Data Coaching Workshop for University of Iowa

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Welcome

- Introductions
- Goals for the day

CEO Story

ROI "stories" vs. ROI numbers

ROI Money Significant

(in hundreds of millions)

But he talked about the stories (samples below)

ACTION	ROI STORY
Run credit workshop. Set up recycling and reduce or revise scheme on our team. Replace handset prompt bullet point.	**Will save the company money**
Reimplement buddy Ops groups. Discuss at Buzz meeting to gain everyone's understanding of how buddies are allocated.	**Better team work, Engaged workforce.**
Consider how we manage checking system. Meeting to review whole process. Be bolder with timeframes.	**Increased efficiency and time spent on value add exercises**
Senior VP to come into team meeting. We will own our own research and report back what we learn. We will prepare a teams news bulletin	**We will all know what we are working towards, which can only be good for the business as a whole.**

ROI = Through Action and Results
Dialogue provides a multiplicative effect

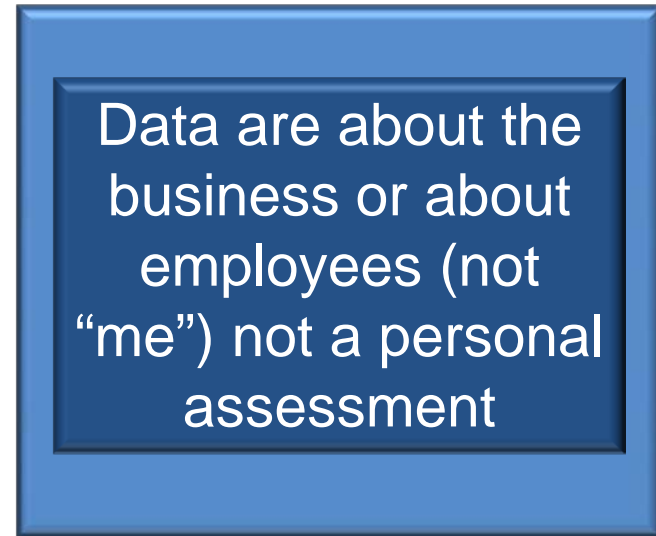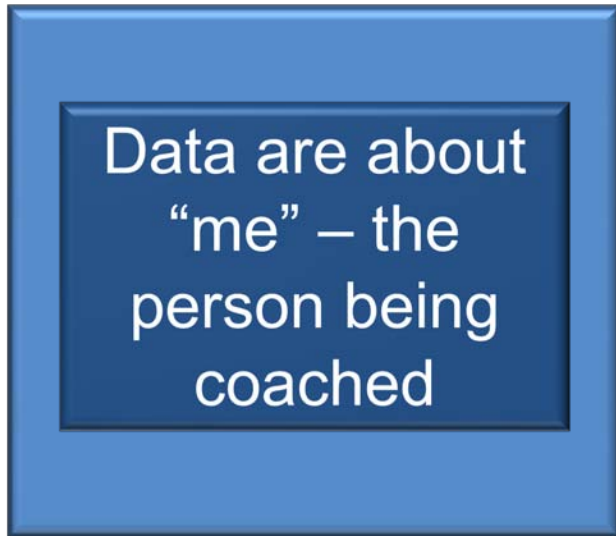| Data	Dialogue	Action	Results Goal Achievement

Getting to dialogue involves intentional, focused work and having a **clear point of view** -- then building the story to tell it to the right audience. Also, **documenting results** is critical for ongoing success.

The data in data coaching

Executive, life and **data coaching**

Data are about "me" – the person being coached

Data are about the business or about employees (not "me") not a personal assessment

Our work to date

- Started teaching data coaching about 3 years ago; public program and custom programs
- Built (or building) tools to support learning
  - Data audit with measurement map (historical and future focused perspectives)
  - Track stories, build case studies
  - Diagnostic tools (data vs. dialogue)
  - Genres in HR data (work in progress)
  - New data models (e.g. employee value exchange proposition)

Results

"Being data oriented, I tend to **error on the side data overload.** This work helped me to understand the power of editing the data in context to a **clear and concise story whose intent is to move people into action.** Our process used to be going over a standard HR dashboard with green, yellow, red indicators tied to our set of HR metrics. This process, while appropriate for our intelligence evolution, was missing the mark in that it was **not eliciting an emotional response** that called our leadership into action.

We still use the dashboard internal to HR but now I work with the data to help craft a story that supports that action. **The story and data will change at each meeting.**

The effect of this new process with our leadership team has been transformational. The conversations are more dynamic and we are resonating with leadership in a way that has not been experienced by HR in the past."

Data and Dialogue

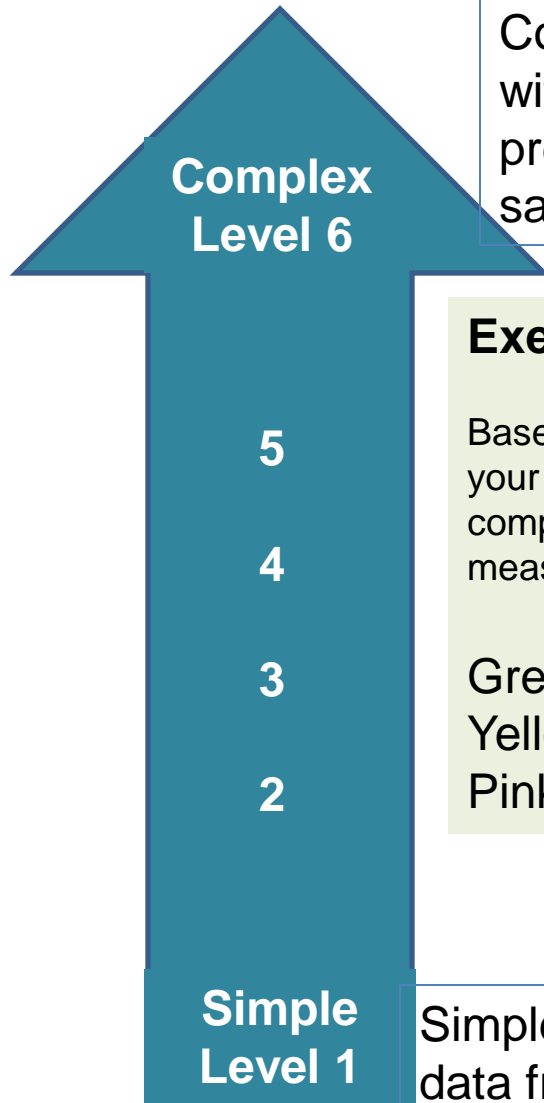# Data powers the story used in the dialogue phase

Power Story Telling

Dialogue: What data stories do you have?

- What data do you find most useful today?

- What dialogues are you driving with the data?

- How are the data and dialogue moving to action?

- What are the results from the actions?

Let's organize our data

Complex Level 6

Complex, level 6 data: Regression analysis, with control variables, longitudinal data, predictive modeling, combine financial and/or sales data. Harder to collect; easier to "argue."

5

4

3

2

Exercise:

Based on your discussions, focus on your most USEFUL data (for your own purposes), and plot that data on the wall (from simple to complex). Choose the sticky note that represents the objective, measurable business result obtained from this USEFUL data.

Green sticky note: High impact measurable result
Yellow stick note: Moderate impact
Pink sticky note: No measurable result

Simple Level 1

Simple, level 1 data: Focus group data or count data from one point in time (less argument, clear)

Mapping your stories

Levels of data complexity	Data	Dialogue	Action	Results
6				
5				
4				
3				
2				
1				

Observations?
Lessons learned?

Great Data Coaches

Get Big Data

- Right data
- Accurate data
- Data from the 'source'

Focus Data

- Create the story with this subset or summary of data
- Write the script

Tell the Story

- Presentation
- Technology
- Choose actors
- Distribute

The Field Today

Story telling
or the narrative
field of study
and expertise

**The emerging
field of data
coaching;**
*telling stories
with data;
teaching
managers to
use stories with
their data*

**Data analytics;
statistics**

Who else is doing data coaching or focusing on story telling?

- **Education – data coaching**
  - "To ensure that student achievement **data drive decisions** in classroom and school"
  - "**Coaches help teams of teachers examine data**, understand students strengths and weaknesses, and identify instructional strategies, structures and programs or curriculum to address identified needs."
- **Health care, not-for-profits** – **create high emotion so people donate money**
  - United Nations publication: "Making Data Meaningful: A guide to writing stories about numbers"
  - Statistical story telling is about:
    - Catching the reader's attention with headline or image
    - Providing the story behind the numbers in an easily understood, interesting and entertaining fashion, and;
    - Encouraging journalists and others to consider how statistics might add impact to just about every story they have to tell

From National Staff Development Council newsletter, 2005

What evidence-based researchers know

There's a story behind the "kinder, gentler" treatment thresholds for jaundice in newborns

Stories are more powerful than data in changing guidelines for treating babies with jaundice.

Emotions matter; getting people to pay attention is critical to action and results.

From: The Power of Stories over Statistics
Thomas B. Newman

Learn to be "nice" to your brains

Your Brain at Work
Know Your Brain, Transform Your Performance

STRATEGIES FOR OVERCOMING DISTRACTION,
REGAINING FOCUS, & WORKING SMARTER ALL DAY LONG
David Rock
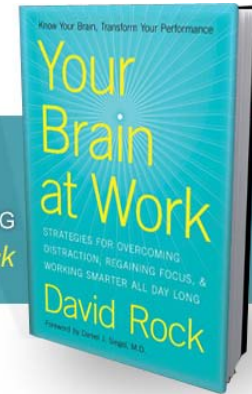
According to David Rock (who reviews research from numerous scientists), when large volumes of data are experienced:

"It's like hundreds of new actors jumping on the stage briefly and then running off" … and you don't remember the information.

*It's all about the **prefrontal cortex**.*
To work well, it can't be overloaded.

The employee retention story

Traditional presentation.

Let the audience discover the problem that arises from the data.

Story telling version of the same data.
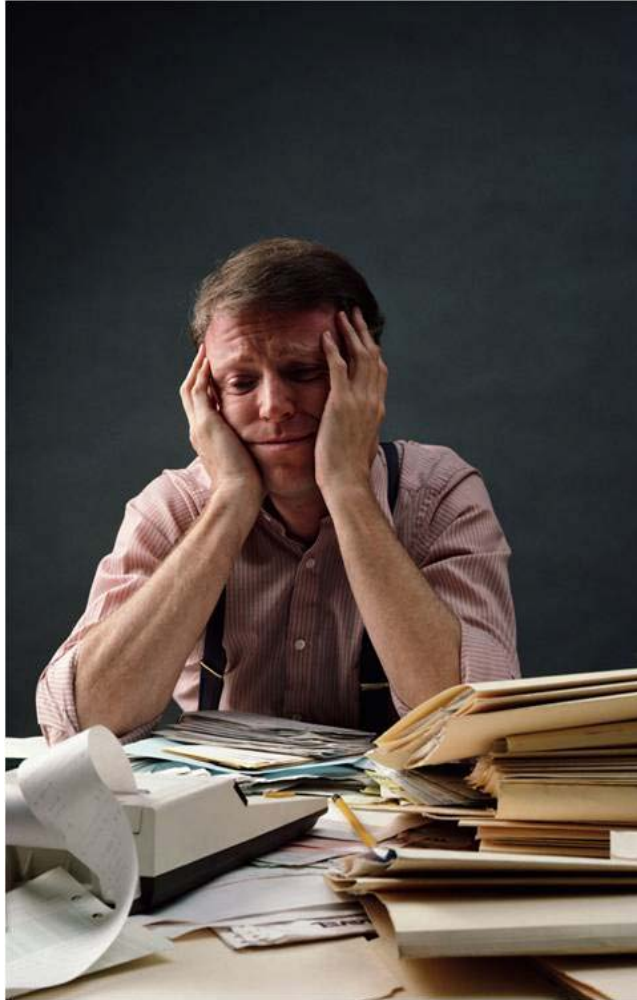
Purposeful story.

Employees can't take it any more;
stacking work syndrome *is*
making them leave.

Find Good Stories   Make New Stories

Evaluate Current HRM Data   **Plan Future Metrics Strategy**

Results

Action   Data

Goals

Dialogue   Dialogue

Action

Data   **Results**

Goals

Start here – move up   Start here – move up
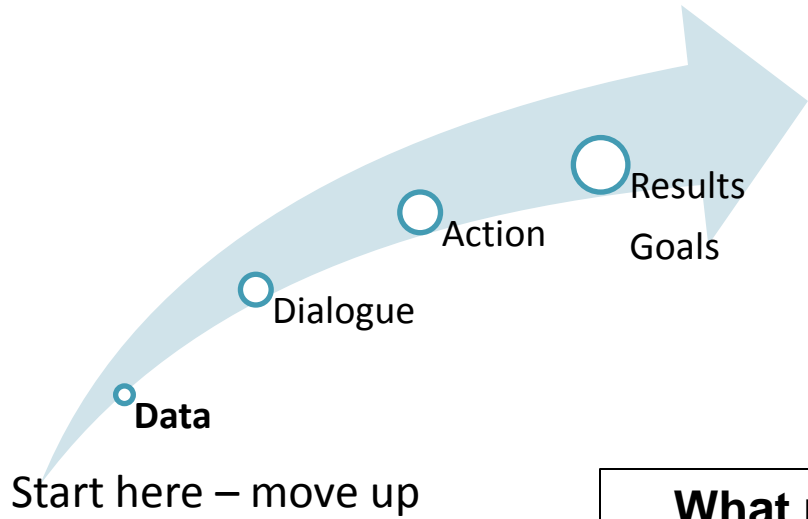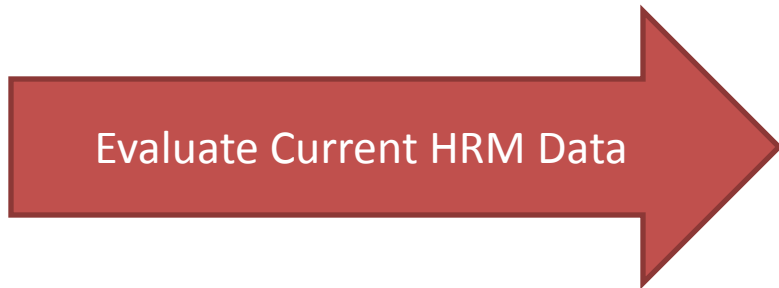
What purpose?

To achieve the
overall BIG GOALS

Good story development

- **Beginning** - introduce the reader to the setting, the characters and the situation (conflict).

- **Plot point** - situation that drives the main character from "normal" life toward some different conflicting situation that the story is about.

- **Middle** - series of complications and obstacles, each leading to a mini crisis.

- **Climax** – the ultimate crisis.

- **Resolution** of the climax – saving the day, feeling happy, celebrate.

- **End** - tie up the lose ends; share the morale of the story.

Typical data story development

Beginning – Introduction to the study

Plot Point 1 - Discuss the variables studied

Middle - series of complications and obstacles, each leading to a mini crisis.

Climax – the ultimate crisis.

Resolution - of the Climax, saving the day, feeling happy, celebrate.

End - Present the results of the data analysis

Get out before the audience wakes up

Story arc

Middle
Obstacles
Conflict

Beginning
Setup, Characters
Background, Who,
What, Where

End
Resolution
Understanding

Dialogue: Find the middle

Middle
Can you think of
any obstacles?
"conditions under
which this may
not go so well?"

Beginning
**Employee
satisfaction**

End
**High firm
performance**

*Talk at your table; play with different
scenarios; **find a few middles that work
for your teams***

Story Arcs Can be Complex
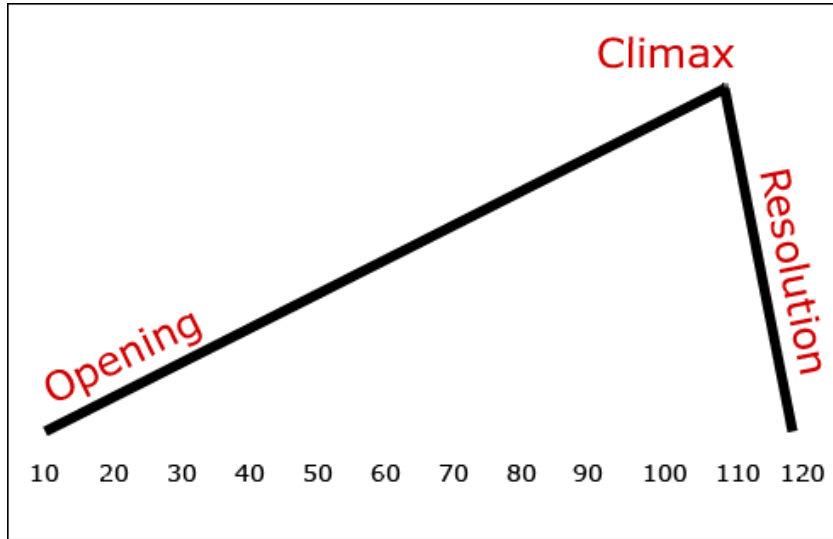
SIMPLE

COMPLEX

From Stargate, the series
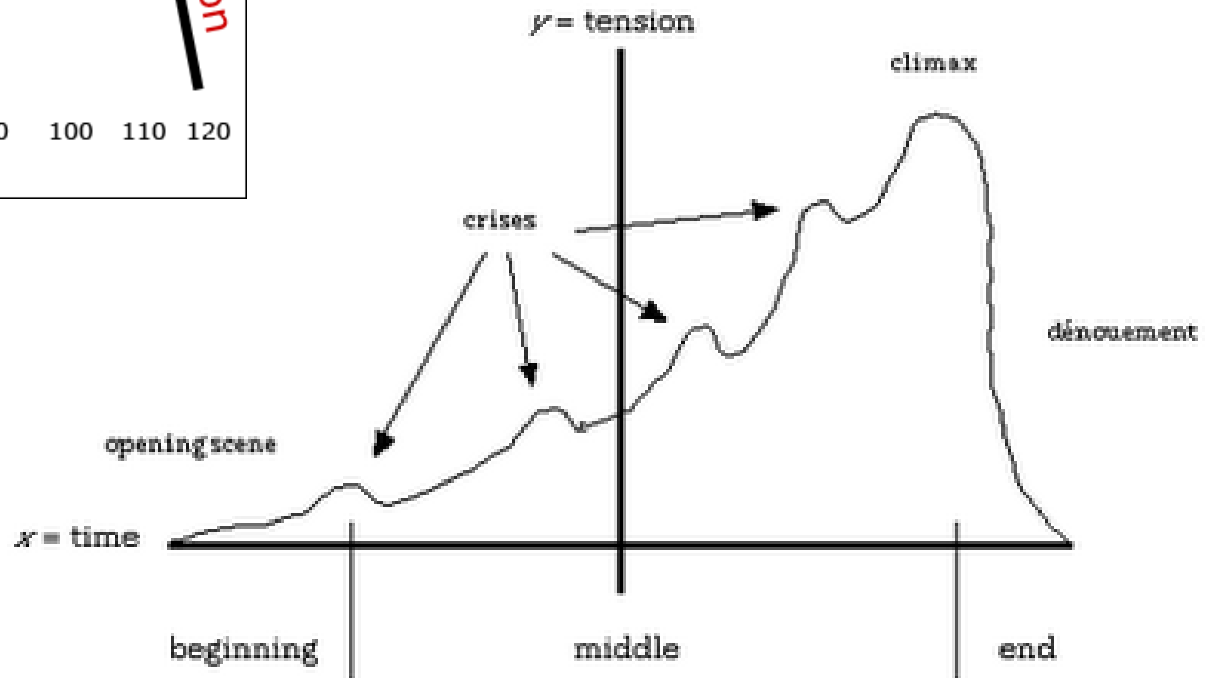
Power story telling requires two types

DATA PEOPLE
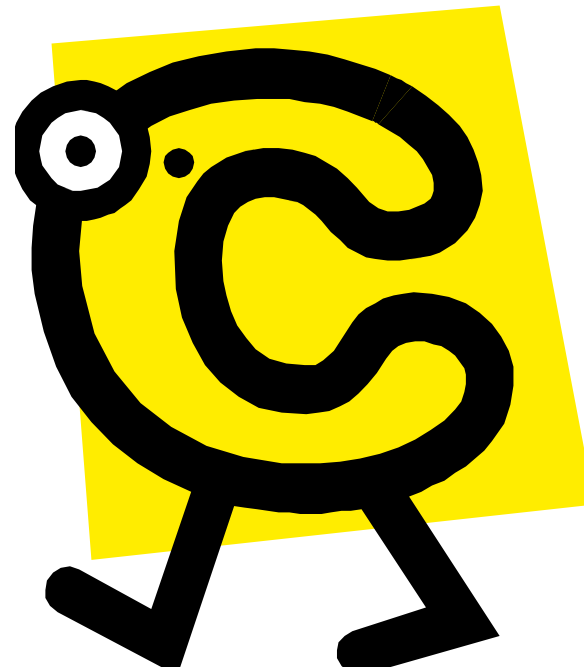
DIALOGUE PEOPLE

Data and Dialogue Diagnostics
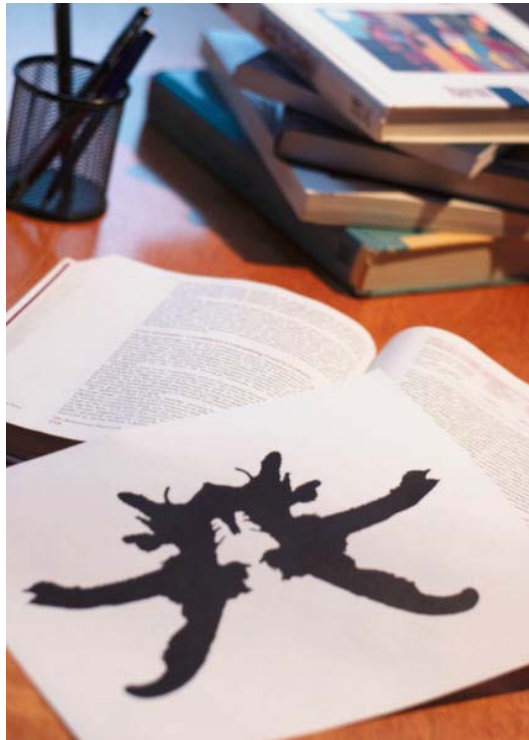
1. Complete the Data Coaching Diagnostics Tool survey.

2. When everyone is finished, a diagnostic workbook will be distributed.

3. Move your scores over to the handout.

4. Plot you scores and determine which quadrant your scores fit into.

Quadrants Link to Map

Dialogue High

QUADRANT A
Work with levels 1 to 4 data; best to team up with someone who is in Quadrant D

QUADRANT B
Work with levels 5 to 6 data; train others in Quadrants A, C and D

QUADRANT C
Focus on using level 1 and level 2 data; as experience grows, move into either Quadrant A or D (based on skill level, opportunity and preference)

QUADRANT D
Work with level 1 to 4 data; best to team up with someone who is in Quadrant A

Dialogue Low

42
33
24
16

7   16   24   33   42

Data Low   **Data High**

Quadrants Link to Map

Dialogue High

QUADRANT A
Work with levels 1 to 4 data; best to team up with someone who is in Quadrant D

QUADRANT B
Work with levels 5 to 6 data; train others in Quadrants A, C and D

QUADRANT C
Focus on using level 1 and level 2 data; as experience grows, move into either Quadrant A or D (based on skill level, opportunity and preference)

QUADRANT D
Work with level 1 to 4 data; best to team up with someone who is in Quadrant A

Dialogue Low

42 — 33 — 24 — 16 —

7   16   24   33   42

Data Low   **Data High**

Discussion

- What did you learn about yourself?

- What observations do you have in thinking about other people with whom you successfully work?

From the leadership pulse data: Find the middle (an example)

EXAMPLE FROM LEADERSHIP PULSE

Example: The Leadership Pulse

www.leadershippulse.com

Started in 2003; global sample of leaders; real-time learning and benchmarking focused on human and relational capital topics Leadership confidence asked annually. Quarterly Pulse Dialogues.

Leadership Confidence Questions

Sorted high to low based on mean score

677 executives answered in July; 40% are C-level executives; about 70% are director and above.

QUESTION SUMMARY	Mean (SD)[a]	Breakdown (%)		
Question — Very Confident *to* Confident ■ (green) / Neutral ■ (yellow) / Not Confident *to* Not at all Confident ■ (red)		Green	Yellow	Red
Your own personal leadership and management skills.	4.07 (.62)	88	9	2
Your organization's leadership team overall.	3.79 (.90)	72	17	10
Your organization's ability to execute on its vision.	3.60 (.91)	64	23	14
That your organization has the right people and skills.	3.49 (.91)	57	26	17
Your organization's strategy making process (the method your organization uses for creating your business strategy).	3.45 (.94)	54	29	17
Your organization's ability to change as needed.	3.43 (.97)	55	24	21
The economic climate for your organization.	3.41 (.95)	55	25	21

[a] Average(Standard Deviation)

What's the story in these data?

Story, Part 1

They are least confident in the economy

People are most confident in themselves

Leadership Pulse Story

Overall they seem more confident in their ability to get work done today and less confident in the planning and changing process
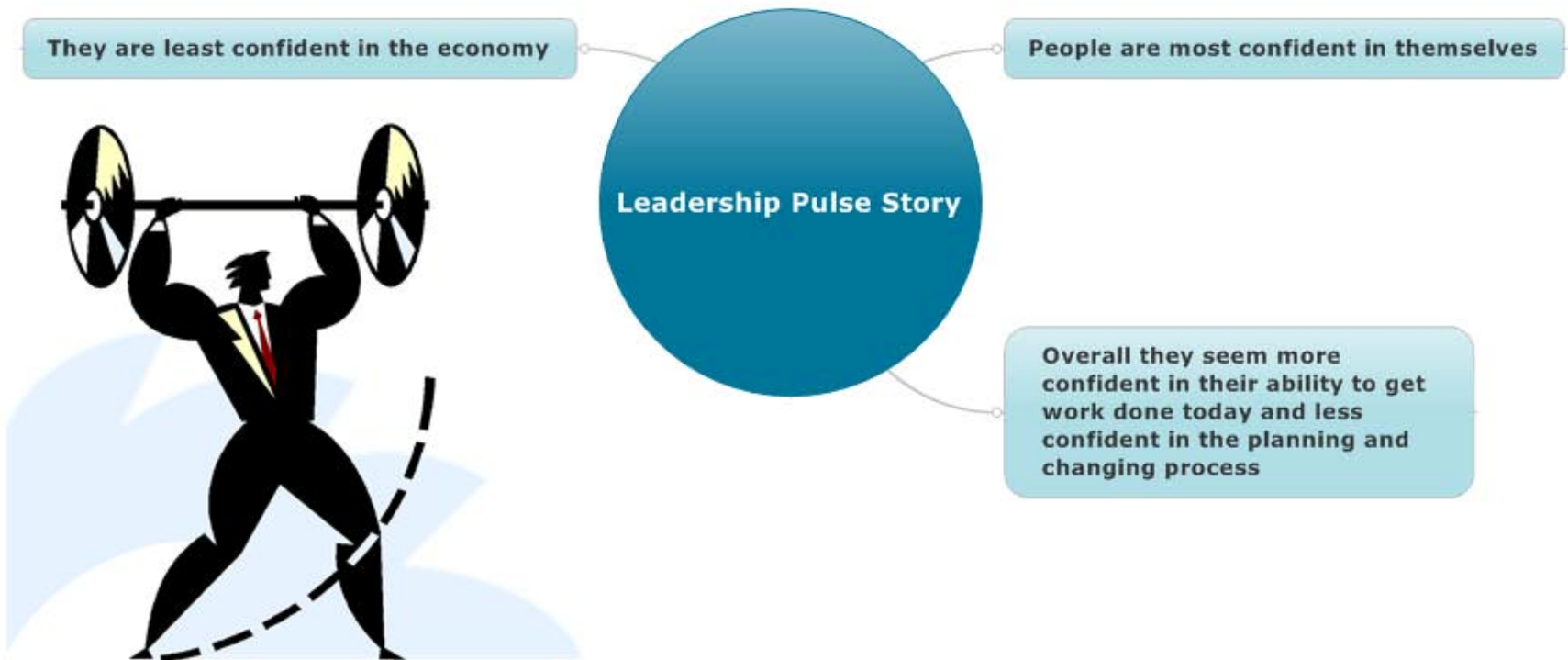
Leadership Confidence Change from 2009 to 2010
Percentage of Confident and Very Confident Responses

Your own personal leadership and management skills. — 91% / 88%

Your organization's leadership team overall. — 82% / 72%

Your organization's ability to execute on its vision. — 73% / 64%

That your organization has the right people and skills. — 71% / 57%

Your organization's strategy making process. — 63% / 54%

Your organization's ability to change as needed. — 60% / 55%

The economic climate for your organization. — 40% / 55%

Economic climate is the only item that increased from 2009 to 2010.

30% 40% 50% 60% 70% 80% 90% 100%
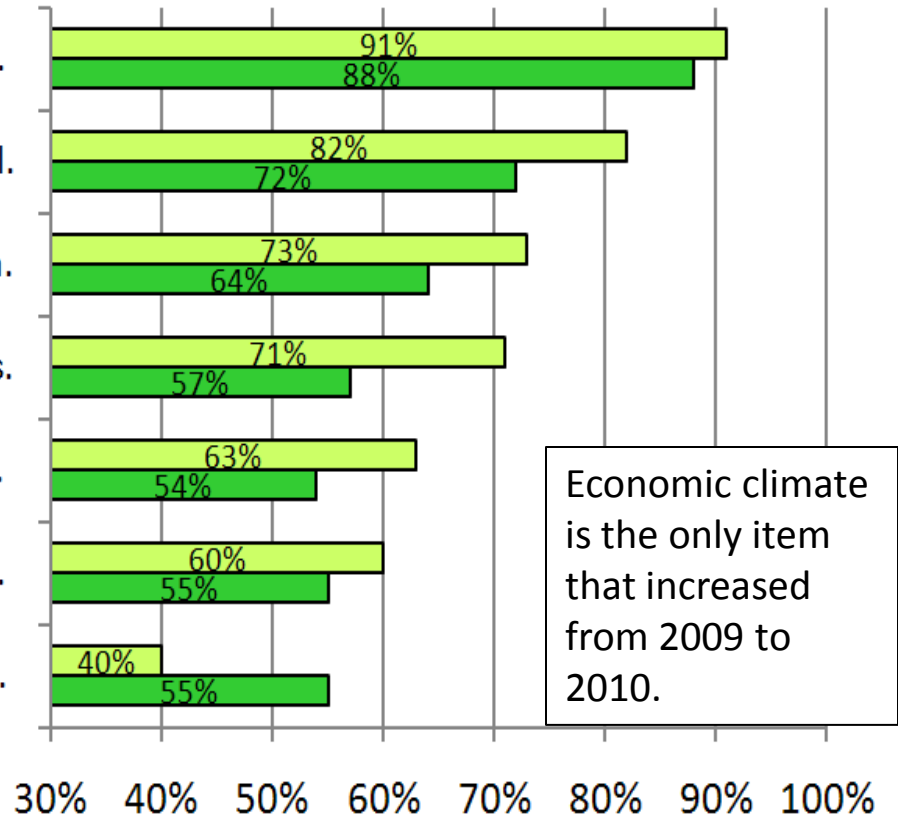
☐ Previous Confidence Measure   ☐ Current Confidence Measure

How does the story change?

Part 2 of the Leadership Story

3. But their confidence in the economy is the only thing that increased from last year to this year

They are least confident in the economy

People are most confident in themselves

1. But that went down over the last year

4. Hypothesized obstacle: Over the year they did not have a strategy - did not make the right choices - they are watching the competition do better and thinking the economy is going up, others are doing well, and they are the only company that has not taken advantage of this. They even go so far as to blame themselves just a tiny amount (confidence in their own skills went down).

From last year to this year what happened?

Leadership Pulse Story

Overall they seem more confident in their ability to get work done today and less confident in the planning and changing process

3. But... when we look at the changes from last year to this year, the biggest dip down is confidence in having the right people and skills

Confused Leaders

3. But their confidence in the economy is the only thing that increased from last year to this year

People are most confident in themselves

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Overall they seem more confident in their ability to get work done today and less confident in the planning and changing process

3. But... when we look at the changes from last year to this year, the biggest dip down is confidence in having the right people and skills

Personal and Team Leadership by Financial Performance

In low performing firms, confidence in "me" is much higher than confidence in the team

Chart axis: 4.25, 4.00, 3.75, 3.50, 3.25, 3.00

Categories: Low and Very Low, Very High

- ■ Your own personal leadership and management skills.--2010
- ■ Your organization's leadership team overall.--2010

How do these data change the story?

Firm Performance Data Added

Confidence in the economy is the only thing that increased from last year to this year

They are least confident in the economy

People are most confident in themselves

Confidence went down over the last year

Being confident in yourself is not enough - in fact, it may be a bad thing for success.

Leadership Pulse

Overall they seem more confident in their ability to get work done today and less confident in the planning and changing process

When we look at the changes from last year to this year, the biggest dip down is confidence in having the right people and skills
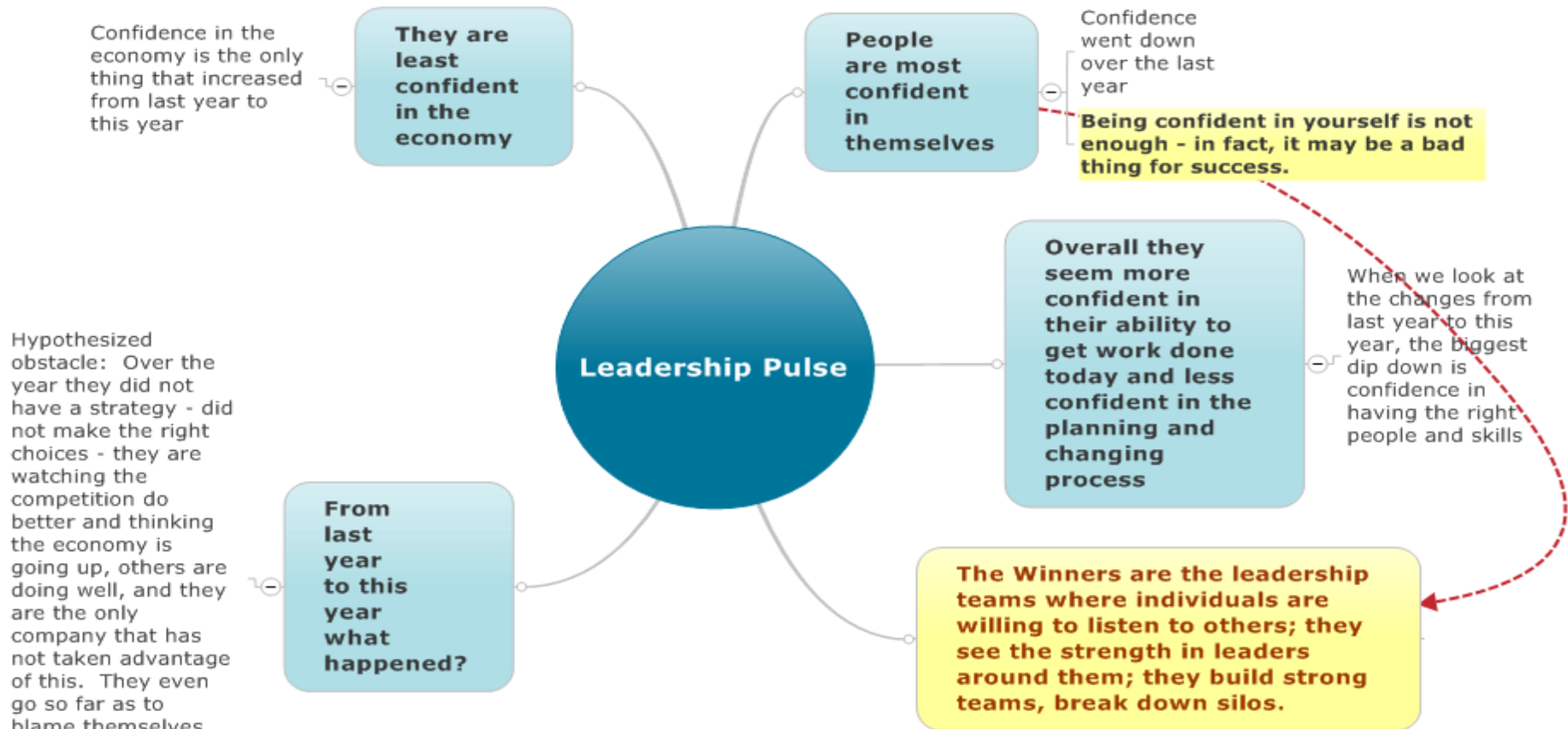
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From last year to this year what happened?

The Winners are the leadership teams where individuals are willing to listen to others; they see the strength in leaders around them; they build strong teams, break down silos.

Success is not about me or my team; it's not about the economy. **Winning is about how we work together.**

Theme Story Arc

A recession hits; conflict arises; rate of change escalates. This makes it difficult for them to perform. What does the "knight in shining armor" leader do to conquer and win?

Leaders around the world want to improve their own performance, their business performance and they want to learn

Only the strong win; the firms with leaders who band together; they form their own "round tables" – they help each other; they are the best of leaders. These knights (leaders) conquer and win.

Theresa's Story: **Hope and Humility**

Review: Lessons learned

Get Big Data

- Right data
- Accurate data
- Data from the 'source'

Focus Data

- Create the story with this subset or summary of data
- Use different lenses; choose genre
- Write the script

Tell the Story

- Presentation
- Technology
- Choose actors
- Distribution network
- LEARN / REWORK

Find the story

Tell the story

Focus on Strategizing

Find stories →　← Strategizing

Results
Action　Goals

Dialogue

Data

Data

Dialogue

Action

Results

Goals

Start here