

Storytelling Charts eBook Companion

Visualize Vertical Logic in PowerPoint – Full Size Images

Where to Download the Add-In



StoryTellingwithCharts.com

Agenda

Introduction

Chapter 1: Getting Started with StoryTelling Charts

Chapter 2: Vertical Logic and Storytelling Charts — A Formula for Life

Chapter 3: Tips, Tricks and Best Practices

Chapter 4: Quantitative Charts Examples

Chapter 5: Next Steps and Resources

Stories can add a premium to identical physical goods

STC Framework Chart and Slide Elements

amazon

American Flag 3x5Ft, Embroidered Stars 3'x5' USA Flag
Outdoor Heavy Duty and Double Edge Sewing



Price \$5.99

- *Quality Material: American flag constructed with strong material to withstand any outdoor weather*
- *Embroidered Stars: The stars are embroidered using densely filled rich white thread.*
- *The stripes are sewn together with two rows of double stitches for added strength*

ebay

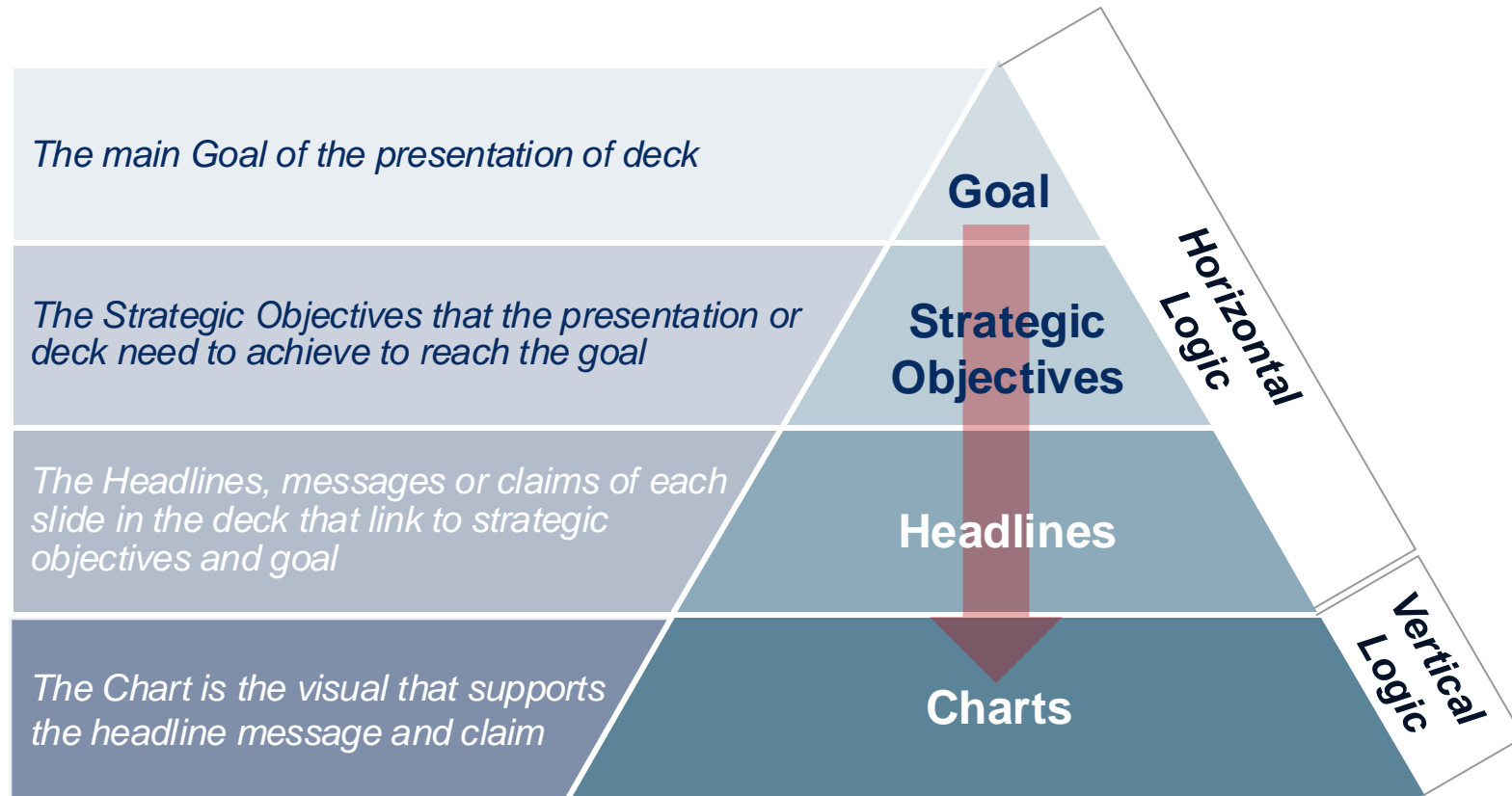
Vintage 1940's Dettra's Stantest Bunting 48 Star
American Flag 3' x 5'



**Buy It Now
US \$300.00**

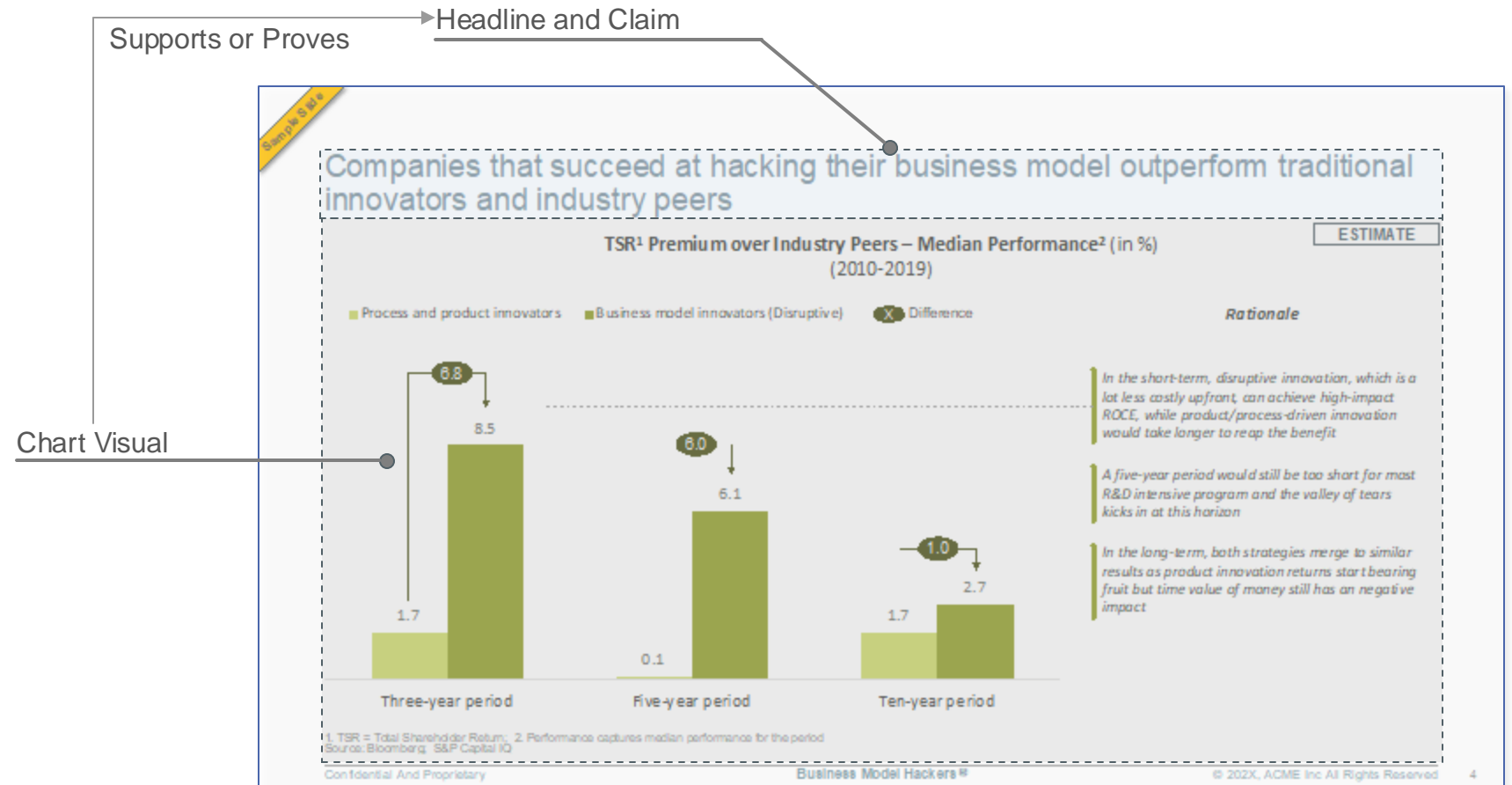
- *This is a 48 star, cotton, US flag made with printed stars, and hand sewn stripes. It was made by the Dettra Flag Co. of Oaks, PA. Stantest bunting was introduced in the 1920's and was used until the 1950's.*
- *Bunting was discontinued as a result of the addition of the 49th star in 1959. This flag has been dated 1942-1945 because of the presence of distinctive wartime grommets*

Horizontal and Vertical Logic Relationship



The “Vertical Logic” is the visualized evidence or story (i.e., the chart) that supports and/or proves the claim in the headline

Vertical Logic:
Are the individual slides and depict how your headline or claim should be supported by the content in the Chart



Agenda

Introduction

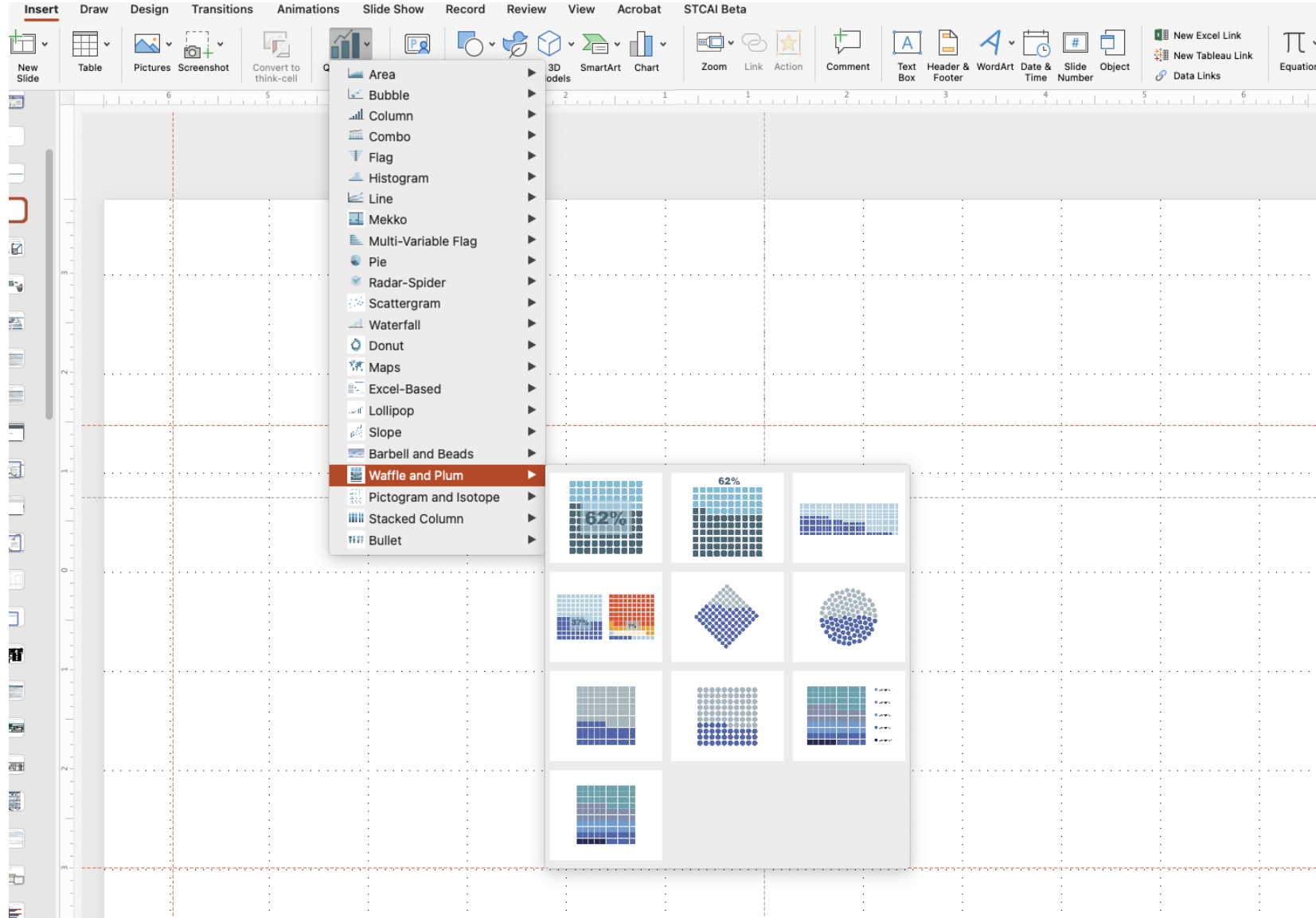
Chapter 1: Getting Started with StoryTelling Charts

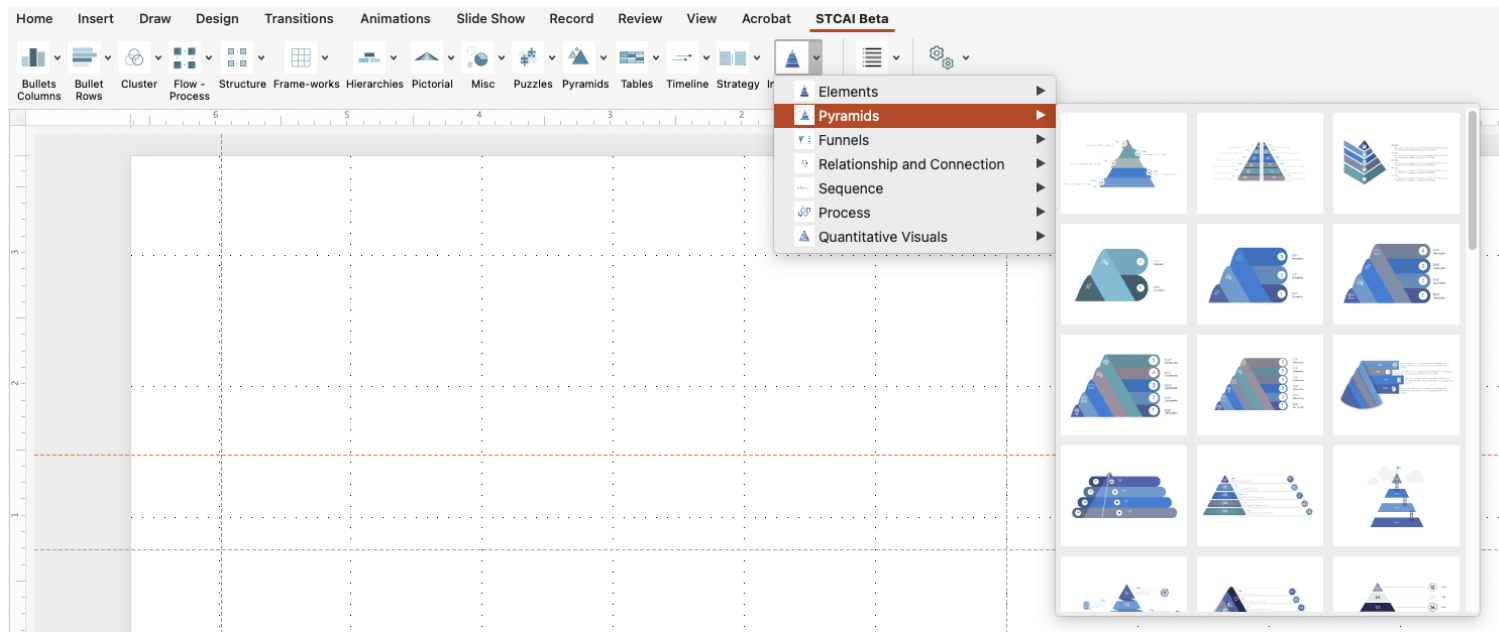
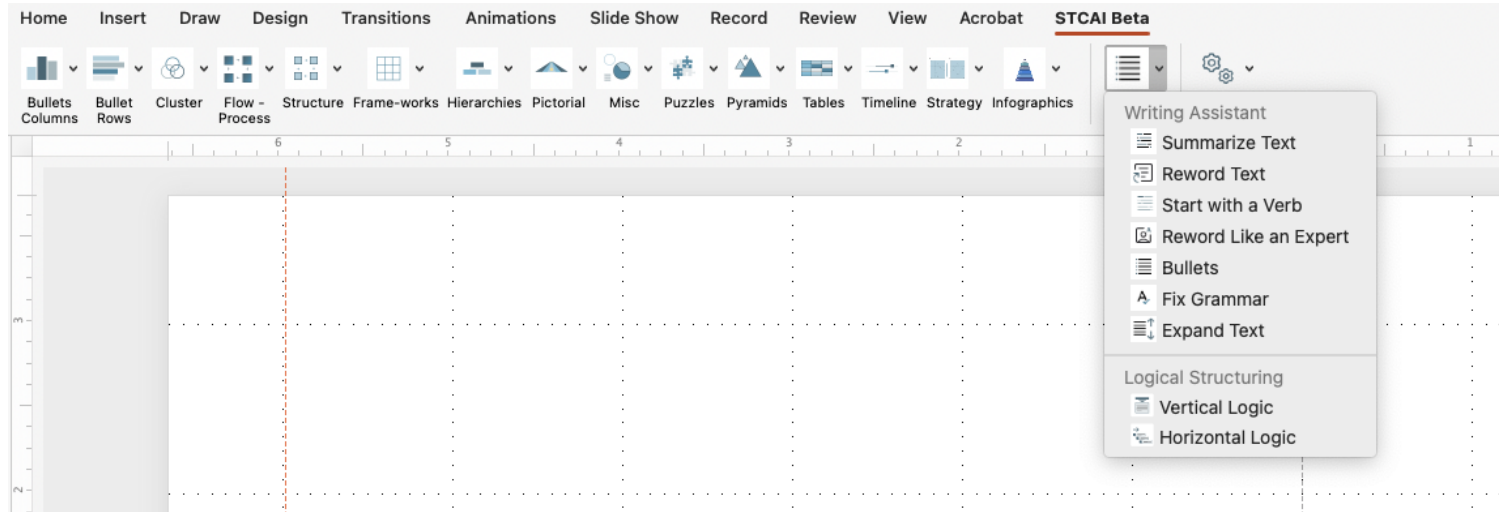
Chapter 2: Vertical Logic and Storytelling Charts — A Formula for Life

Chapter 3: Tips, Tricks and Best Practices

Chapter 4: Quantitative Charts Examples

Chapter 5: Next Steps and Resources





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Chapter 1: Getting Started with StoryTelling Charts

Chapter 2: Vertical Logic and Storytelling Charts — A Formula for Life

Chapter 3: Tips, Tricks and Best Practices

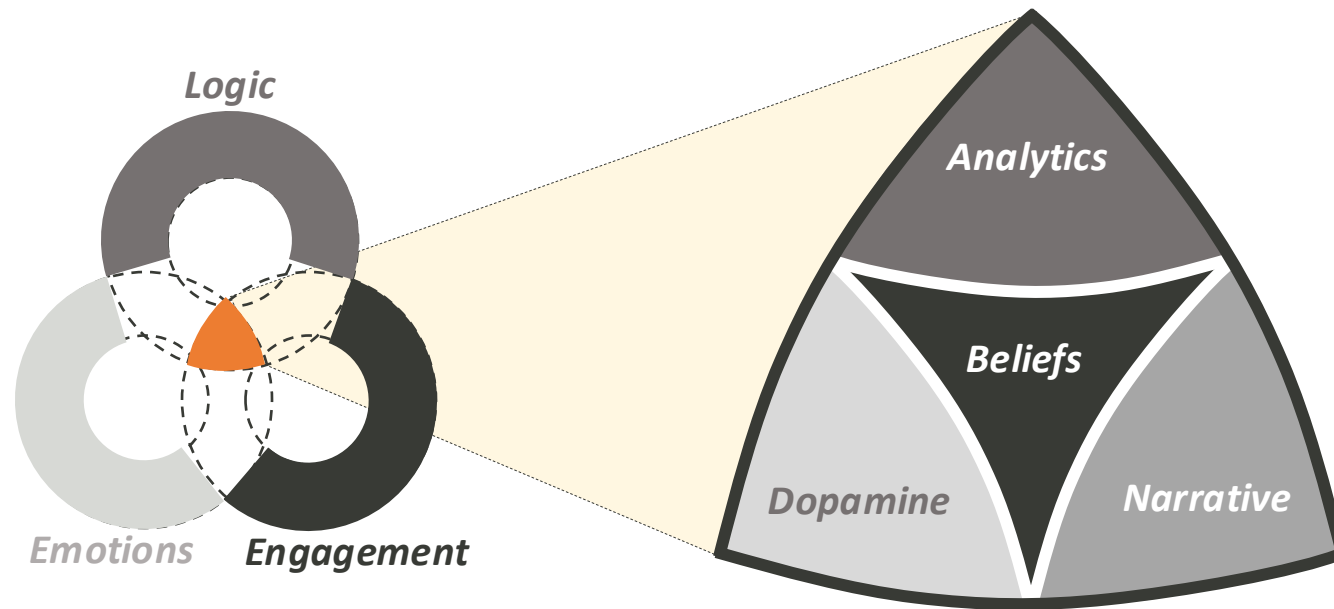
Chapter 4: Quantitative Charts Examples

Chapter 5: Next Steps and Resources

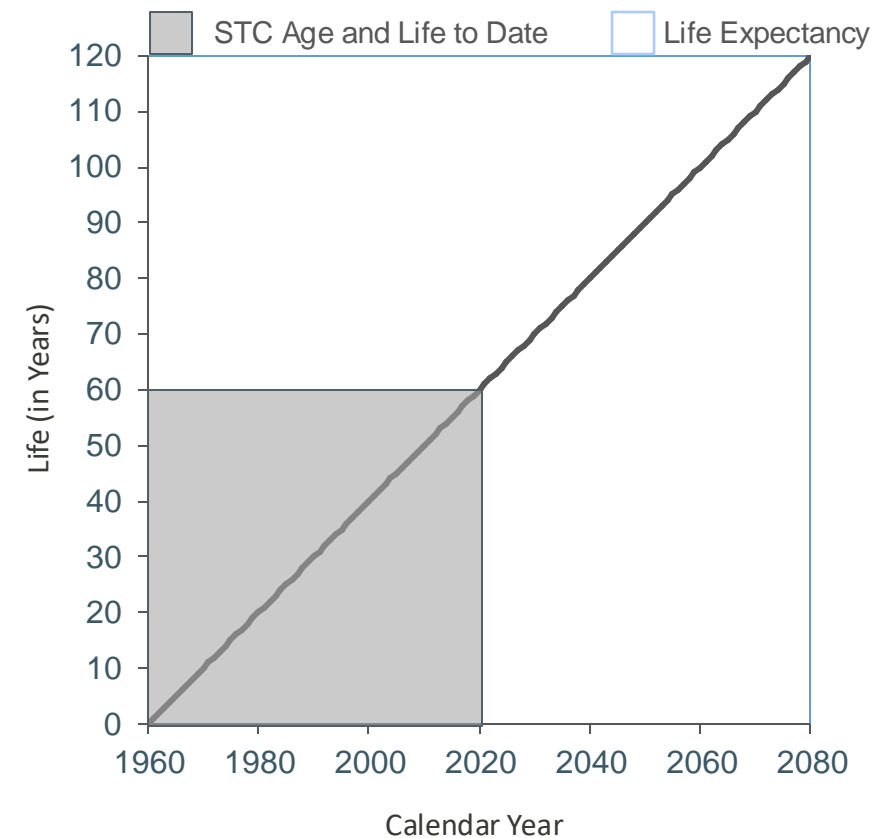
The STC core concept, mechanism and levers thrived for 60 years and will survive another 60, if you apply the “Lindy Effect” to determine its life expectancy

STC Core Concept and Its Life Expectancy

STC Core Concept, Mechanism and Levers



STC Life Expectancy as Non-Perishable



1. Perishable are elements that have an unavoidable organic expiration date, such as humans, light bulbs, canned food; 2. Nonperishable would be those with no organic, inevitable expiration date
 Source: Antifragile: Things that gain from disorder, Nassim Taleb; Business Model Hackers; STC Toolkit

Sketching a single slide in the year 40 BLC¹ was a long and painful process with little room for error

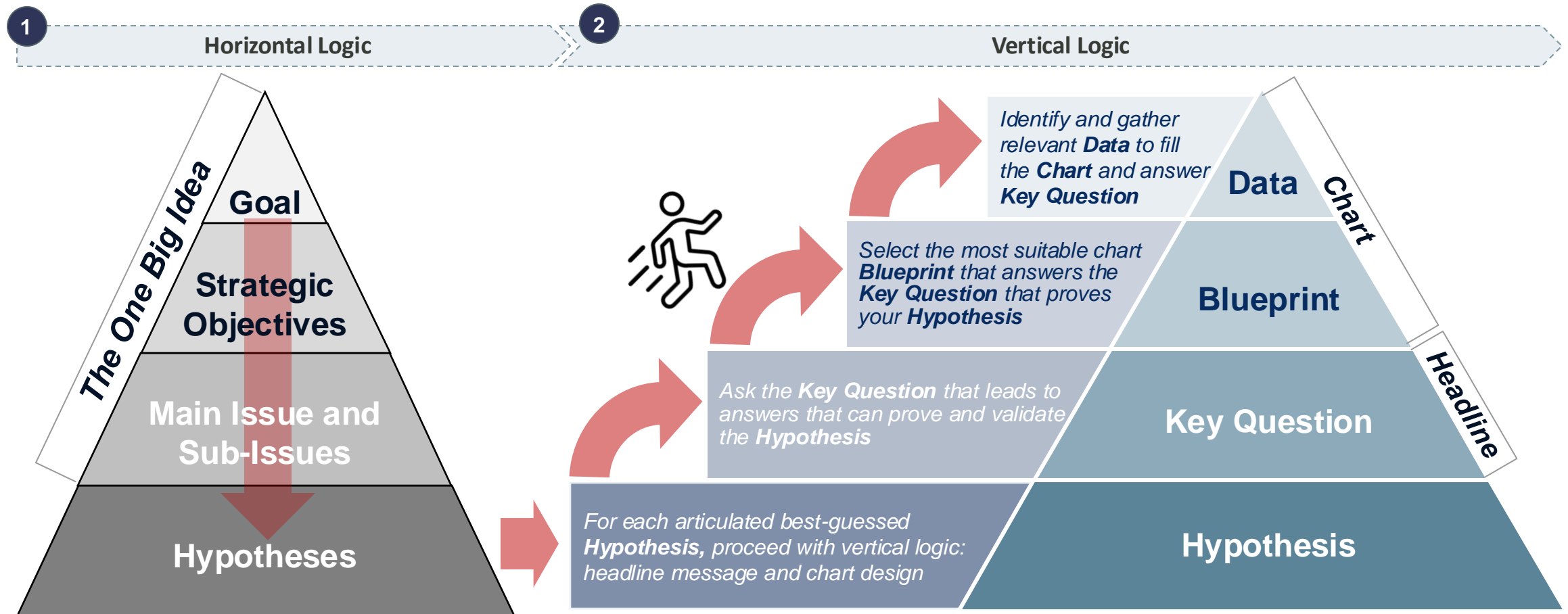
Slide Deck Development in the Year 40 BLC



1. BLC = Before Laptops and Computers
Source: Business Model Hackers; STC Toolkit

STC starts with the goal and the strategic objectives and not the data

The STC Framework Method



There are 15 key elements in a chart and slide that follow the STC framework (1/2)

STC Framework Chart and Slide Elements

R#	Element	Visible	Must	Definition and Purpose	Design Rule
1	Headline	✓	✓	The main message on a slide extracted from the story	No more than 2 lines
2	Title	✓	✓	The description of a graphic or a chart within a slide	Consistent location across all slides
3	Chart Area		✓	The area in which the chart should fit and not exceed the margins allocated to it - as set by the guides set by this template	The area isn't marked but should be consistent throughout: Its borders should have the same distance from the top and the left
4	Ghost	✓		A text or graphic illustrating position in a story within the story	Can be a text, image or both and goes between the header and chart area
5	Label	✓		Description of highlights and visual cues	Location should be consistent across the entire deck
6	Ribbon	✓		Ribbons can be used to highlight an attribute or something on the entire slide. Can also be used for disclaimer (see below)	It needs to go above the header
7	Disclaimer	✓		Used to clarify and delimit the scope of proof in the chart that is used to support the headline claim or message	Disclaimers can refer to a specific chart or the entire chart area. Multiple disclaimers can be added
8	Callout	✓		A callout is a text or a visual cue designed to stress or highlight a particular message in the chart	Avoid overcrowding the slide

Source: Business Model Hackers; STC Toolkit

There are 15 key elements in a chart and slide that follow the STC framework (2/2) – see the following pages for positioning visualization

STC Framework Chart and Slide Elements

R#	Element	Visible	Must	Definition and Purpose	Design Rule
9	Page #	✓	✓	Is a must on every page except the first page	Format and location should be consistent throughout
10	Source	✓	✓	The source of the chart or the data in the chart should go on every slide. Every chart should have a source, i.e., if you have 2 charts from different sources, include the 2 sources	Consistent location, font, size, format at the bottom of the page but above the footer if there is one. Separate different sources with semicolons
11	Footnote	✓		This is a useful field to explain or justify specific elements, figures, analysis, etc. in the chart area	Use only when clarification or qualification is needed. Usually comes before the source field listed in numerical order and use 10pt font or less
12	Note	✓		Unlike the footnote, the note typically refers to the entire chart and not specific elements within the chart.	Comes after the numbered footnote if there are any
14	Footer	✓		A footer is only needed for branding, or adding disclaimers, copyright and confidentiality marks	It's recommended but may crowd out the slide
15	Margins		✓	The position and the space and margins between the elements in the chart including the headline, the title, and the source/note field	Positions of titles, internal charts (i.e., for a single chart or multiple charts), margins, spacing between elements and the spacing from the top and the left should be consistent throughout

Source: Business Model Hackers; STC Toolkit

1. Headline Area (Fits maximum 2 lines aligned to the left)

2. Chart Title Area (Can be split up into 2, 3 or 4 titles one for each chart, can be centered or left-aligned)

3. Chart Area

1. xxxx 2. xxxx 3. xxxx

Note: Use font 9

Source: Include a source for every chart that you use; Separate each source with a semicolon followed by two spaces

STC Framework Additional Chart and Slide Elements Sample Slide Illustration

6. Ribbon

Sample Slide

Companies that succeed at hacking their business model outperform traditional innovators and industry peers

4. Ghost Area

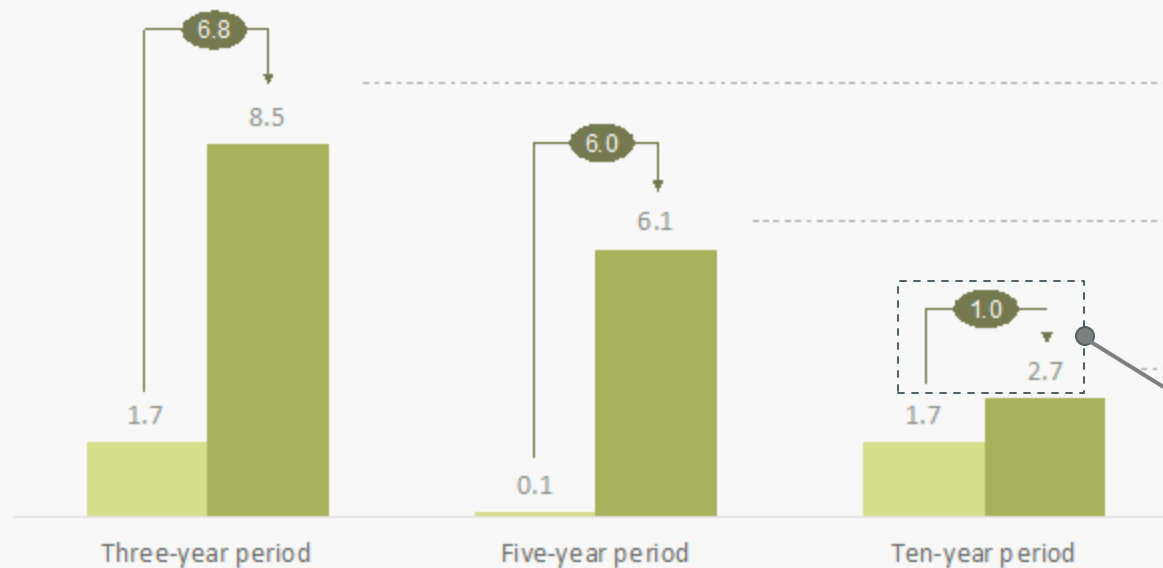
TSR¹ Premium over Industry Peers – Median Performance² (in %)
(2010-2019)

ESTIMATE

7. Disclaimer

4. Label

■ Process and product innovators ■ Business model innovators (Disruptive) ⊗ Difference



Rationale

- In the short-term, disruptive innovation, which is a lot less costly upfront, can achieve high-impact ROCE, while product/process-driven innovation would take longer to reap the benefit
- A five-year period would still be too short for most R&D intensive program and the valley of tears kicks in at this horizon
- In the long-term, both strategies merge to similar results as product innovation returns start bearing fruit but time value of money still has a negative impact

8. Callout

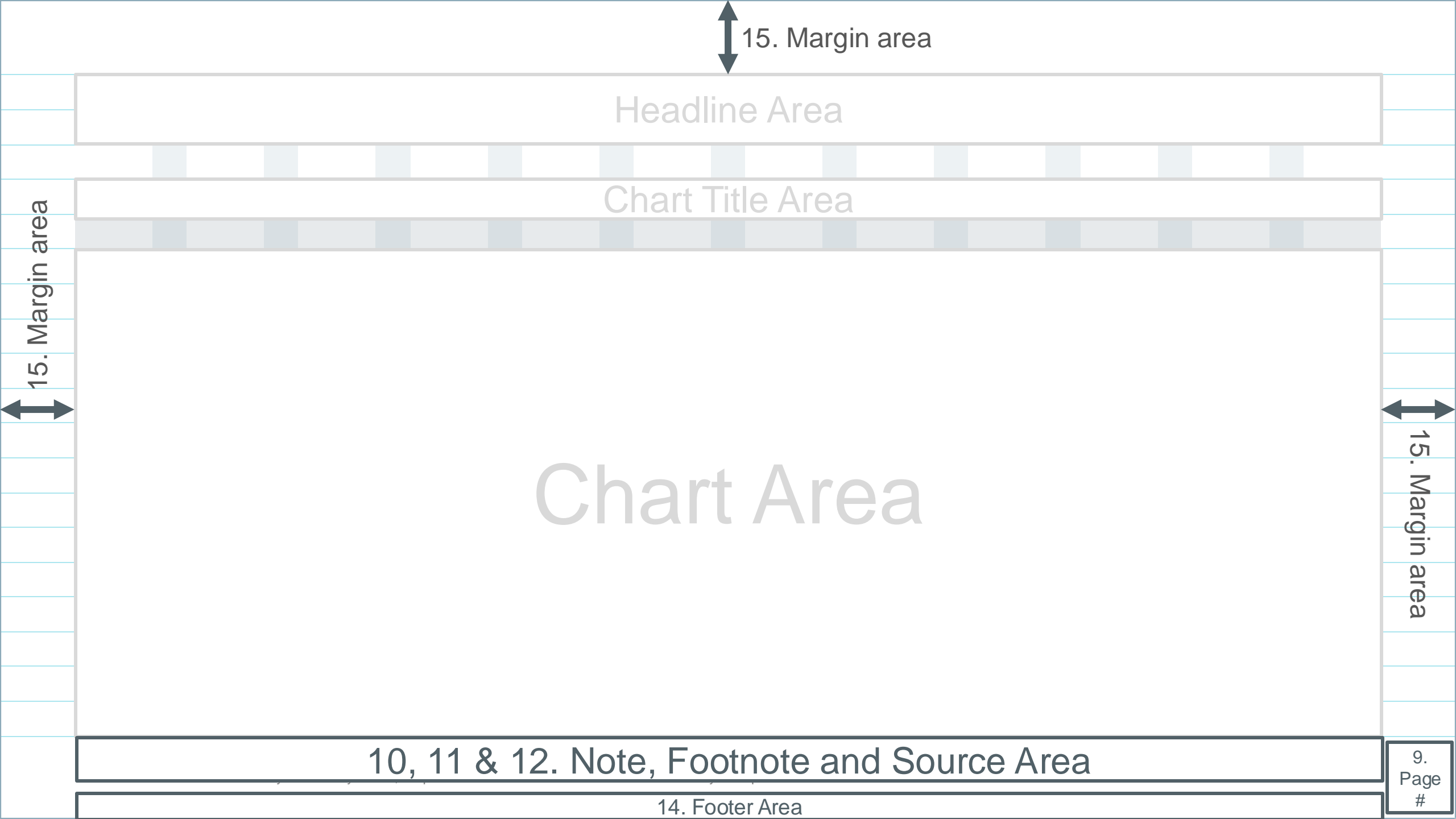
1. TSR = Total Shareholder Return; 2. Performance captures median performance for the period
Source: Bloomberg; S&P Capital IQ

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4



15. Margin area

Headline Area

Chart Title Area

Chart Area

15. Margin area

15. Margin area

10, 11 & 12. Note, Footnote and Source Area

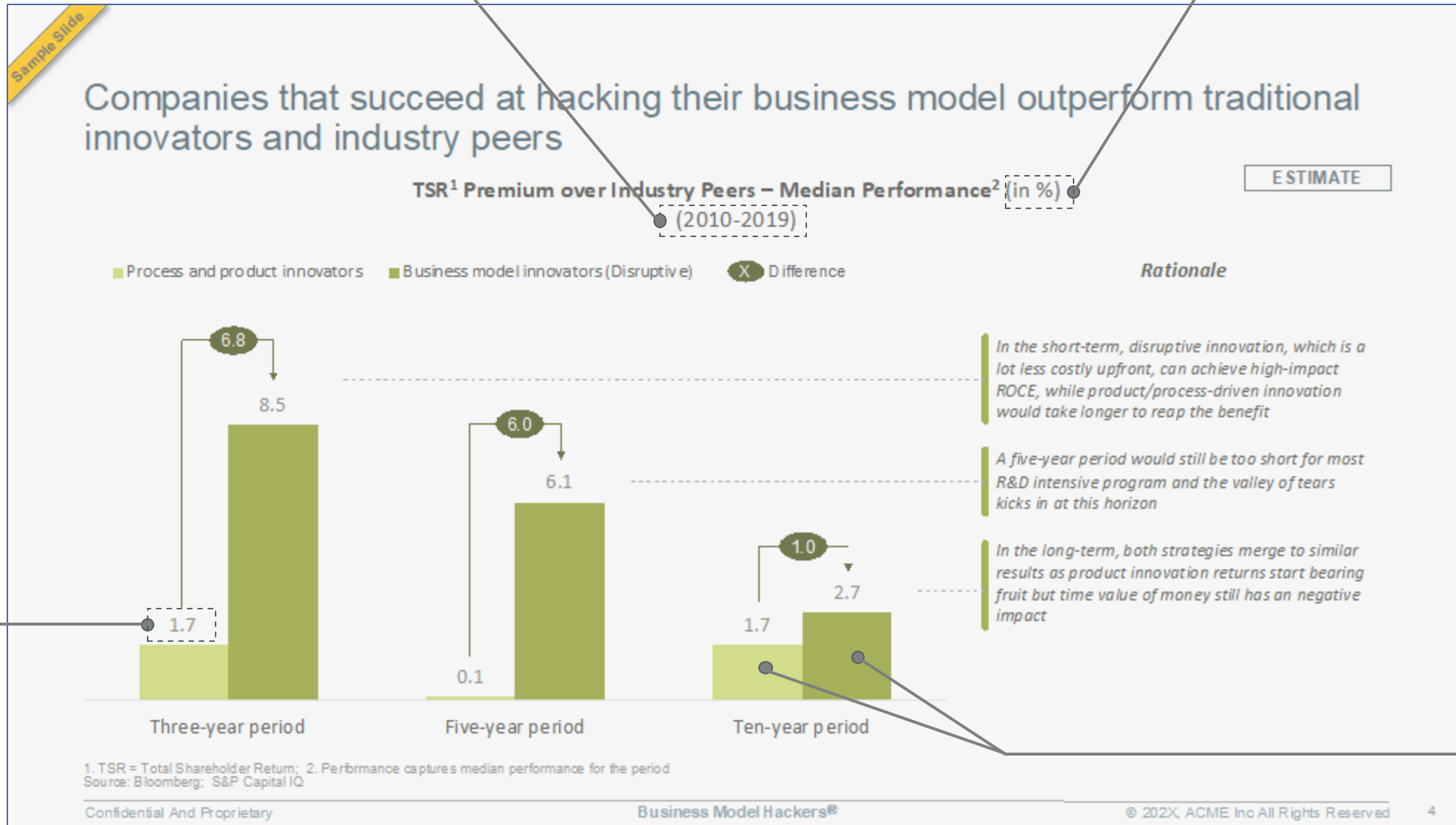
14. Footer Area

9. Page #

STC Framework Best Practice Design Rules Sample Slide Illustration

1. Date

2. Units



3. # of Digits

6. Colors

Whether you are presenting onscreen in a hall or a conference room, you can use the following chart table to guide your font size

Best Viewing Distance by Screen Size			
Font Size (in pt.)		Screen Width	
		3 meters	4 meters
Can you read this?	9	3	3
Can you read this?	10	3	4
Can you read this?	12	4	5
Can you read this?	14	5	6
Can you read this?	16	6	7
Can you read this?	18	7	9
Can you read this?	20	10	15
Can you read this?	22	12	17
Can you read this?	24	15	20
Can you read this?	28	17	24
Can you read this?	32	20	26

Fillers and bloaters include Table Of Content (TOC), Agenda, Separators, or Chapter slides

Agenda Bloater Example

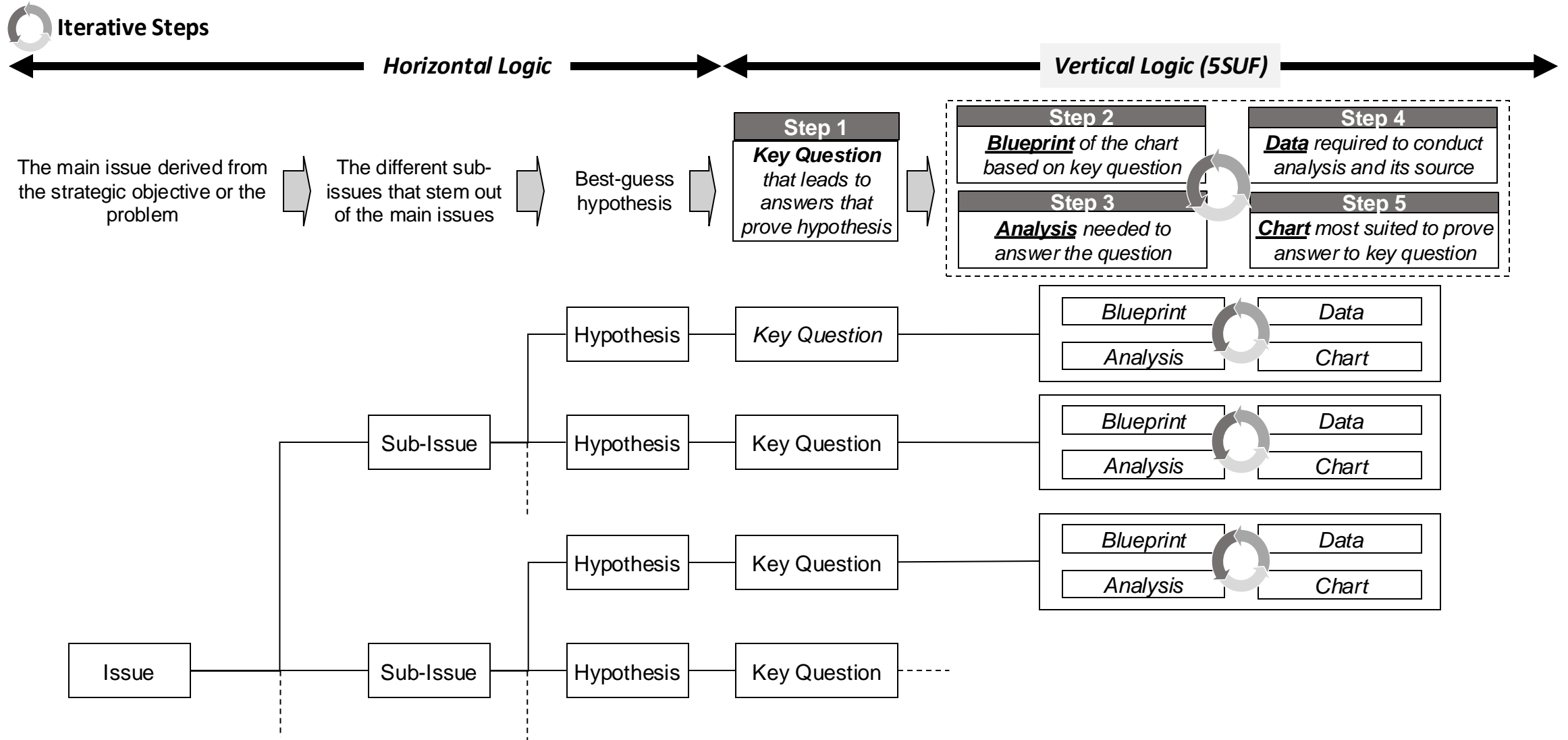
Agenda

- Part 0: Introduction**
- Part 1: What is STC?
- Part 2: Why the STC Method Will Live Forever
- Part 3: The Anatomy of STC
- Part 4: The Anatomy of Charts
- Part 5: The Universal Framework
- Part 6: Using the Toolkit for Chart Selection
- Part 7: Horizontal Logic and Storylines
- Rules Of Thumb

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Source: Business Model Hackers; STC Toolkit

The five steps universal framework is centered around asking the right questions



Source: Business Model Hackers; STC Toolkit

Posing the right question is driven by the type of hypotheses designed during horizontal logic blueprinting process

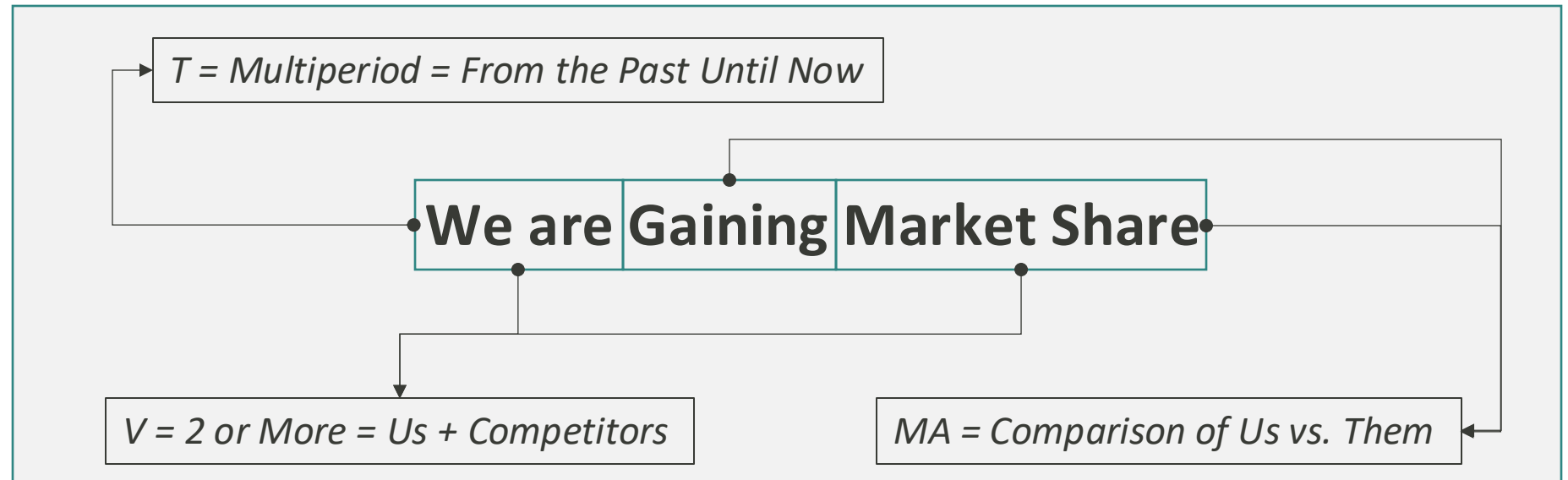
Hypothesis – Question Example

Issue: Sales and profits are declining	
Sub-Issue 1: The company is losing market share to new entrants and competitors	
Hypothesis	Question
The technology adopted in the company's product is old dated and undesired by customers	Is a new or emerging technology replacing the old one?
Growing attrition of users who are switching to substitute products	How many customers switched over the past three years? Where did customers purchase or switch to?
Product prices of like-for-like features are too high	How do the product prices compare to competitors' products for the same features?
Users are increasingly dissatisfied with the product	Are users unhappy with our product?
A new product launch is required to retain customers	What happens to our sales or financials if we don't launch a new product and the current sales trend continues?
A new state-of-the-art technology will be required to remain competitive	If the company copies a competitor, wouldn't it be just playing catch up?
Acquiring a new company or startup in a new emerging technology space is one of the best and quickest ways out of the vicious circle	What are the options to get out of this vicious cycle and how do these options compare to each other?

Selecting the right chart follows a simple framework driven by a single equation

Quantitative Chart Selection Universal Equation

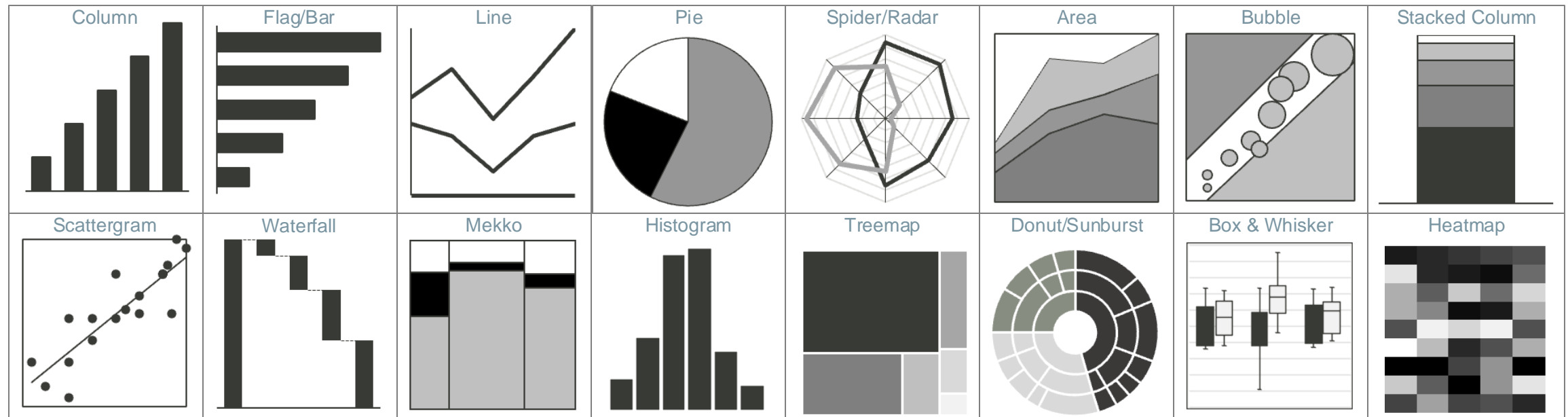
Chart Type =
F(T, V, MA)



Symbol	Variable	Explanation
T	Time Variant	Is there a time factor, meaning is it static in time or trending over time? The answer is yes or no
V	Number of Variables	Is it a single or multiple variables? The answer is the number of variable, i.e., 1, 2 3 or more
MA	Message Attribute	What is the insight that needs to be shown? i.e., Is it a comparison, breakdown, relationship, distribution or frequency?

Fundamentally, there are 16 families of charts that can visualize almost every quantitative scenario you can imagine

The 16 Families of Charts





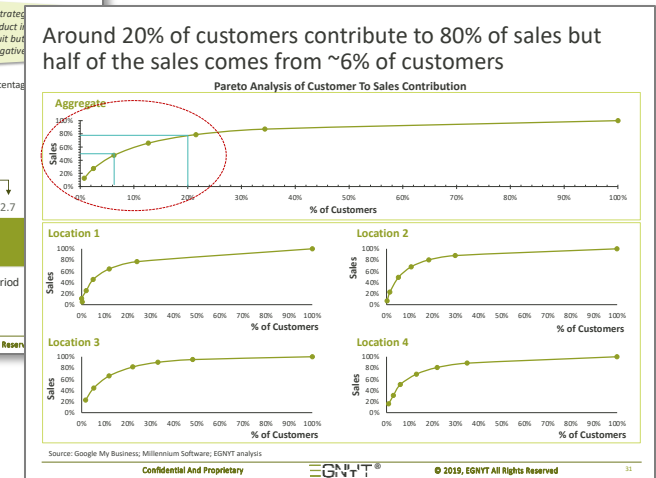
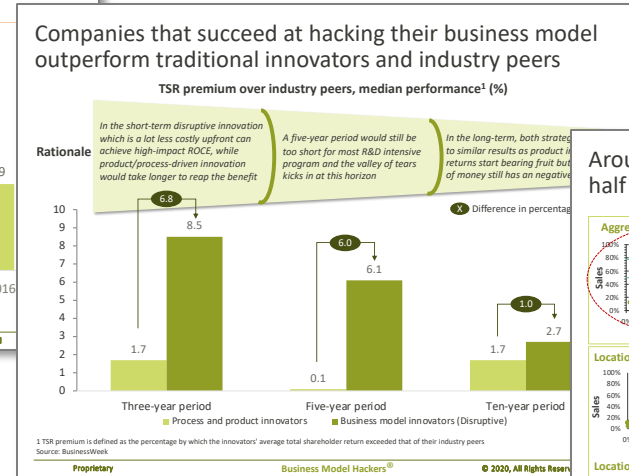
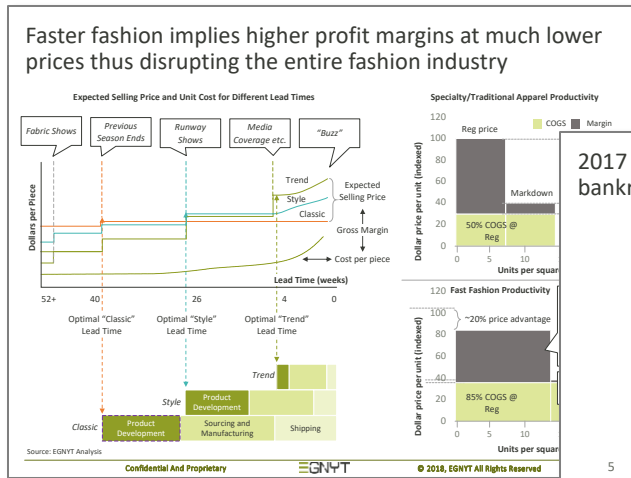
Lookup table and cheat sheet is to be used until STC becomes intuitive

TV▶	Static: Single Point in Time				Trending: Changing over Time	
MA▼	1 Variable	2 Variable	3 Variable	4+ Variable	1 Variable	2+ Variables
Comparison	Flag	Multi flags	Mekko	Mekko	Line	Line
			Multi flags	Multi flags		Column
		Heatmap	Spider/Radar	Spider/Radar	Column	Flag
			Heatmap	Heatmap		
Relationship	Scattergram	Scattergram	Bubble	3D Bubble	Scattergram	Bubble
			Surface/3D Scattergram			
Frequency/ Distribution	Histogram	Multi histograms	Multi histograms	Box and Whisker	Box and Whisker	Box and Whisker
	Single line	Multi line	Multi line			
	Column	Scattergram	Bubble			
		Box and Whisker	Box and Whisker			
Breakdown/ Composition	Pie	Multi-stacked column	Multi-stacked column	Donut/Sunburst	Multi pie	Area
		Multi pie	Mekko		Stacked Column	Donut/Sunburst
	Waterfall	Mekko	Donut/Sunburst	Treemap	Waterfall	Multi Radar
		Donut/Sunburst	Waterfall		Donut/Sunburst	
	Stacked Column	Waterfall	Treemap	Mekko	Treemap	Waterfall
	Treemap	Treemap			Mekko	Mekko
Hierarchy	Donut/Sunburst	Donut/Sunburst	Donut/Sunburst	Donut/Sunburst	Donut/Sunburst	Donut/Sunburst
	Treemap	Treemap			Treemap	
		Mekko	Treemap	Treemap	Mekko	Treemap
	Histogram	Multi histogram	Mekko	Mekko	Multi histogram	Mekko

Source: Business Model Hackers; STC Toolkit

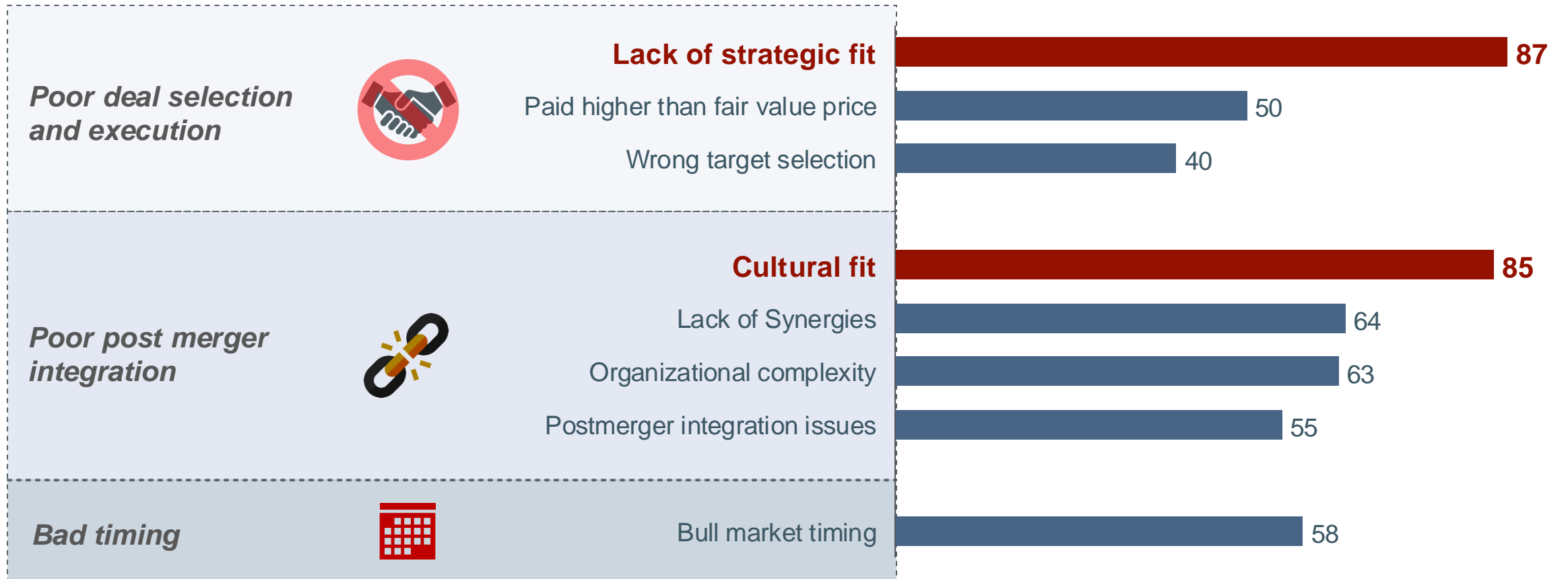
Quantitative charts can range from simple to understand chart to multi-chart requiring brain strain to back the claim in the headline

Examples of Quantitative Charts



Visual Cues and icons are very useful in directing your audience's attention towards the chart highlights and key takeaways

The Top Three Reasons Why M&A Deals Fail



Source: Business Model Hackers; STC Toolkit

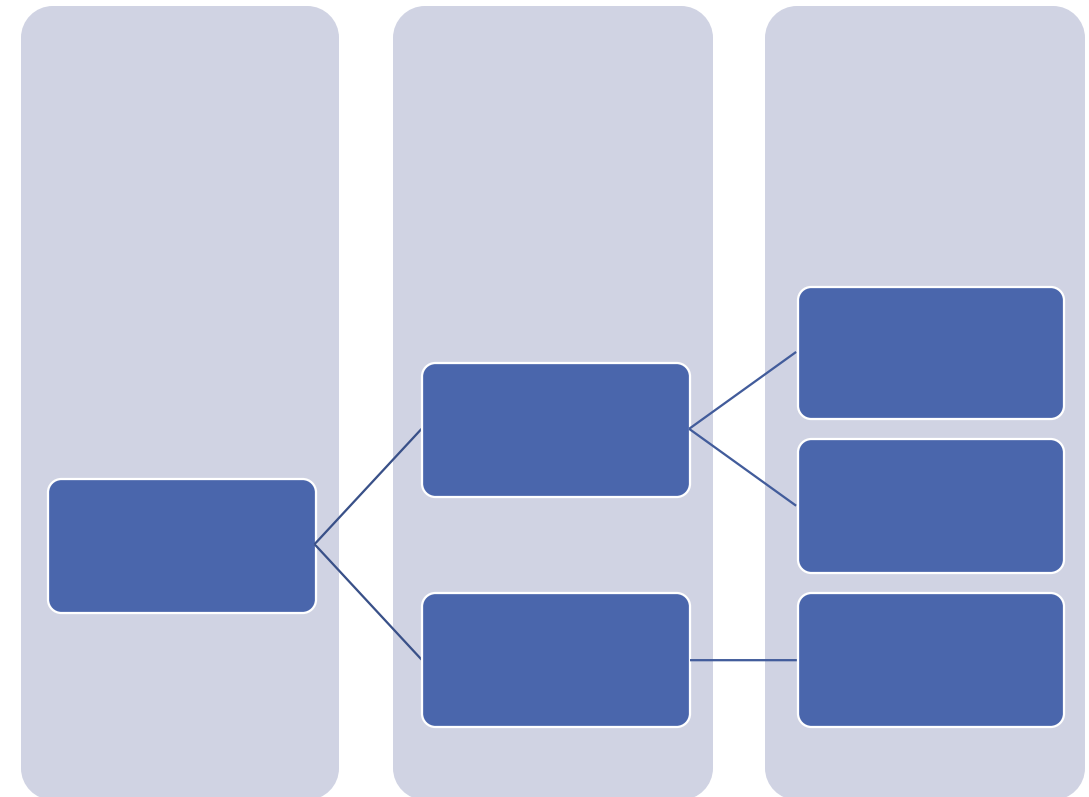
PowerPoint Smart Art has imbedded lots of qualitative chart options, but they lack the flexibility of free-form objects

Initiatives Prioritization Framework

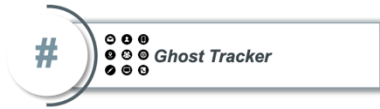
SmartArt Options



SmartArt Look and Feel



We defined three types of qualitative charts that we grouped into three categories



Qualitative Charts Categories

1



Text to visual metaphor

These are the most common charts. They are simple variation of the same concept. Convert a whole a bunch of text into a concise and nice

2



Conceptual Framework charts

These are explanatory charts to illustrate an intellectual concept visual

3



Framework for structuring storylines

These are simple flowing charts that are used as used as miniature ghosts to guide the reader through a complex deck or a storyline within a storyline

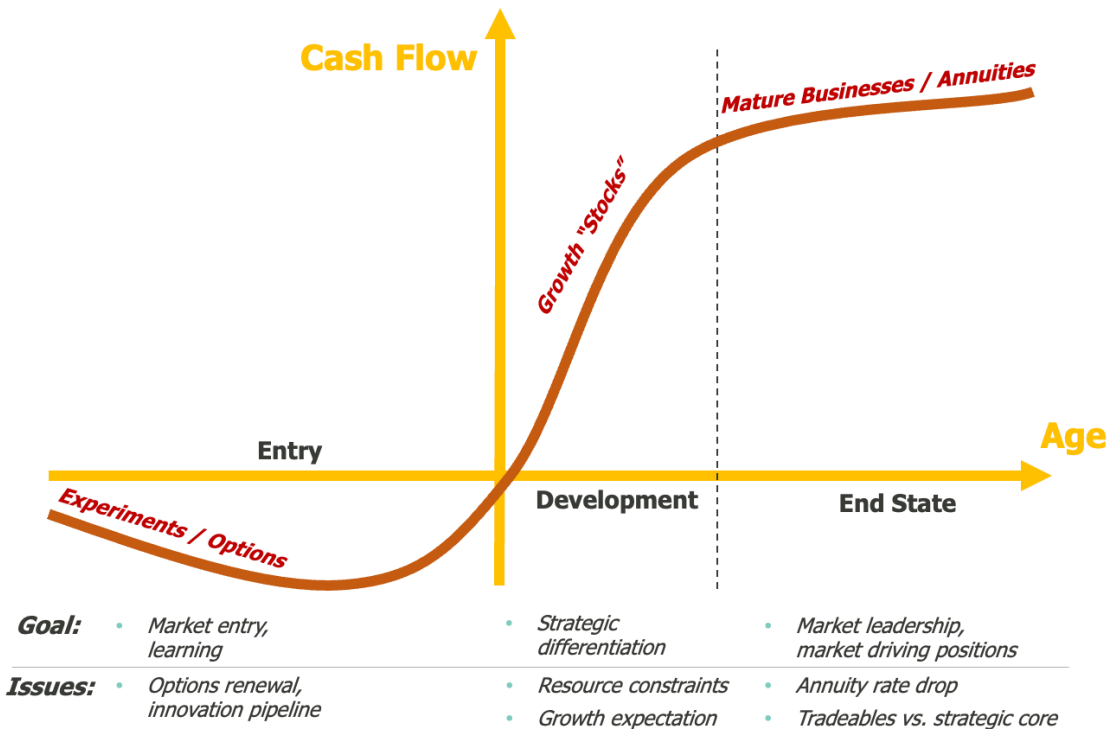
There are so numerous forms of text-to-visual metaphors, and the most common ones are bullet point and tables replacement

1  Text to visual metaphor

Text-to-Visual Metaphor Examples

Visual Illustration of Corporate Business Unit Portfolio Distribution

Business Unit Portfolio Management Strategies in the Form of a Lookup Table or Cheat Sheet



Portfolio Value Creation Lever / Balance	Options	Growth Stocks	Annuities
Margin Plays (Market Discontinuities)	Can we supercharge the upside by buying assets with significant optionality? Which businesses may grow faster than market?	In which sector and geographies can we accumulate assets at the bottom of the cycle?	Which markets will experience precipitous margin decline positions are tradeable?
Strategy Plays (Competitive Discontinuities)	Where are we experimenting to define the next strategic leadership play and which innovations will define future market leaders?	Which markets offer big bang opportunities from leveraging our strategies and where can we redefine the rules of the game in large markets?	Where are we the undisputed market leaders, able to set the terms of trade?
Turnaround Plays (Operational Discontinuities)	Can we enter somewhere advantageously by buying or turning a weakling around?	Where can we roll-up or fix weak competitors?	Which under-performing mature businesses offer the potential for market leadership and are there any mature business units worth fixing?

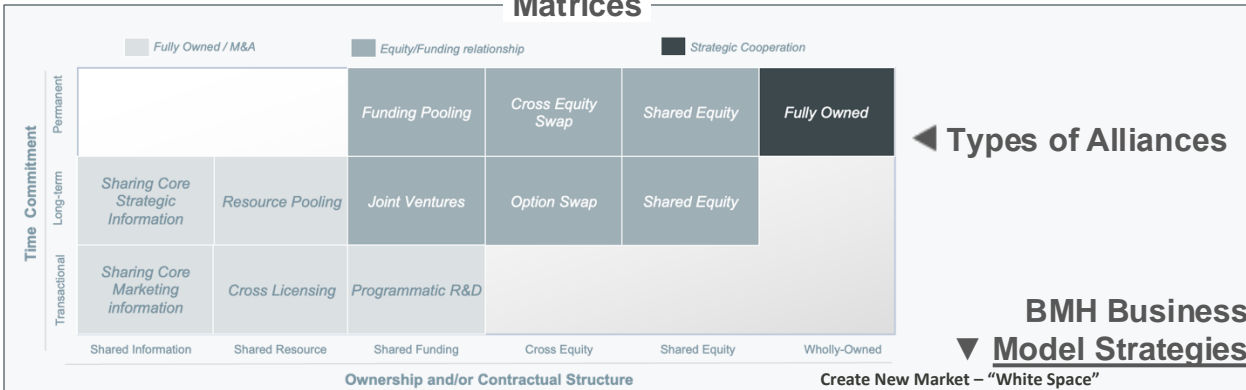
Source: Business Model Hackers; STC Toolkit

Conceptual framework charts are are explanatory charts designed to simplify the illustration of an intellectual or complex concept in a easy to grasp visual

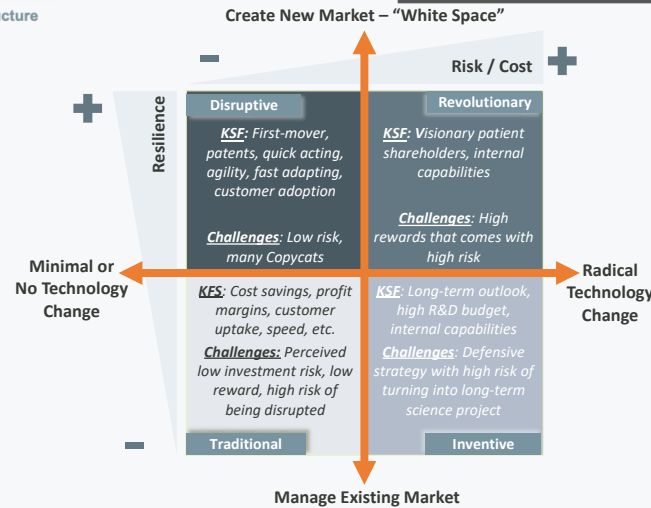
2  **Conceptual Framework charts**

Examples of Popular Conceptual Frameworksc

Matrices



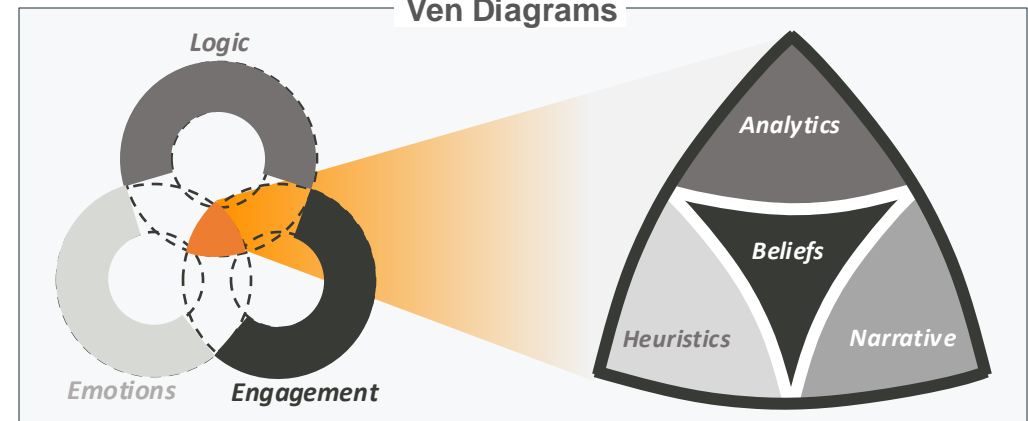
BMH Business Model Strategies



Sliding Scale



Ven Diagrams



Initiatives can be prioritized by adopting a three-step sequential and iterative process across four interdependent criteria

2 Conceptual Framework charts

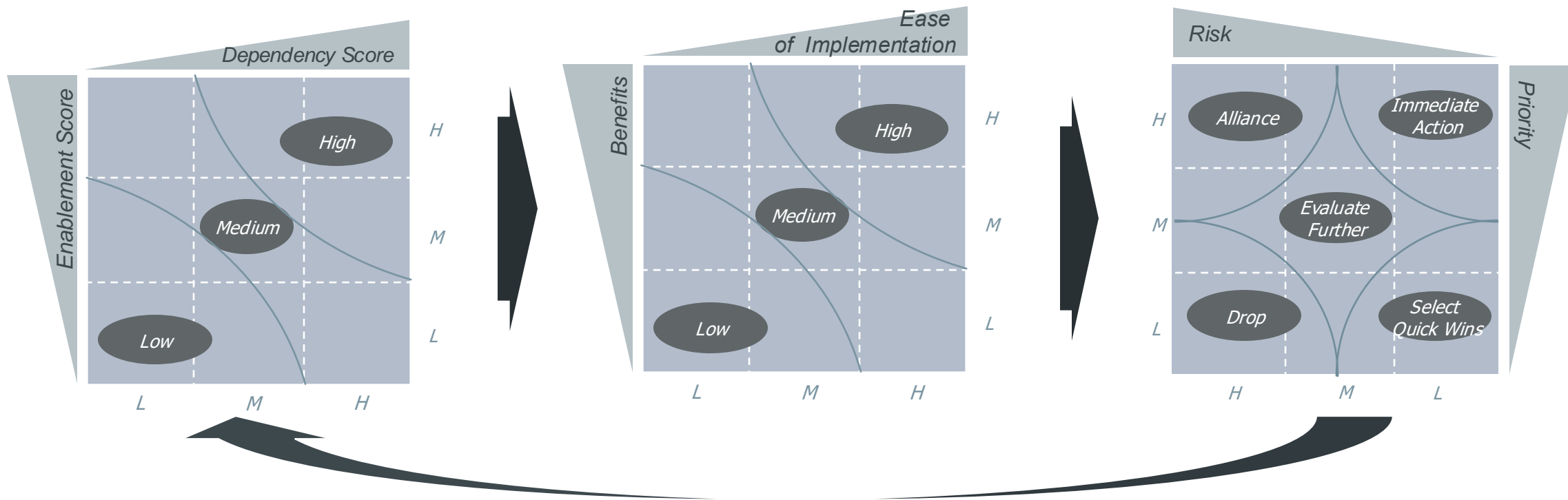
Initiatives Prioritization Framework

ILLUSTRATIVE

I Benefit

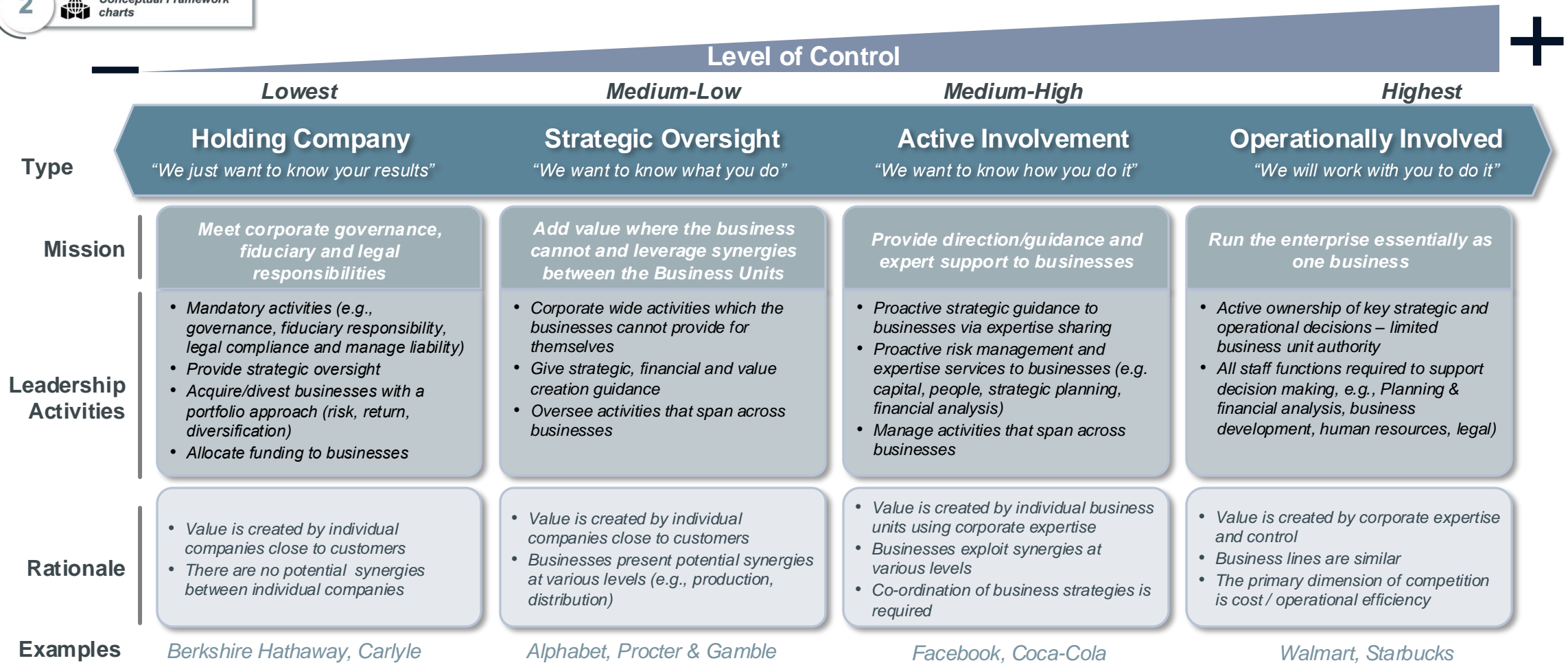
II Risk

III Priority



We define we kinds of operating models for corporate structures, each suited for a different level of control

2  Conceptual Framework charts



The most suitable operating model for Acme may be a hybrid strategy and active involvement model

2  Conceptual Framework charts

Operating Model Selection

Dimension	Characteristics	Operating Model Options				Characteristics	Rational
		Holding Company	Strategy & Oversight	Active & Selective Involvement	Operationally Involved		
Linkages	Value Proposition	Different for each business	←	→	→	Same or very consistent	
	Resources	Unique to each business	←	→	→	Commingled	
	Risks	Containable within a business	←	→	→	Likely to affect entire company	
Environment	Environmental Certainty	Volatile and Uncertain	←	→	→	Stable	
	Strategic Agenda	Differs by business	←	→	→	Same across business	
Structure	Financial Reporting	Clear and unambiguous	←	→	→	Unclear and intertwined	
	Number of Businesses	Multiple	←	→	→	One	
Style	President Style	Indirect role	←	→	→	Direct Role	
	Management Style	Delegated	←	→	→	Centralized	

Redacted for Client Confidentiality

A number of challenges and issues were identified across 6 of the 8 key performance factors

2 Conceptual Framework charts

Gap Assessment Branch Performance

Assessment Basis
■ Hypothesis²
■ Fact or Analysis

Performance Lever	Performance ¹	Rationale
1 Customer Loyalty	1 2 3 4 5	
2 Direct Response Marketing	1 2 3 4 5	
3 Product Strategy	1 2 3 4 5	
4 Pricing Strategy	1 2 3 4 5	
5 New Customer Acquisition	1 2 3 4 5	
6 Branch Growth Strategy	1 2 3 4 5	
7 Competitive Intelligence	1 2 3 4 5	
8 Personalization Strategy	1 2 3 4 5	



1. Performance is relative against "best in class"; 2. Hypotheses are preliminary and are awaiting validation with quantitative survey
Source: Business Model Hackers; Team analysis

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Most data analysis in consulting relies on common sense, but sometimes requires you to go a step further and use more advanced methods

Examples of Methods Used in Analysis

Technique Name	Fermi Thinking	Data Triangulation	The 80/20 Rule and the Pareto Principle	Sensitivities and Scenarios
Origin	Named after physicist Enrico Fermi	Derived from Latin, "Triangulum"	Named after the civil engineer Wilfredo Pareto	Often used in financial modeling and simulations
Description	<ul style="list-style-type: none"> An estimation techniques adopted for problems are extreme and cannot be solved mathematically or scientifically The solutions involve adopting the answers as an estimate that is an order of magnitude. The Fermi estimation gives a quick, simple way to obtain this frame of reference for what might reasonably be expected to be the answer 	<ul style="list-style-type: none"> When sourcing data, it's often the case that different data sources have conflicted data sets Triangulation is a metaphorical reference to validating the accuracy of data points by examining the data from different angles and by cross-checking the sanity of each data source and how it was obtained 	<ul style="list-style-type: none"> Pareto distribution is easily modeled in a spreadsheet and graphed on a powerful but simple two-dimension graph visual. It reveals major insights in large datasets and complex problems, systems and programs. It's also a simplified visual of power law distribution It's a good rule of thumb to assess and determine the 20% area of focus or quick wins 	<ul style="list-style-type: none"> One of the areas to test when validating hypotheses with data are the assumptions made to lead to the conclusion that the hypothesis is valid Sensitivities and scenarios allow the stress testing of how variances in assumptions can affect your conclusion and thus the confidence in the proof of your hypothesis
Use Case Examples	Used to check if data is within a reasonable range	Use to validate and more accurately select data sets from multiple sources	Used to understand structure of dependent datasets or for prioritization and focus	Used to stress test the robustness of forecasts, conclusions, claims, etc.

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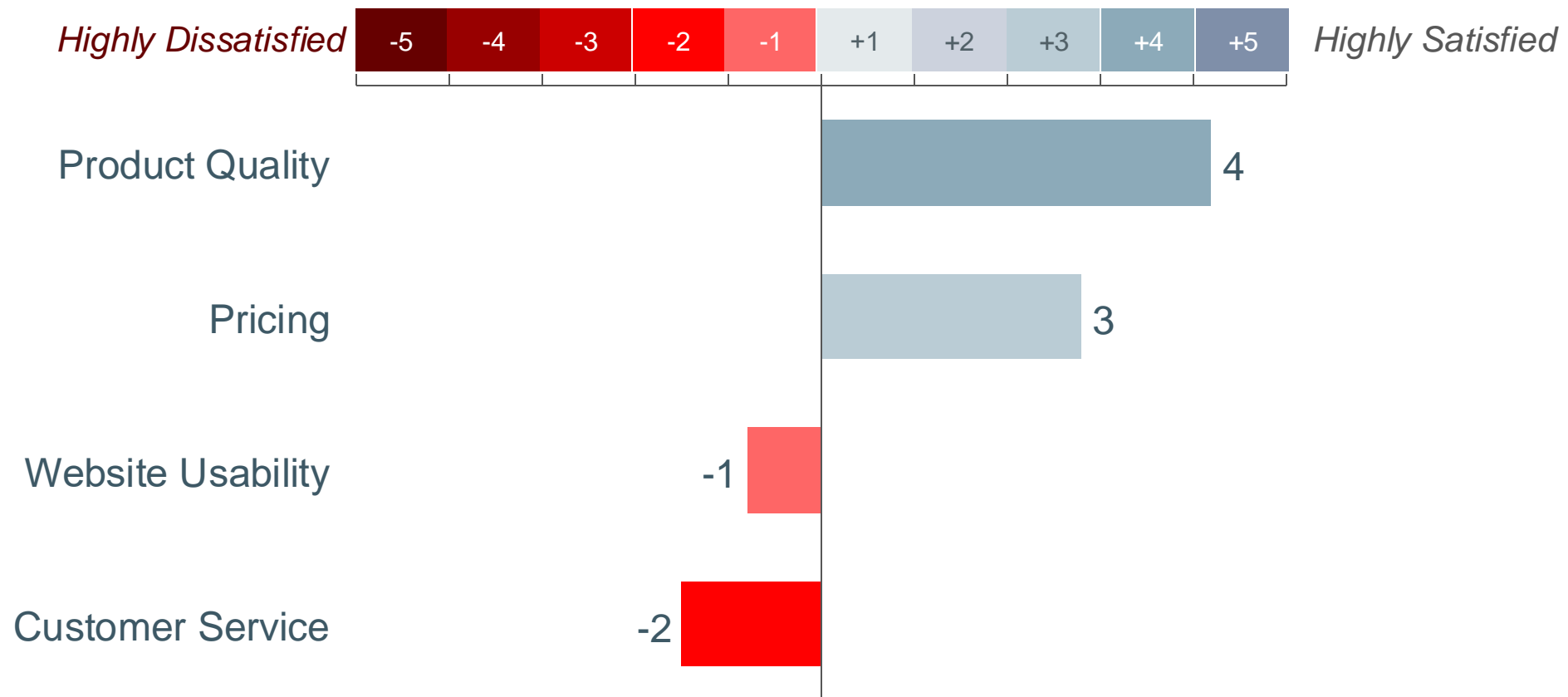
Chapter 4: Quantitative Charts Examples

Chapter 5: Next Steps and Resources

Flag Charts – Diverging Bar Chart

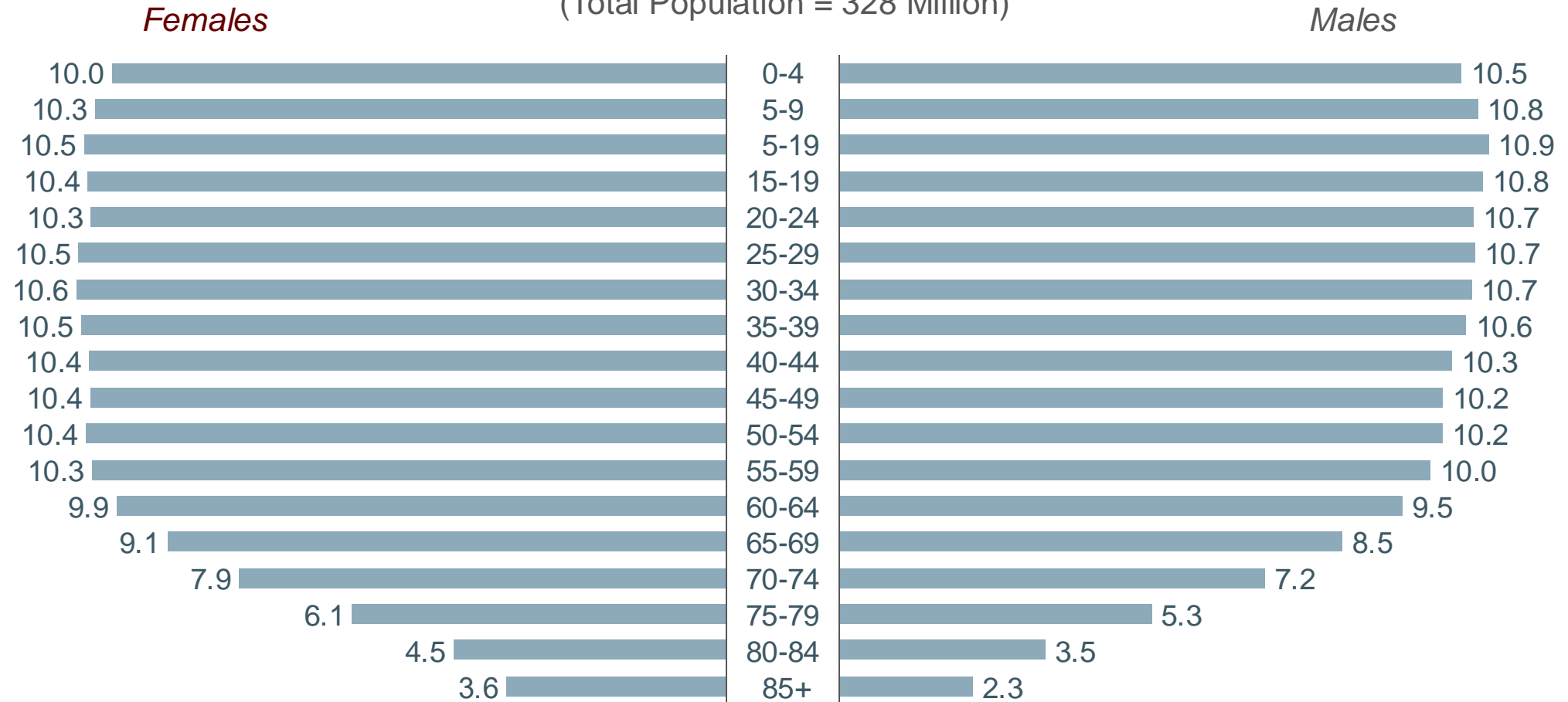
Customer Satisfaction Survey Results

(Number of Respondents = 500)

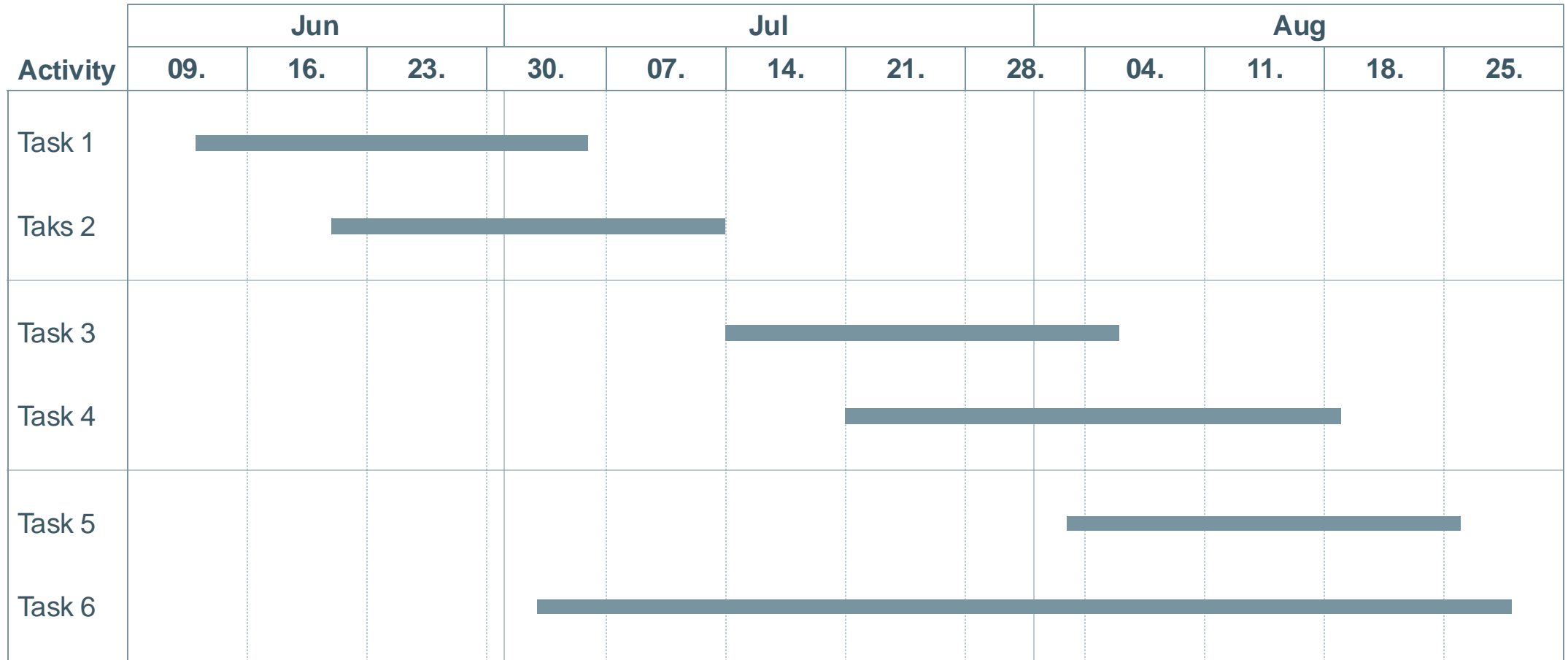


Flag Chart – Tornado or Butterfly Chart

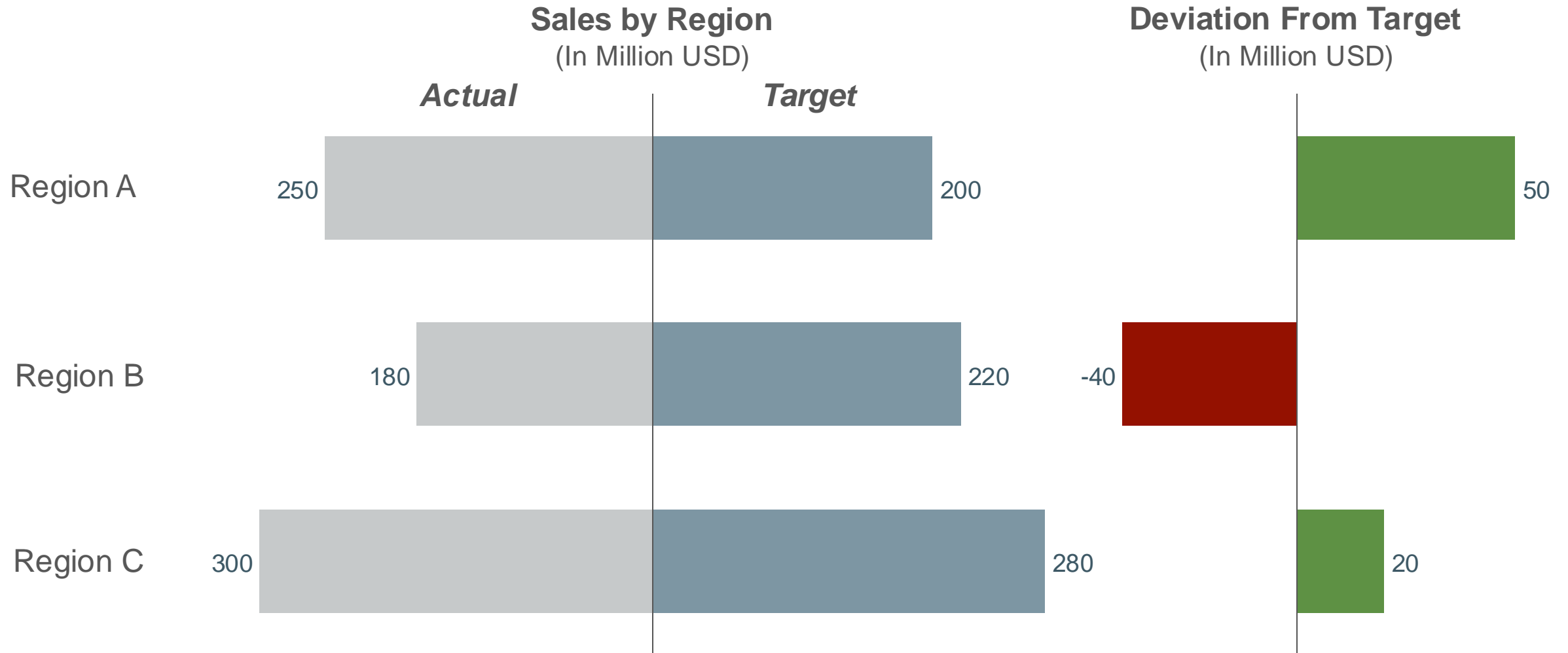
Population Breakdown
2024, In Million
(Total Population = 328 Million)



Flag Charts – Range Visualization

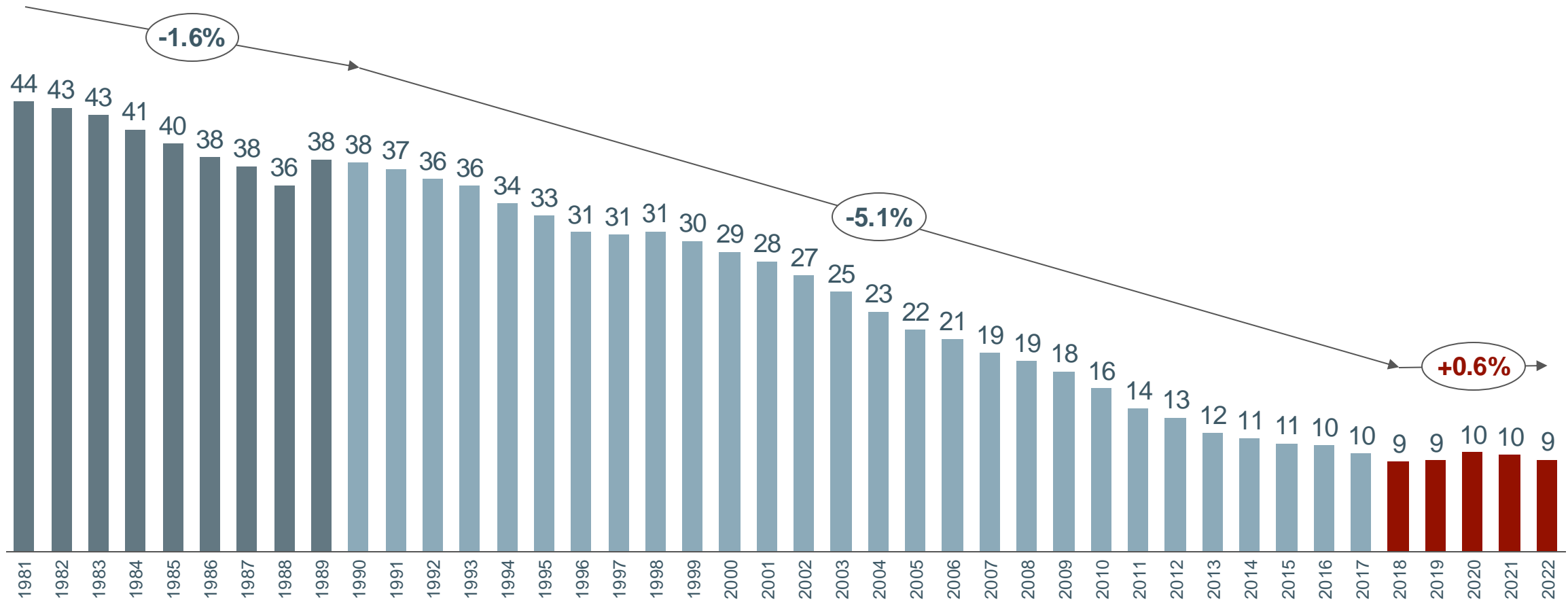


Flag Charts – Deviation and Ranking



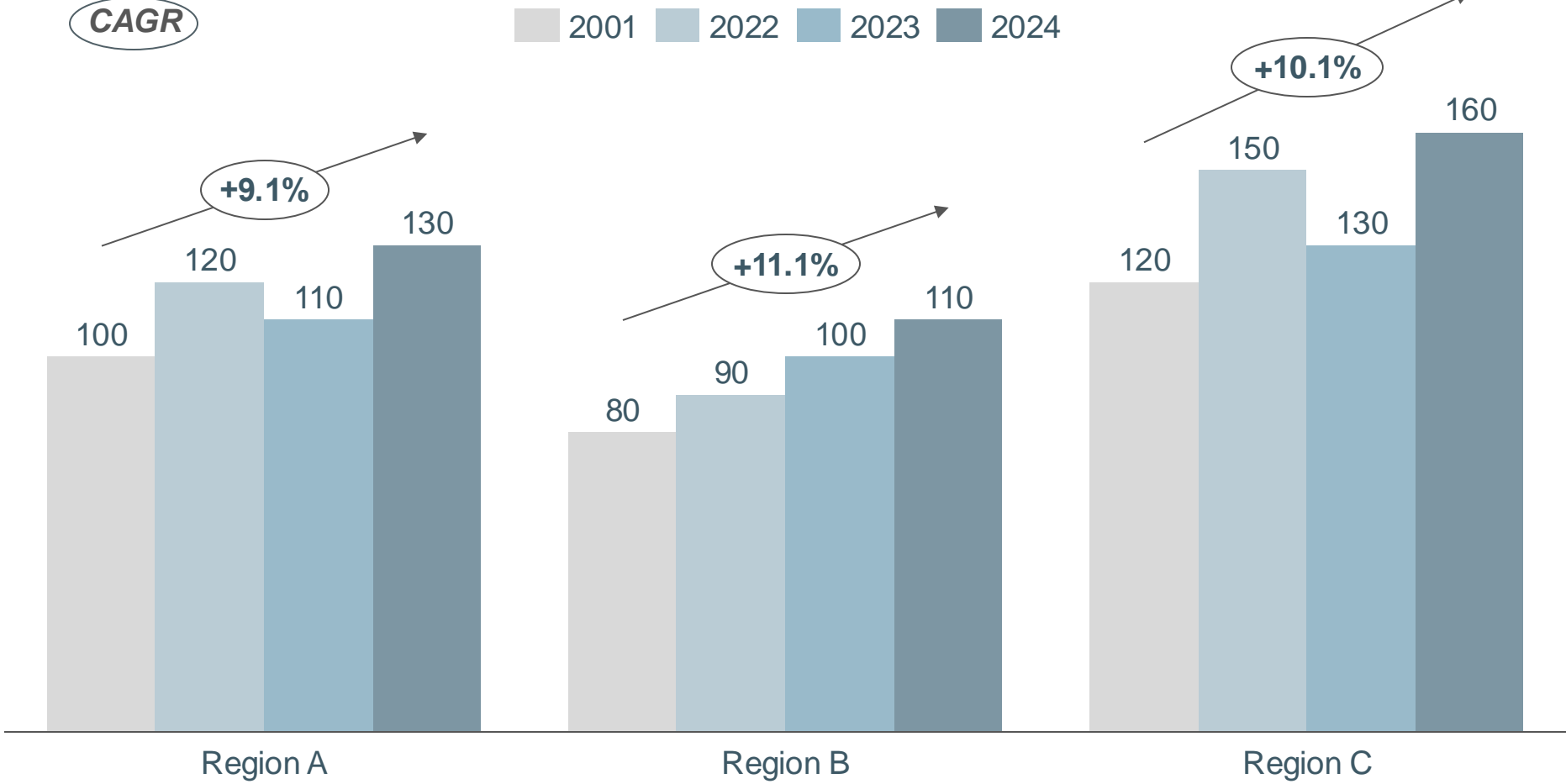
Column Charts – Time Series

Poverty Headcount Ratio at \$2.15 (2017 PPP) a Day As % of Total World Population



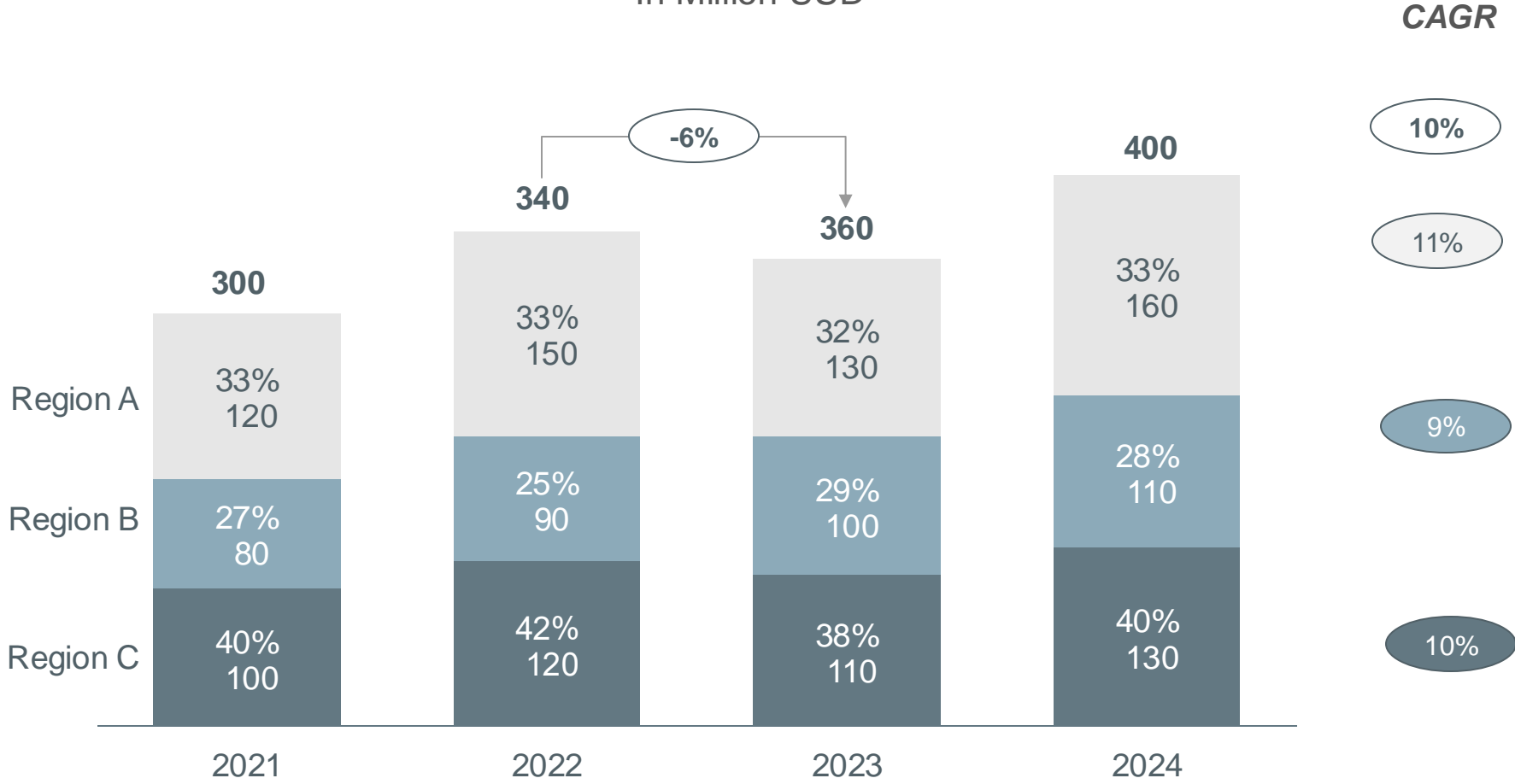
Quarterly Sales By Region

In Million USD



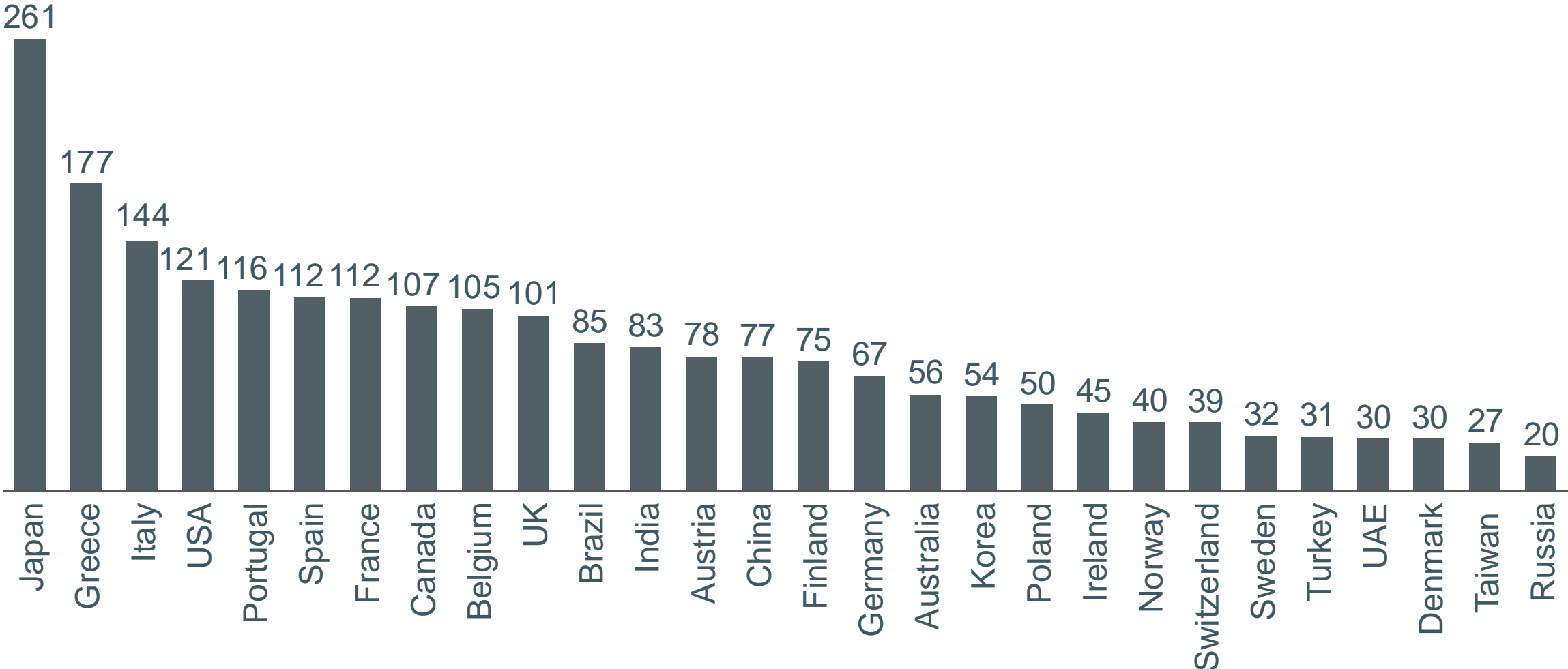
Quarterly Sales By Region

In Million USD

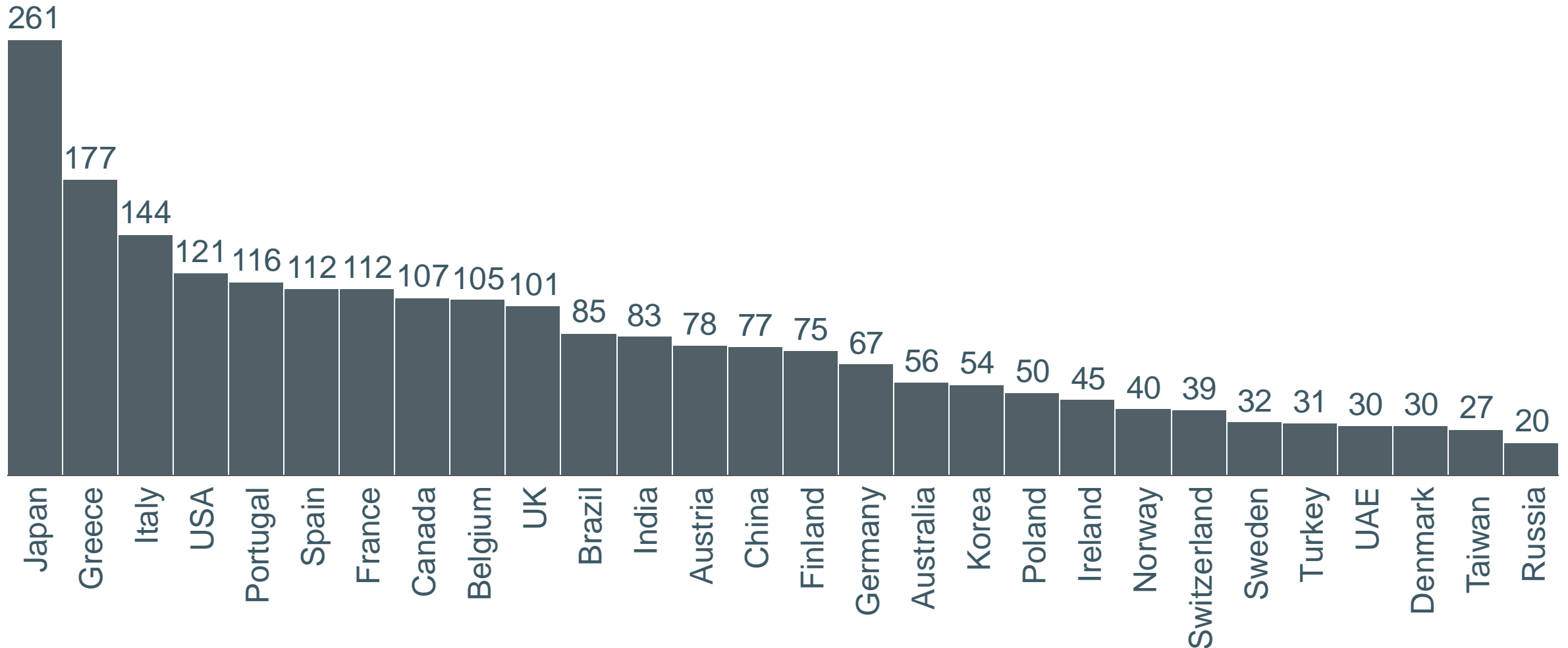


Debt to GDP

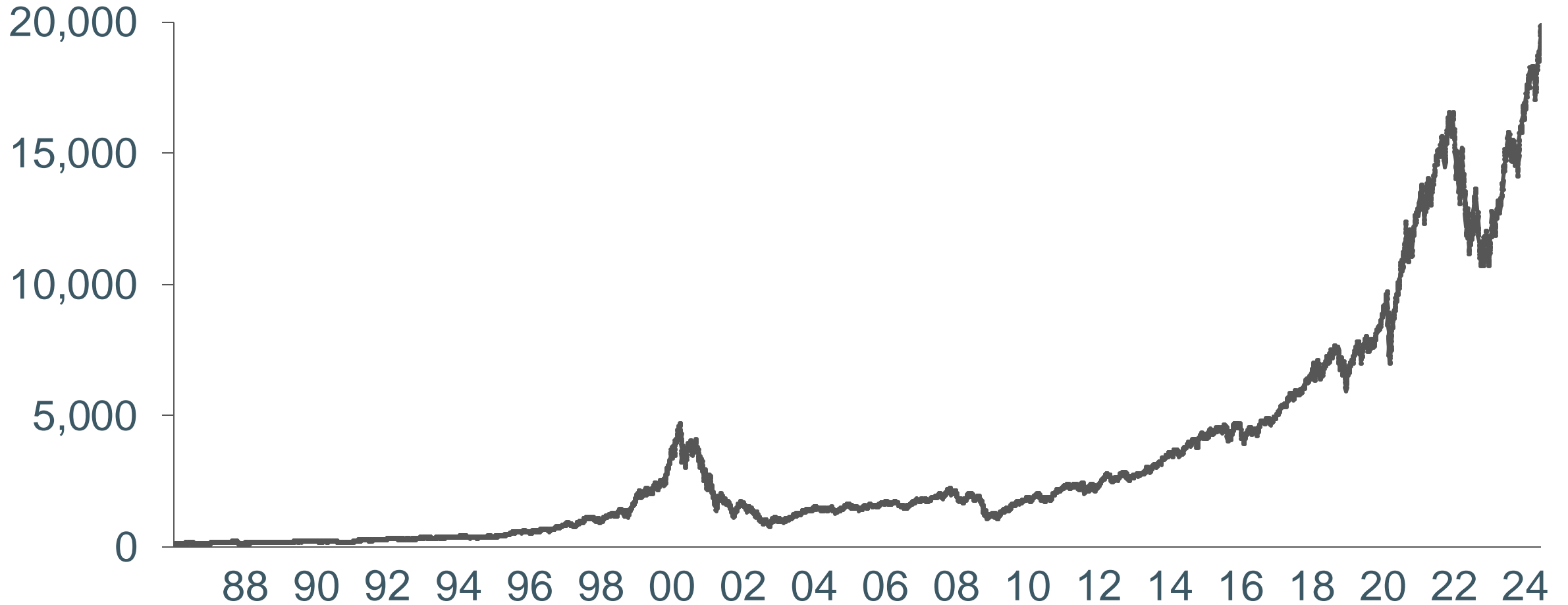
In %, 2022



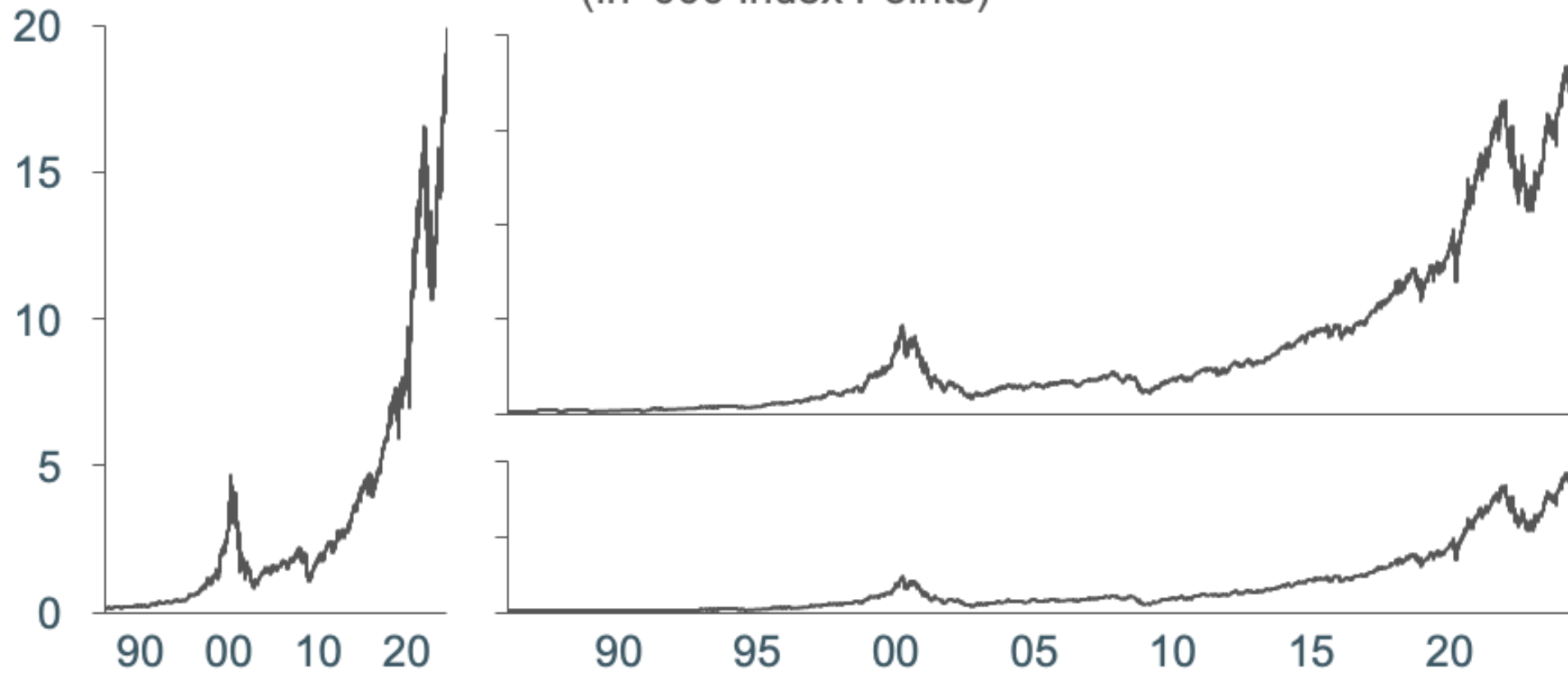
General Government Debt to GDP In %, 2022



NASDAQ 100 Index

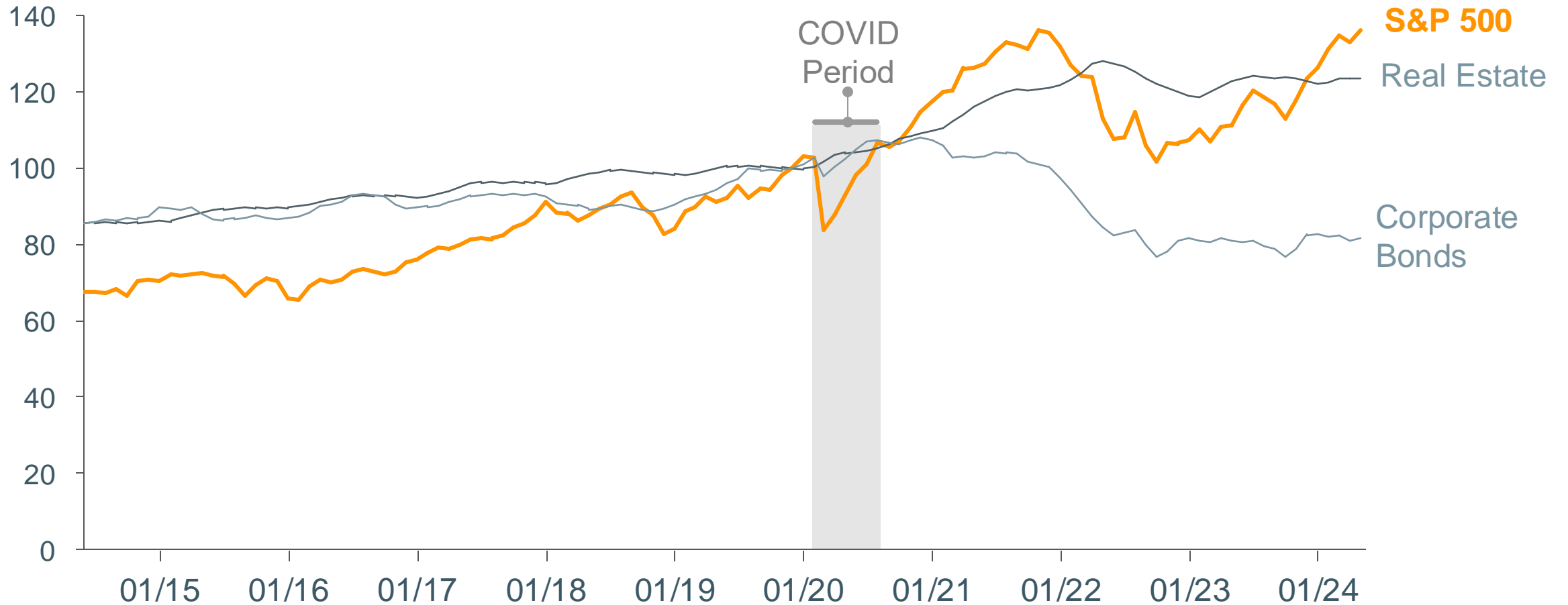


NASDAQ 100 Index (In '000 Index Points)

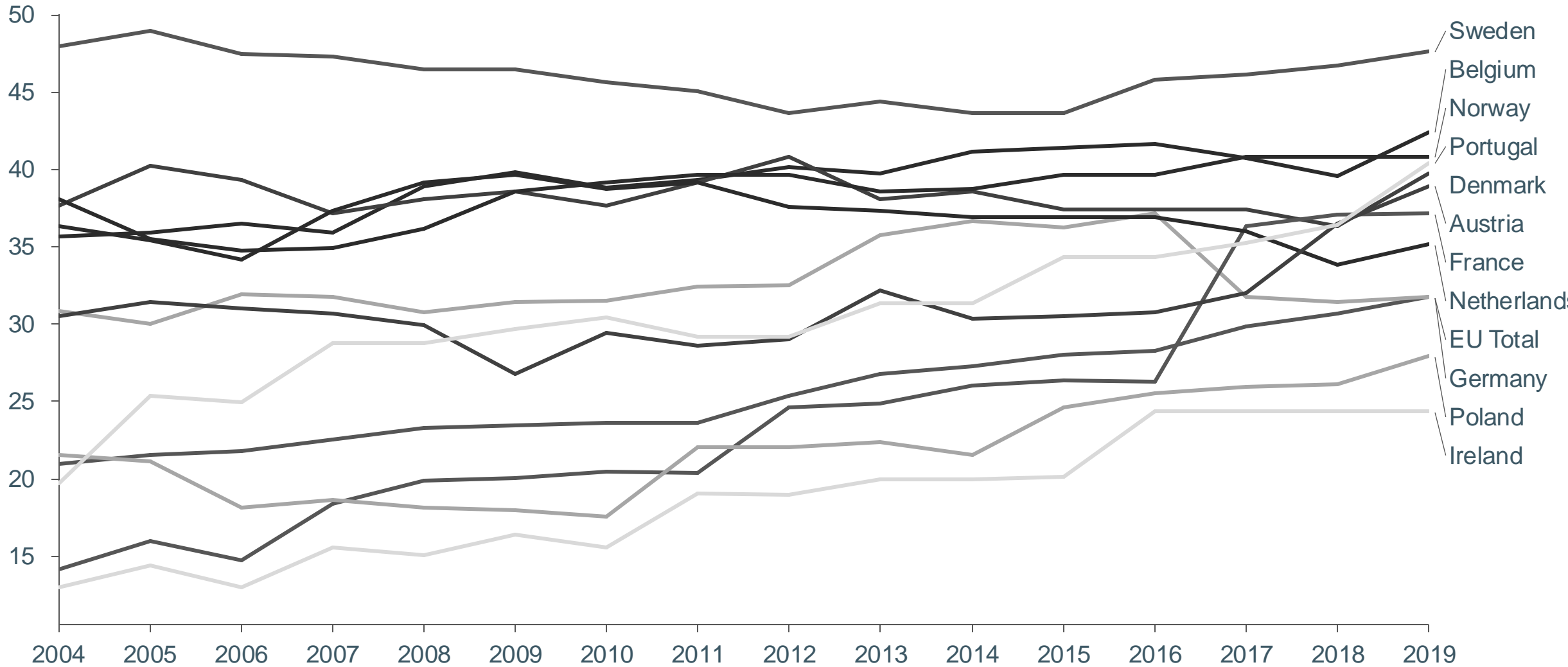


Real Returns on Major Asset Classes (In %)

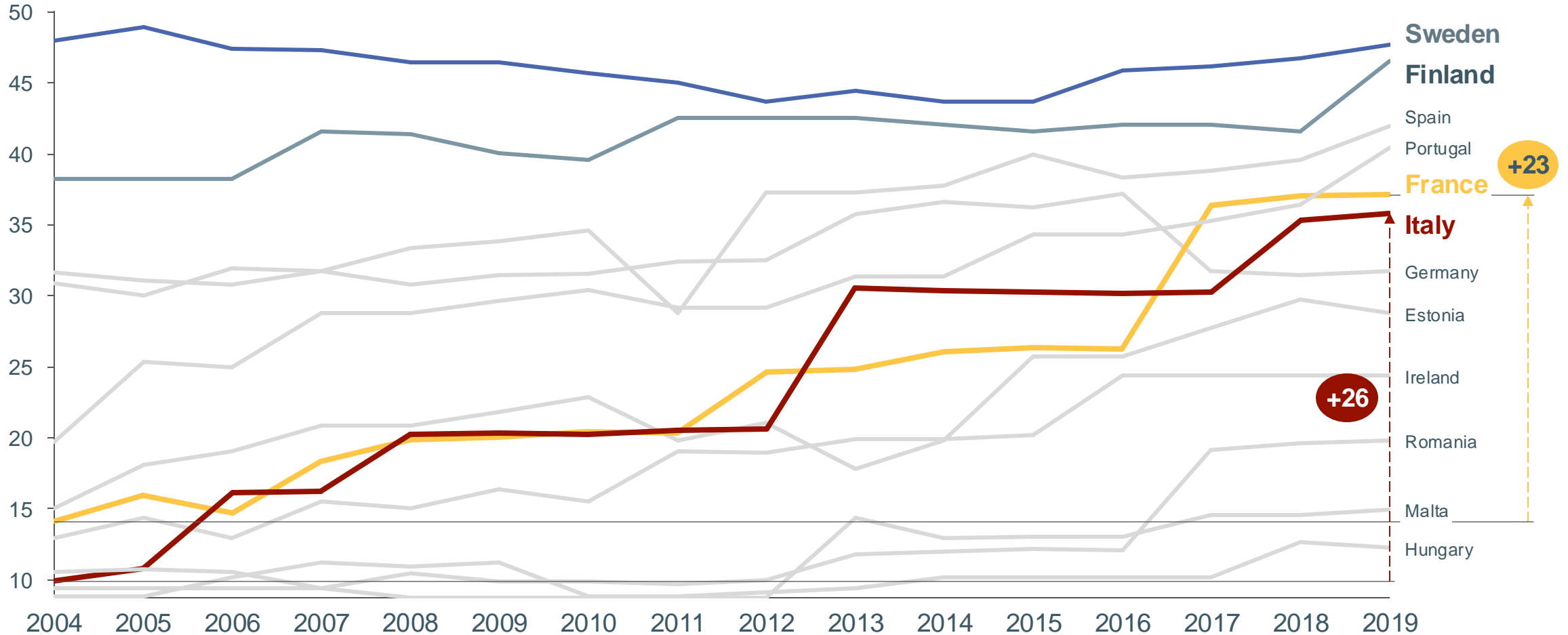
Q1-2020 = Baseline



Parliamentary Seats Held by Women (In %)

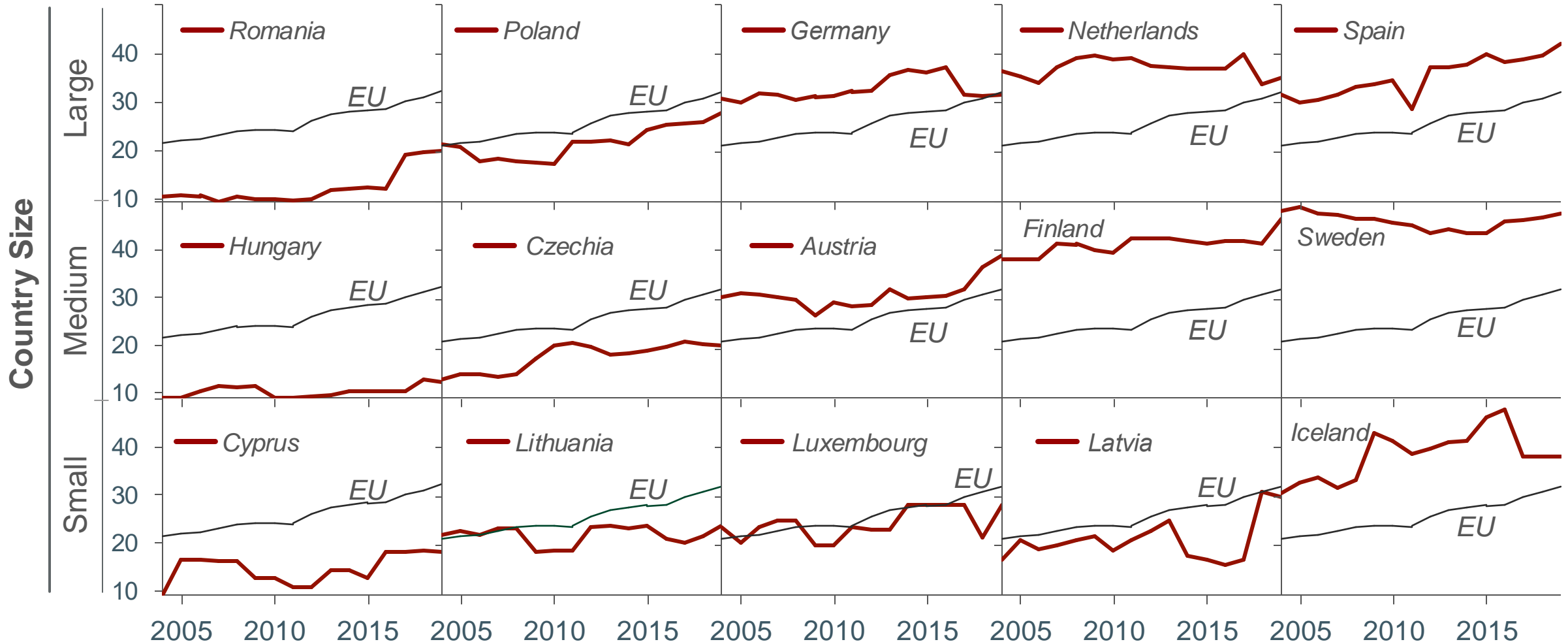


Parliamentary Seats Held by Women (In %)



Parliamentary Seats Held by Women By Country Vs. EU Total

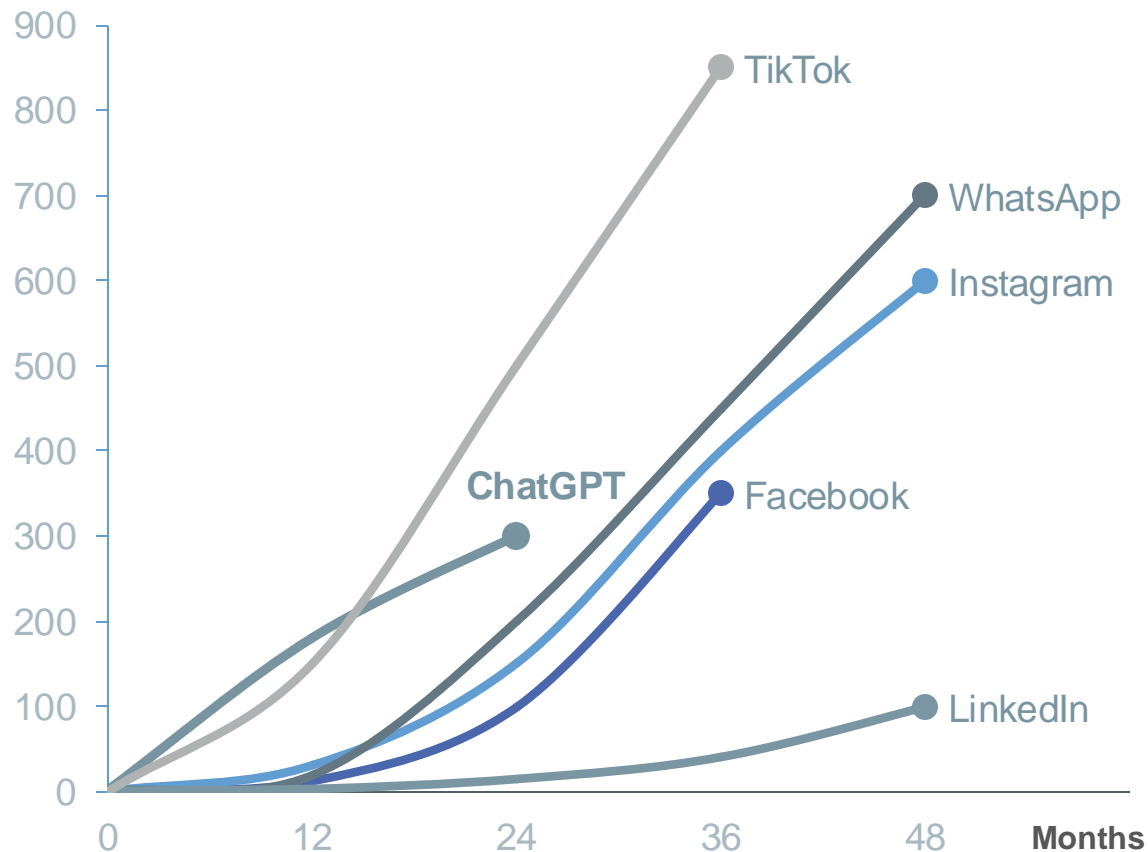
2004-2019, In %



ChatGPT was the most viral app, surpassing 150 million active users within a year of launch

Monthly Active Users Since App Launch

(In Millions)



Monthly Growth Patterns

Hyper-Viral

(> 50% monthly growth, < 10 months to 100M)

ChatGPT	54%
TikTok	52%

Fast Growth

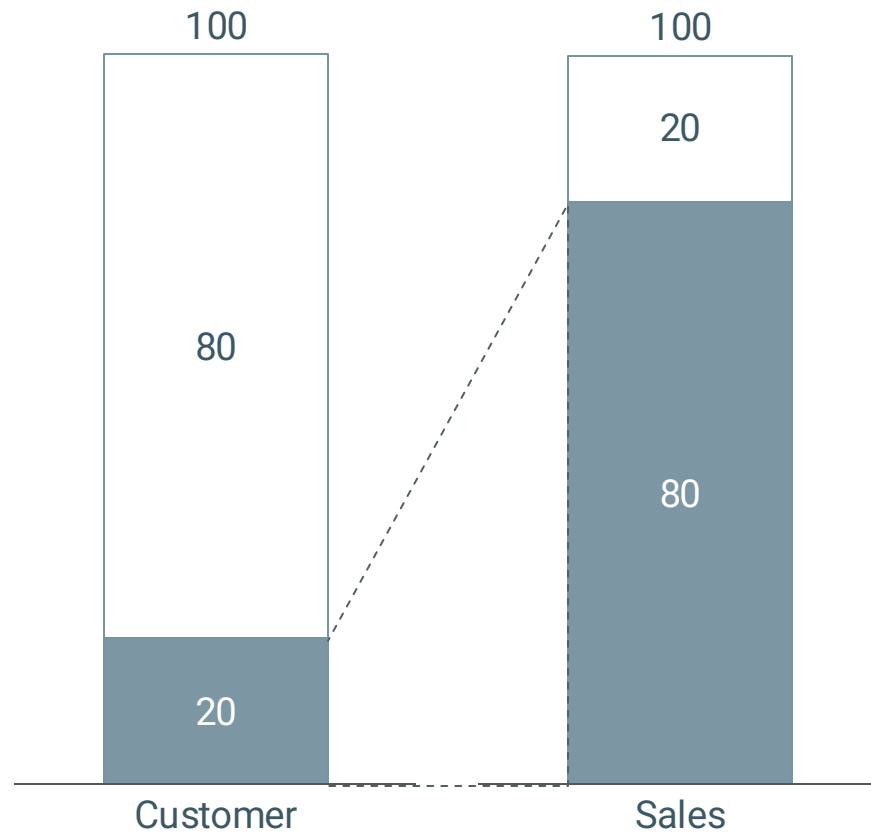
(25-35% monthly growth, 15-20 months to 100M)

Instagram	33%
WhatsApp	28%
Spotify	28%

Steady Growth

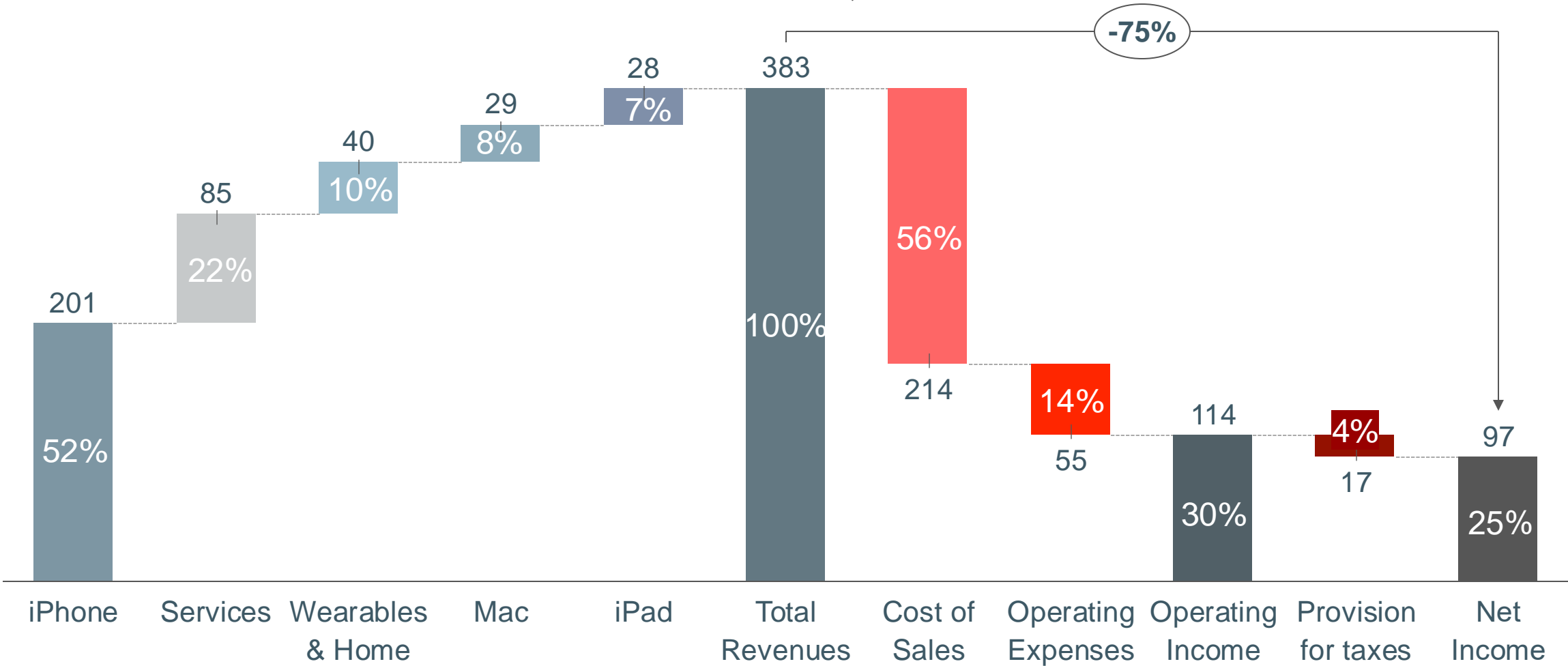
(< 25% monthly growth, > 24 months to 100M)

Facebook.	23%
LinkedIn.	20%
Netflix	12%

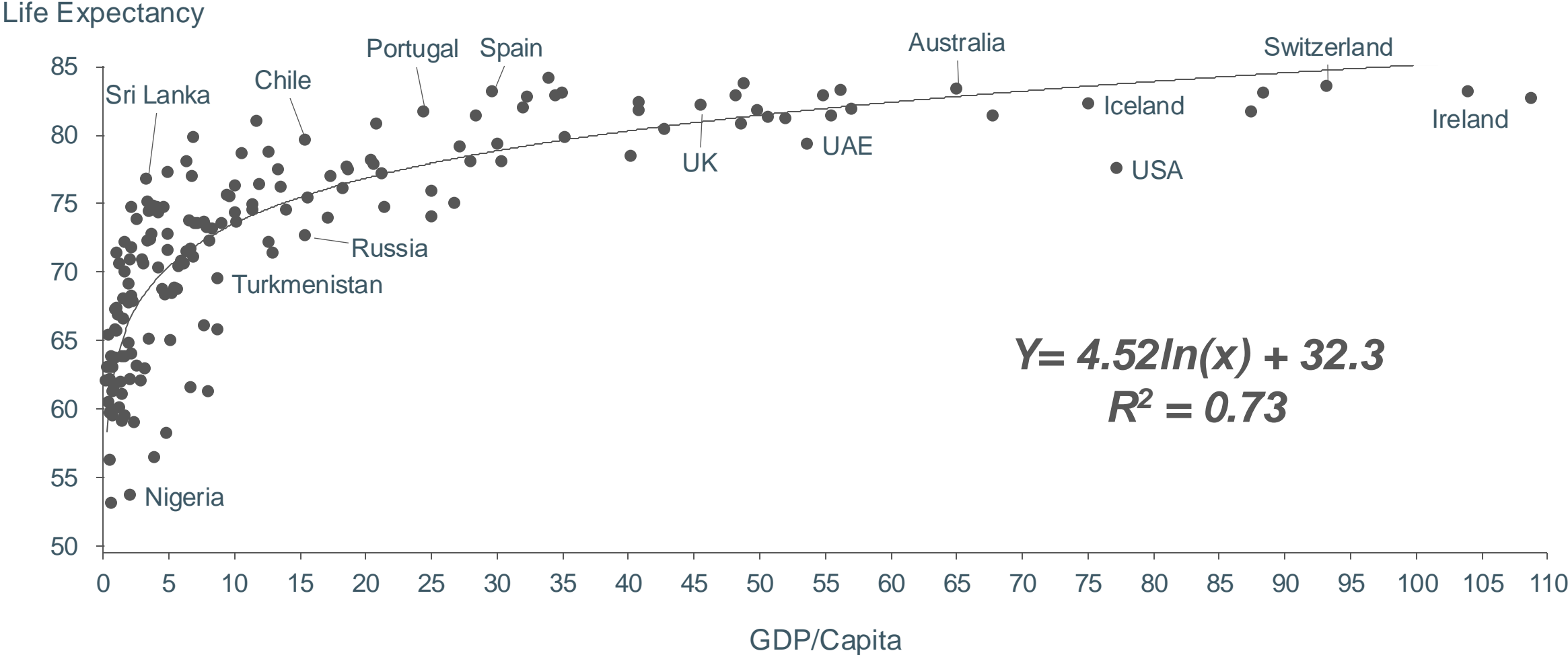


Apple Income Statement

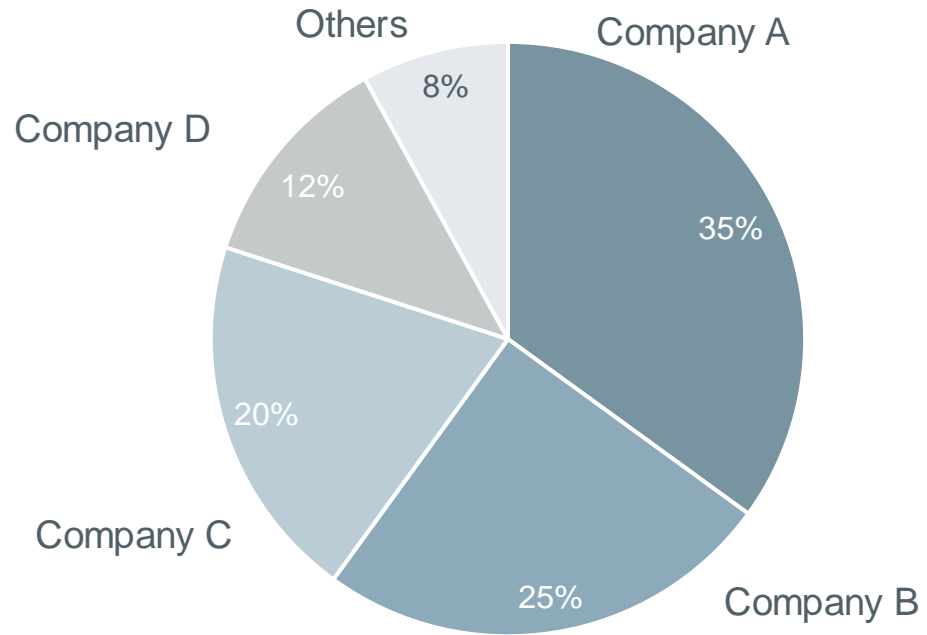
In USD Billion, 2023



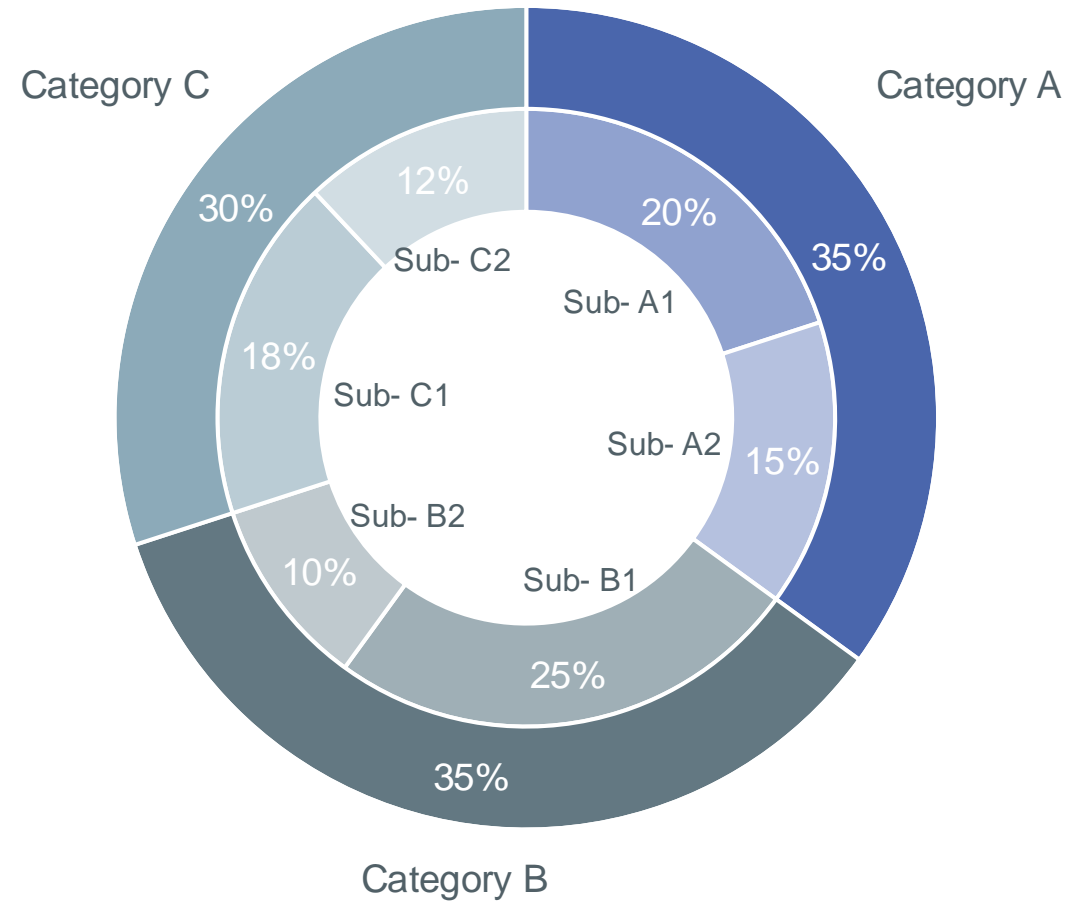
Relationship of GDP Per Capita to Life Expectancy (2022)



Product Market Share

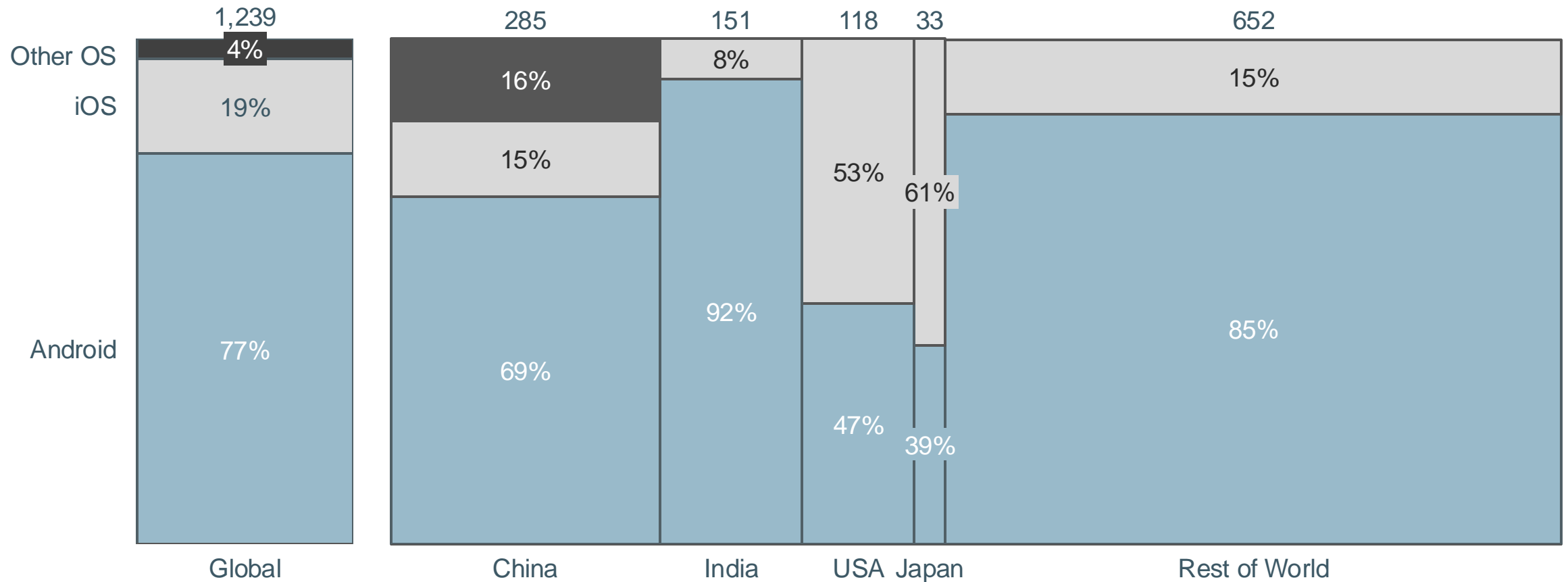


Product Breakdown By Category and Sub-Category

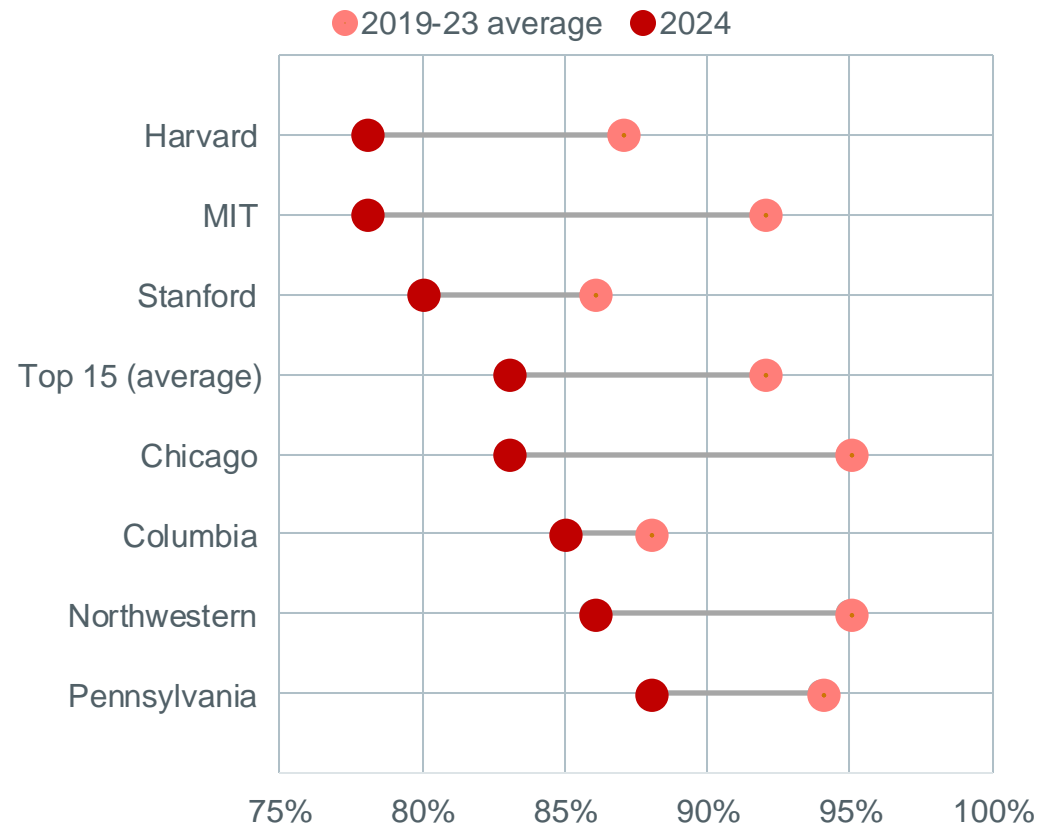


Global Smartphone Sales Breakdown

In Million Units Sold, 2024



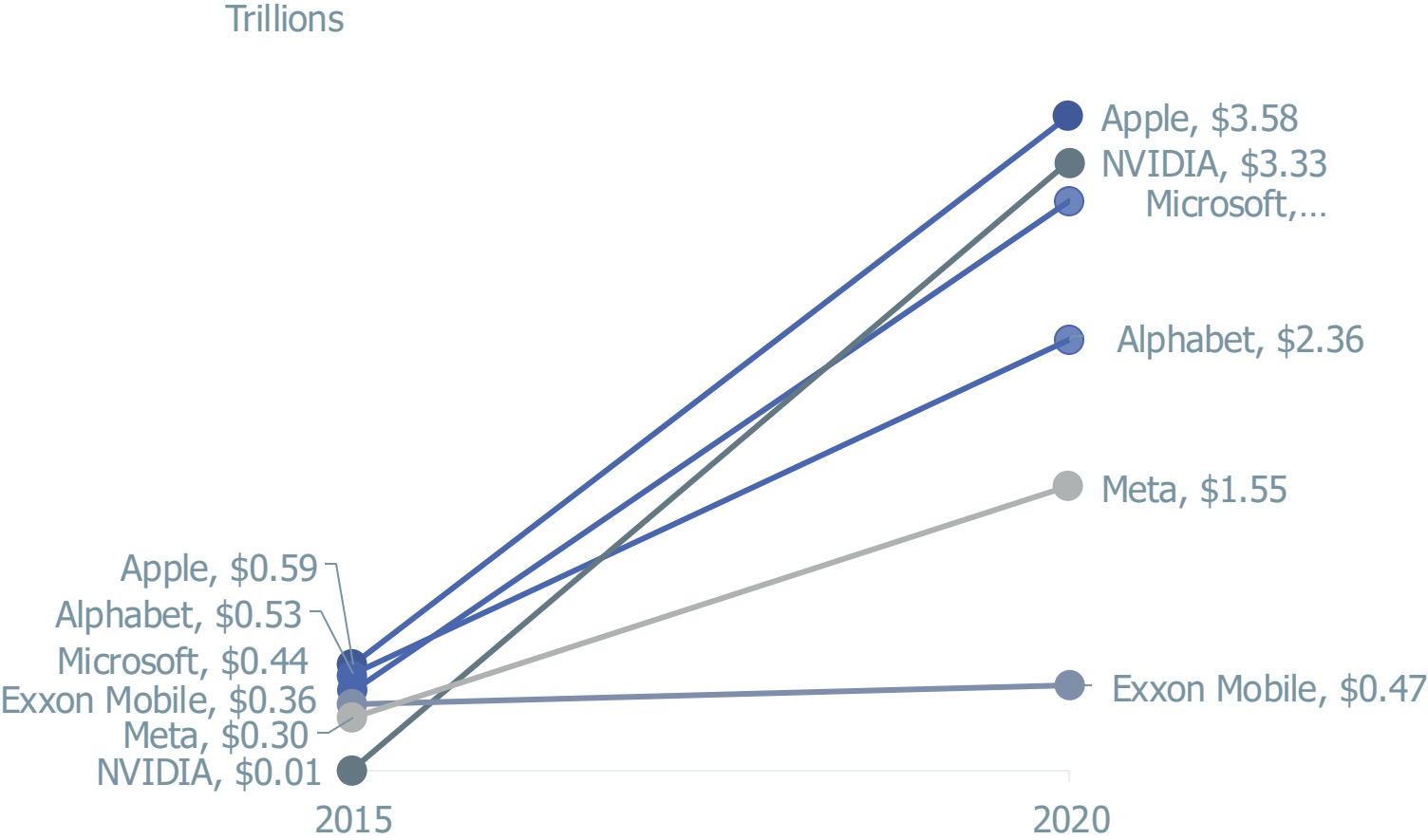
Top Business Schools Graduates Accepting Offers Within 3 Months (%)



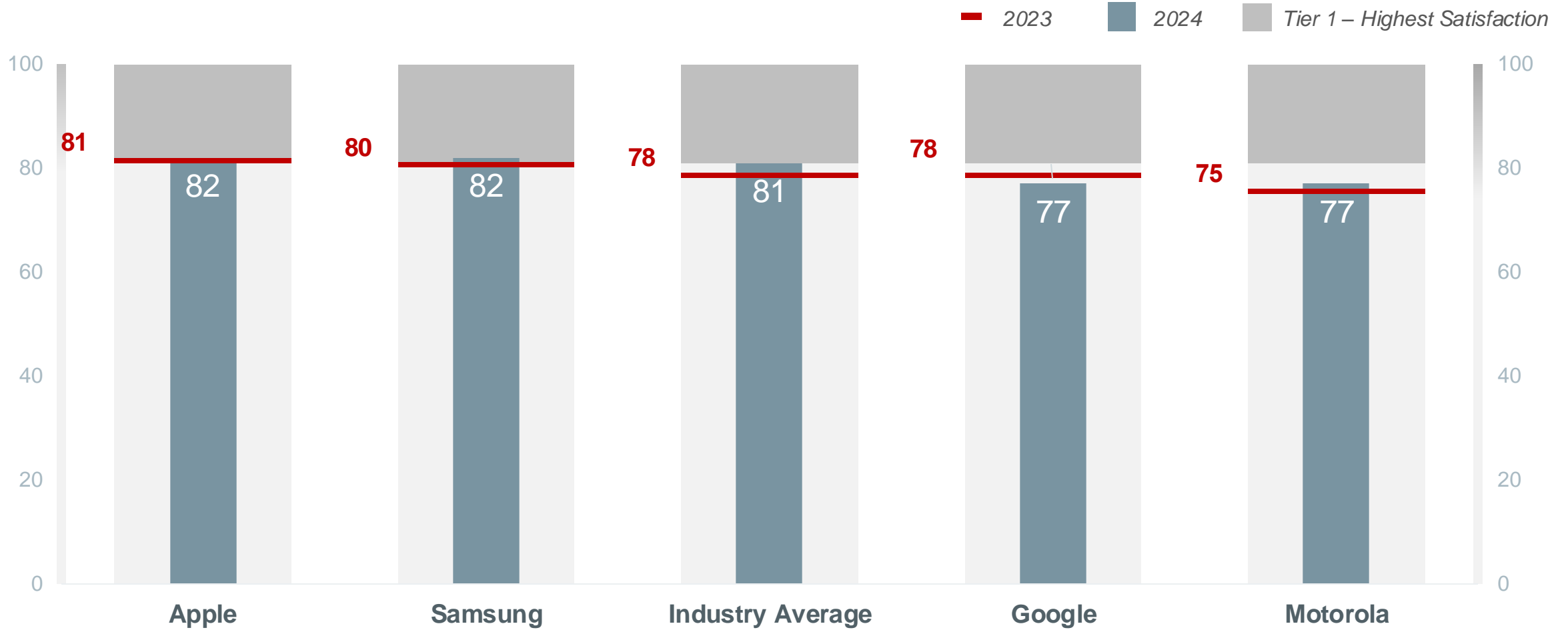
*Excludes those who become entrepreneurs or return to school

Source: US News & World Report; Business Schools Employment Reports; The Economist Analysis

Market Cap Change for Selected Stocks



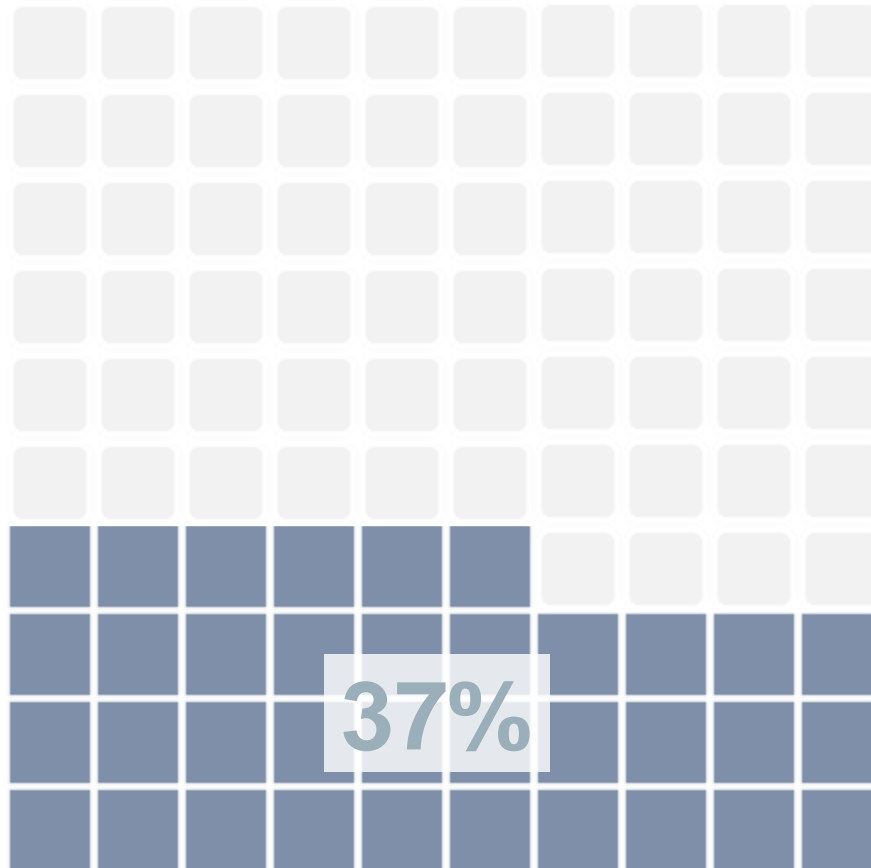
American Customer Satisfaction Index (ACSI) for Smartphones



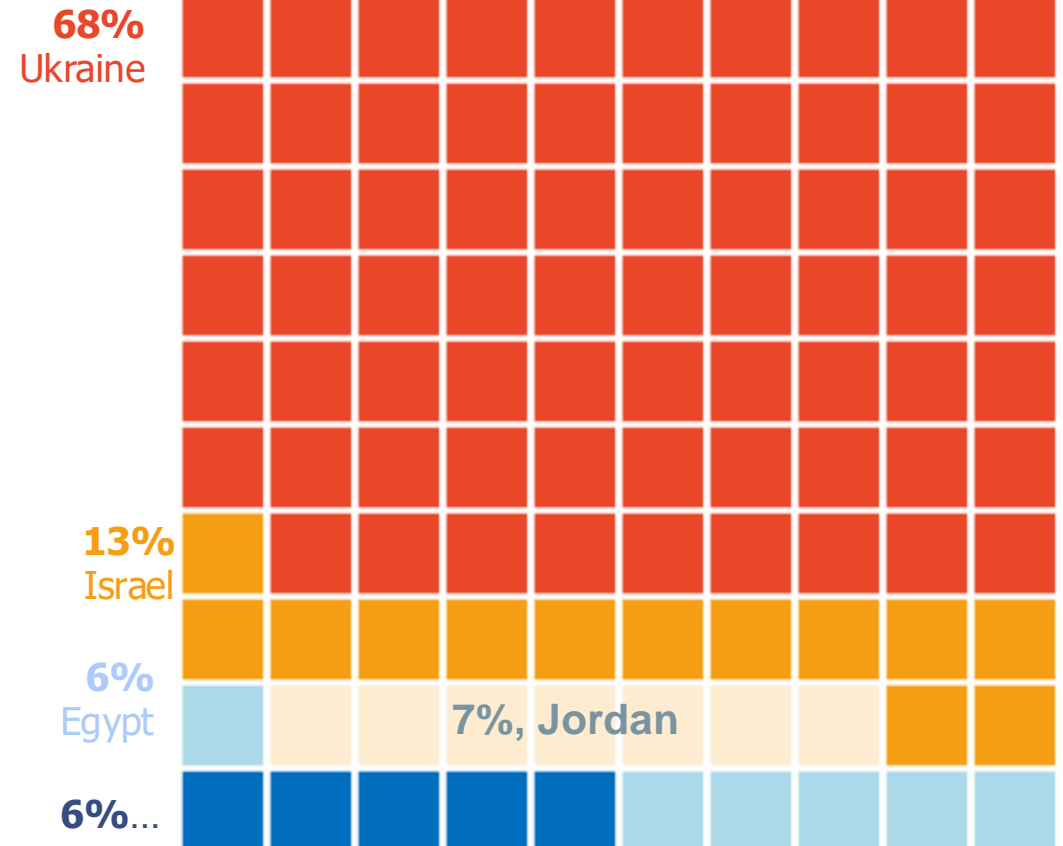
In 2023, over a third of US foreign aid went to the top 5 countries receiving aid from the US

US Foreign Aid (2023)

Top 5 Aid Recipients (100% = \$68 Billion)



Breakdown of Top 5 Aid Recipients (100% = \$24 Billion)

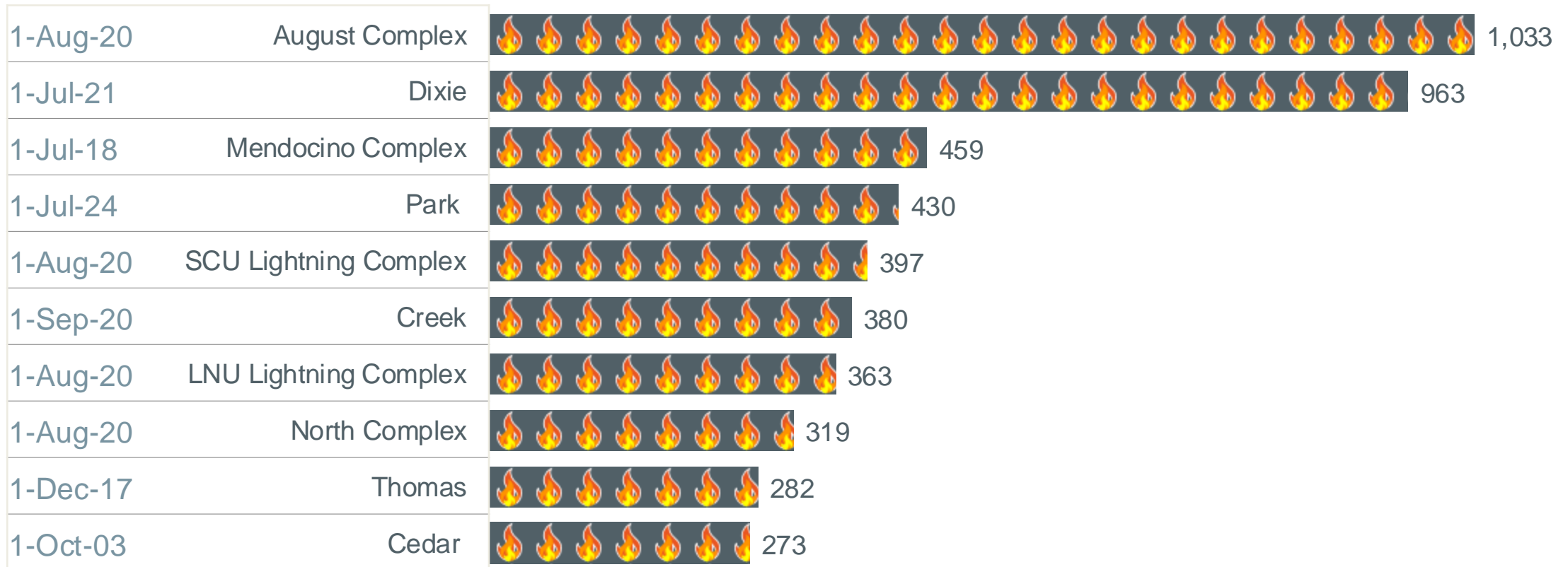


Source: ForeignAssistance.gov

Nine out of the ten largest California wildfires occurred in the last five years


California 10 Largest Wildfires

(2017-2024, In '000 Acres)



Seven out of the eight largest wildfires in California occurred in the last four years

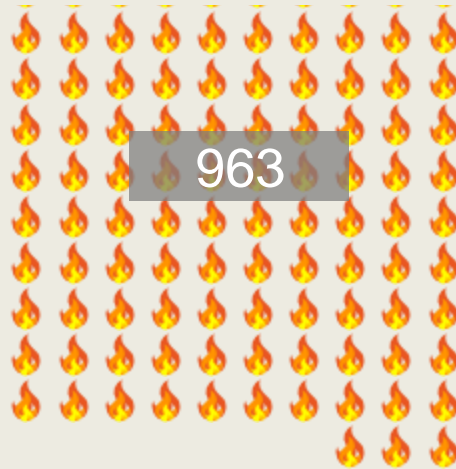
California 8 Largest Wildfires (2008-2024, In '000 Acres)

 ~10,000 acres

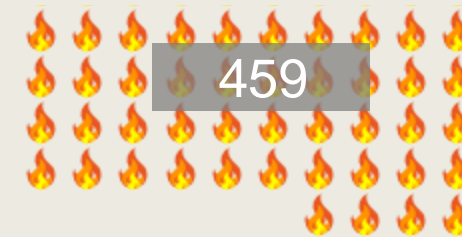
August Complex
(08/20)



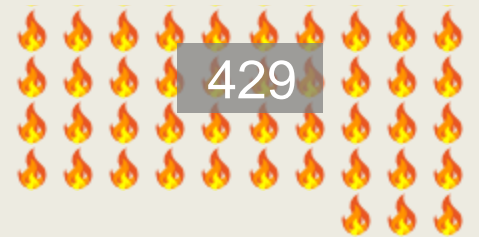
Dixie
(07/21)



Mendocino Complex
(07/18)



Park
(07/24)



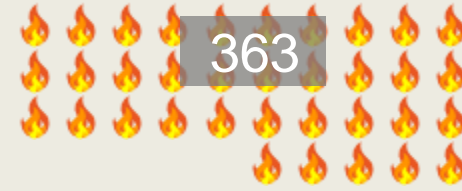
SCU Lightning Complex
(08/20)



Creek
(09/20)



LNU Lightning Complex
(08/20)



North Complex
(08/20)



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 ~10,000 acres

August Complex
(08/20)



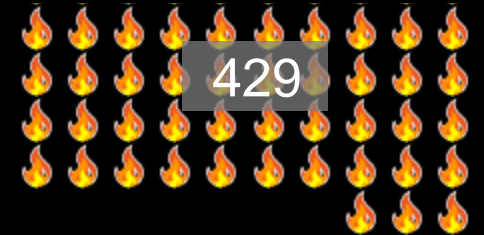
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(08/20)



Creek
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LNU Lightning Complex
(08/20)



North Complex
(08/20)



Agenda

Introduction

Chapter 1: Getting Started with StoryTelling Charts

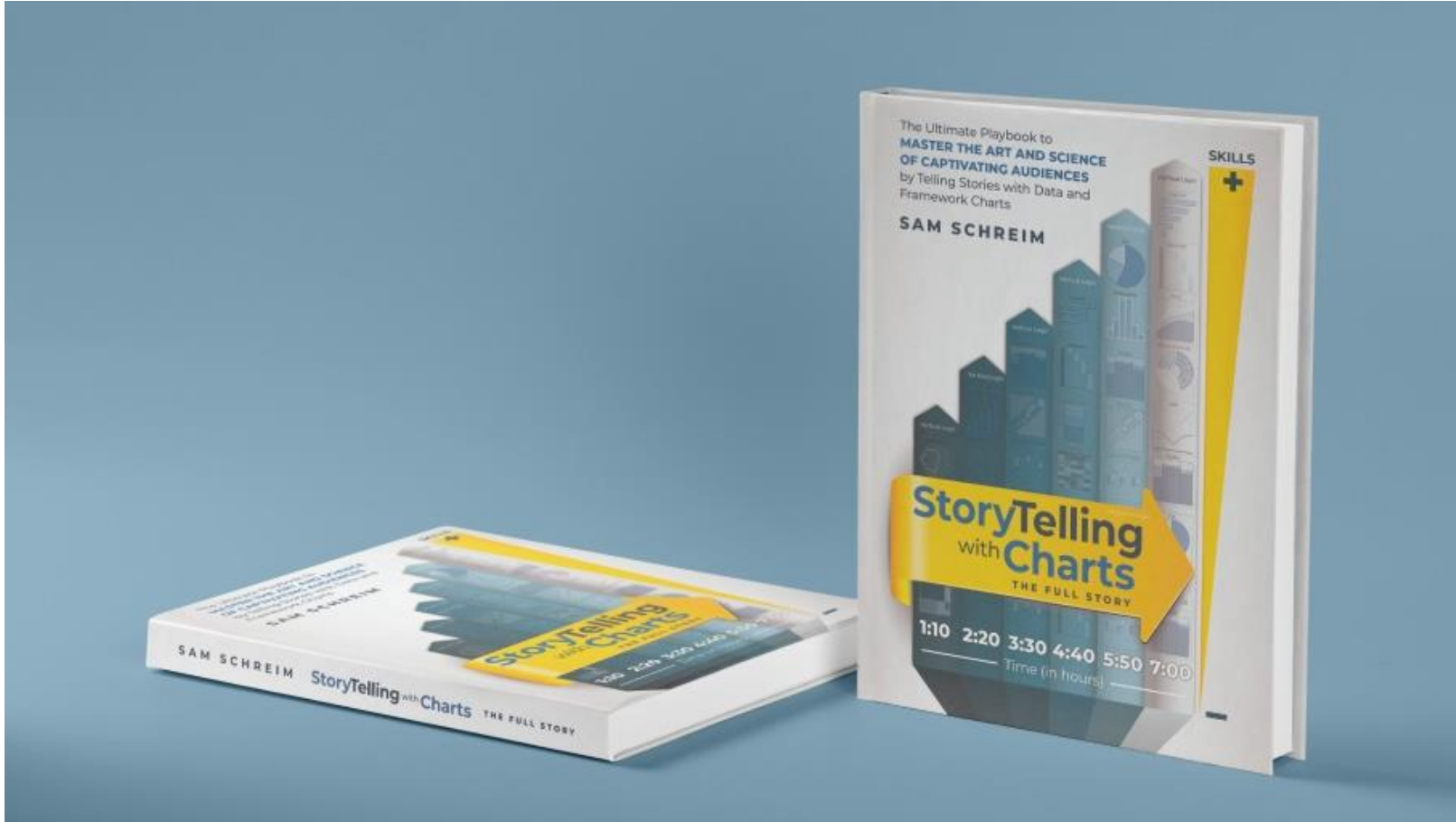
Chapter 2: Vertical Logic and Storytelling Charts — A Formula for Life

Chapter 3: Tips, Tricks and Best Practices

Chapter 4: Quantitative Charts Examples

Chapter 5: Next Steps and Resources

Where to Buy Storytelling with Charts: The Full Story



<https://www.amazon.com/dp/1960908006>

Where to Download the Add-In



StoryTellingwithCharts.com