Overcoming Communication Challenges to Improve Success in Analytics

Digital Analytics Summit 2024

Amsterdam

Anna Lewis

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Anna Lewis

@annatlewis

- Founder of Polka Dot Data analytics consultancy
  - GA, GTM, Looker and a bit more
  - A friendly team of 8
  - Medium-large (often luxury niche) businesses
- Over 15 years analytics experience
- Did my time in the SEO & PPC world
- Google Analytics geek
- Helped over 250 businesses increase cashflow!
- Love Lego, gin and kickboxing
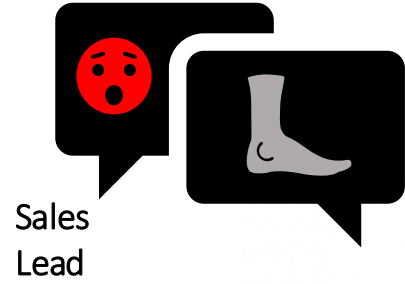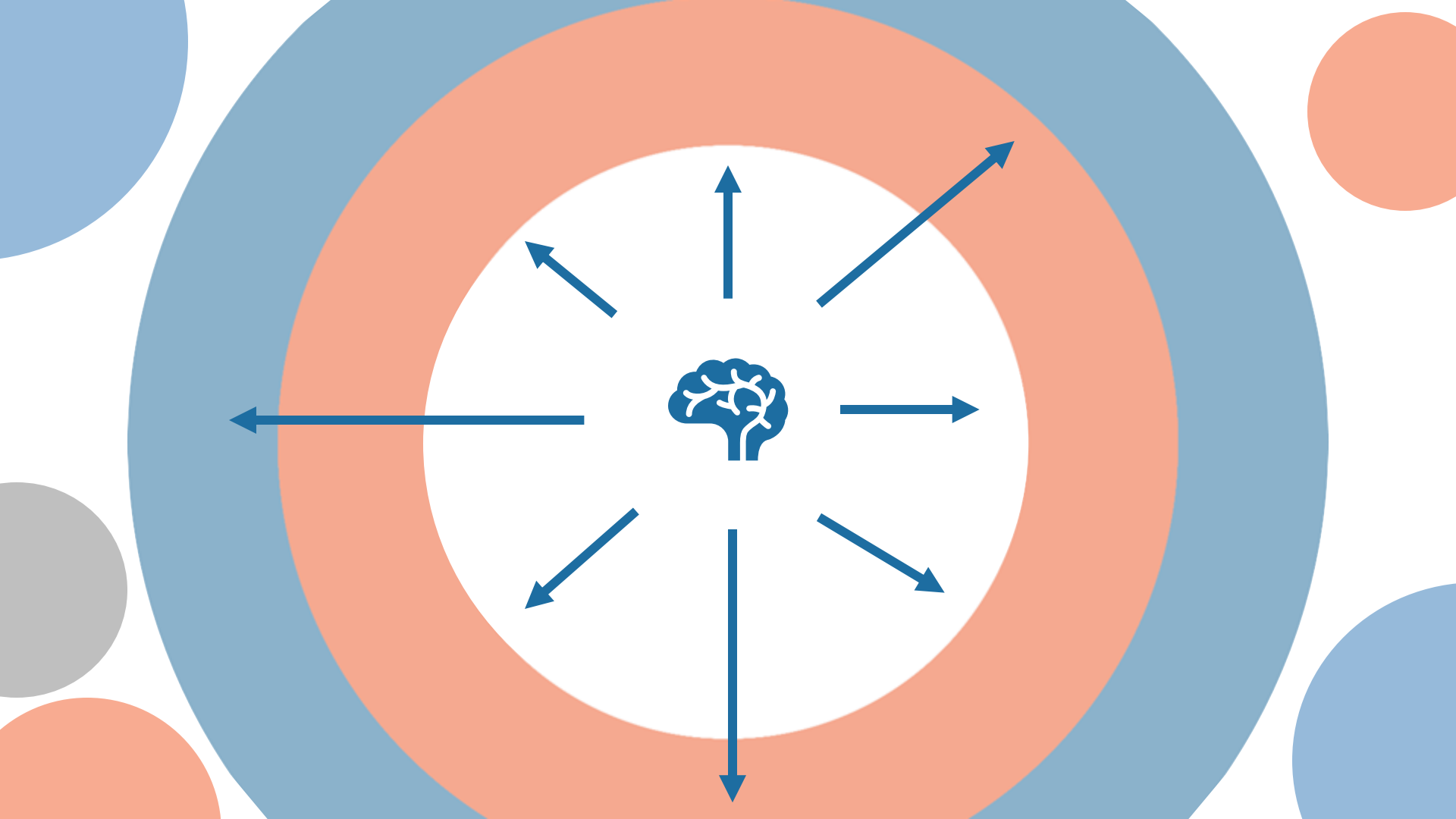
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THE CRYSTAL MAZE

Sales
Lead

Sales Lead

Problems

▶ Misunderstandings

▶ Clients don't know they need what you're talking about

▶ Someone made a mistake / did it wrong

▶ That's great data, but what do I do with it?

▶ I didn't know that's even possible!

▶ Feeling threatened by you coming in as the "expert"

▶ We all see the world differently

Juicy brains!

Who?

Client	Nuerotypical	Parent
Adult	Nuerodivergent (Autistic, ADHD, Dyslexic etc)	Colleague
Child	Teacher	Different language
Superior	Student	Different background
Employee	Boss	Historically aggressive
Friend	Empowered	Over-thinker
Family	Service Provider	Hormonal
Partner	Customer Service Rep	Depressed
Hyper Sensitive		Emotional

DISC Types

- Dominance
- Influence
- Steadiness
- Conscientiousness

https://blog.extendeddisc.org/disc-profiles-same-us-canada-singapore-uk

RED

D-Style

- Direct
- Demanding
- Results-oriented
- Assertive
- Decisive
- Independent
- Impatient
- Strong-willed

D

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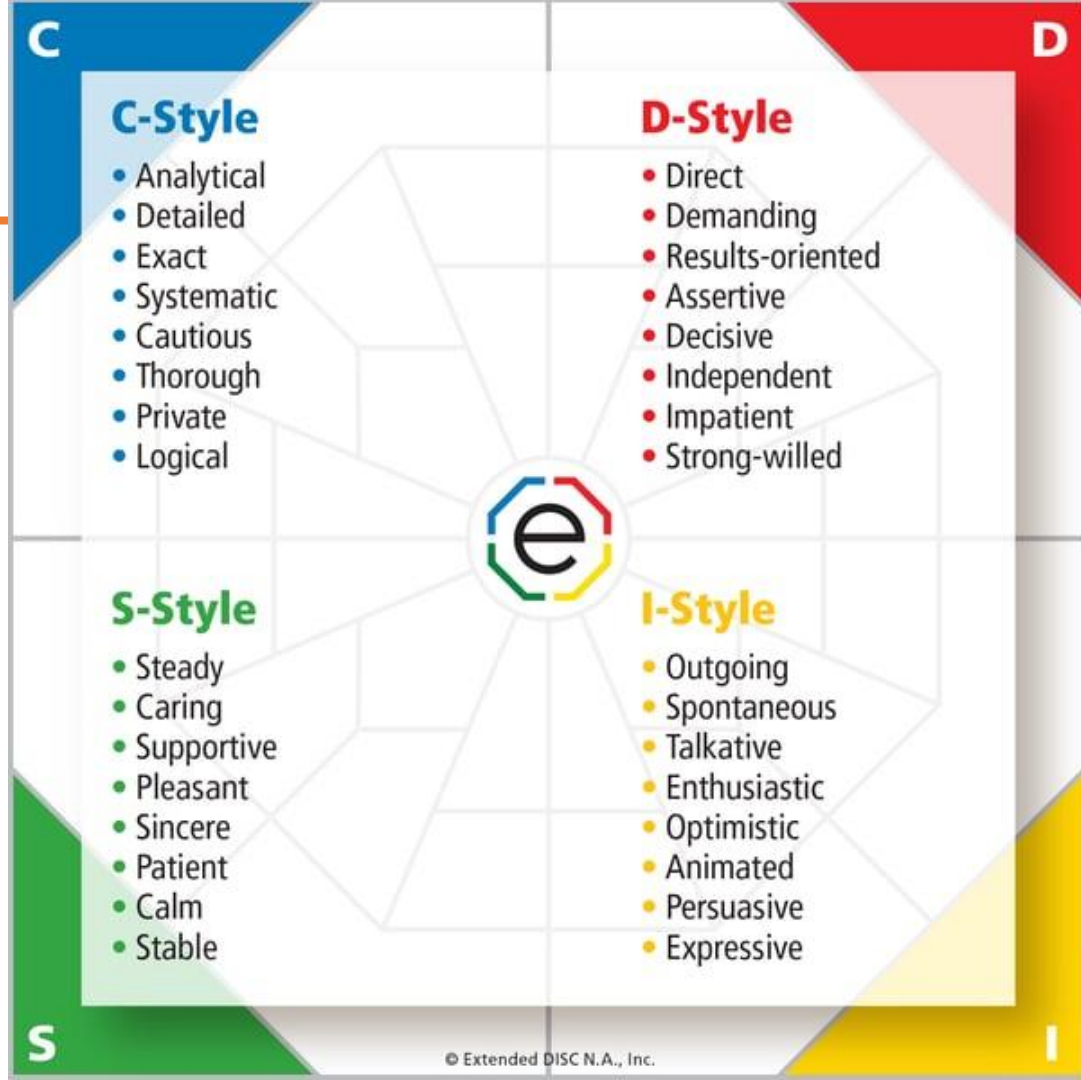
Yellow

I-Style

- Outgoing
- Spontaneous
- Talkative
- Enthusiastic
- Optimistic
- Animated
- Persuasive
- Expressive

DISC N.A., Inc.

Green

S-Style

- Steady
- Caring
- Supportive
- Pleasant
- Sincere
- Patient
- Calm
- Stable

S

© Extended
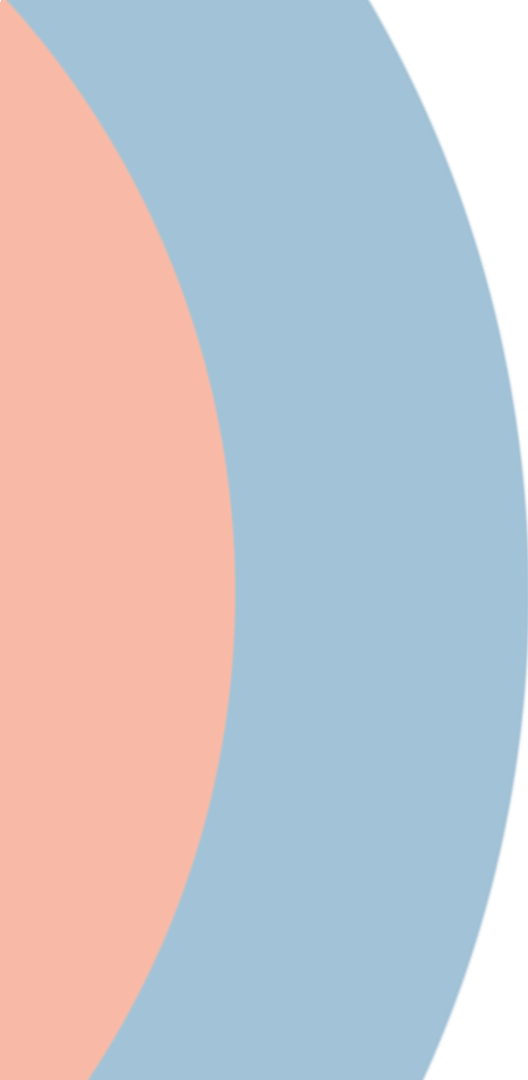
Blue

C-Style
- Analytical
- Detailed
- Exact
- Systematic
- Cautious
- Thorough
- Private
- Logical

Communication is only as good as what the listener can interpret

Surrounded by Idiots, Thomas Erikson

Types of Communication

4 Types of Communication

Verbal

Non-Verbal

Visual

Written

4 Types of Communication in Projects

Graphs
Pictures
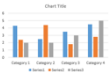
Visual

4 Types of Communication in Projects

Phone calls
Video calls
Presentations
Meetings

Verbal

Graphs
Pictures

Visual

Written

Emails
Reports
Documentation

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4 Types of Communication in Projects

Phone calls
Video calls
Presentations
Meetings

Verbal

Non-Verbal

Expressions
Gestures
Body language

Graphs
Pictures

Visual

Written

Emails
Reports
Documentation

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Verbal & Non-Verbal

What Do You Think Makes a Good Talk?

Content

Delivery

Visuals

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What Really Makes a Good Talk?

Delivery

Content

Visuals

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7 Secrets of Greatest Speakers

Body Language

55%

Tone of Voice

38%

Words

7%

The 7 secrets of the greatest speakers in history | Richard Greene | TEDxOrangeCoast

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What matters most?

Sharing from the heart.

The 7 secrets of the greatest speakers in history
Richard Greene | TEDxOrangeCoast

lovelyperson@clientname.com

Helpful Email

Dear Attendees,

That ⛔**DOES NOT** ⛔**mean** the same rules apply to

📧 emails you send ✉️ to your 🌸 lovely 🌸 👨 clients 💰📈.

Love and kisses 💕

Anna

🤮 Please don't do this!

Anna Lewis

Written

Reverse Pyramid
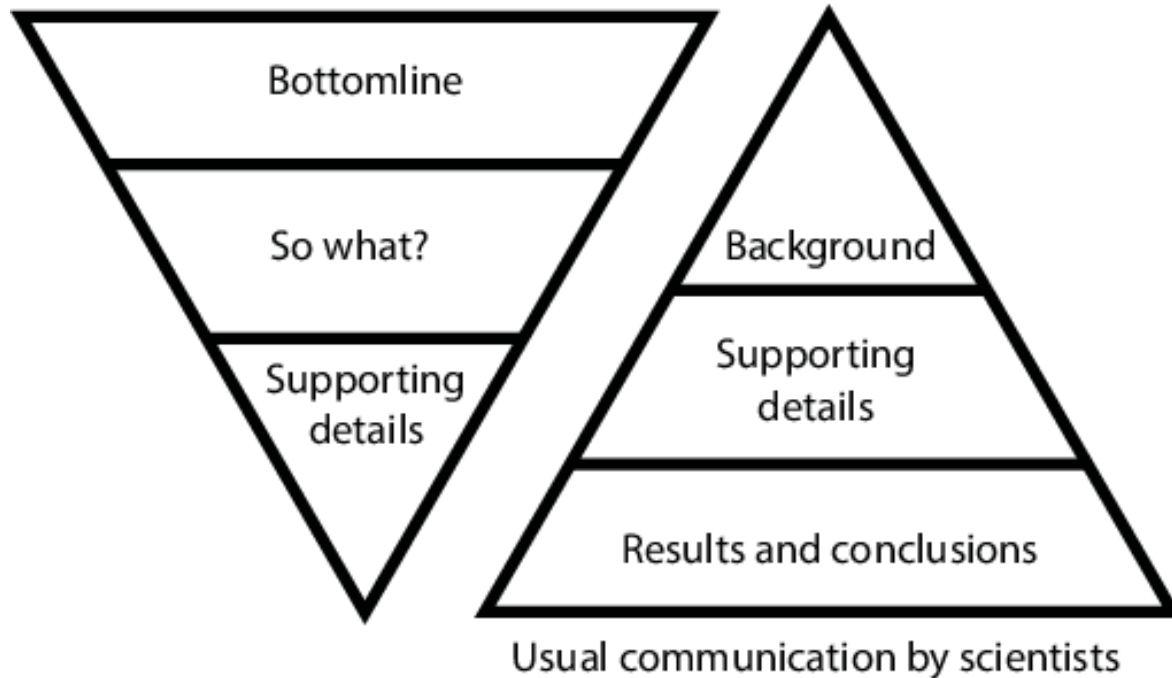
Hi Client,

Purchase tracking code needs fixing.

Best regards,

Anna

Hi Client,

You will need to ask the developers to *fix the purchase tracking code* **revenue value to be in the local currency, such as GBP**.

Best regards,

Anna

Hi Client,

We have identified an issue that means the sales data isn't accurate for your reporting. At the moment it is a mix of currencies so the total value will be inaccurate.

You will need to ask the developers to fix the purchase tracking code revenue value to be in the local currency and ensure the currency variable has the correct value, such as GBP.

Best regards,

Anna

Hi Client,

We have identified an issue that means the sales data isn't accurate for your reporting. At the moment it is a mix of currencies so the total value will be inaccurate.

You will need to ask the developers to fix the purchase tracking code revenue value to be in the local currency and ensure the currency variable has the correct value, such as GBP.

Please can this be done as a matter of urgency, ideally before the sale launching on Thursday.

Best regards,

Anna

Hi Client,

I hope you had a great time away at the weekend and you're not too busy ahead of the sale!

We have identified an issue that means the sales data isn't accurate for your reporting. At the moment it is a mix of currencies so the total value will be inaccurate.

You will need to ask the developers to fix the purchase tracking code revenue value to be in the local currency and ensure the currency variable has the correct value, such as GBP.

Please can this be done as a matter of urgency, ideally before the sale launching on Thursday.

Let us know if you have any issues or questions at all.

Best regards,

Anna

Email ABCDE Rules

▶ Attention - Hi so and so, how are you?

▶ Breakdown - Here's where we are, and where we need to be. So here is what needs to happen.

▶ Check - Is that going to be ok? When can so and so have this done by?

▶ Deliverables - remind of the status of the key deliverables, when you're next working on the project etc.

▶ End - Adios Amigo.

Before you even start

▶ WHO – are they? Who are you to them?

▶ HOW – are they likely to be feeling? In general AND about this.

▶ WHY – is this relevant to them? Why should they care?

▶ WHAT – do you need out of this?

▶ WHEN – does anything need to happen?

Different person

Different rules

Who?

Client	Nuerotypical	Colleague
Adult	Nuerodivergent (Autistic, ADHD, Dyslexic)	Different language
Child		Different background
Superior	Empowered	Historically aggressive
Employee	Teacher	Over-thinker
Friend	Student	Hormonal
Family	Boss	Depressed
Partner	Service Provider	Emotional
Hyper Sensitive	Customer Service Rep	Arrogant
	Parent	

Does it matter who they are?

Not necessarily…

whoever they are you should always be:

► Respectful

► Kind

► Aware we're all just trying our best

► No need to be scared of anyone

But, do use it to think about:

► THEIR WHY

► How they might read this

► What type of communication suits their personality type

Bear in mind:

Tone of voice

Phrasing

Purpose – for you

Purpose – for them

Language barriers

Lifestyle impacts

Ego states

Kindness and mutual respect

Project Communication Strategies

What's involved?

▶ Planning

▶ Discussions

▶ Documentation

What's involved?

▶ Planning
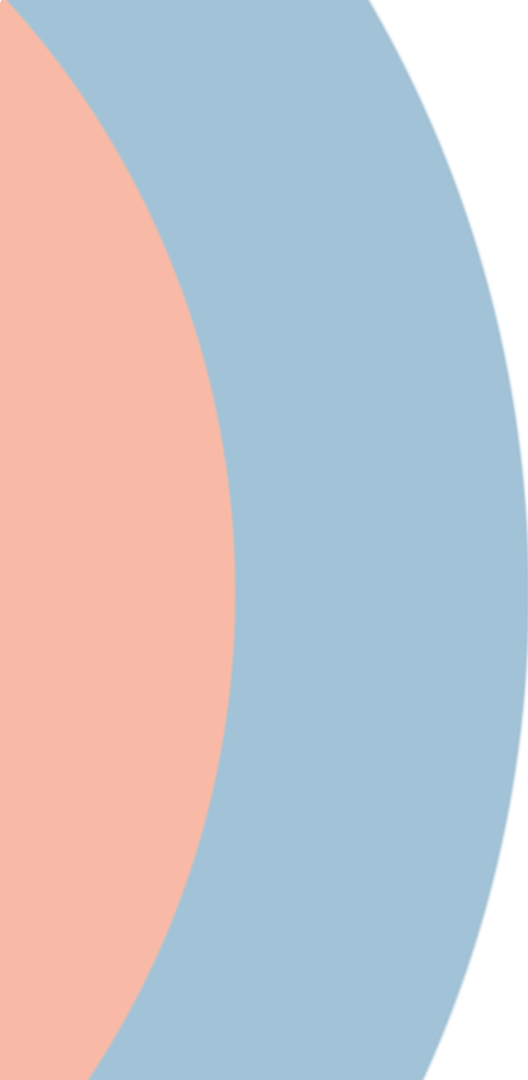
▶ Discussions ➡ **UNDERSTANDING** ➡ **OBJECTIVES**

▶ Documentation

Speak the *right* language
To the *right* person
At the *right* time
In the *right* way
For the *right* reasons

Managing Project Comms

► Kick off call

► Clear documentation

► Clear technical guide

► Open communication

Managing Project Comms

▶ Kick off call to all get on the same page – set questions and a chance to let the client talk. Main objective – find out their main objective.

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▶ Clear documentation

➡ NOT a 30 page written document!!

➡ Tick lists

➡ Prioritised to do lists / action plan

➡ Finding – which means that – who needs to do what (and when)

Managing Project Comms

▶ Kick off call to all get on the same page – set questions and a chance to let the client talk. Main objective – find out their main objective.

▶ Clear documentation
- ➡ NOT a 30 page written document!!
- ➡ Tick lists
- ➡ Prioritised to do lists / action plan
- ➡ Finding – which means that – who needs to do what (and when)

▶ Technical guide – clear customised examples

Managing Project Comms

▶ Kick off call to all get on the same page – set questions and a chance to let the client talk. Main objective – find out their main objective.

▶ Clear documentation
- NOT a 30 page written document... unless that's what they want!
- Tick lists
- Prioritised to do lists / action plan
- Finding – which means that – who needs to do what (and when)

▶ Technical guide – clear customised examples

▶ Open communication with developers to explain it for the marketing team we work for

Our Project Document

Project Management

   Project Plan

   Who's who

   Scope

   Call Notes

Planning and Auditing

   GA4 Set up Checklist

   GA4 Audit

   UA to GA4 Plan

The Tracking Specification

   Each core spec required

   Testing plan and log

Post Launch Actions

   Customisations, Insights

   Annotations, connections

Reference Materials

   Channels, Parameters, etc

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Hello, do you speak geek?

Team:

"Just implement a Data Layer:
[Link to the Google data layer guide](#)"

Item parameters

Name	Type	Required	Example value	Description
item_id	string	Yes*	SKU_12345	The ID of the item. *One of item_id or item_name is required.
item_name	string	Yes*	Stan and Friends Tee	The name of the item. *One of item_id or item_name is required.
affiliation	string	No	Google Store	A product affiliation to designate a supplying company or brick and mortar store location. Note: 'affiliation' is only available at the item-scope.
coupon	string	No	SUMMER_FUN	The coupon name/code associated with the item. Event-level and item-level coupon parameters are independent.
discount	number	No	2.22	The monetary discount value associated with the item.
index	number	No	5	The index/position of the item in a list.

Hello, do you speak geek?

Team:

"Just implement a Data Layer:
[Link to the Google data layer guide](#)"

Marketer:
"Implementwhatnow?!"

Item parameters

Name	Type	Required	Example value	Description
item_id	string	Yes*	SKU_12345	The ID of the item. *One of item_id or item_name is required.
item_name	string	Yes*	Stan and Friends Tee	The name of the item. *One of item_id or item_name is required.
affiliation	string	No	Google Store	A product affiliation to designate a supplying company or brick and mortar store location. Note: 'affiliation' is only available at the item-scope.
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Analytics Communication

Mental Block Mental Block Mental Block
Mental Block Mental Block Mental Block
Mental Block Mental Block Mental Block
Mental Block Mental Block Mental Block
Mental Block Mental Block Mental Block
Mental Block Mental Block Mental Block

Speak their language(s)

Purchase	Ecommerce tracking to be sent	DL Name	DL Value	Required	Type	Information Needed	Example
Push this event on the thank you page when the purchase is confirmed	Push a "purchase" event with the ecommerce data containing the purchase and product details	event	"purchase"	Yes	text	event name	
		ecommerce		Yes	object	<ecommerce object>	
		transaction_id		Yes*	text	Unique transaction identifier	
		currency		Yes*	text	Currency code i.e 'GBP', 'EUR'	
		value		Yes	float	Total Revenue including Tax, excluding Shipping.	
		tax		Yes	float	Tax amount	
		shipping		Yes	float	Shipping amount	
		affiliation		No	text	The store or affiliation from which this transaction occurred.	
		coupon		No	text	Order level discount/coupon code	
		voucher_purchased		Yes	integer	If the user bought a gift card, put the value in here	
		voucher_redeemed		Yes	integer	If the user paid with a gift card, put the value in here	
		items		Yes	list	<list of item objects>	
		<list of item objects>	item_name	Yes*	text	ENGLISH Name of the product (item_name or item_id are required)	
			item_id	Yes*	text	ID / SKU of the product	
			price	Yes	float	Product unit price	
			discount	Yes	float	Discount amount	
			coupon	Yes	text	Discount code/coupon	
			quantity	Yes	integer	Quantity in the cart	
			item_brand	Yes	text	Product brand	
			item_category	Yes	text	Product category top level - may need its own Primary category fields	
			item_category2	Yes	text	Product category 2nd level	
			item_category3	Yes	text	Product category 3rd level	
			item_category4	Yes	text	Product category 4th level	
			item_variant	Yes	text	Product Variant i.e. colour, size etc	

Example:

```
<script>
window.dataLayer = window.dataLayer || [];
window.dataLayer.push({
  'event': 'purchase',
  'ecommerce': {
    'transaction_id': 'E812345678',
    'currency': 'EUR',
    'value': 17.90,
    'tax': 2.98,
    'shipping': 6.50,
    'affiliation': 'E8',
    'coupon': 0.00,
    'voucher_purchased': 0.00,
    'voucher_redeemed': 17.90,
    'items': [
    {
      'item_name': 'Cotton Jersey Stripe Short Sleeve T-shirt (Baby)',
      'item_id': '4880182649376',
      'price': 7.95,
      'discount': 0,
      'coupon': '',
      'quantity': 1,
      'item_brand': 'Muji',
      'item_category': 'Apparel',
      'item_category2': 'Kids',
      'item_category3': 'Baby',
      'item_category4': 'Baby Clothes & Accessories',
      'item_variant': 'Navy, 70-80'
    },
    {
      'item_name': 'Indian Cotton Stretch Rib Sarouel Trousers (Baby),
      'item_id': '4880344205334',
      'price': 9.95,
      'discount': 0,
      'coupon': '',
      'quantity': 1,
      'item_brand': 'Muji',
      'item_category': 'Apparel',
      'item_category2': 'Kids',
      'item_category3': 'Baby',
      'item_category4': 'Baby Clothes & Accessories',
      'item_variant': 'Navy, 70-80'
    }]
  }
});
</script>
```

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Speak their language(s)

Purchase	Ecommerce tracking to be sent	DL Name	DL Value	Required	Type	Information Needed	Example

Push this event on the thank you page when the purchase is confirmed	Push a "purchase" event with the ecommerce data containing the purchase and product details.	event	"purchase"	Yes	text	event name	`<script>`
							`window.dataLayer = window.dataLayer || [];`
							`window.dataLayer.push({`
							`  'event': 'purchase',`
							`  'ecommerce': {`
							`    'transaction_id': 'E812345678',`
							`    'currency': 'EUR',`
							`    'value': 17.90,`
							`    'tax': 2.98,`
							`    'shipping': 6.50,`
							`    'affiliation': 'E8',`
							`    'coupon': 0.00,`
							`    'voucher_purchased': 0.00,`
							`    'voucher_redeemed': 17.90,`
							`    'items': [`

		ecommerce		Yes	object	`<ecommerce object>`	
		transaction_id		Yes*	text	Unique transaction identifier	
		currency		Yes*	text	Currency code i.e 'GBP', 'EUR'	
		value		Yes	float	Total Revenue including Tax, excluding Shipping.	
		tax		Yes	float	Tax amount	
		shipping		Yes	float	Shipping amount	
		affiliation		No	text	The store or affiliation from which this transaction occurred.	
		coupon		No	text	Order level discount/coupon code	
		voucher_purchased		Yes	integer	If the user bought a gift card, put the value in here	
		voucher_redeemed		Yes	integer	If the user paid with a gift card, put the value in here	
		items		Yes	list	`<list of item objects>`	
		`<list of item objects>`	item_name	Yes*	text	ENGLISH Name of the product (item_name or item_id are required)	
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			quantity	Yes	integer	Quantity in the cart	
			item_brand	Yes	text	Product brand	
			item_category	Yes	text	Product category top level - may need its own Primary category fields	
			item_category2	Yes	text	Product category 2nd level	

Annotation overlays:

- **WHEN (normal language)**
- **WHEN (tech speak)**
- **Code bits for devs**
- **Real life examples in marketing speak that everyone understands**
- **Code example that technical team can use but marketers can spot their relevant items in too**

Definition and example both updated to their business and product terminology

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Communicating Test Results

Tell us WHAT to DO, not what you SEE

	L	
	Step 4 - Collection Details - Selected Date and delivery	**Step**
volu	https://███████████████████.com/book-collection/?type=by_ite m&postcode=PO6%203EN	https: e=by_
	An add shipping event is firing here **SO WHAAAAT??**	Th data "cd gtm
	`dataLayer.push({event: "collect_date_entered", gtm.uniqueEventId: 23})`	data "cd gtm

Findings + ACTIONS

|	A	B	C
1	**Test Journey - ▓▓▓ Global Dev - 24-08-23**		
2	Issues note in red	https://developers.google.com/analytics/devguides/collection/ga4/ecommerce?client_type=gtm#make_a_purchase_or_issu	
3	Notes in orange		
4	**TEST Account Details**		
5	Where to test?	https://▓▓▓global-dev.myshopify.com/?_ab=0&_fd=0&_sc=1&key=13a68bc8b5c2f4eeabc0f8f8dd272dce34282acdc0d17	
6	Card Details	4242 4242 4242 4242 - any future date and CVV	
7			
8	**Action**	**View Item**	**Add 2 quantity to Cart**
9	**URL**	https://▓▓▓ev.myshopify.com/products/▓▓▓	https:▓▓▓dev.myshopify.com/products/▓▓▓
10			
11	**Notes**	- Item name, item id and itme price value are always displayed of the first size product when viewed. If first size is 50ml it will show the name, id, price of 50 ml product - Product name is not consistent throughout the journey	- add_to_cart is firing twice - the price parameter is incorrect. it should be 601 - the value parameter is also incorrect as price is incorrect -item name is getting changed as per the size selected - Product name is not consistent throughout the journey
12			

Top Strategies

Communication Rules to Implement

▶ Reply to clients within …

▶ Manage client expectations by…

▶ Plan and template core communications

▶ Write client zoom call rules

Client Call Rules
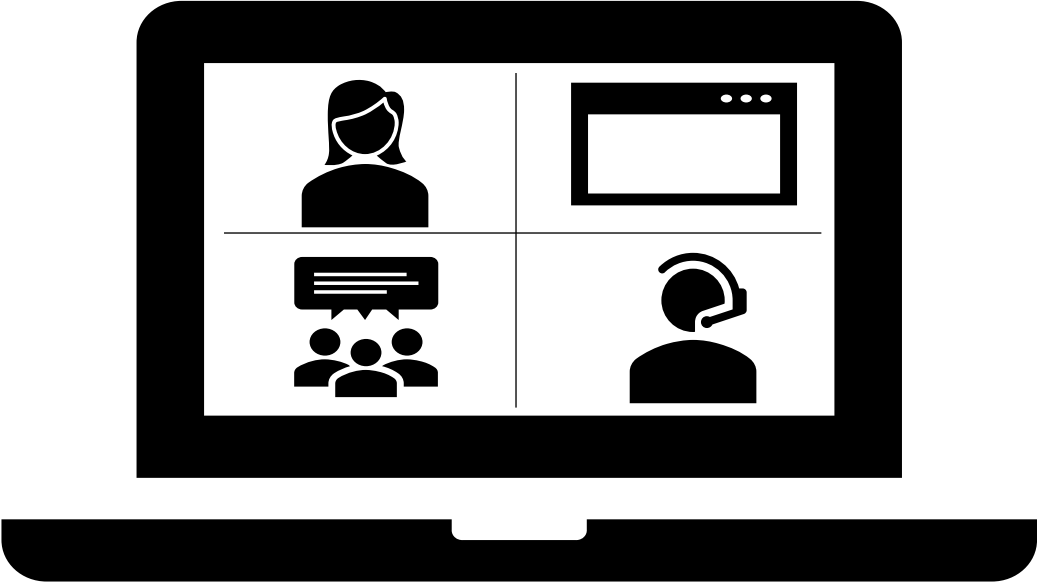
Client Call Rules

- Close EVERYTHING before the call
  - Avoid distractions
  - Prevent accidentally screensharing the wrong thing!
  - Remove embarrassing notifications

- Start with intros (if necessary) and agenda, finish with summary of actions

- Keep conversation friendly and flowing throughout
  - Feel free to chit chat about weather / etc at the beginning briefly
  - Use phrases to keep the conversation moving

Tailor your communication

▶ To their personality

▶ To how they work

Details … top level … data … stories … simple … technical

Have you met their needs?

Best Practices

▶ Document who's who and how to communicate with them

    ▶ Even who will manage the communication and who is back up

▶ Create an email address per client, clientname@businessname.com

▶ Do your best to stay positive! Even when things go wrong.

Internal Comms

▶ Be clear who owns each task

▶ Have a back up person on each task - for when you're offline - OR - use XX as a PM contact so she can hold the fort whilst you're not online

Stakeholders

▶ Be clear who needs to know what

▶ Who makes the decisions

▶ Who to CC, when

Stay POSITIVE!

Even when things go wrong

Communication Scripts

Opening lines

- Hi BlahdeBlah, How are you?
- Have you coped with the cold weather?
- Are you enjoying the sunshine?
- How bad has the weather been where you live? Where is that again?
- How are your other projects going?
- Is business stressful right now?
- How has this financial year been for you guys?
- Are X whiskey/ perfume/ tool X sales being affected by X weather/ economy Z?

Progression lines

- Is that ok?
- Shall we move on to the next point now?
- Was there anything else to discuss on that topic?
- Brilliant! Is there anything else?
- Everyone happy? Great let's keep going
- Boris did you have anything to add here?

"Oh sh*t / help" lines

- Oh that's really interesting, let me look into it and get back to you
- Ah, I wonder why that's happened, do you know anything else about this?
- Ok, what impact is this currently having, just so I know how quickly we need to allocate resource to it?
- Can you think of anything else that might have affected this?
- Could you please send over the links to the reports and some useful screenshots, then we can look into it as a team

Sales lines

- **Would it be ok if** I showed you …
  - how else we could help?
  - How we work?
  - This amazing example of a dashboard you might be interested in
- Now you have XY data, **have you considered** automating your reporting with dashboards?
- Just **wondering if you'd be interested in** the training we have to offer?

Polite ending lines

- Super, so have we covered everything we needed to?

- Did anyone have anything else to add? Wonderful, speak xxx

- Did everyone get what they needed?

- Everyone know what they need to do next? Great, let's get cracking!

Acceptable to not acceptable...

Polite
Positive
Actionable
Honest
Friendly

Relaxed
Informal
Off topic

Sarcasm
Swearing

Politics
Religion
Rudeness
Grumpines

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I'm worried about GA4 accuracy

I'm worried about GA4 accuracy

Well privacy and consent are VERY important …

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or

I'm worried about GA4 accuracy

Oh I KNOW!!

It is such a challenge isn't it?

Shall we talk about the causes or what we can do to mitigate the impact?

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I'm worried about GA4 accuracy

HUMAN *Oh I KNOW!!*

It is such a challenge isn't it? EMPATHY

Shall we talk about the causes or what we can do to mitigate the impact?

SUPPORT OBJECTIVES

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Why SO WHAT matters

Statements mean

NOTHING

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I'm cold.

Relationship experience

I'm cold.

SO WHAT!?

Relationship experience

I'm cold.

I'm cold, **please could you** get me a blanket

Relationship experience

Traffic has increased.

My own frustrations in reporting

Traffic has increased.

Traffic has increased.

> *Organic traffic has increased in the UK compared to the same period last year, but not enough to hit our target growth plans.*

My own frustrations in reporting

What is the conversion rate of X?

2.8%

right

What is the conversion rate of X?

Predict Questions
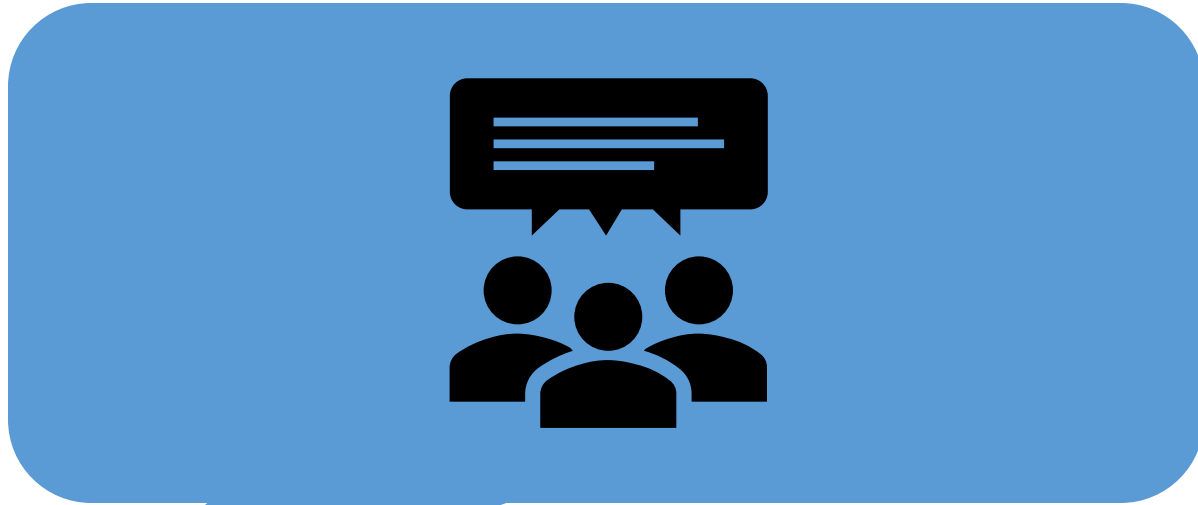
Kelly, our super Senior Analytics Executive

"Manage Up"

Ellie Hughes, Eclipse Digital

How To Win Friends and Influence People

Don't criticise or correct.

Listen and take an interest.

Make what you say relevant.

How to Win Friends and Influence People, Dale Carnegie

NO

Parenting!

NO

Yes, however

Parenting content

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No, you can't have an ice cream

Parenting desperation

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Can you reduce the price?

No, you can't have a discount

Parenting content

Can you reduce the price?

Yes, if we take out part C
we can do it for less

Parenting content

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Validation of No: then AND not BUT

I can understand you want XYZ, AND if we do yyz then it would be better

Yehoshua Coren

Thank you > I'm sorry

© Walt Disney
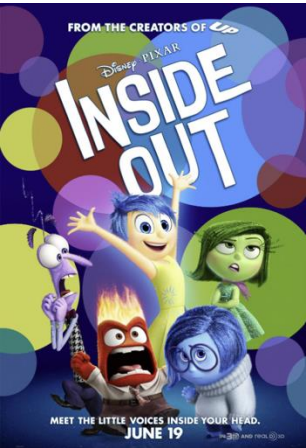
I'm sorry for being late ☹ ☹

Thank you for your patience ☺ ☺

Business Development training

polkadotdata.com

Don't go towards the pier

My mum…

Don't go towards the pier

My mum…

I did x, I did y, then blaaaaaaah

Alan, who ran presentation training for me 10yrs ago

search..

IT   DE

Road Bike   Trekking   Trail Running   Multisport   Gravel   MTB and E-BIKE   Via Ferrata   Ski & Skisafari   Explore

If you don't ASK
the answer is always no

To guarantee a fast and comprehensive response, you may reach us via E-mail. Please do not hesitate to contact us with all of your inquiries. We ensure that we will meet each and every request to our greatest ability in a timely manner.

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https://www.holimites.com/

Email overwhelm

4 hour work week, Timothy Ferriss

Out of Office

4 hour work week, Timothy Ferriss

And finally…

Email ABCDE Rules

▶ Attention - Hi so and so, how are you?

▶ Breakdown - Here's where we are, and where we need to be. So here is what needs to happen.

▶ Check - Is that going to be ok? When can so and so have this done by?

▶ Deliverables - remind of the status of the key deliverables, when you're next working on the project etc.
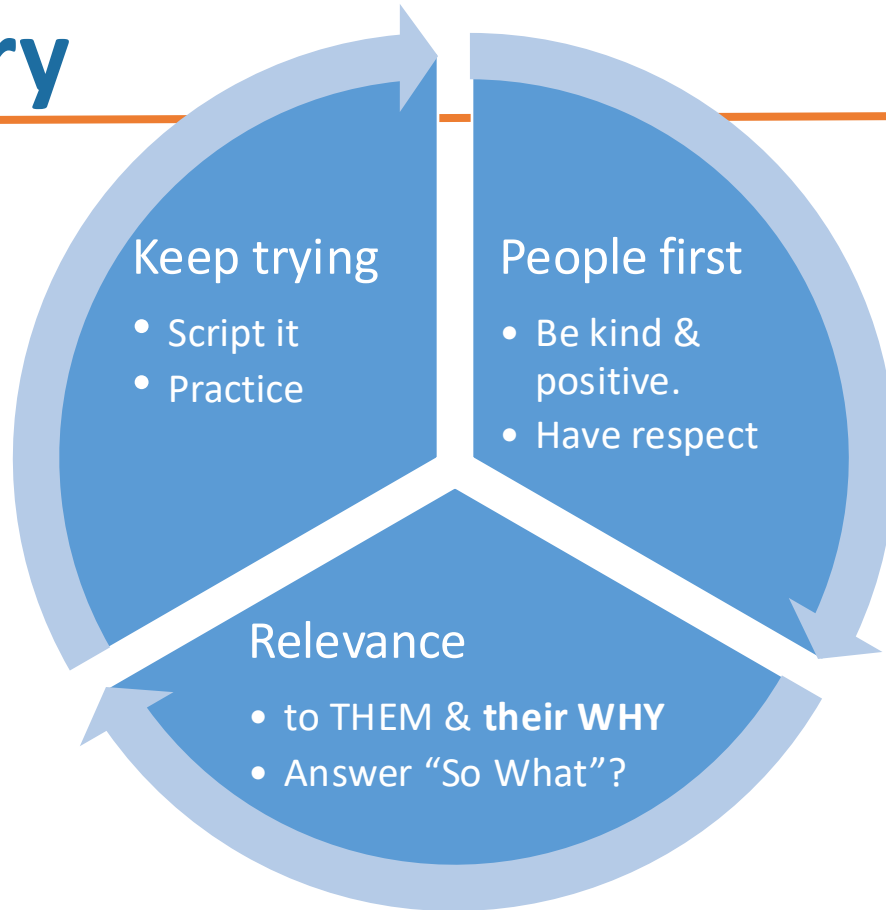
▶ End - Adios Amigo.

Reading List

▶ How to Win Friends and Influence People
  ▶ Dale Carnegi

▶ Surrounded by Idiots
  ▶ Thomas Erikson

▶ The Subtle Art of Not Giving a F*ck
  ▶ Mark Manson

▶ Parenting guides!

Summary

Keep trying
- Script it
- Practice

People first
- Be kind & positive.
- Have respect

Relevance
- to THEM & **their WHY**
- Answer "So What"?

Tone of voice

Objective

Empathy

#dontbeadick

Fake it
until
you make it!

Tone of voice

Objective

Empathy

#dontbeadick

We're all just people.

Anna Lewis

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