

# Rethinking data

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## Compliance Report

	AGA	BGD	FDEC	MMAT	SRA
<b>Business Ethics</b>	94%	87%	97%	88%	95%
<b>Code of Conduct</b>	72%	100%	91%	95%	97%
<b>Data Privacy</b>	53%	95%	100%	98%	95%
<b>Internet Ettiquette</b>	94%	100%	97%	100%	95%
<b>Sexual Harrassment</b>	75%	97%	97%	93%	100%

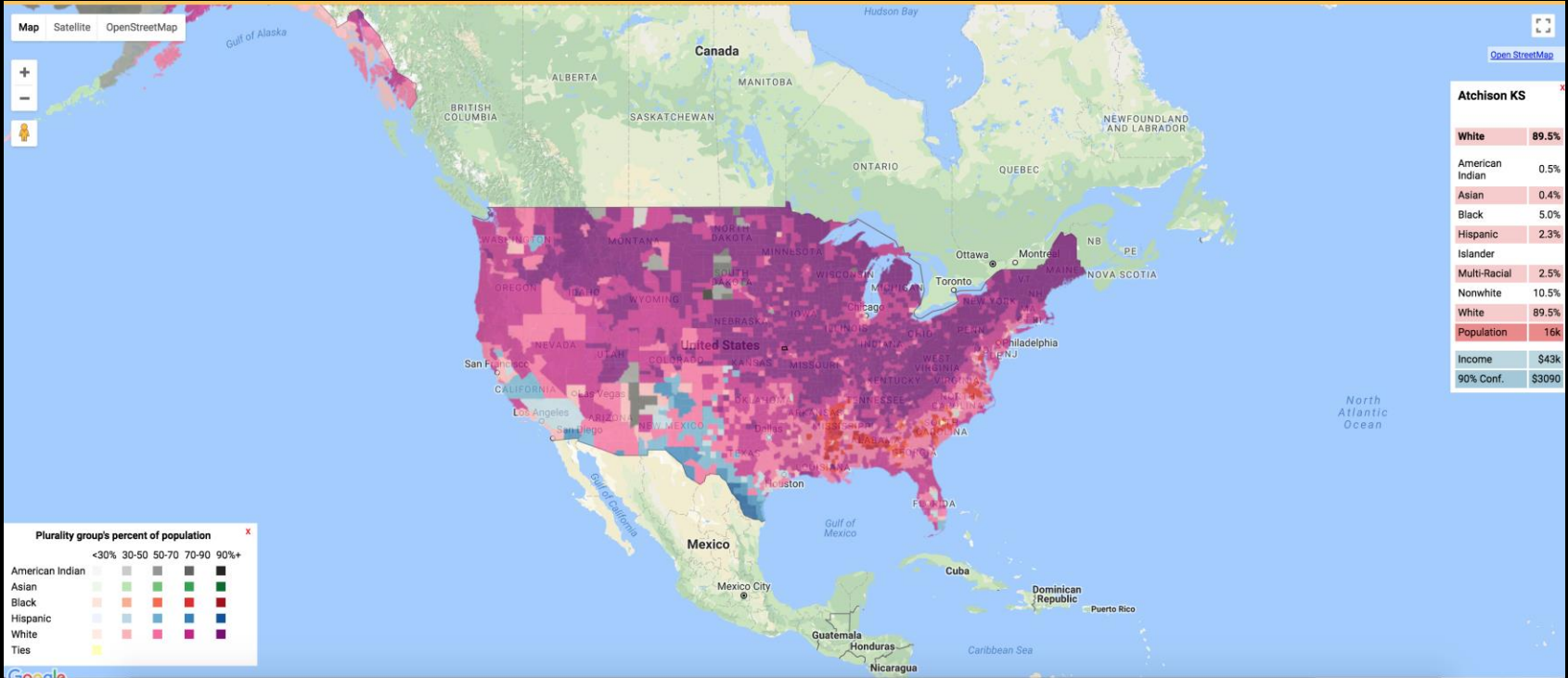
Course	Course Type	Course Number	Type	Hours	Cost	Rating	Completions
Business writing	CS	CS185598	Self-study	4	75	3.96	4809
Crucial Conversations	CS	CS168720	Classroom	16	350	3.91	6369
Effective Listening	CS	CS183463	Self-study	8	25	3.69	6215
Electronic Medical Records - Introduction	BS	BS157290	Self-study	8	25	4.65	5705
Electronic Medical Records - Planning and analysis	BS	BS186724	Virtual	16	50	3.81	7541
Evidence-based medicine and patient care	PSQ	PSQ138490	Classroom	16	1200	3.76	6681
HIPPA and patient privacy	BS	BS173339	Self-study	4	50	3.85	872
Impacts of the ACA on hospital operations	BS	BS100322	Virtual	4	200	3.5	503
Infection control	PSQ	PSQ152389	Self-study	4	25	4.24	6454
Leadership Forum	LM	LM194232	Classroom	16	1000	3.88	2026
Managing your budget	LM	LM193670	Self-study	8	50	4.47	2630
Maximizing quality care	PSQ	PSQ107991	Virtual	4	25	3.85	7200
Meetings that matter	CS	CS195351	Classroom	8	250	3.51	4119
New employee orientation	O	O116065	Classroom	24	500	3.52	2514
New manager program	LM	LM138200	Classroom	40	750	3.93	3133
Optimizing the patient experience	PE	PE182058	Virtual	4	25	4.71	3968
Patient safety essentials	PSQ	PSQ126468	Self-study	8	50	4.64	6927
Putting the patient first	PE	PE134148	Virtual	4	25	3.73	3448
Sentinel events - lessons learned	PSQ	PSQ131295	Self-study	2	0	4.53	2335
Working as a holistic patient care team	PSQ	PSQ134063	Classroom	8	750	3.8	5716

### Quarterly company-wide scorecard

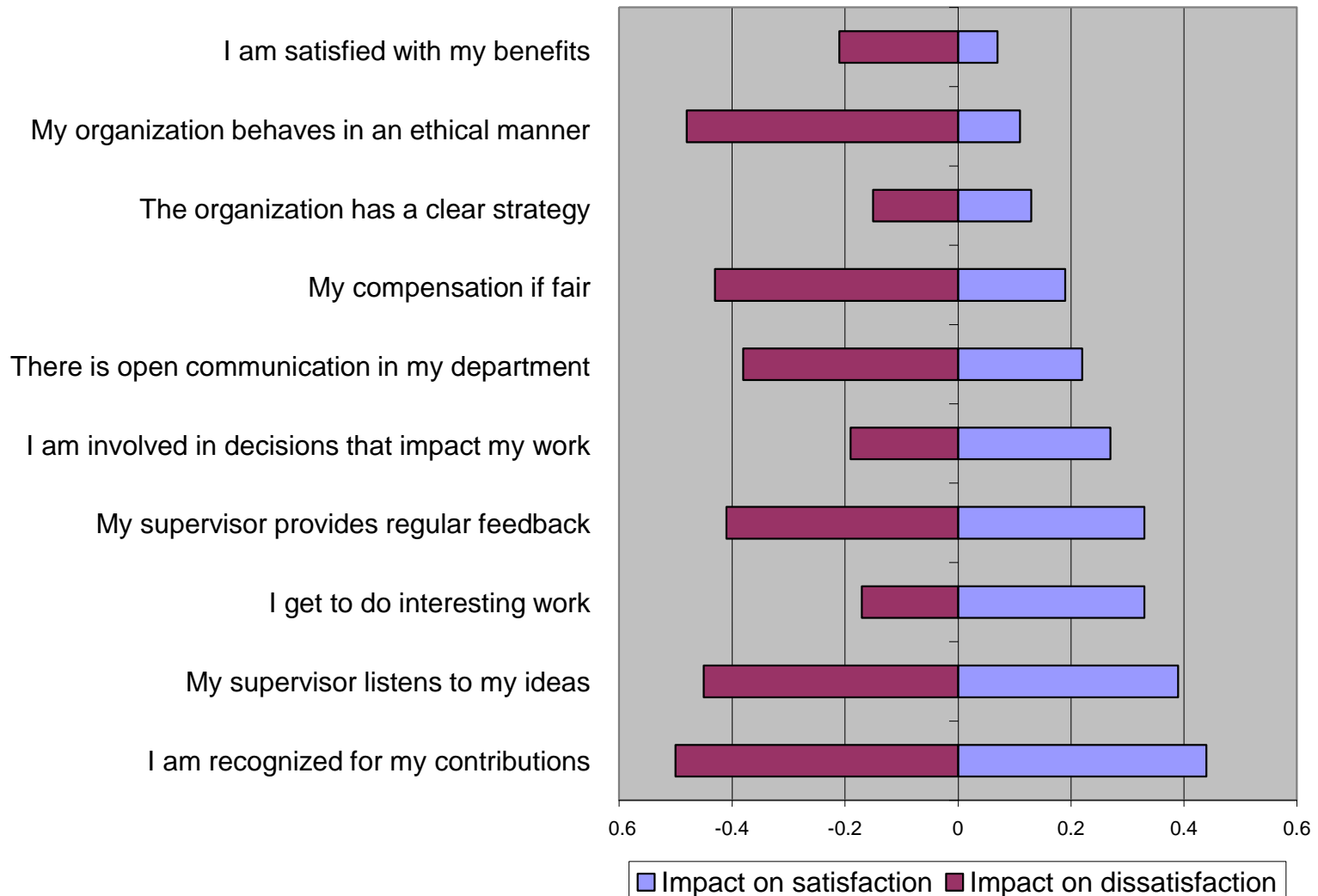
	This quarter	Target	Last quarter
<b>Finance</b>			
Revenue	\$37,103,329 ▼	\$39,432,514	\$40,342,143
Operating expense	\$35,954,312 ▲	\$38,041,534	\$38,954,567
Operating profit	\$1,149,017 ▼	\$1,390,980	\$1,387,576
Investment revenue	\$1,432,254 ▲	\$1,647,092	\$1,303,351
Capital expenses	\$4,750,351 ▼	\$3,325,246	\$4,275,316
<b>Quality</b>			
Manufacturing defect rate	0.53% ▼	0.65%	0.46%
Customer complaints (per 1000 customers)	1.20 ▲	1.51	1.26
Product returns (%)	2.13% ▲	1.60%	2.41%
<b>Customer</b>			
Customer satisfaction	4.13 ▼	4.23	4.38
Likelihood to recommend	4.48 ▼	4.62	4.69
Customer growth	8.40% ▼	9.80%	10.20%
<b>Workforce</b>			
Employee engagement	4.09 ▼	4.79	4.34
# of training hours/employee	23 ▼	18	26

**Customer growth and attrition**

<b>Region</b>	<b>New cutomers (actual)</b>	<b>New customer (target)</b>	<b>Customer attrition (actual)</b>	<b>Customer attrition (target)</b>	<b>Total customers (actual)</b>	<b>Total customers (target)</b>
Asia	18,453	21,036	21,467	19,320	61,520	45,525
Asia-China	17,481	14,859	12,900	16,770	68,862	57,844
Asia-India	15,014	15,915	28,463	30,740	59,576	72,683
Central and South America	38,663	46,396	22,323	18,975	94,166	99,816
Europe-Eastern	26,720	22,178	25,185	19,644	80,715	58,115
Europe-Western	23,449	30,484	12,155	15,072	90,802	66,285
Middle East and Africa	18,932	14,578	19,747	14,810	72,077	92,259
US-Midwest	93,321	73,724	31,088	36,995	305,459	238,258
US-North	48,033	51,395	53,526	48,709	177,073	123,951
US-Northeast	106,276	126,468	53,885	61,968	269,727	307,489
US-Pacific	54,746	68,433	22,252	28,038	270,439	189,307
US-Southeast	65,240	71,112	28,959	24,326	252,083	211,750
US-Southern	101,877	128,365	29,046	37,179	316,795	291,451
US-Western	41,793	35,524	50,605	60,220	208,319	191,653



# Drivers and detractors of employee satisfaction



Unit	Courtesy of Staff		Quality of care	
	Percentile	Target	Percentile	Target
Ambcare	83	95	71	93
AntePrtn	58	93	70	91
Burn Ctr	77	95	78	93
Ccu	75	88	92	88
CPCU	75	91	65	93
CVICU	58	90	79	94
Fm Focus	74	88	65	94
Gen Surg	92	93	59	86
IVC	82	94	62	88
MdSrg Sd	80	91	67	87
Med Surg	74	90	55	86
Med6	70	94	50	90
MPCU	82	95	74	88
Ms Icu	56	86	91	87
Neur/Srg	90	94	89	90
Oncology	86	91	78	92
Orth/Srg	95	90	52	86
Peds2	58	95	53	86
Peds5	80	87	55	88
Peds7	65	85	90	85
Rehab	80	87	63	86
SPCU	76	87	87	94
TICU	80	94	81	92
Wo Hlth	92	86	63	94
<b>Overall Hospital</b>	<b>85</b>	<b>91</b>	<b>90</b>	<b>92</b>



	Enterprise	Central	Northeast	Northwest	Southeast	Southwest
Revenue	\$ 37,103,329	\$ 7,420,666	\$ 10,388,932	\$ 4,452,399	\$ 6,678,599	\$ 8,162,732
Operating expense	\$ 35,954,312	\$ 8,269,492	\$ 9,348,121	\$ 5,752,690	\$ 5,393,147	\$ 7,190,862
Operating profit	\$ 1,149,017	\$ (848,826)	\$ 1,040,811	\$ (1,300,290)	\$ 1,285,452	\$ 971,870
Investment revenue	\$ 1,432,254					
Capital expenses	\$ 4,750,351	\$ 4,750,351	\$ 4,750,351	\$ 4,750,351	\$ 4,750,351	\$ 4,750,351
Manufacturing defect rate	0.5%	0.8%	0.5%	0.5%	0.8%	0.8%
Customer complains (per 1000 customers)	1.2	1.3	2.1	1.8	1.8	1.8
Product returns (%)	2.1%	2.1%	1.4%	1.8%	1.9%	1.1%
Customer satisfaction	4.30	4.73	3.89	4.50	4.39	3.72
Customer growth	8%	6%	11%	8%	11%	12%
Likelihood to recommend	4.62	4.88	4.1	4.62	4.5	3.91
Employee Engagement	4.0	4.1	3.7	4.5	3.7	4.1
# of training hours/employee	23	25	21	24	25	14



# Q4 Snapshot

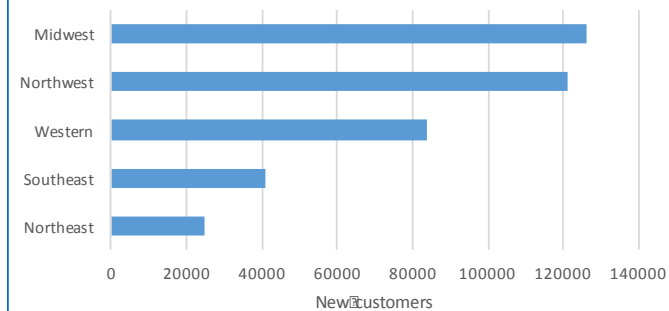
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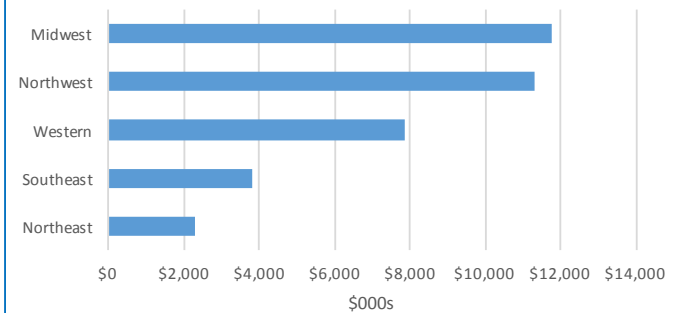
Top 10 Sales People

First	Last	State	Region	Q4 Sales
Katherine	Dunn	California	Western	\$31,210
Benjamin	Ward	California	Western	\$27,430
Raymond	Adams	California	Western	\$23,710
Stephen	Scott	California	Western	\$21,010
Debra	Warren	California	Western	\$20,040
Robert	Williams	California	Western	\$19,960
Catherine	Holmes	California	Western	\$16,230
Theresa	Wagner	California	Western	\$10,720
Michelle	Ortiz	California	Western	\$5,510
Judith	Spencer	California	Western	\$5,070

Q4 Customer Acquisition

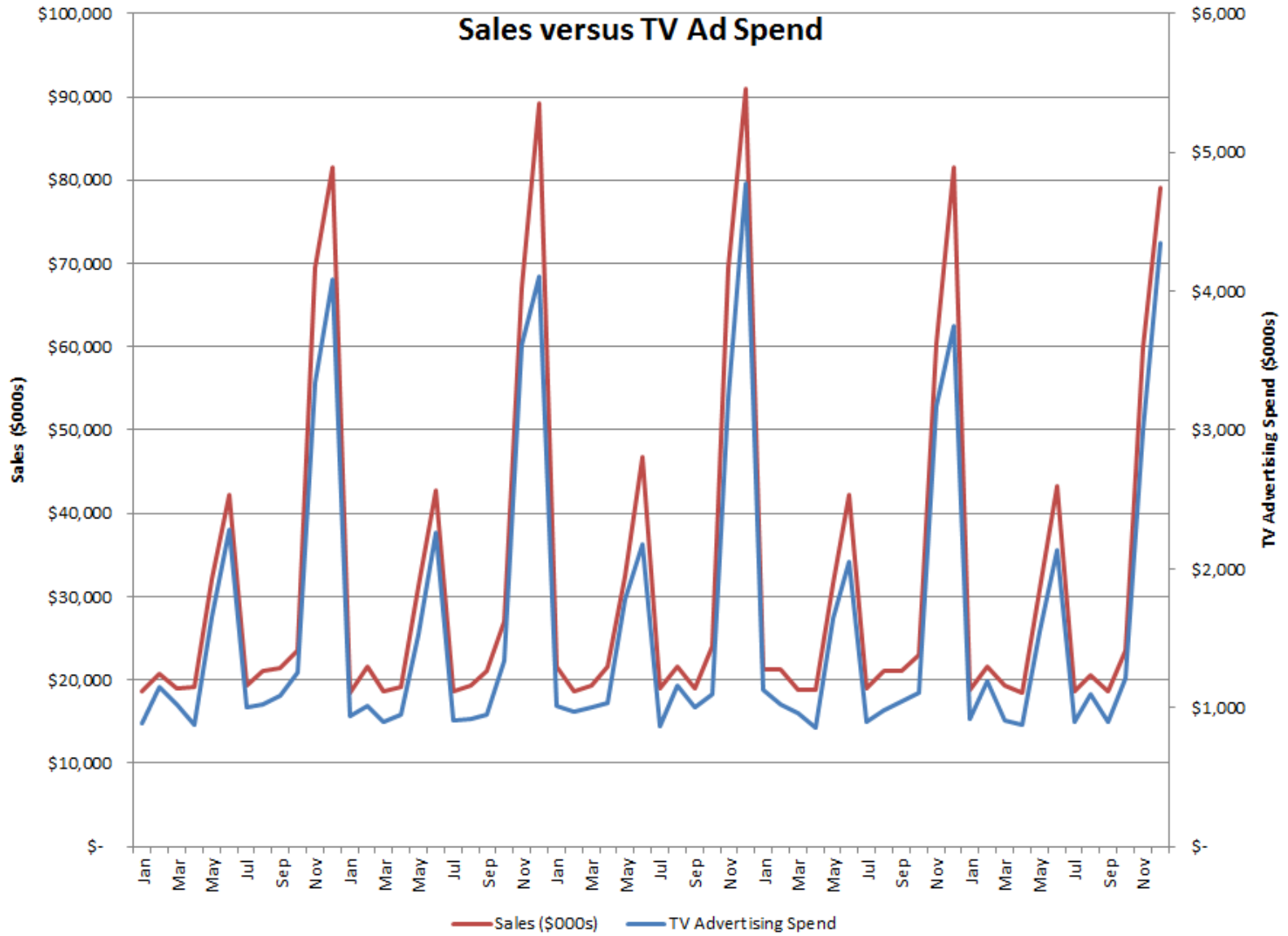


Q4 Revenue



Count of Status	Column Labels	
Row Labels	Complete	Incomplete
<b>Business Ethics</b>	92%	8%
AGA	94%	6%
BGD	87%	13%
FDEC	97%	3%
MMAT	88%	12%
SRA	95%	5%
<b>Code of Conduct</b>	92%	8%
AGA	72%	28%
BGD	100%	0%
FDEC	91%	9%
MMAT	95%	5%
SRA	97%	3%
<b>Data Privacy</b>	89%	11%
AGA	53%	47%
BGD	95%	5%
FDEC	100%	0%
MMAT	98%	2%
SRA	95%	5%
<b>Internet Ettiquette</b>	97%	3%
AGA	94%	6%
BGD	100%	0%
FDEC	97%	3%
MMAT	100%	0%
SRA	95%	5%

### Sales versus TV Ad Spend



Focusing on numbers  
doesn't work

The value of data  
is not  
the data

Nope, not insights...

...but you're getting  
closer



1986 Space Shuttle Challenger Disaster

1986 Chernobyl Meltdown

2005 Katrina Devastation of New Orleans

2007 Global Financial Meltdown

2010 Hunza River Valley Landslide

2011 Fukushima Meltdown

Sources: Pasternack, Alex. *Was Space Shuttle Challenger a Casualty of Bad Data Visualization?* Motherboard. Jan 27 2012, Web.

LaFrance, Adrienne. *Disasters That Were Foretold*, The Atlantic, Sep 4 2015, Web.

Dörner, Dietrich. *The Logic of Failure: Recognizing and Avoiding Error in Complex Situations*. Reading, MA: Addison-Wesley Pub., 1997. Print.

Lewis, Michael. *The Big Short: Inside the Doomsday Machine*. New York: W.W. Norton, 2010. Print.

The value of data  
is  
decisions and actions

People want answers,  
not numbers

Your brain isn't very good  
with numbers

# Rethinking Data

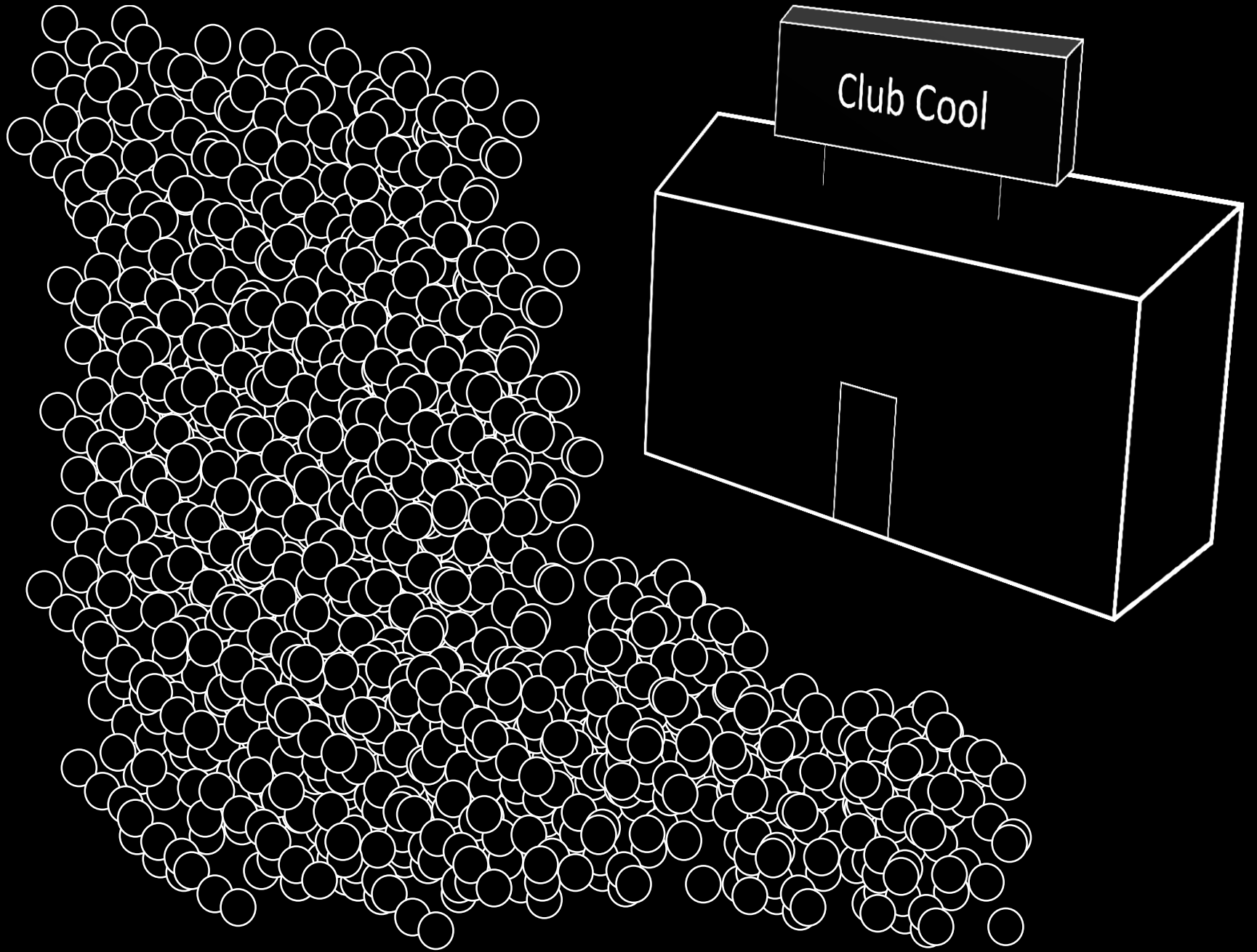
Aligning data  
and decisions

Turning  
information into  
action

Reporting  
answers instead  
of numbers

Rethinking how we think

Rethinking the way we  
think



Who would  
you let in?



First 100

“Good looking”

Bribe

Friends

Availability Bias

Confirmation Bias

Vested interested

Familiarity Bias

$$77 + 14 = 91$$

$$83 - 35 = 48$$

$$5^2 = 25$$

the

$$E = MC^2$$

the

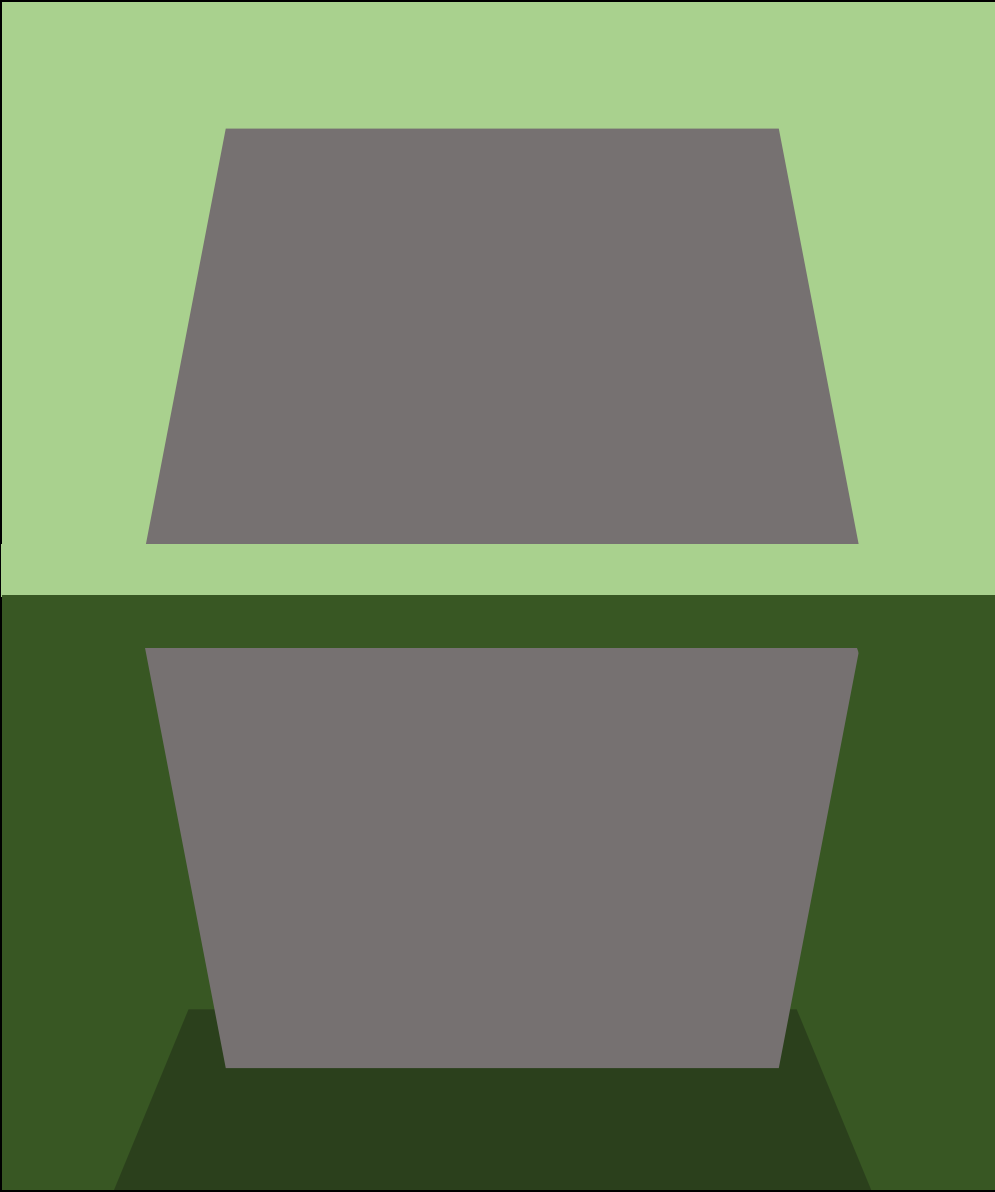
1 2 3 4 5 6 7 8 9 10

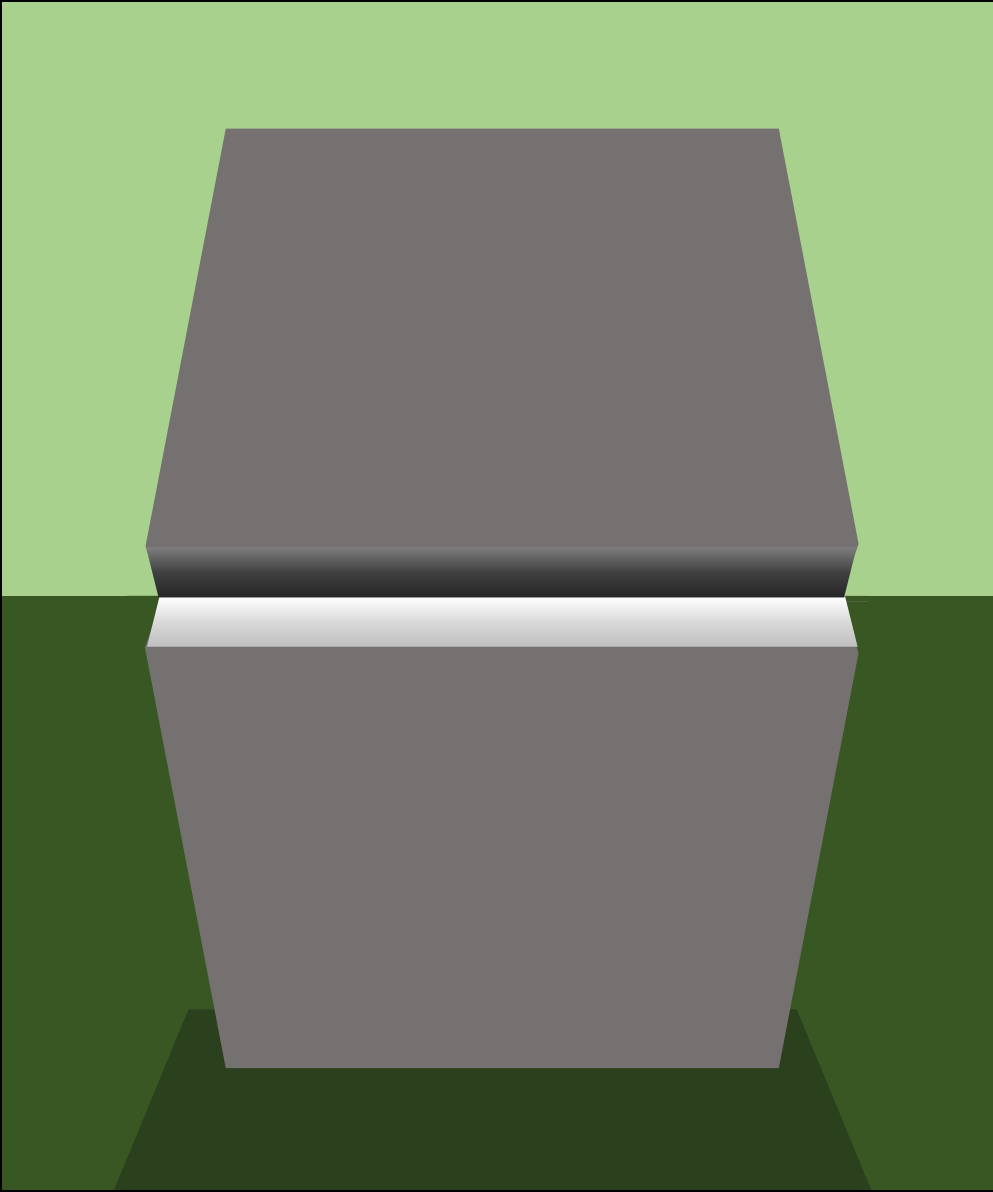
$$13 \times 4 = 52$$

$$100^\circ \text{ C} = 212^\circ \text{ F}$$



The more you see, the more  
you miss





2 4 6

Request	Award
\$100	\$990
\$20,000	\$36,000
\$5 mil	\$440,000
\$1 bil	\$490,000

Source: The More You Ask for, the More You Get... Anchoring in Personal Injury Verdicts, Gretchen B. Chapman and Brian H. Bornstein, (1996)



# How fast were the cars going when they . . .

Smashed	40.8
Collided	39.3
Bumped	38.1
Hit	34.0
Contacted	31.8

**Millionaire Jackpot  
Lottery**

4 9 15 22 29 36

**Tonight's Jackpot  
\$1.3 Billion**

**Millionaire Jackpot  
Lottery**

6 13 21 ~~22~~ ~~32~~ 40

**Tonight's Jackpot  
\$1.3 Billion**

Jill bought a bat and a ball for \$1.10. The bat cost \$1.00 more than the ball.

How much did she pay for the ball?

Ball	Bat	Total
------	-----	-------

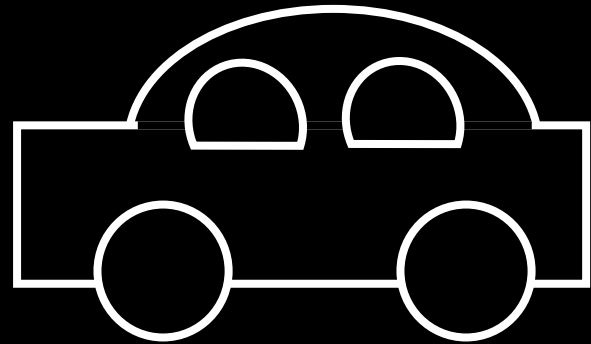
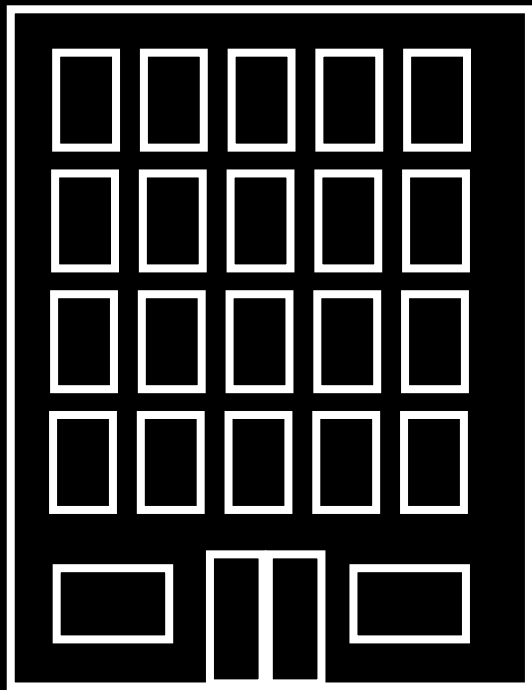
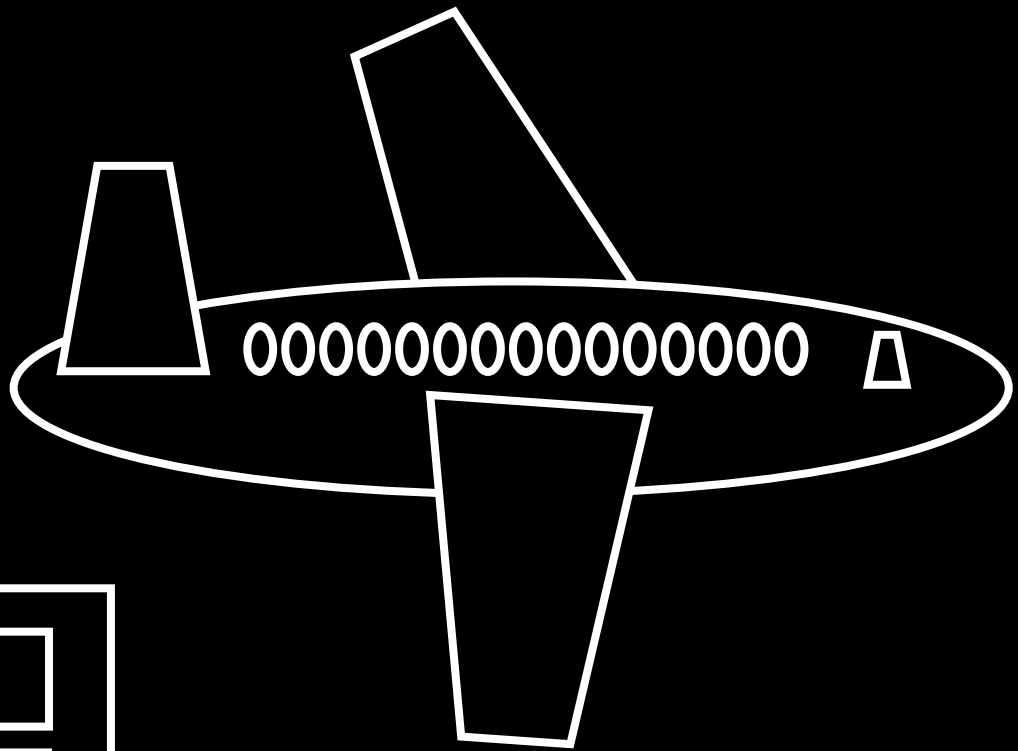
\$0.10	\$1.10	\$1.20
--------	--------	--------

\$0.05	\$1.05	\$1.10
--------	--------	--------

# Cotton Blouse Business

		Suit	Suit
Usual store	Usual store	\$15	\$800
Alternate store	Alternate store	\$5	\$790
		\$10	\$10

The more you see, the more  
you (unconsciously) use



[WWW.TRAVELSITE.COM](http://WWW.TRAVELSITE.COM)



# Airline

Name

Bradley Kolar

Street

123 Main Street

City, State, Zip

Cool City, CA 90210

Phone

(213) 555 1234

DOB

02/29/72

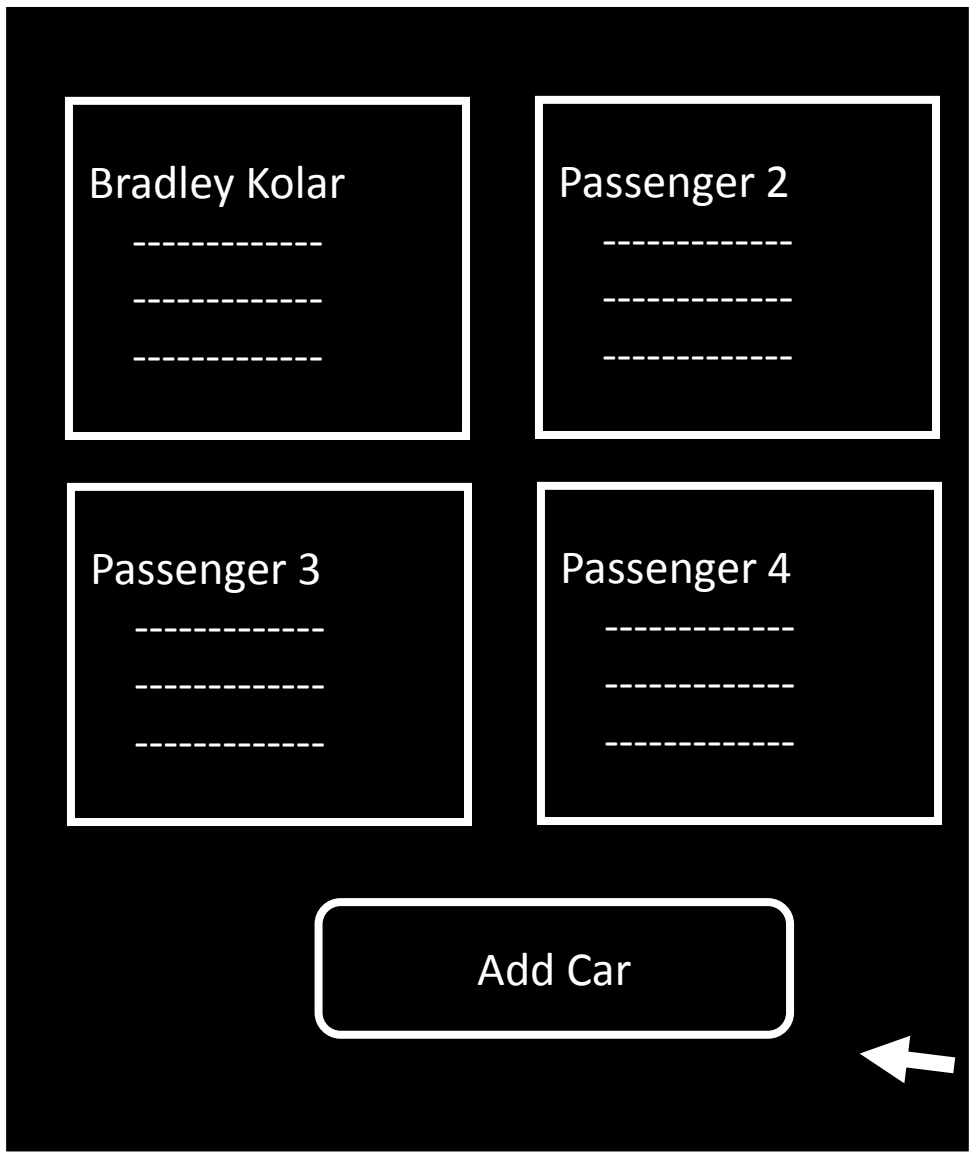
FF#

WBX10943

?????

Clunky system

# Clunky system



# Car Rental

Name

Bradley Kolar

Street

123 Main Street

City, State, Zip

Cool City, CA 90210

Phone

(213) 555 1234

DOB

02/29/72

D/L#

K325-65-5531

Clunky system

Bad programming

# Hotel

Name

Bradley Kolar

Street

123 Main Street

City, State, Zip

Cool City, CA 90210

Phone

(213) 555 1234

DOB

02/29/72

Reward #

CHR32134

Submit

Clunky system

Bad programming

## CONFIRMATION

Airline

Passenger: Brad Star

Flight: High Airlines 184

Depart: O'Hare, 27-Jan, 5:15pm

Arrive: SFO, 27-Jan, 11:15pm

Clunky system

Bad programming

Bad processes

## CONFIRMATION

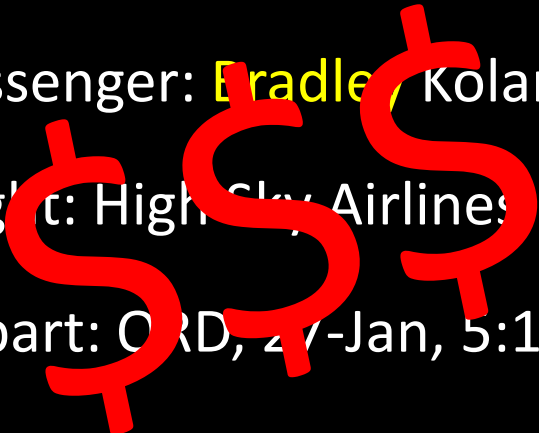
Airline

Passenger: **Bradley** Kolar

Flight: High Sky Airlines 184

Depart: ORD, 27-Jan, 5:15pm

Arrive: TPA, 27-Jan, 9:15pm



Clunky system

Bad programming

Bad processes

Questionable

customer service

skills

“These guys  
have no clue  
what they  
are doing”

I’m going to  
get charged a  
fee



# Statement

High Sky Airlines      Fee      \$25.00

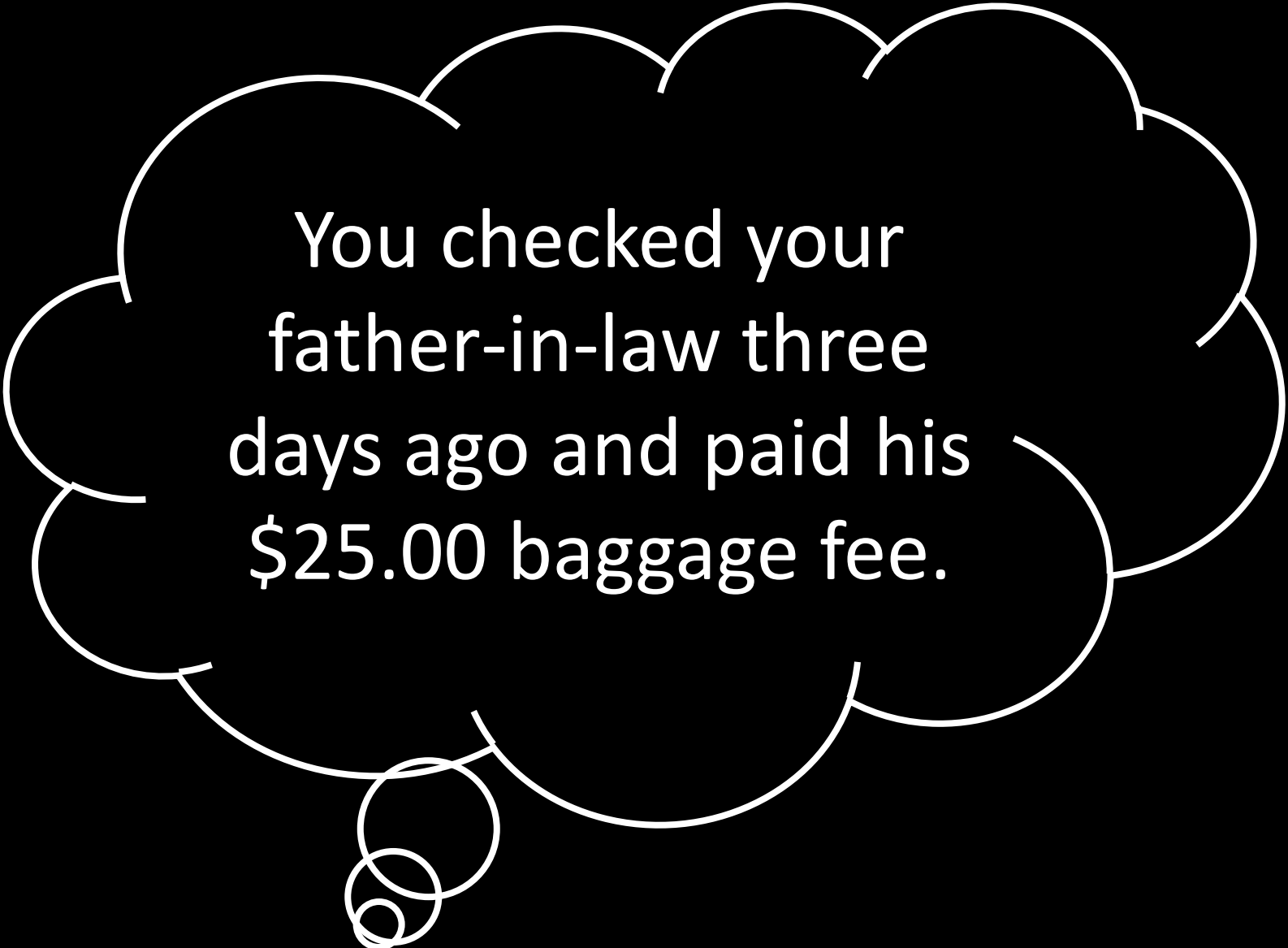
Date: Dec 15

Description: Service Fee

Amount: \$25.00



"They are so incompetent  
they can't even get the date  
right"



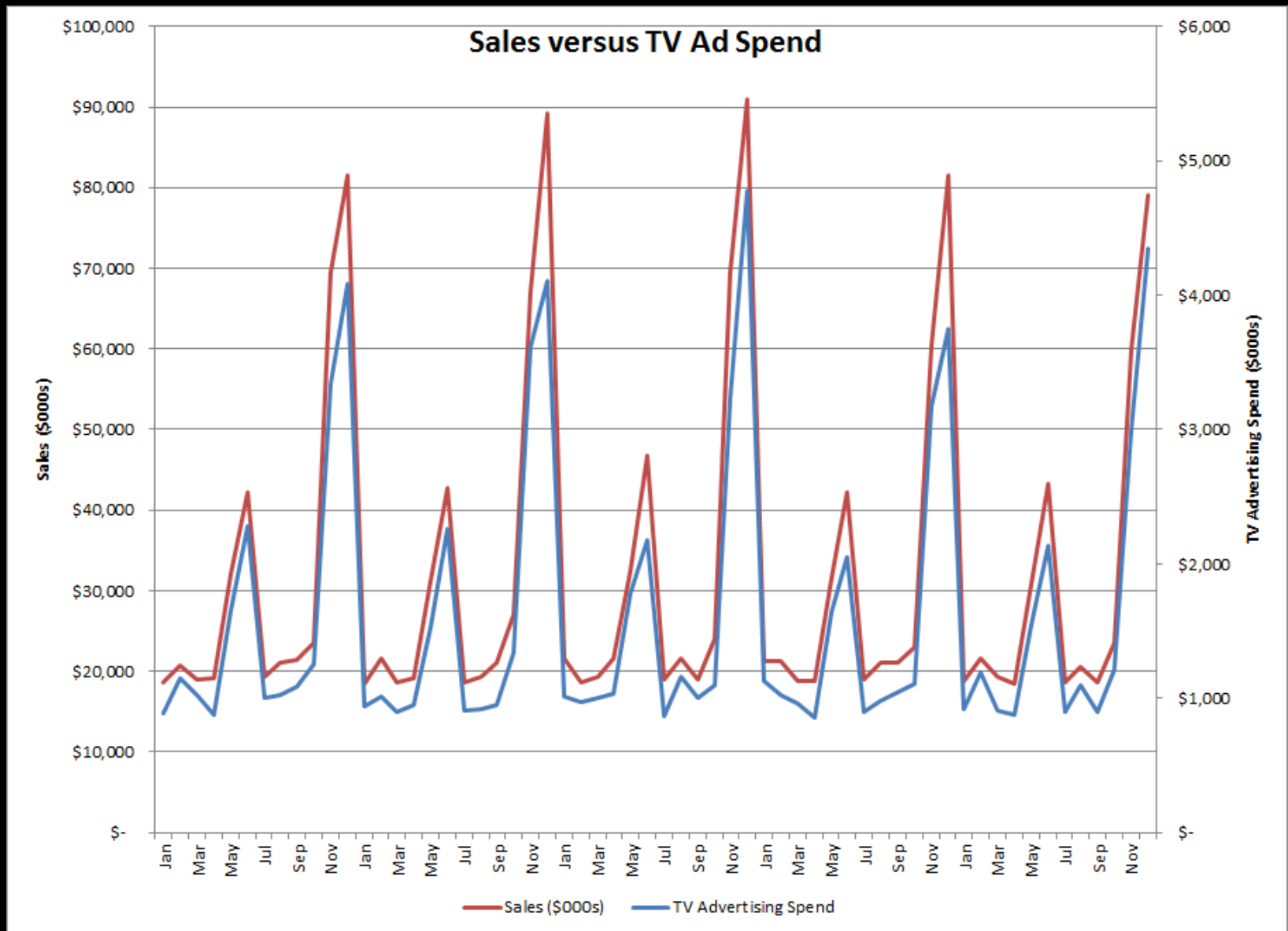
You checked your  
father-in-law three  
days ago and paid his  
\$25.00 baggage fee.

Using data  
effectively is about  
setting and resetting  
your filters

To see more, look at less



Simplicity drives  
understanding

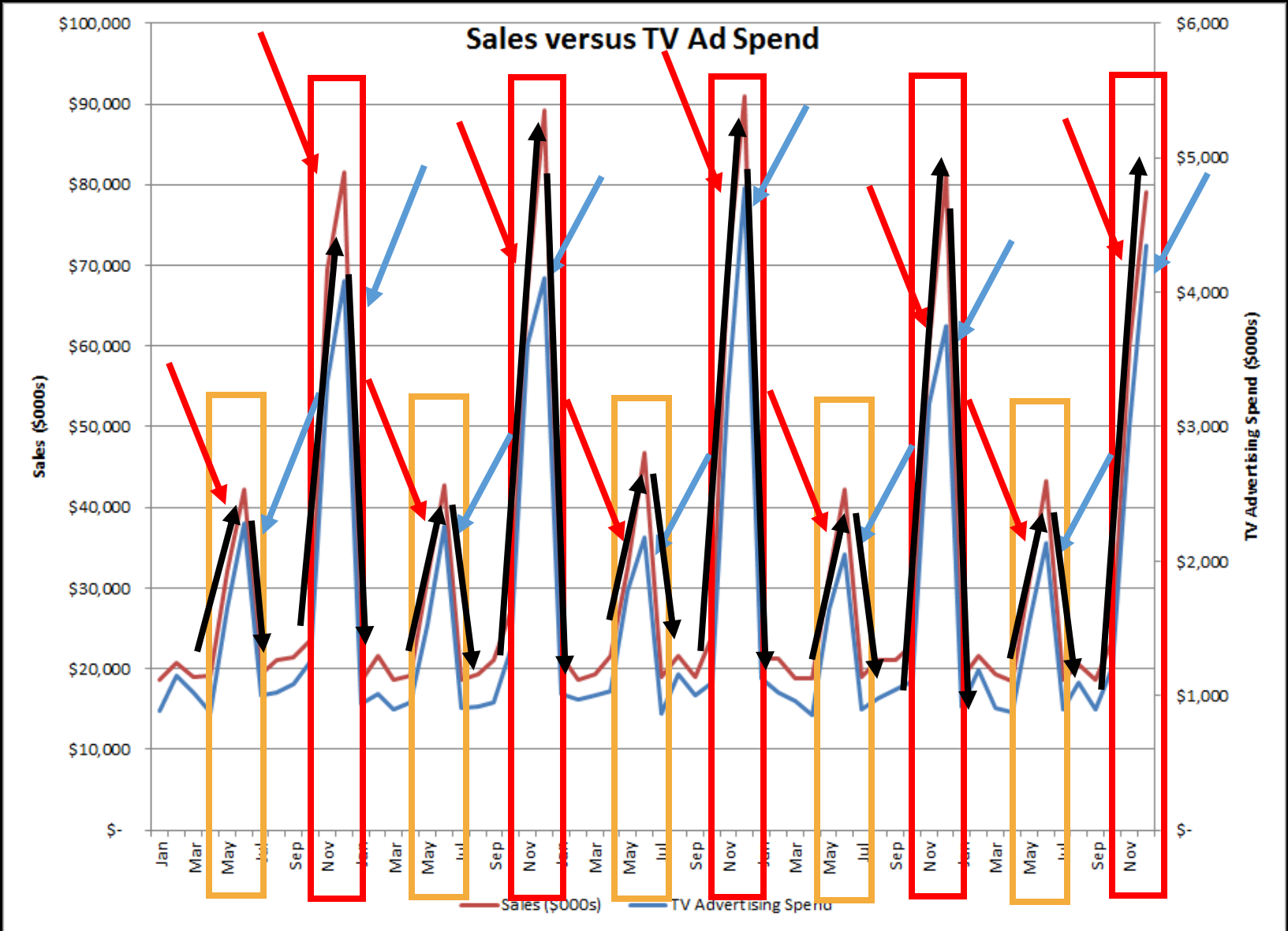


Based on an example from *Think Like a Freak: The Authors of Freakonomics Offer to Retrain Your Brain* by Steven D. Levitt and Stephen J. Dubner

# Sales and advertising show increases twice a year

- Large increase– November/December
- Small increase– May/June





Source: Think Like a Freak: The Authors of Freakonomics Offer to Retrain Your Brain by Steven D. Levitt and Stephen J. Dubner

Aligning data and  
decisions

We should increase marketing for X

- Profitability is down from last year
- Market Share is down from last year
- Retailers aren't providing enough shelf space

We should increase marketing for X

- Consumers aren't aware of the product
- Consumers are cost-focused
- Competitors are aggressively driving promotions

Decision: Is Bobby be ready to transition to a lower level of care?

Does our course provide value?

Does course  
provide value?

Alignment  
with  
priorities?

Fit our cost  
model?

Support core  
skills?

Reach target  
audience?

Improves  
productivity?

Good  
transfer and  
application?

Within time  
guidelines?

Fills a critical  
gap?

Does course provide value?

Aligned with  
strategy?

Fit operating  
guidelines?

Has impact?

Priorities

Cost

Audience

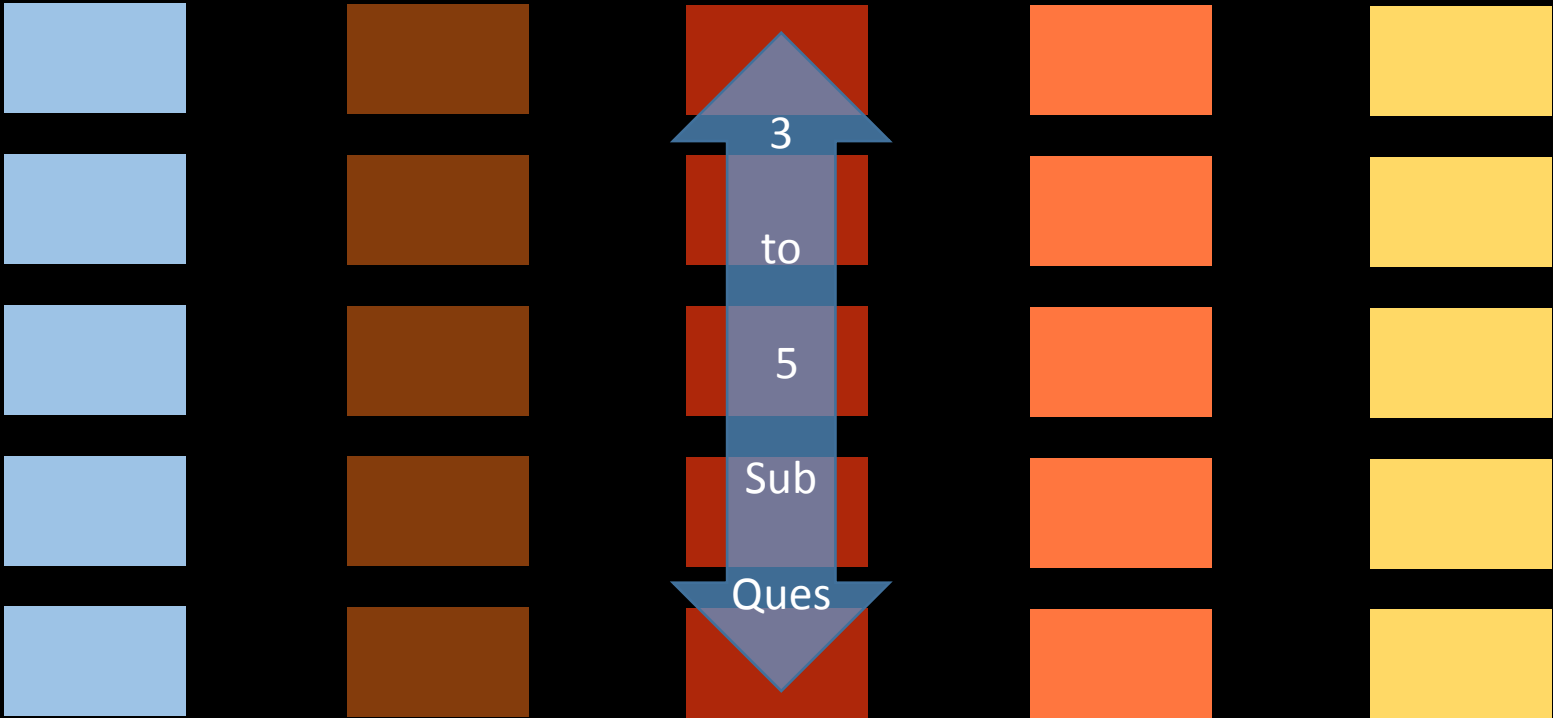
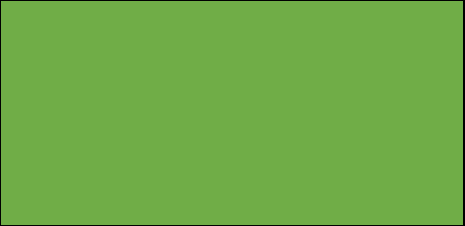
Skills

Time

Productivity

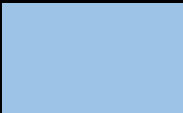
Gap

Transfer





# Decision



Does course provide value?

Aligned with  
strategy?

Fits operating  
guidelines?

Has impact?

Priorities

Cost

Audience

Skills

Time

Productivity

Gap

Transfer

Course provides value  
because . . .

Aligned with  
strategy

Fits operating  
guidelines

Has impact

Priorities

Cost

Audience

Skills

Time

Productivity

Gap

Transfer

Course **does not** provide value because . . .

Not aligned with strategy

Doesn't fit guidelines

Doesn't have impact

Priorities

Cost

Audience

Skills

Time

Productivity

Gap

Transfer

Course provides value  
because . . .

Aligned with  
strategy

Fits operating  
guidelines

Has impact

Cost

Time

Bobby is ready to transition  
because . . .





# Simplifying your message

1:1:1 Rule



↑ idea per sentence

Inequality runs deeper than thought.

New research shows the average pretax income of the bottom 50 percent of U.S. adults has stagnated since 1980, while the share of income of U.S. adults in the bottom half of the distribution collapsed from 20 percent in 1980 to 12 percent in 2014.

Inequality runs deeper than thought. New research shows that **the bottom half of US adults** have taken quite a hit. Their average pretax income has stagnated since 1980. Also, their share of income decreased from 20 percent (1980) to 12 percent (2014).

1:1:1 Rule

1 theme per paragraph

Inequality runs deeper than thought.

New research shows the average pretax income of the bottom 50 percent of U.S. adults has stagnated since 1980, while the share of income of U.S. adults in the bottom half of the distribution collapsed from 20 percent in 1980 to 12 percent in 2014. In a mirror-image move, the top 1 percent commanded 12 percent of income in 1980 but 20 percent in 2014.

Inequality runs deeper than thought.

New research shows that the bottom half of US adults have taken quite a hit. Their average pretax income has stagnated since 1980. Also, their share of income decreased from 20 percent (1980) to 12 percent (2014).

The trend is opposite for the top 1 percent. During the same timeframe, their share of income increased from 12 percent to 20.

Inequality runs deeper than thought.

New research shows that the bottom half of US **adults have taken quite a hit**. Their average pretax income has stagnated since 1980. Also, their share of income decreased from 20 percent (1980) to 12 percent (2014).

**The trend is opposite for the top 1 percent.** During the same timeframe, their share of income increased from 12 percent to 20.



Inequality runs deeper than thought.

New research shows the average pretax income of the bottom 50 percent of U.S.

adults has fallen to a **Flesch-Kinkaid Grade-**  
share **level: 14.5**

bottom half of the distribution collapsed

from 20 percent in 1980 to 12 percent in

2014. In a mirror-image move, the top 1

percent commanded 12 percent of income

in 1980 but 20 percent in 2014.

Inequality runs deeper than thought.

New research shows that the bottom half of US adults have taken quite a hit. Their

ave

sin

dec

per

**Flesch-Kinkaid Grade-  
level: 8.4**

The trend is opposite for the top 1 percent.

During the same timeframe, their share of income increased from 12 percent to 20.

1:1:1 Rule

1 decision per presentation

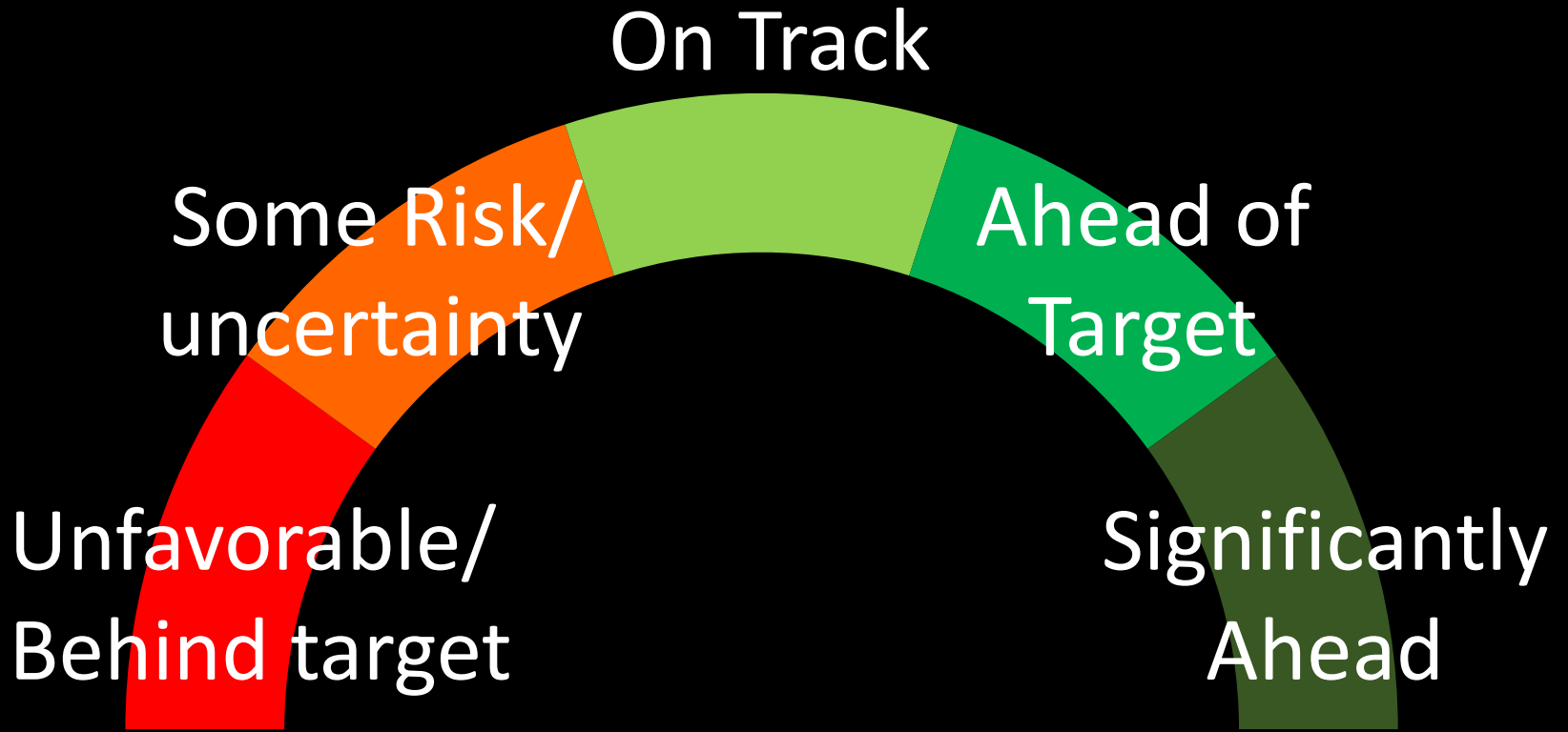
1:1:1 Rule

# The "Five Second" Rule

How are we doing? What  
needs to be fixed?







On Track

Some Risk/  
uncertainty

Ahead of  
Target

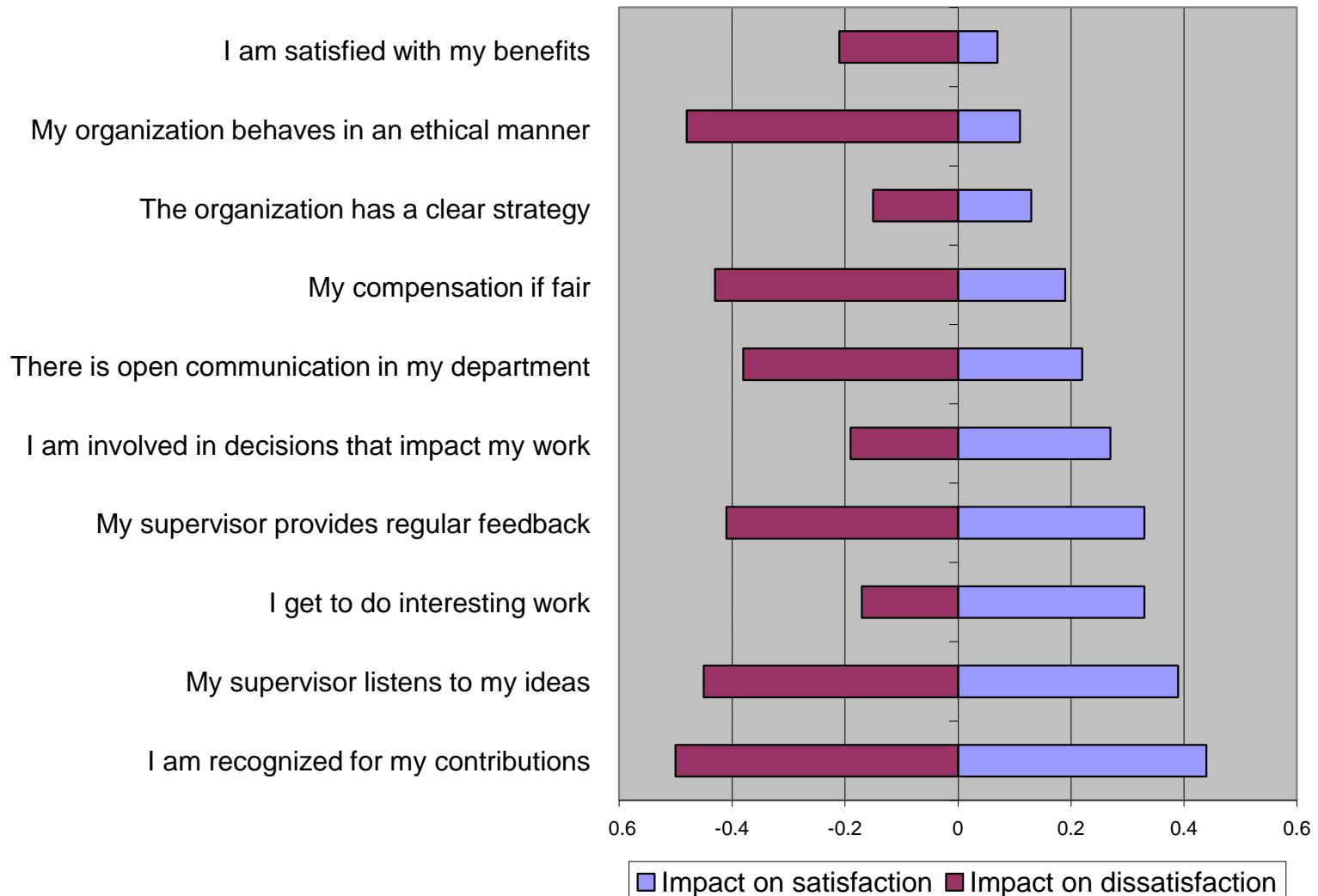
Unfavorable/  
Behind target

Significantly  
Ahead

# What action do you take if your metric is . . .

- Unfavorable to/behind target
- Some risk/uncertainty vs. target
- On track
- Ahead of target
- Significantly ahead of target

# Drivers and detractors of employee satisfaction



# We need to focus on rebuilding the Southeast region

- Not keeping up with the market
- Not meeting organizational goals
- Leadership issues

Six word challenge!

Consumers will reward  
sustainable companies

"There is a new candy store across the mall"

"We are getting closer to the candy store"

"We are passing the candy store!"

We should . . .



We should sell sustainable  
products

Where would you put the  
diapers and the beer?

Next to each other

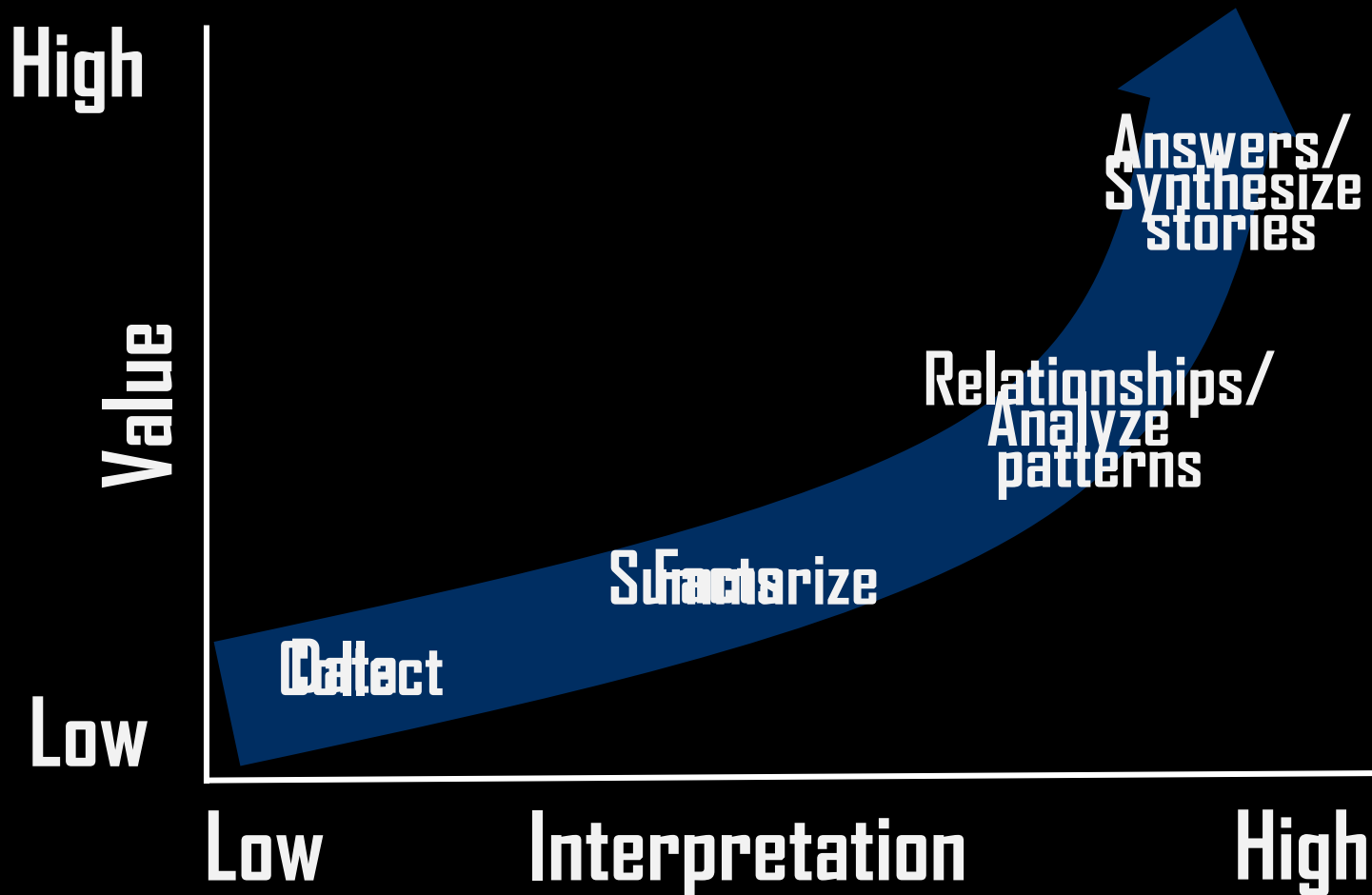
**DB**

As Far Apart As Possible

**D**

**B**

The "story" in your  
report is incomplete



# The structure of a six word recommendation



Assessment

Action

Urgency

Assessment

Constraints

Action

selling sustainable  
products

Urgency

cash flow

# We should start selling sustainable products now!

- Customers want it
- Customers will pay a premium
- Our product portfolio is lacking
- We are behind our competition



# Simplifying your reports



You don't look at reports  
for the numbers

	<b>Quiz 1 Date</b>	<b>Score</b>
Barbara Hamilton	5/1/2014	85%
Larry Hernandez	5/30/2014	87%
Virginia Boyd	5/20/2014	92%
Cynthia Stevens	4/29/2014	95%
Anna Crawford	5/21/2014	99%
Dorothy West	5/23/2014	98%
Arthur Evans	5/30/2014	98%
Russell Coleman	5/21/2014	93%
Peter Roberts	5/28/2014	93%
George Martin	5/21/2014	86%
Melissa Porter	5/30/2014	97%
Robert Williams	5/13/2014	97%
Ralph Cooper	5/5/2014	100%
Helen Ellis	5/29/2014	85%
Aaron Bennett	4/24/2014	85%
Heather Mills	6/2/2014	86%
Andrea Cunningham	5/8/2014	100%
Janice Stephens	5/10/2014	87%
Alan Butler	5/13/2014	98%
Kathryn Bradley	5/21/2014	93%
Shawn Simmons	5/30/2014	92%
Gary Hall	4/28/2014	95%
Debra Warren	5/1/2014	85%
Amy Hicks	5/14/2014	86%
Ernest Long	5/21/2014	85%
Stephanie Ramos	5/28/2014	97%
Jennifer Sullivan	5/22/2014	89%

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Ernest Long	5/21/2014	85%
Stephanie Ramos	5/28/2014	97%
Jennifer Sullivan	5/22/2014	89%

## Fail – retake

Barbara Hamilton

Helen Ellis

Aaron Bennett

Debra Warren

Ernest Long

George Martin

Heather Mills

Amy Hicks

Larry Hernandez

Janice Stephens

Jennifer Sullivan

# Customer satisfaction report

	Question	Very Poor	Poor	Fair	Good	Very Good	Total	Average
<b>Store P</b>								
	Associates made me feel welcome	2.3	2.2	9.8	31.2	54.6	3231	4.34
	Adequacy of store hours	2.6	1.9	13.5	35.9	46.2	156	4.22
	Associates provide appropriate assistance	3.4	3.4	19	29.3	44.8	58	4.08
	I was greeted promptly	1.7	1.7	3.4	37.9	55.2	58	4.43
	Associates answered all of my questions	2.5		20	42.5	35	40	4.08
	Associates treated my courteously	1.2	2.9	12.2	33.7	50	344	4.28
	Cleanliness of store	1.7	1.7	15.5	39.7	41.4	58	4.17
	Associates acted professionally		5.2	10.3	29.3	55.2	58	4.35
	Product selection		1.8	8.8	14	75.4	57	4.63
	Product pricing		5.3	19.3	38.6	36.8	57	4.07
	Product availability	5.3	1.8	15.8	47.4	29.8	57	3.95
	Check out simple and fast		1.8	3.5	33.3	61.4	57	4.54
	No hassle return	2.2	5.9	12.9	33.3	45.7	186	4.14
<b>Store Q</b>								
	Associates made me feel welcome	8		8	32	52	25	4.20
	Adequacy of store hours		16.7	9.3	31.5	42.6	54	4.00
	Associates provide appropriate assistance	1.9	3.7	22.2	35.2	37	54	4.02
	I was greeted promptly	1.9		9.4	34	54.7	53	4.40
	Associates answered all of my questions	1.5	1.8	10.9	29.2	56.5	329	4.37
	Associates treated my courteously			1.8	32.7	65.5	55	4.64
	Cleanliness of store	3.7	3.7	27.8	25.9	38.9	54	3.93
	Associates acted professionally	1.8		9.1	30.9	58.2	55	4.44
	Product selection		3.6	10.9	29.1	56.4	55	4.38
	Product pricing	1.8	3.6	9.1	27.3	58.2	55	4.37

High performing (No action needed)

I was greeted promptly  
Associates answered all of my questions  
Associates treated my courteously  
Associates acted professionally  
Product selection  
Product pricing  
Product availability  
Check out simple and fast

On the edge of greatness (Minimal resources, "polish")

No hassle return

Inconsistent (Moderate resources – update targeted processes)

Consistently Bad (Major resources – re-engineer)

Associates made me feel welcome  
Adequacy of store hours  
Associates provide appropriate assistance  
Cleanliness of store

Let's see some live  
examples

## Quarterly company-wide scorecard

	This quarter	Target	Last quarter
<b>Finance</b>			
Revenue	\$37,103,329 ▼	\$39,432,514	\$40,342,143
Operating expense	\$35,954,312 ▲	\$38,041,534	\$38,954,567
Operating profit	\$1,149,017 ▼	\$1,390,980	\$1,387,576
Investment revenue	\$1,432,254 ▲	\$1,647,092	\$1,303,351
Capital expenses	\$4,750,351 ▼	\$3,325,246	\$4,275,316
<b>Quality</b>			
Manufacturing defect rate	0.53% ▼	0.65%	0.46%
Customer complaints (per 1000 customers)	1.20 ▲	1.51	1.26
Product returns (%)	2.13% ▲	1.60%	2.41%
<b>Customer</b>			
Customer satisfaction	4.13 ▼	4.23	4.38
Likelihood to recommend	4.48 ▼	4.62	4.69
Customer growth	8.40% ▼	9.80%	10.20%
<b>Workforce</b>			
Employee engagement	4.09 ▼	4.79	4.34
# of training hours/employee	23 ▼	18	26



# Creating a decision-based report

1. Define your question/decision
2. List your choices/options
3. Identify the data you will use to make your choice
4. Determine the rules for each choice

# List your choices/options

Which metrics need  
immediate  
attention?

Which metrics are at  
risk?

Which metrics are  
ok?

# Identify the data you will use to make your choice

Quarterly company-wide scorecard			
	This quarter	Target	Last quarter
<b>Finance</b>			
Revenue	\$37,103,329 ▼	\$39,432,514	\$40,342,143
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<b>Workforce</b>			
Employee engagement	4.09 ▼	4.79	4.34
# of training hours/employee	23 ▼	18	26

# Identify the data you will use to make your choice

- Performance against target
- Performance against last quarter

Determine the rules for each choice

Hitting Target	<b>At Risk</b>	<b>No Action</b>
Missing Target	<b>Immediate Attention Required</b>	<b>At Risk</b>
	Getting worse	Improving

<p style="text-align: center;"><b>At risk</b></p> <ul style="list-style-type: none"><li>• Manufacturing defect rate</li><li>• # of training hours/employee</li></ul>	<p style="text-align: center;"><b>No action needed</b></p> <ul style="list-style-type: none"><li>• Operating expense</li><li>• Customer complaints (per 1000 customers)</li></ul>
<p><b>Immediate action required</b></p> <ul style="list-style-type: none"><li>• Revenue</li><li>• Operating profit</li><li>• Capital expenses</li><li>• Customer satisfaction</li><li>• Likelihood to recommend</li><li>• Customer growth</li><li>• Employee engagement</li></ul>	<p style="text-align: center;"><b>At risk</b></p> <ul style="list-style-type: none"><li>• Investment revenue</li><li>• Product returns (%)</li></ul>

Turn one of your reports into a  
decision-based report

# Creating a decision-based report

1. Define your question/decision
2. List your choices/options
3. Identify the data you will use to make your choice
4. Determine the rules for each choice



# The eight rules of rethinking data

- Provide answers, not numbers
- See more by looking at less
- Make things simple to foster understanding
- Separate relevant data from related data
- Provide context to create meaning
- Use reasoning to support your decisions
- Become a prosecutor not a mystery writer
- Design reports around answers not numbers

# About Avail Advisors

For nearly a decade, Avail Advisors has provided executive consulting, speaking, and leadership development to executives and leaders around the world. Our goal is to help leaders drive business success by bringing clarity, simplicity and resolution to their complex issues. We bring a unique combination of business acumen, an understanding of how people think and process information and innovative ways of re-framing challenging issues. We help leaders be more mindful in their decision-making and actions without sacrificing speed or agility.

Our clients range from Fortune 50 businesses to mid-sized companies. We also serve large non-profit organizations and local government executive teams. Avail has helped leaders in nearly every major industry across thirty-six countries.

Our clients seek us out to help them think differently about their business, their role as leaders, and their problems and issues. We pride ourselves on being “agitators” – we will challenge what you know, what you do, and how you think. The result: better outcomes for you and your organization.

Our [services](#) focus on helping executives frame problems more effectively, develop a strategic focus, drive outcomes and accountability, use data more effectively, and drive change.

If you are tired of the status quo, contact us today.

# Rethinking Data Workshop

*Our Rethinking Data workshop will help you put these tips into action.*

**This workshop provides an overview of how to shift from being data - driven to being decision - driven.**

## **Workshop Options**

The Rethinking Data workshop is offered in several formats. We recommend the full, eight - hour instructor - led workshop, as that option provides the deepest learning experience as well as the opportunity to practice and receive feedback. We offer other options to help meet your schedule and audience needs. All workshops address the eight tips at varying levels of detail and application.

## **Workshop Outcomes**

Close the gap between analysis and action by :

- Understanding and managing the three key biases that inhibit data - driven decision making.
- Quickly defining the data needed to make a decision so that you spend more time thinking about what the data is telling you and less time searching for it.
- Turning data into actions that drive decision making.
- Creating reports that provide answers rather than numbers, thus significantly decreasing the time needed to make a decision.
- Creating simple, logical, fact - driven recommendations and presentations that speed up and drive audience decision - making

# Rethinking Data Workshop - Feedback

- One of the most thought-provoking presentations was Brad Kolar's. His perspective on how to present information to people, based on human evolution and how our brains are wired was extremely beneficial and fascinating. This can definitely be applied directly to real-life work situations.
- Loved it! Game changer! We need more of these. -Sales Manager, Fortune 50 Consumer Packaged Goods company
- The 10 principles Brad share [sic] were amazing, this is truly a [sic] transformational training, I wish more people on [sic] the organization took it.
- I appreciate Brad for being open and bold in his feedback. I appreciate he gave us his contact information in case we have questions afterwards. Very dedicated instructor =)
- Brad was full of energy and always showed interest in all participant's questions, giving helpful answers to apply in the everyday routine.
- Just had a great workshop with Brad Kolar from Avail Advisors about using data more effectively. It totally changed the way we will look at and use data and will make our decision-making much more efficient and effective. Anyone whose organization is struggling to use data better should give Brad a call.
- Candid feedback from the larger group reveals that your working session was among the most popular during our time there.
- Amazing! This was the best virtual training I've ever taken.
- Your common sense and efficient approach this week was refreshing. I thought about trying to get out of this session but I chose to attend. Boy am I glad that I did and I really mean that. (Manager, Fortune 100 Financial Services Company)
- I thought that my reports were very simple until I took this course
- Fantastic workshop and one of the best I have ever been to! You kept our attention and engagement all day and really demonstrated to us that we can really improve how we get through all of the data and what we really need and want from it. -Claims Executive, Fortune 50 Insurance Company.
- This is one of the best classes I have taken. What I learned will help me use a better approach to making decisions and determining the best direction going forward. (Director, Systems Department, Fortune 100 Company)
- I love the simplicity of what you taught us while appreciating how complex it can be underneath the data! I am excited to start planning my report from the reverse order and then communicating in the same way! (City Manager, City of Champaign, IL)
- This is probably one of the most relevant trainings I've attended and I hope we can cascade this to more people in the organization.
- This course will transform the way you look at and report on data! Anyone expected to report data to leadership should take this course.
- Brad was amazing! He had complete control of the subject and of the group. He was even able to regain our attention after a fire drill.

Avail Advisors

Brad.kolar@availadvisors.com

630.343.9354

[www.availadvisors.com](http://www.availadvisors.com)

[www.availadvisors.com/rethinkingdata](http://www.availadvisors.com/rethinkingdata)