

Elevate Your Insights Org with C-Suite Level Reporting and Storytelling

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What We Hope To Accomplish Today



- 1 How to set up a “**story**” narrative to **keep your audience engaged**
- 2 Turn your **data-heavy tables** into sleek insight-focused content
- 3 Quick tips to **instantly upgrade** your PowerPoint Presentation to “WOW”
- 4 **Deliver actionable insights** into easy-to-digest formats



How To Tell A Good Story

Before you can tell a story, let's think about the movies, TV shows, or books that were major successes

Key Components Of What Made It “Good”

1. **Good character development** with back stories
2. It had a “**good story**” with an **actual plot**, that you **can follow along**
3. **Imaginative world**, with good cinematography
4. Good “**edge of your seat**” **action/acting**, leaving you wanting to know what happens next
5. Have a **good ending** (with closure or cliffhanger!)

20 HIGHEST-GROSSING FILMS OF ALL TIME		CULTURE CRAVE	
1	AVATAR \$2.92B	2	AVENGERS: ENDGAME \$2.8B
3	AVATAR: THE WAY OF WATER \$2.32B	4	TITANIC \$2.26B
5	STAR WARS: THE FORCE AWAKENS \$2.07B	6	AVENGERS: INFINITY WAR \$2.05B
7	SPIDER-MAN: NO WAY HOME \$1.92B	8	JURASSIC WORLD \$1.67B
9	THE LION KING \$1.66B	10	AVENGERS \$1.52B
11	FURIOUS 7 \$1.52B	12	TOP GUN: MAVERICK \$1.50B
13	FROZEN II \$1.45B	14	Barbie \$1.41B
15	AVENGERS: AGE OF ULTRON \$1.4B	16	THE SUPER MARIO BROS. MOVIE \$1.36B
17	BLACK PANTHER \$1.35B	18	Harry Potter \$1.34B
19	STAR WARS: THE LAST JEDI \$1.33B	20	JURASSIC WORLD \$1.31B

Leverage Epic Movie Components When Designing Your PowerPoint Deck of Research Data

Successful Movie Components

1. **Good character development** with back stories
2. It had a **“good story”** with an **actual plot**, that you **can follow along**
3. **Imaginative world**, with good cinematography
4. Good **“edge of your seat”** action / acting
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Research Reporting

Create a “back story” for your segments (Users vs. Non) (e.g. show attitudes, behaviors, shopping habits)

Have slides follow a logical order (e.g. questionnaire order or make it flow. Connect with purpose.)

Make your slides “pretty” (e.g. optimize the space with good use of colors, graphics, icons, pictures, shapes)

Each slide should have a point (e.g. what’s the 1 (or 2) findings you want them to walk away with)

End with next steps or recommendations on how to move forward (e.g. change their claim? Val prop? Positioning?)

How To Turn Data-Heavy Tables Into Insights



Data-heavy tables are a great way to ‘mine’ for the story, but it is not “show ready” when presenting to C-Suite executives

Beliefs <i>Strongly/Somewhat Agree</i>	Gen Z (A)	Young Millennials (B)	Old Millennials (C)	Gen X/Boomers (D)
I prefer credit cards with rewards and perks that never expire as long as I have the card	95%CD	96%CD	90%	86%
I'd be willing to apply for a new credit card that offers a high sign-up offer	90%CD	85%D	77%	71%
I choose the credit card that offers the best rewards for my purchases	90%	90%	95%B	97%AB
I value cash back rewards more than a points system	90%D	86%D	85%D	78%
I prefer a credit card that offers reward categories of my choice	72%	80%ACD	70%	66%
I'd be interested in a card that offers rewards for larger purchases	69%D	73%D	77%AD	60%
I'd be willing to apply for a new credit card that offers discount off future purchase as their sign-up offer	53%D	57%D	55%D	30%
I'd be willing to pay an annual fee for higher benefits / perks	35%	63%AD	60%	44%

Questions:

- What's the finding here?
- What's the insight?

This is what I saw at first glance...

Beliefs	Gen Z	Young Millennials	Old Millennials	Gen X/Boomers
hnmjenvbwhbvwhb	xx% CD	xx% CD	xx%	xx%
l newvnbbw wg	xx% CD	xx% D	xx%	xx%
Vewbewbhwehv w	xx%	90%	xx% B	xx% AB
Wbewbbfw whbv cv	xx% D	xx% D	xx% D	xx%
Wibehewh v iiooewh	xx%	xx% ACD	xx%	xx%
Bhewhbhew	xx% D	xx% D	xx% AD	xx%
Ehbf v v jebhbwe f	xx% D	xx% D	xx% D	xx%
Bebrbhweh vg	xx%	xx% AD	xx%	xx%

My Initial Key Takeaway:

Young Millennials are more like than **???** to do

Wibehewh v iiooewh, and Bebrbhweh vg ?



4

Key Questions That
Help To Focus
Your Story, Insights &
Actionable
Recommendations



Who's your audience or final user of this deck? (e.g. marketing, product dev, C-suite, insights team)



What was your research trying to solve for? (e.g. business questions/ objectives)



What were they looking to learn? (e.g. competitive landscape, concept evaluation, positioning, CX)




Are there key user segments they care more about than others? (e.g. Gen Z, Customers, Prospects, Affluent)

Knowing the answers to the top 4 questions will better help you focus on the “right” numbers for your story.

Example:

- **Audience:** Marketing team
- **Business Objective:** how to attract new cardholders / customers to sign up
- **Looking to Learn:** how to craft right marketing campaign for target audience
- **Key User Segment:** Attract more Gen Z and Young Millennial to client base



Beliefs <i>Strongly/Somewhat Agree</i>	Gen Z (A)	Young Millennials (B)	Old Millennials (C)	Gen X/ Boomers (D)
I prefer credit cards with rewards and perks that never expire as long as I have the card	95%CD	96%CD	90%	86%
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Make mental notes on what the headline would be and what attributes contribute to that takeaway to determine “your” storyline.

Headline:

- Gen Zs and Young Millennials are looking for credit cards that offer high sign-up offers, rewards that suit their lifestyle, and never expires.
- Gen Zs are less willing to pay an annual fee than their counterparts.

Beliefs <i>Strongly/Somewhat Agree</i>	Gen Z (A)	Young Millennials (B)
I prefer credit cards with rewards and perks that never expire as long as I have the card	95%CD	96%
I'd be willing to apply for a new credit card that offers a high sign-up offer	90%CD	85%D
I choose the credit card that offers the best rewards for my purchases	90%	90%
I value cash back rewards more than a points system	90%D	86%D
I prefer a credit card that offers reward categories of my choice	72%	80%ACD
I'd be interested in a card that offers rewards for larger purchases	69%D	73%D
I'd be willing to apply for a new credit card that offers discount off future purchase as their sign-up offer	53%D	57%D
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Gen Z

- **95%** prefer rewards that never expire (significantly higher than older)
- **90%** willing to apply for high sign-up offer
- **90%** choose the card with best rewards for purchases
- **NOT willing** to pay an annual fee (35%)

Young Millennials

- **96%** prefer rewards that never expire (significantly higher than older)
- **90%** choose the card with best rewards for purchases
- **80%** prefer cards that rewards categories of choice (*significantly higher than older*)
- **MAY BE willing** to pay an annual fee (63%)



Now How Do We Get To “WOW”?



Let Your Creativity Shine or Google Ideas !

4 Easy Tips To “WOW” Anyone

- 1 **Use charts, color or pictures** to emphasize your point better
- 2 Use **meaningful icons, lines or arrows** instead of text where possible
- 3 **Simplify and declutter slides** to create more “white” space
- 4 **Use shapes of all sizes and colors** to help “separate” the space

Turn That Table Into An Easy-To-Follow Chart Of ONLY The Supporting Data Points To Keep This High-Level

Headline:

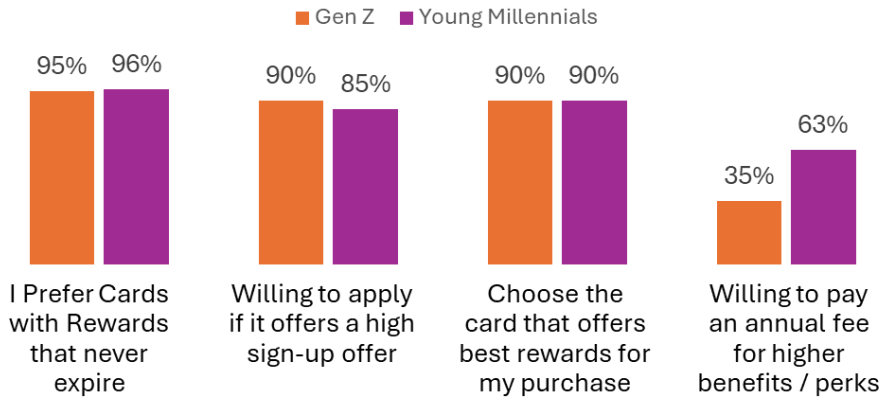
- Gen Zs and Young Millennials are looking for credit cards that offer high sign-up offers, rewards that suit their lifestyle, and never expires.
- Gen Zs are less willing to pay an annual fee than their counterparts.

Beliefs <i>Strongly/Somewhat Agree</i>	Gen Z (A)	Young Millennials (B)	Old Millennials (C)	Gen X/ Boomers (D)
I prefer credit cards with rewards and perks that never expire as long as I have the card	95%CD	96%CD	90%	86%
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I choose the credit card that offers the best rewards for my purchases	90%	90%	95%B	97%AB
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I'd be willing to pay an annual fee for higher benefits / perks	35%	63%AD	60%	44%



Headline:

- Gen Zs and Young Millennials are looking for credit cards that **offer high sign-up offers, rewards that suit their lifestyle, and never expires.**
- Gen Zs are **less willing to pay an annual fee** than their counterparts.



Add a picture, icon, or shape to make this slide even more compelling

1. Add a picture

Headline:

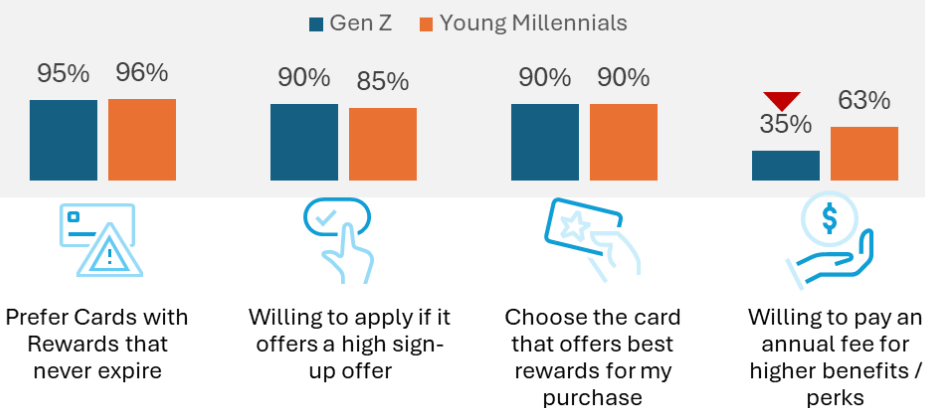
- Gen Zs and Young Millennials are looking for credit cards that offer high sign-up offers, rewards that suit their lifestyle, and never expires.
- Gen Zs are less willing to pay an annual fee than their counterparts.



3. Add a Shape As Background

Headline:

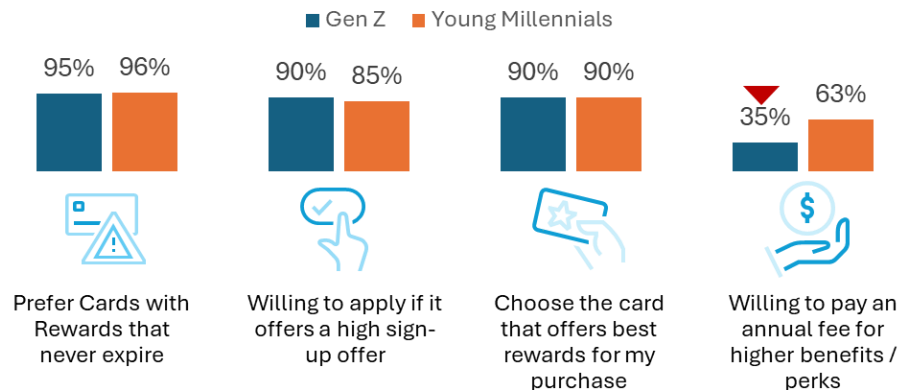
- Gen Zs and Young Millennials are looking for credit cards that offer high sign-up offers, rewards that suit their lifestyle, and never expires.
- Gen Zs are less willing to pay an annual fee than their counterparts.



2. Use Icons

Headline:

- Gen Zs and Young Millennials are looking for credit cards that offer high sign-up offers, rewards that suit their lifestyle, and never expires.
- Gen Zs are less willing to pay an annual fee than their counterparts.



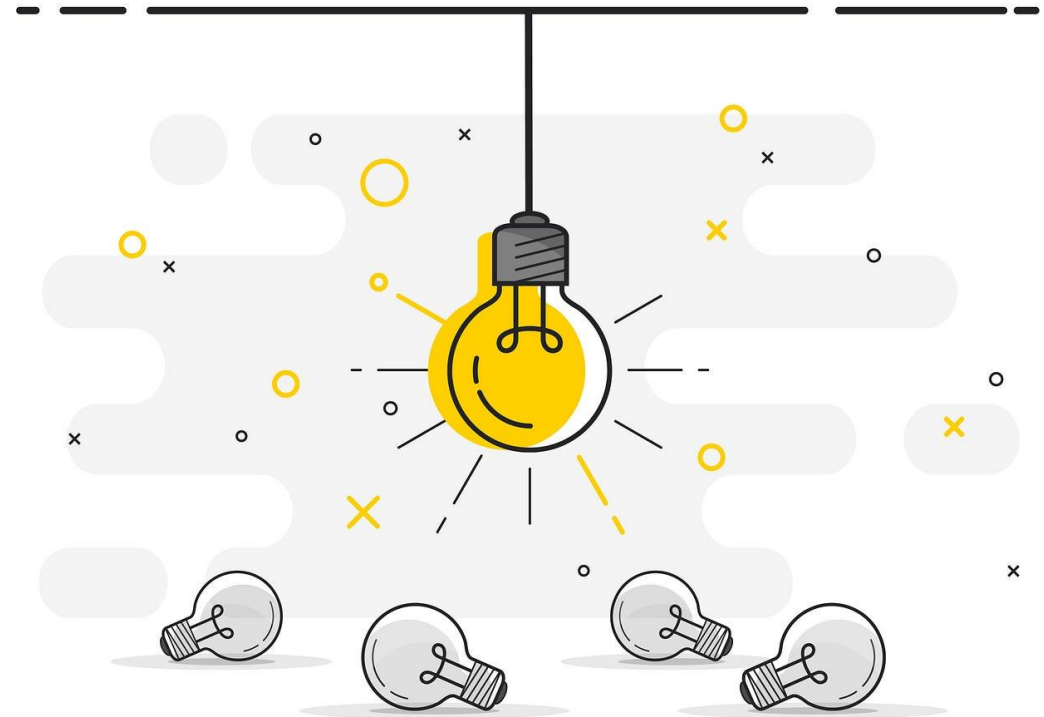
In A Pinch, You Can Still Turn That Data-Heavy Table Into Something That's Easier to Follow & Help To Make Your Point More “Sticky”.

1. Change table shading
2. Add meaningful borders
3. Color-code the #s you want them to focus on
4. Distribute rows so they are “equal” height
5. Shorten labels and add font color emphasis to keywords
6. Draw a box around important findings

Credit Card Beliefs & Preferences <i>Strongly/Somewhat Agree</i>		Gen Z (A)	Young Millennials (B)	Old Millennials (C)	Gen X/ Boomers (D)
Prefer rewards / perks that never expire		95% CD	96% CD	90%	86%
Willing to apply for a new card high sign-up offer		90% CD	85%D	77%	71%
Choose the card that best rewards for my purchases		90%	90%	95% B	97% AB
Value cash back rewards more than a points		90% D	86% D	85% D	78%
Prefer reward categories of my choice		72%	80% ACD	70%	66%
Interested in rewards for larger purchases		69%D	73%D	77% AD	60%
Willing to apply for a new card discount off future purchase as sign-up offer		53%D	57%D	55%D	30%
Willing to pay an annual fee for higher benefits / perks		35%	63% AD	60%	44%

Blue = Top 3 For Subgroup

Deliver Actionable Insights In Snackable Sizes For C-Suite Execs





Key Tips To Win Over Clients and C-Suite Executives With Your Reports

- 1 **Keep it succinct** - figure out ~**1-5** pieces of data you want them to walk away with
- 2 Get to the point in **10 seconds or less** (per slide)
- 3 **Keep it simple** - don't “**clutter**” it with too much text, data numbers or bar charts
- 4 Make sure it's **actually “actionable”** – tell them directly what needs to be done

Gen Zs anticipate traveling more in 2025, and plan to bring at least 2 credit cards with them.



94% ▲

Plan to travel in next 12 months



85% ▲

Anticipate bringing a credit card with them on trip



2.4

Average # credit cards will bring on trip

▲ Significant difference between 2025 vs. 2024

Tips:

1. Use a relevant hi-res picture
2. Use meaningful icons
3. Make #s BIG
4. Show up to 4 stats
5. Add shading to key areas to bring it to life



*I always **bring at least 2 credit cards** when traveling internationally, especially the one with **no foreign transaction fees**. But I also bring my debit card in case I need to withdraw cash from an ATM.*

– Young Millennial, Female



- Create up to 5 “buckets” for high-level themes.
- Lead with “action” words to make it actionable, and follow with quick facts.
- These can be used for coding open-ends, executive summary, or next steps, etc.



Target Gen Zs with High Sign-up Offers

90% of Gen Zs

would sign up for a new credit card with a significant sign-up offer



Emphasize Key Val Prop Of Credit Card

90% of Young Millennials

prefer cards that offers the best rewards for their purchase



Consider Marketing On Social Media

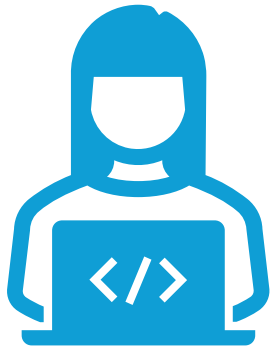
- **85%** of younger audience (age <40) use TikTok, or Instagram
- **65%** indicated they've purchased from an influencer



Drive Awareness To Travel Benefits/ Features

- **80%** worry about their card getting stolen overseas
- **45%** are not aware of Travel Insurance

Cheat Codes To Get You Started



- 1. Open Google.com (or bing.com)**
- 2. Search for keywords & toggle to “Images”:**
 - a. Good looking powerpoint slides
 - b. Professional powerpoint slide examples
 - c. Free powerpoint slide examples
 - d. professional powerpoint templates free download
 - e. modern professional powerpoint templates

FAQs



Great presentation, but when I see large amounts of data, I have no idea where to start?

Remember the **4 key questions to help you focus**, determine your key segments, and start turning them all into bar charts, donuts. Any chart is better than a table of numbers.

Where do I find pictures? My company doesn't provide them.

Google is your new BFF; keyword search anything like: Gen Z shopping, Affluent person smiling, Boomer sailing a boat, modern family shopping at a supermarket.

I did the search for PowerPoint templates, but they cost money and I don't know how to replicate these?

Pick a design you DO like, and try to re-create them using shapes filled with color, use that as a background, or draw a box and use a thick border line.

Where do I find those neat icons you used in your presentation? My company doesn't provide them.

PowerPoint offers a huge library of icons. In your menu toggle to "Insert" and select "Icons"



How do I know which 3-4 numbers I should pull into a slide?

Remember the **4 key questions to help you focus**. Have a theme you want to draw attention to, and find the #s to support it.

Tip! AFTER you've posted all the data into bar charts, write the headline on what the key finding is on the slide.

Based on the # you wrote in headline, now delete all of the other #s on the slide you didn't write about.

It gets easier with time!
Keep Practicing!