

## How to turn data into decisions

Your readers often decide what to do because of what feels right, not just what adds up.

By John Sturtevant



Finance professionals are skilled at assessing, evaluating, and measuring. But it's often the things we can't quantify that determine our success in helping people make decisions and take action.

In a [previous article](#), I introduced the idea of communicating with a human touch. That article describes how clear, persuasive writing helps financial professionals provide value by turning information into knowledge.

Knowledge embodies qualities like perceptions, benefits, insight, trust, and confidence. Those characteristics are hard to define and difficult to measure. Yet, they significantly influence the decisions your readers make.

Clear writing gives your data and recommendations balance by adding those unquantifiable qualities to the facts and conclusions you provide.

Here are three ways to add the unquantifiable to your writing.

**Use words with intention.** You have a nearly infinite assortment of words available to you. By words, I mean all of the shapes and images you use to communicate — words, numbers, charts, graphs, photos, emojis, and illustrations — and most of them are free!

Keep in mind, it's likely your reader will define words differently from the way you do, and vague statements result in vague responses. So choose your words with purpose to support your message.

If you want to encourage your reader to make a specific decision by a specific date, use specific words. Asking your CEO to review your financial forecast at the earliest convenience is vague. It hides the action you expect, blurs your sense of urgency, and muddles your message.

Instead, clearly define the action you expect, and give your reader a specific time, date, reason, and even method for giving you the response you want.

So, you might write something like:

*Thanks for your time meeting with me yesterday. I attached the revised Q3 financial forecast based on our discussion. Please take a look at the revenue updates we talked about on pages 4-6.*

*If you approve as is, just reply with your OK. Or, if you have changes, please note them in red, and email them to me by noon Thursday, 24 January.*

*I'll have the final printed copies ready for the board meeting Friday morning.*

By using words with intention you make it easier for your readers to understand your expectations. Your readers know they can rely on you to be clear and specific in your communication.

And the more you do that, the more you create a bond built on confidence and trust.

**Develop a distinct and consistent style.** It's a strong position for you when your readers learn to expect and rely on a distinct point of view, outlook, and perspective from you. Achieving that takes more than presenting detailed facts, and insightful conclusions.

You also want to develop a style and tone that helps make your writing more accessible and your ideas more salient.

One way you can develop your own writing style is by getting inspiration from others. I encourage you to read from a writer's perspective. That means pay attention to writing you like and examine why you like it.

What kinds of words does the writer use? How does the writer transition from one idea to the next? How does the writer keep you engaged, interested, and wanting to know more?

Use that inspiration to add the same kinds of techniques to your own writing. I'm not suggesting you plagiarise, but rather, learn from others whose writing you admire.

Also, keep an eye on writing you *don't* like. You may find yourself sitting on a plane glancing through an article on a topic that interests you. But the article is uninspiring. In this case, examine why you don't like it. Is it full of meaningless jargon and clichés? Does the writer make vague references with no connections or relevance? Are the ideas out of order, and the logic difficult to follow?

If you look closely at what you read, and pay attention to what keeps you engaged — and what doesn't — you'll get ideas you can use to shape your own writing style.

Once you develop a clear and distinctive voice, your writing will become more of a conversation between two people, rather than merely a list of facts. Creating that distinct and consistent style will help your readers feel they know you, and can trust you.

**Think like a salesperson.** Although you're not out hawking your organisation's products and services, you are fundamentally a salesperson. We all are.

Here's a basic definition of sales: I give you something. You give me something. We're both happy. And what is the most treasured asset you ask people to give you every day?

Their time.

In exchange, you must give your readers something of equal or greater value. Your readers will assess the value you give them in large part by how you present information to help transform disparate data into clear, decision-making criteria. So they can focus less on trying to understand the information, and concentrate more on how the information will influence their decisions.

Think of it as the user experience — in the same way car companies spend millions on television ads to help you feel what it's like to sit behind the wheel and drive. Or a computer company uses animation and bold graphics to give you the experience of holding and typing on their newest ultra-thin laptop. Great advertising is great storytelling.

You can use clear writing to tell a story about how your reader will follow, process, understand, and use the information you provide. And all great stories have three primary parts — a beginning, a middle, and an end.

Your beginning is context — show your reader why you are writing and what you want the reader to learn. The middle is where you describe how you sourced your data and arrived at your conclusions. The end is when you show your reader how and why the facts are related, how they affect decisions, the benefits the outcome will achieve, and the decision you recommend.

This gives your readers the guidance they need, and positions you as a reliable resource — one they can turn to and trust for insight, perspective, and advice.

By presenting your ideas with the reader's perspective in mind, and transforming information into insight, you add empathy to your writing. And that lets your readers feel you understand their perspectives and the challenges they face.

So, as you plan your next memorandum to the executive team about last quarter's most active revenue sectors and your recommendations for fiscal-year planning, consider using these three ideas to determine how you want your audience to *feel*, not just what you want them to know.