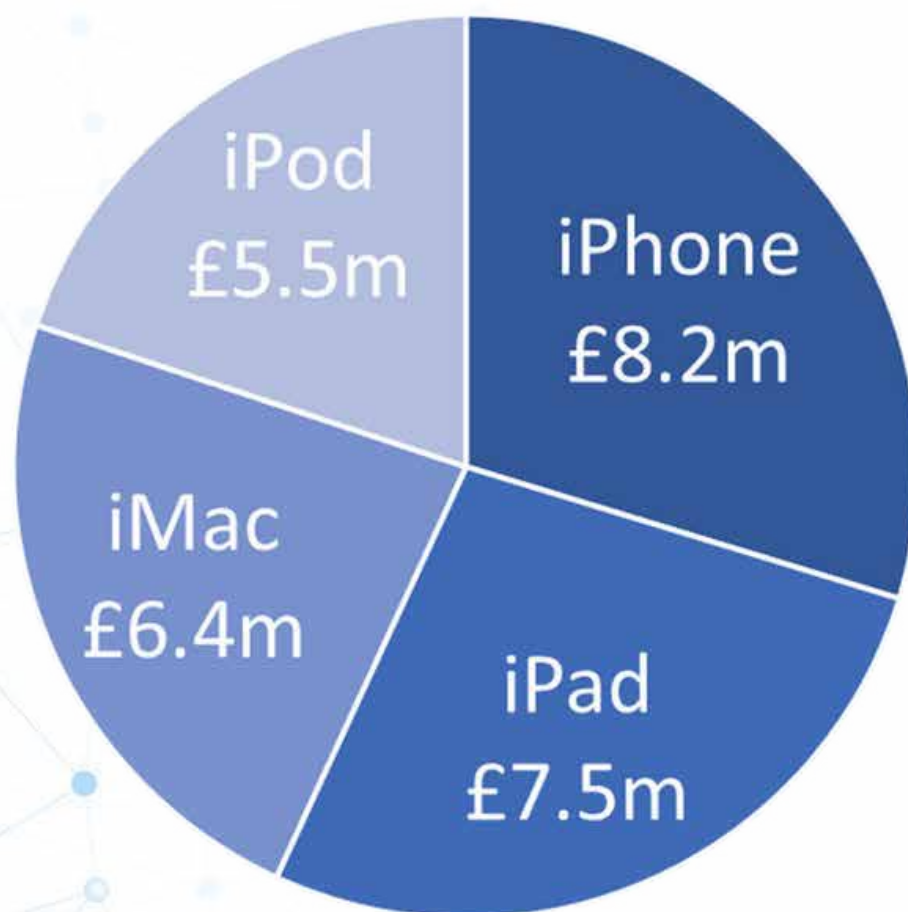
To show starting point and how a value changes by various factors that either increase the value, or decrease it, and the resulting. ending point

Use maximum 7 bars.

Put commercial drivers not product or category.

# LINEGRAPH

## CHART SELECTOR GUIDE



It shows a part to whole relationship.

Limit the number of categories to 4 or 5 maximum.

- Use colours to make your most important value stand out.

**KNOWLEDGE**

# ***THE POWER OF VISUAL DATA***

Did you know? Visual data can improve decision-making speed by up to **17%** according to a recent study.

By **effectively visualizing financial data**, FP&A professionals can drive quicker, more informed decisions across all levels of management.

(Source: Visual Capitalist)



# 04 **DELIVERING MEMORABLE PRESENTATION**

## MAKING YOUR PRESENTATION MEMORABLE

Crafting your story and visuals is just the start. Delivering them in a way that captivates and resonates is the key to memorable presentations.



### **Know Your Audience**

Tailor the story for them



### **Simplicity Wins**

Keep it straightforward and focused



### **Practice Makes Perfect**

Rehearse for confidence and impact



### **Engage Emotionally**

Connect on a personal level



### **Use the Rule of Three**

Simplify complex ideas



### **Call to Action**

Leave your audience with clear next steps

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Effective delivery ensures your data story not only reaches your audience but sticks with them, driving meaningful action.

## COMPETITIVE STRATEGY INSIGHTS

# ***THE IMPACT OF STORIES ON MEMORY***

65% of people remember information three days later if it's presented with a relevant story, compared to only 10% when data is presented alone. This highlights the transformative power of storytelling in FP&A narratives.

(Source: Stanford University)



# RECAP

SHORTEN IT UP!

As we close our journey, let's revisit the milestones we've covered. From understanding our audience to choosing the right visuals, each step is a building block in the art of data storytelling.



## **Blend data and narrative**

This duo makes your insights stick



## **Tailor to your audience**

Make every message hit the mark



## **Choose visuals wisely**

The right image amplifies your story

You're now equipped with the tools to transform data into compelling stories that drive decisions. Remember, great data storytelling can change the course of your FP&A efforts. It's your turn to turn data into destiny. Let's make every number tell a story!

# DID YOU LIKE IT?

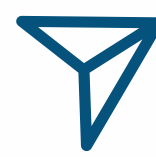
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