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BRING YOUR DATA TO LIFE

How to Speak C-Suite When It Comes to Data

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Chief Marketing Officer

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Lost in Translation

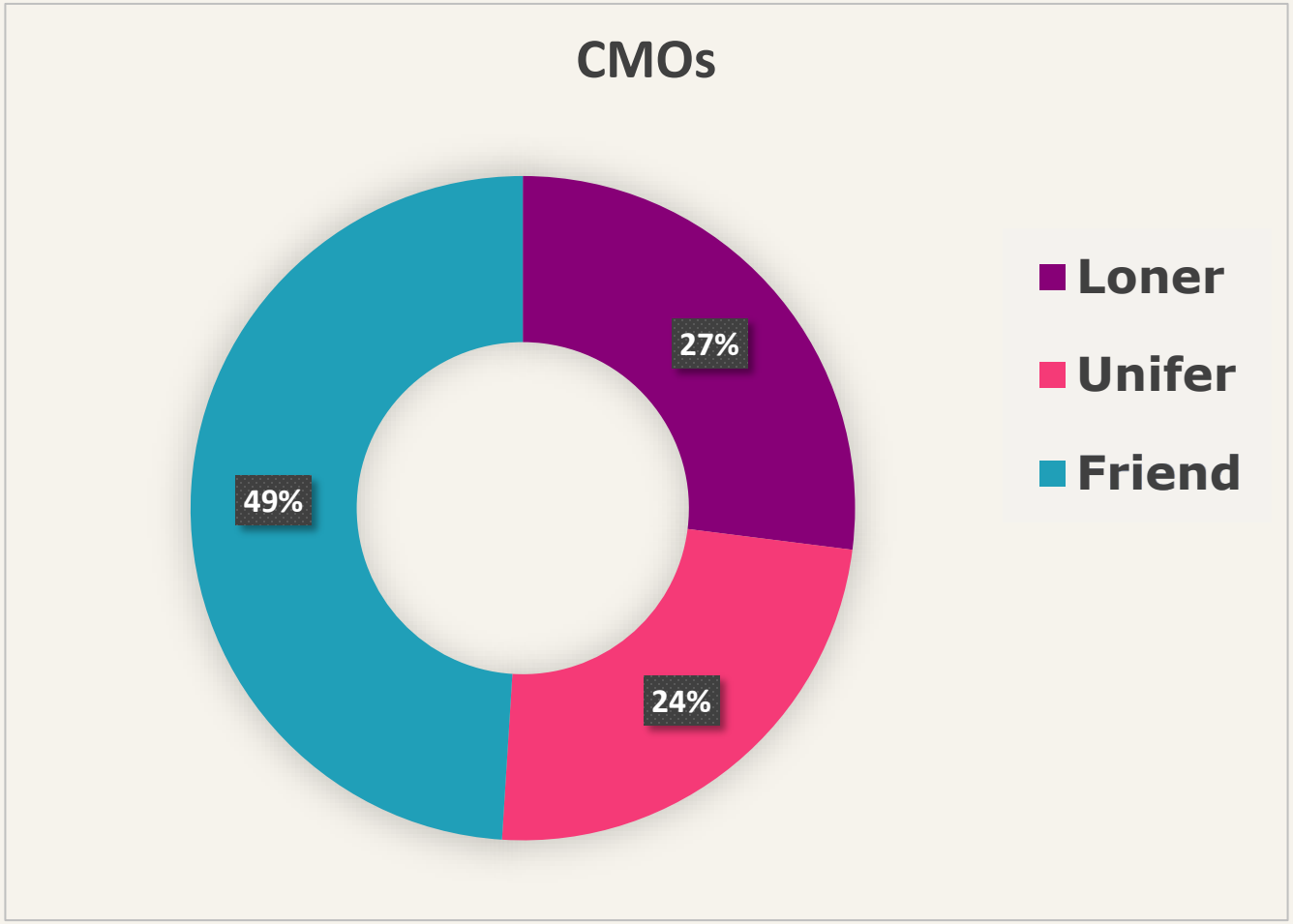
83% of CEOs globally see marketing as owning the **growth area.**

23% don't feel their marketing organization is delivering on the growth agenda

Source: : McKinsey & Company, 2019 CEO Study

CMO Archetypes

- **Unifer** –
  Strong partnership with C-Suite to drive growth
- **Loner** –
  Limited relationship with C-Suite focused primarily on marketing communications
- **Friend** –
  Good relationship with 1-2 of C-Suite,
  especially CEO, with limited responsibility for growth and experience.



Source: : McKinsey & Company, 2019 CEO Study

CMO Archetypes - Loners

- Don’t have the full support of, or deep relationships with, their C-suite peers.
- Focus on near-term activities like ad campaigns and social media
- Seen by CEOs as executors of brand stewardship, advertising, and PR, not as equal partners
- More likely to implement strategy than develop it
- Often report that their CEO doesn’t understand or trust marketing

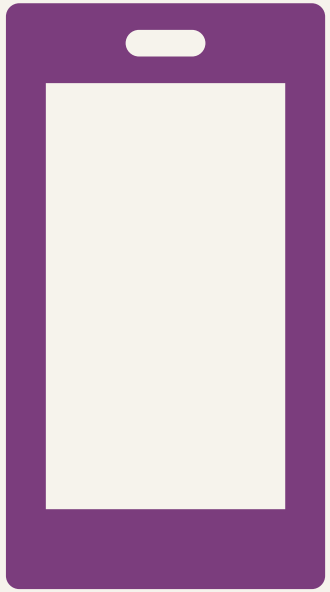
CMO Archetypes - Friends

- Have one or two allies in the C-suite, often the CEO
- Responsible for top-line growth through marketing
- Don’t have broad P&L responsibility or even much influence across the entirety of CX
- Not as adept at speaking the language of the C-suite
- CTOs tend to see them as “customers” of technology rather than partners

CMO Archetypes - Unifers

- Masters at fostering cross-functional collaboration
- Ensure marketing has a clearly defined role in the eyes of C-suite peers
- Adopt the language & mindset of other C-Suite exec
- Articulate how marketing can help meet the C-Suite needs
- Establish mutual accountability & shared vision

Cue The Audience



PollEv.com/KlariVis

When poll is active, respond at **pollev.com/klarivis**

Text **KLARIVIS** to **22333** once to join

What type of Marketer are you?

Start the presentation to see live content. For screen share software, share the entire screen. Get help at **pollev.com/app**

How to become a Unifer

- Become a **BANKER**
- Have or work for a **SEAT AT THE TABLE**
- Take the C-Suite to lunch – **REGULARLY**
- **Ask questions** – then ask more.
- Become a **DATA STORYTELLER**

What is Data Storytelling?

The practice of building a narrative around a set of data and its accompanying visualizations to help convey the meaning of that data in a powerful and compelling fashion.

The Brain and Storytelling

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Data doesn’t change behavior, emotions do.

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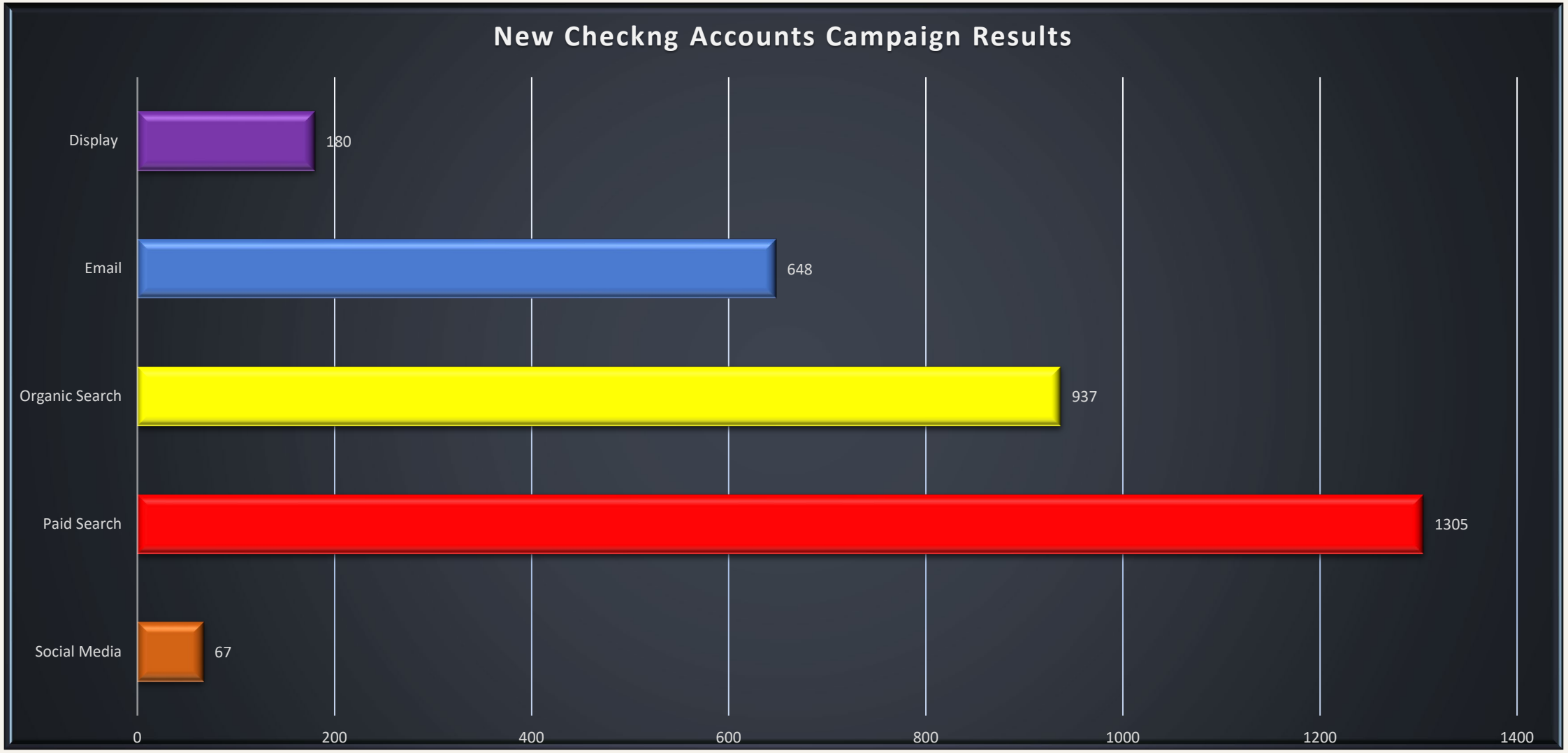
EXAMPLE 1:
New Checking Account Campaign

Component #1 - Data

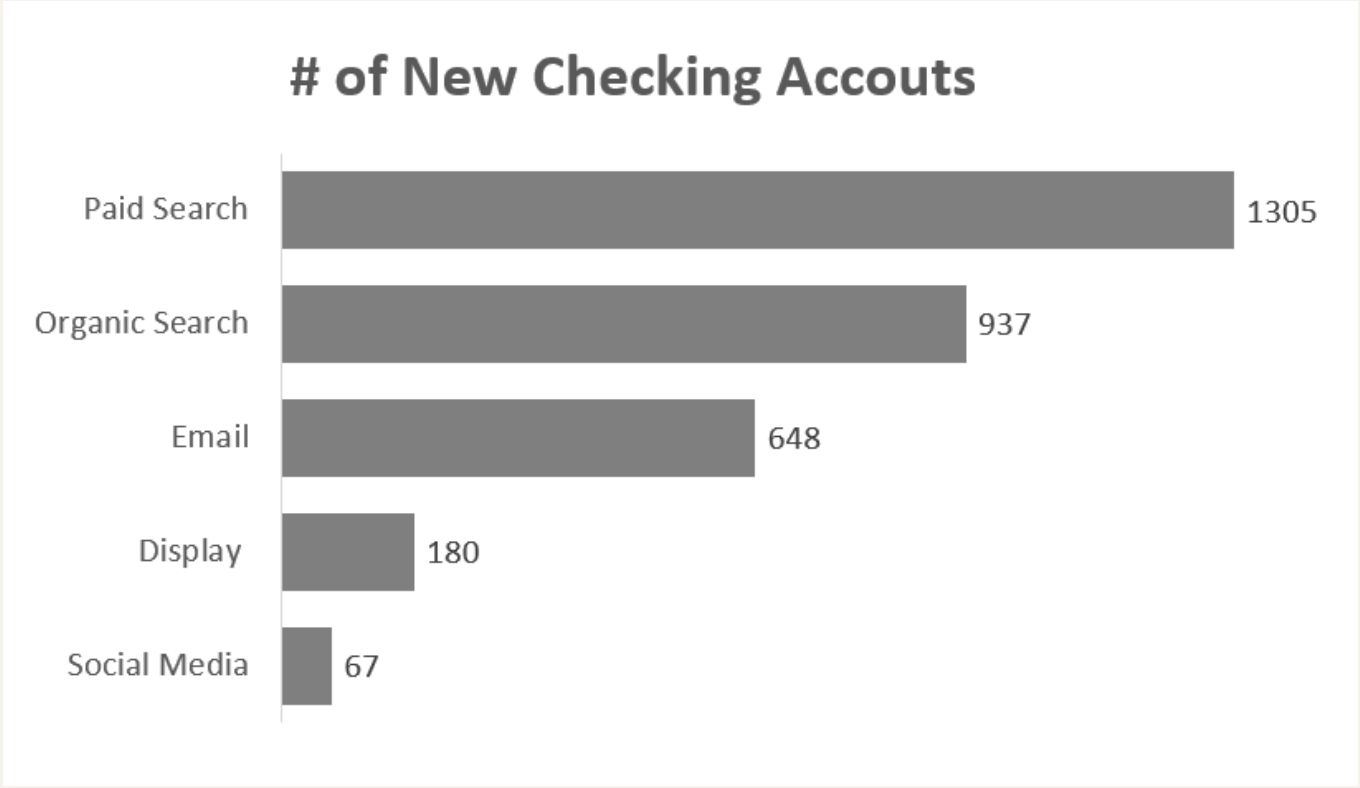
Medium	New Checking Accounts
Social Media	67
Display	180
Email	648
Organic Search	937
Paid Search	1305

What is the focus?



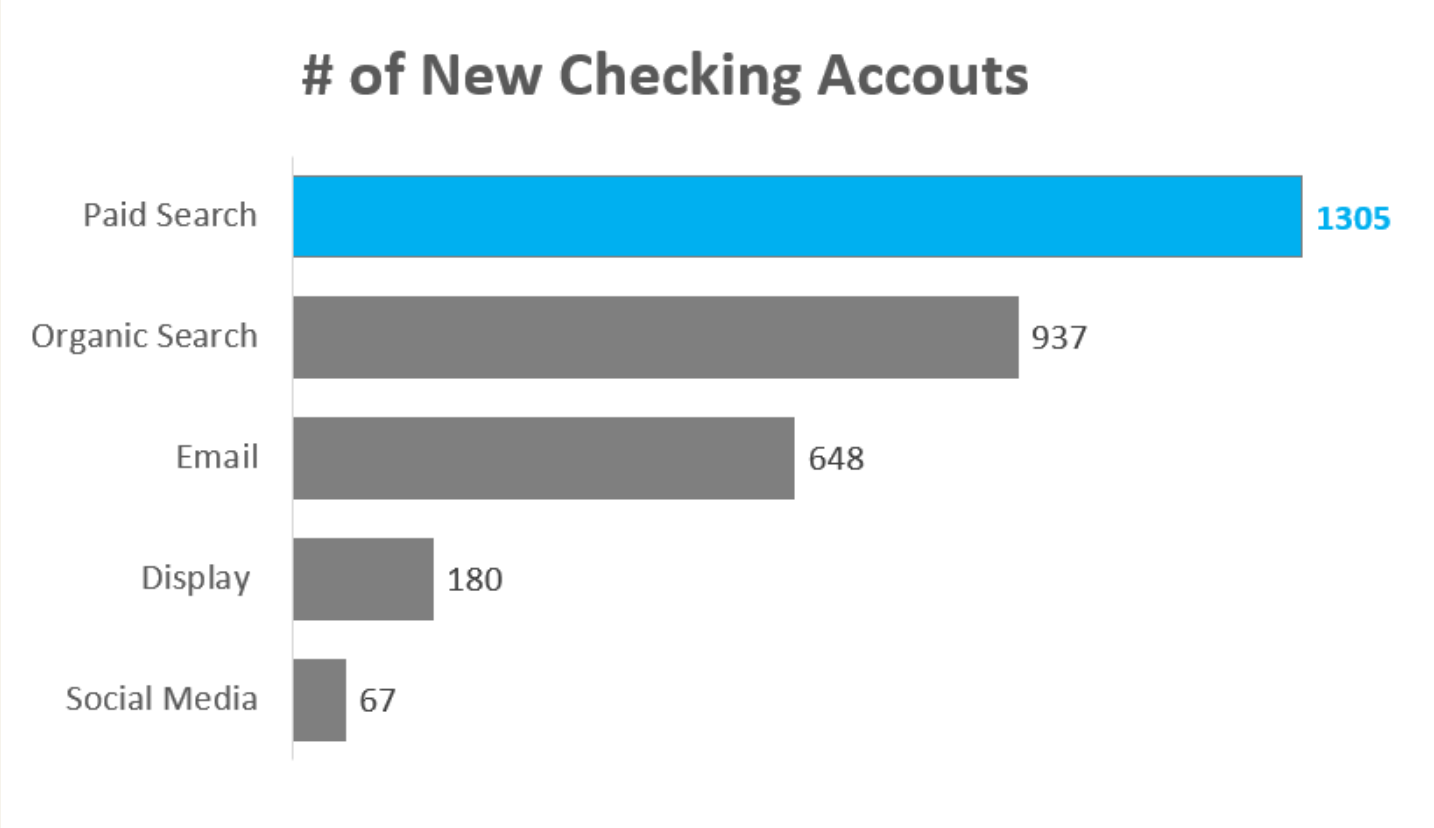
Component #2 – Compelling Visuals

- ✓ Eliminate 3-D
- ✓ Remove background
- ✓ Border, gridlines, axes
- ✓ Refine font choice / size
- ✓ Direct data labeling
- ✓ Intentional coloring

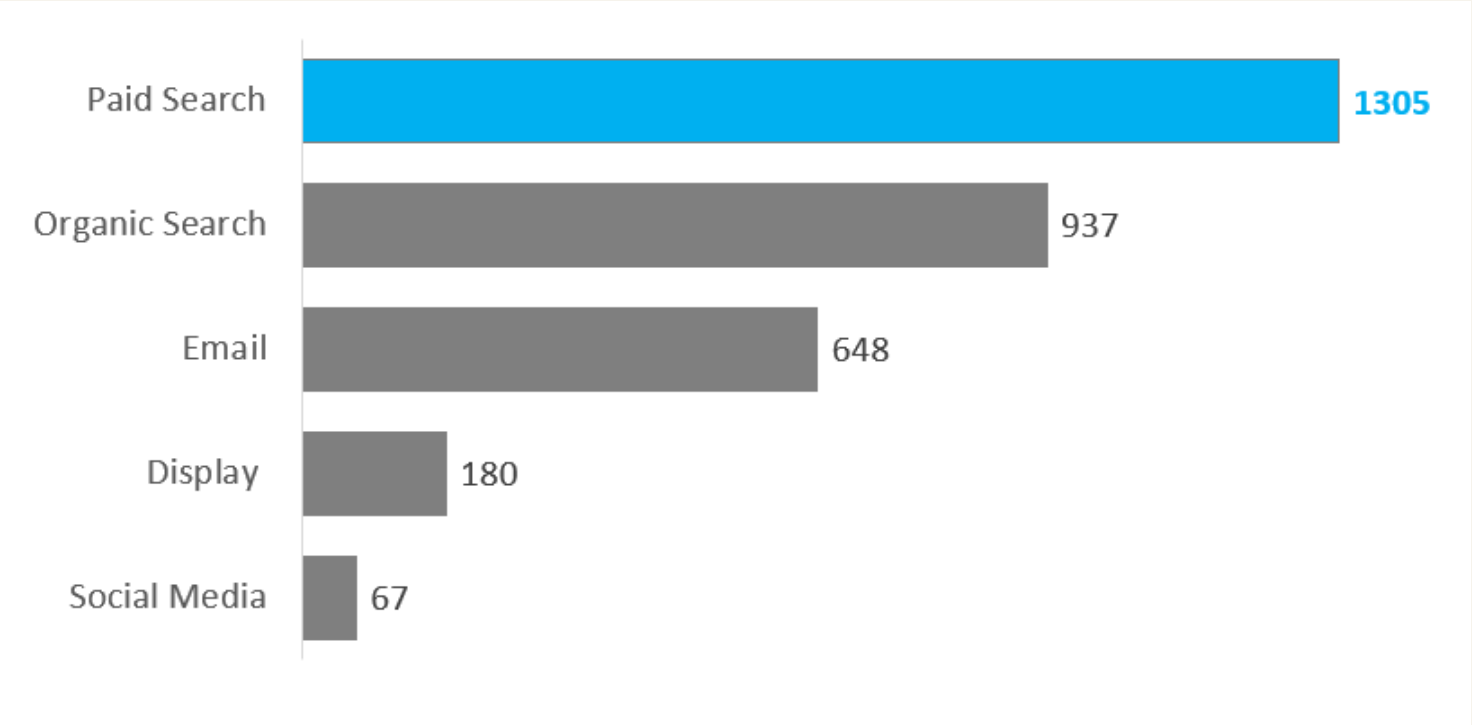


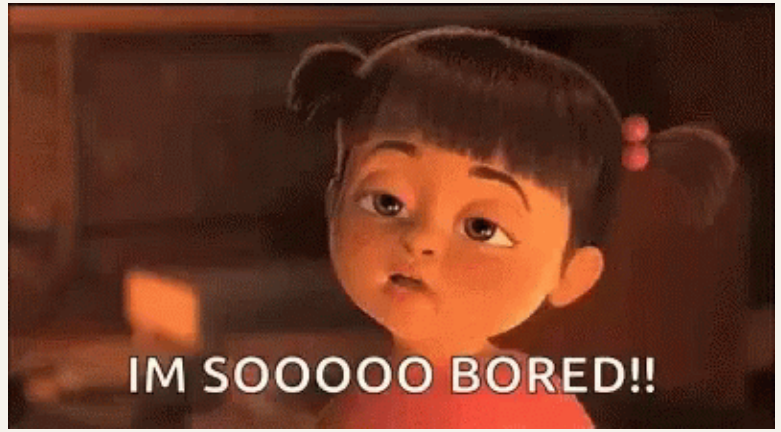
Emphasize Your STORY

Strategic Coloring



of New Checking Accounts By Channel…Zzzz

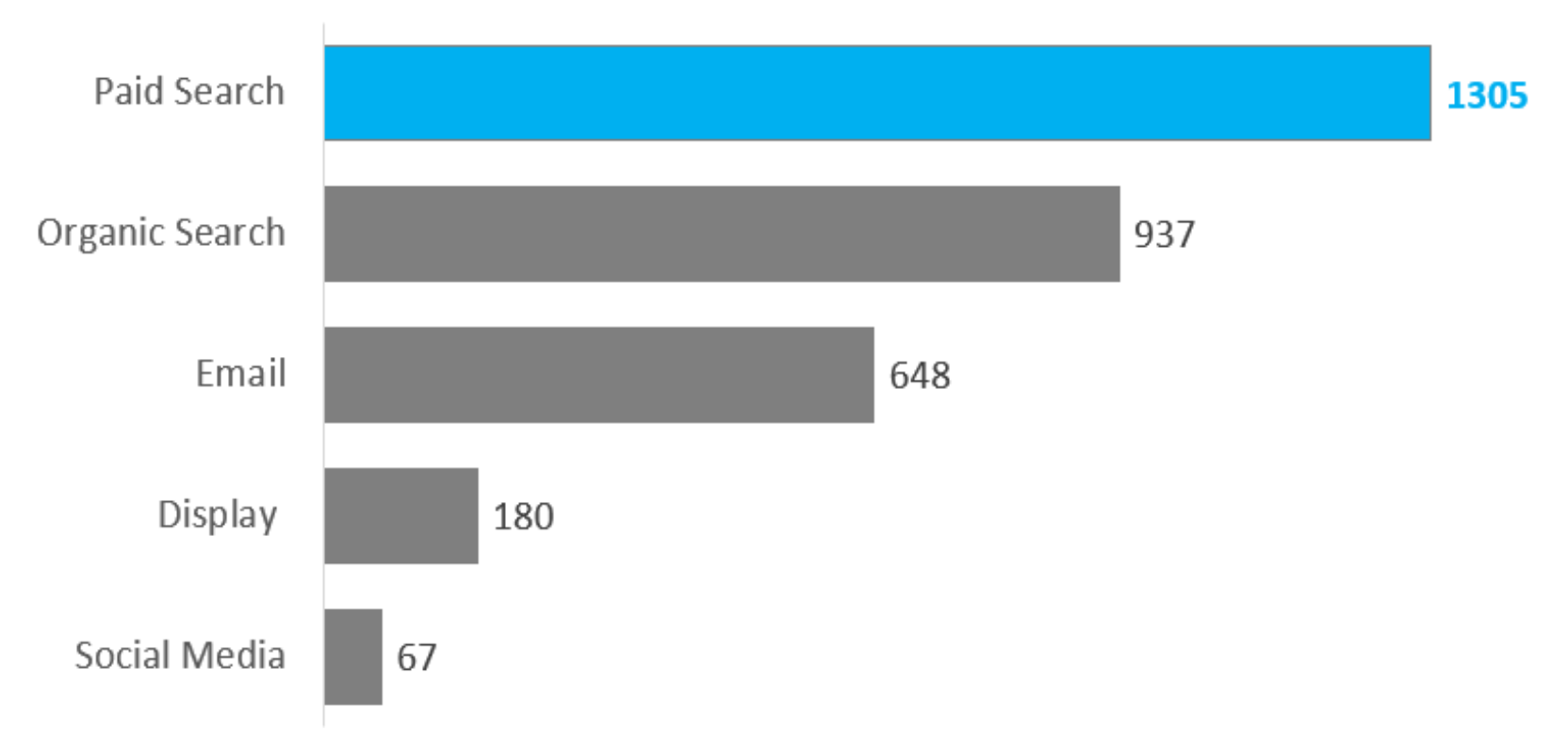




Paid Search generates the highest volume of New Checking Accounts (42%)

Campaign Channel # of New Accounts

McKinsey Title



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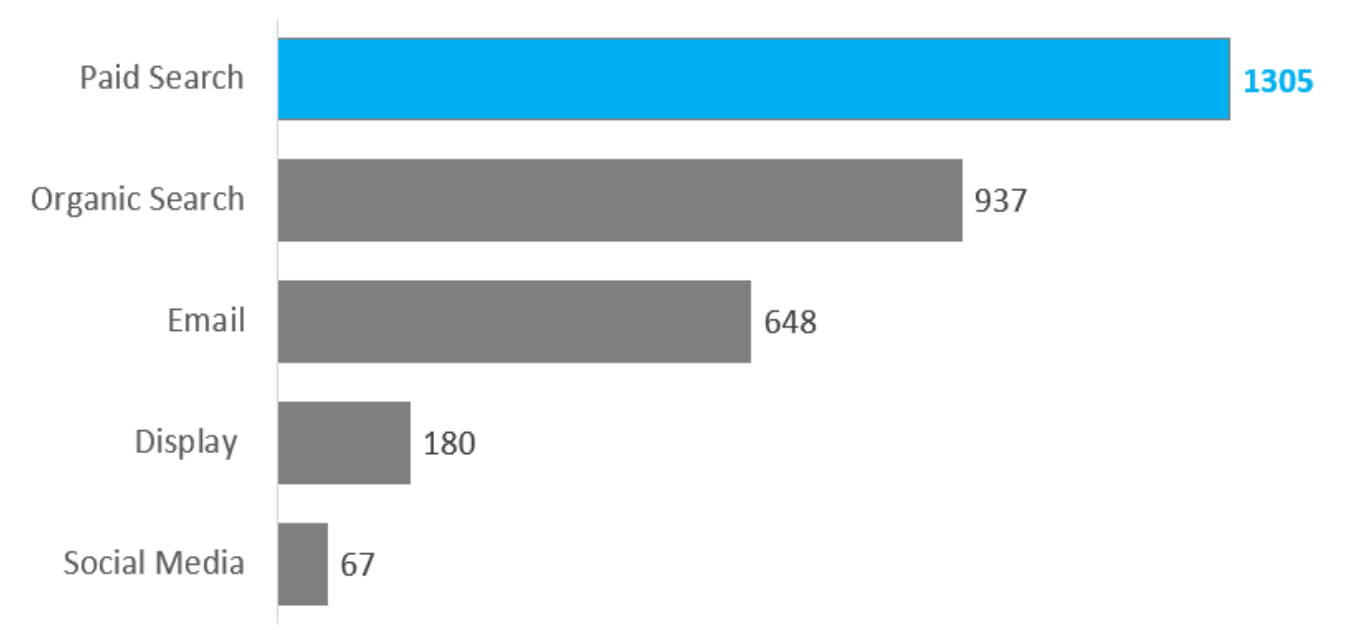

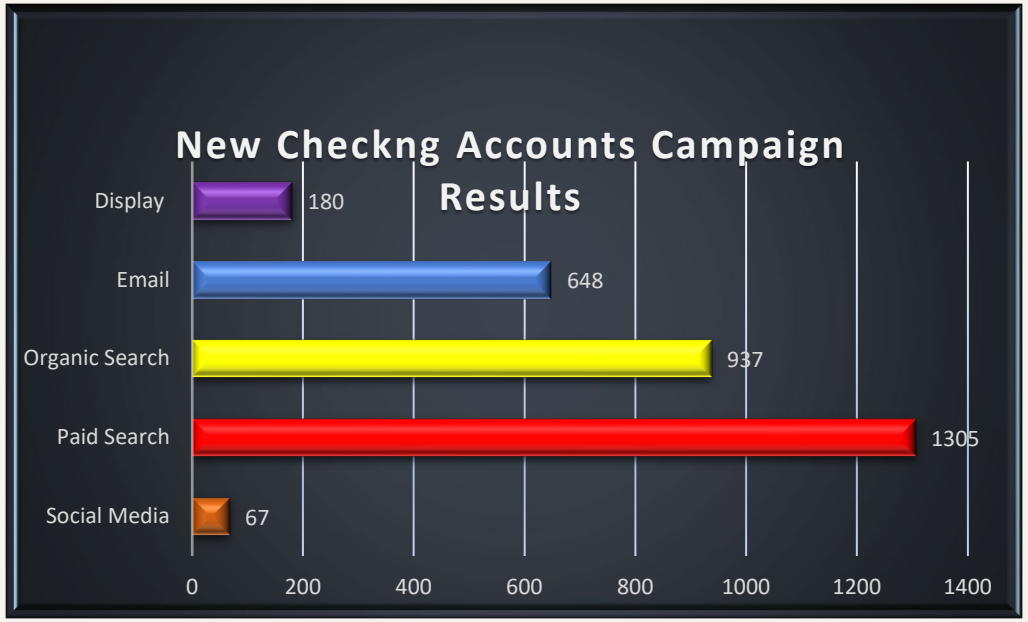

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EXAMPLE 2:
Loan Cross Sell Opportunities

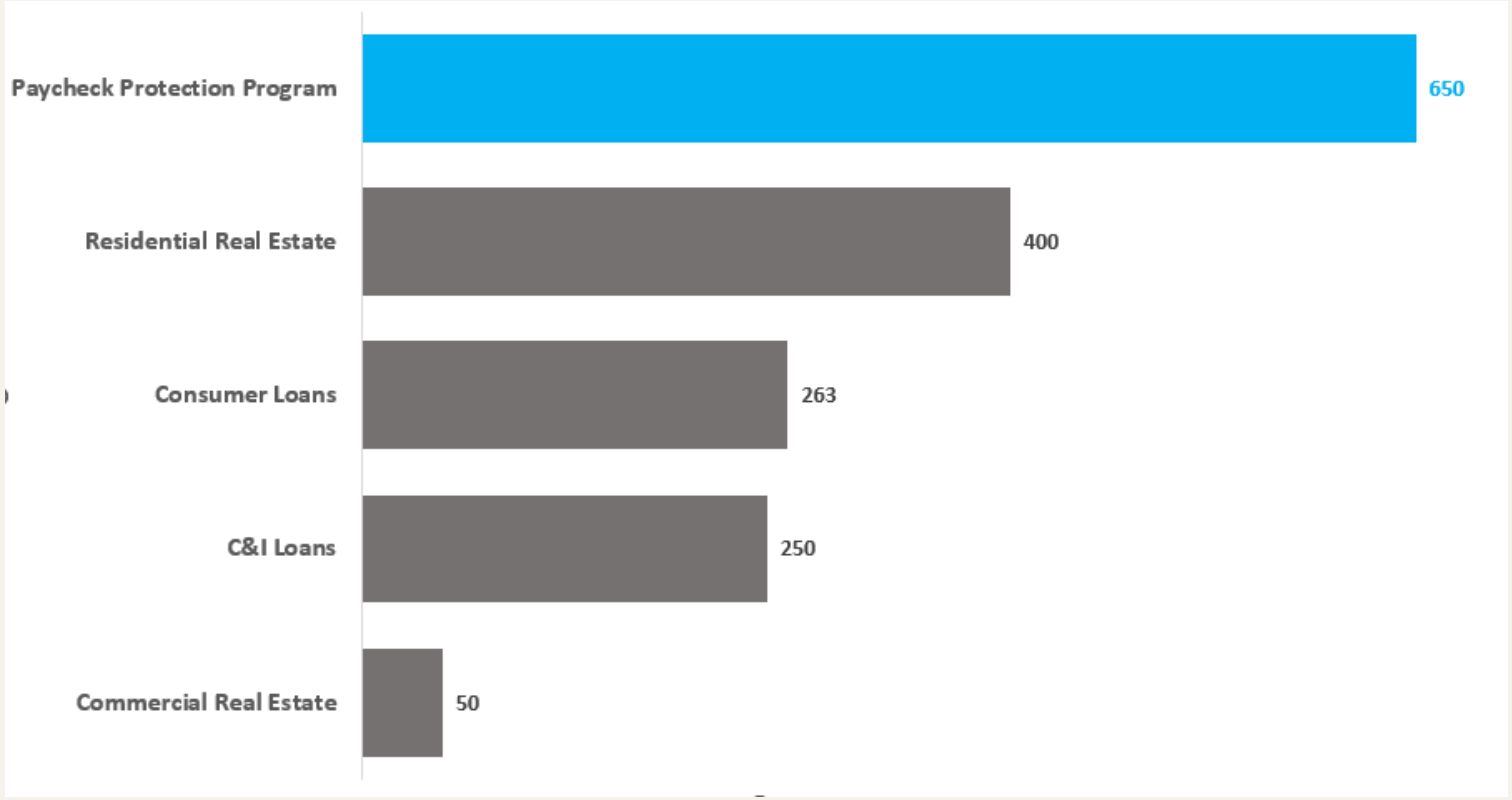
Component #3 – The Narrative

Meet Maria

Component #3 – The Narrative

PPP Loans offer greatest opportunity for cross sell

Single Product Loan Customers



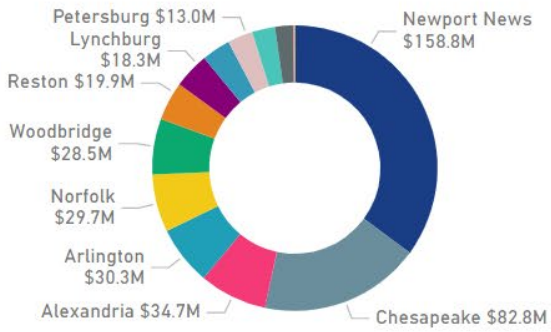
We drink our own Kool-Aid

Top 25 Depositors

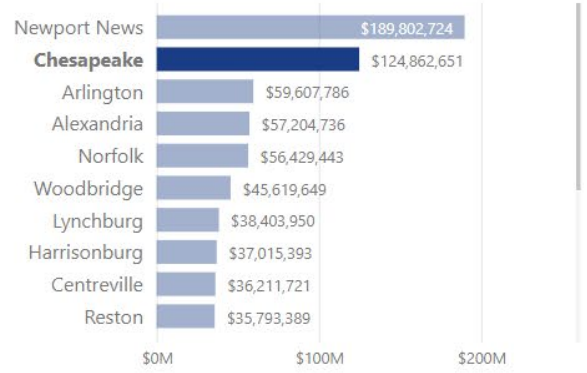
11/14/2022

Market	Officer
Branch	Type

Portfolio Composition of Top 25 Accounts by Branch



Top 25 Accounts by Branch



Top 25 Depositor Accounts

Current Period	Prior Period	Difference
$124,862,651 46.7%	$122,411,597 45.8%	$2,451,054 0.9%

TopN — To See a Larger List, Make a TopN Selection

Customer Name	Current Balance	Prior Period Balance	Difference	% Difference
Hannah Kerluke Sr.	$26,848,908	$24,712,647	$2,136,261	7.96%
Aurelie Hyatt	$20,028,055	$20,037,405	($9,350)	-0.05%
Haylie Klocko	$7,997,942	$7,964,476	$33,467	0.42%
Craig Shields	$7,748,126	$5,792,726	$1,955,400	25.24%
Kirstin Gerhold	$7,663,201	$8,016,816	($353,615)	-4.61%
Dr. Leonora Littel	$6,550,103	$6,737,008	($186,905)	-2.85%
Merl Schaefer	$6,369,684	$7,673,160	($1,303,476)	-20.46%
Owen Purdy	$6,345,371	$6,062,316	$283,055	4.46%
Kaia Larkin	$4,884,793	$4,884,793	$0	0.00%
Mohammed Simonis	$3,745,677	$4,605,577	($859,900)	-22.96%
Barton Abshire	$3,445,531	$2,789,285	$656,246	19.05%
Phoebe Kutch	$3,179,369	$3,154,016	$25,353	0.80%
Anya Turcotte	$3,115,978	$3,115,978	$0	0.00%
Elaina Hansen	$3,105,983	$3,105,983	$0	0.00%
Montana Klocko	$2,019,466	$2,016,246	$3,220	0.16%
Cecelia Yundt	$1,634,167	$1,633,068	$1,100	0.07%
Gage Gerhold	$1,625,443	$1,625,377	$66	0.00%
Porter Schuster	$1,500,288	$1,532,256	($31,968)	-2.13%
Miss Abbie Hegmann	$1,486,783	$1,486,851	($68)	-0.00%
Guido Fritsch	$1,412,406	$1,330,047	$82,359	5.83%
Ansley Schuster	$1,407,301	$1,319,450	$87,851	6.24%
Leanne Stiedemann Jr.	$1,381,223	$1,381,223	$0	0.00%
Macie Bailey	$1,366,853	$1,366,853	$0	0.00%

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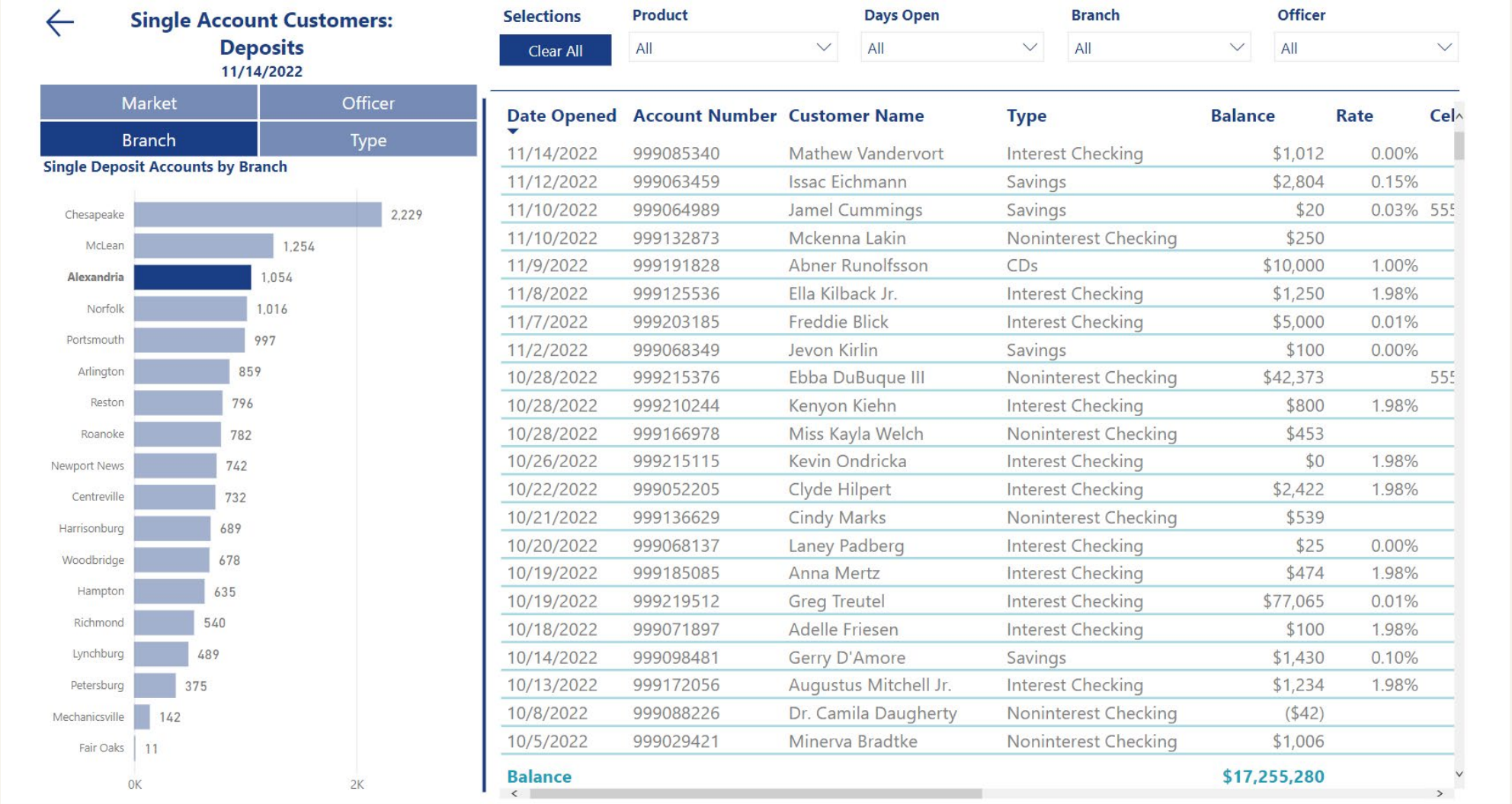

Takeaways

- Become a Unifier Marketer
- Simple, direct and intentional visuals are your friend
- Leverage your **SUPERPOWER** as a marketer and tell the story behind the data