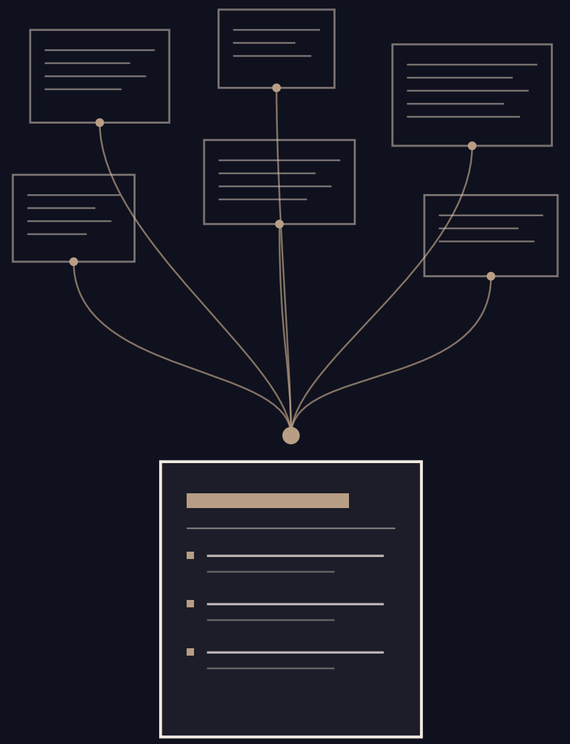
EA IGNITE FALL 2026 · ADVANCED LAB

Data Storytelling

Turning Executive Information into Insight



Meg Steinschauer
Founder, Connected Assistants

Renaissance Nashville Hotel
Monday 2 November 2026

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YOUR FACILITATOR

Meg Steinschauer

Here to guide the discussion and make insight tools practical.

Founder, Connected Assistants, an accredited training provider

MBA
Business administration

Organisational and Business Psychology
Postgraduate study in progress

WHAT YOU CAN EXPECT

A practical session, built around better decisions

- Start with the decision, not the spreadsheet.
- Turn findings into messages leaders can act on.
- Leave with a structure for your next executive update.

> You bring the context. I'll bring the structure.

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NINETY MINUTES · FIVE PHASES

Session Roadmap

01	The Strategic Question Behind the Data	10 min	PRESENTATION
02	The Scenario: Caldwell Weekly Update	20 min + work	GROUP WORK
03	Simplifying Without Losing Meaning	20 min + work	GROUP WORK
04	Building the Narrative Layer	15 min	PRESENTATION
05	The Executive Update + Debrief	25 min	GROUP WORK

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BEFORE WE START

Laptops open. One per group.

Open The Executive Update Builder now. The Caldwell inputs are already loaded. It is the tool you will build your update in, and it is yours to keep.

connectedassistants.com/ea-ignite-2026-executive-update

Phones work. Laptops are better. Paper is on your table if the Wi-Fi gives up.

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PHASE ONE · 10 MINUTES

The Strategic Question Behind the Data

The report is the format. The decision is the point.



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WHERE IT STARTS

Your leader did not ask for a report. They asked for help making a decision. The report is just the format it arrived in.

The skill is learning to hear the decision behind the request. This is what separates reporting from strategic support.

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HEARING THE DECISION BEHIND THE REQUEST

Request, Then Question

THE REQUEST	THE STRATEGIC QUESTION
“Can you pull the Q3 numbers?”	**Are we on track for the year-end target, and if not, what needs to change in Q4?**
“Can you update the headcount dashboard?”	**Do we have the right people in the right places to deliver what we committed to?**
“Can you summarise the client feedback?”	**Is there a pattern here that tells us something about retention risk?**
Your request from this week	*The question underneath it*

Shout one out. We will translate it together.

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BEFORE YOU OPEN THE SPREADSHEET

Three Questions to Ask Yourself

01 What decision will this information inform?

02 What would change my leader's mind or confirm their direction?

03 What does the reader need to believe, understand, or act on after seeing this?

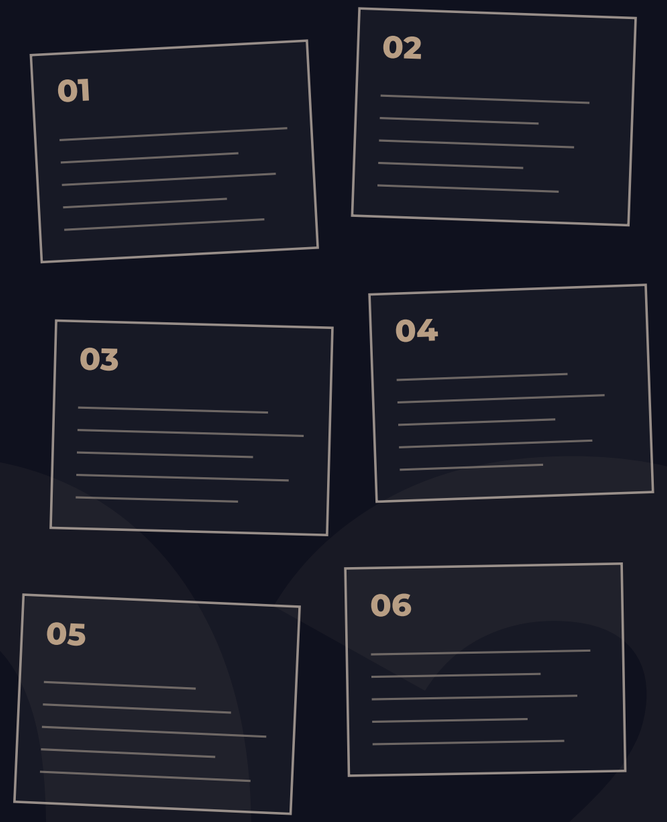
> **If you cannot answer these three questions, you are not ready to build the report. You are ready to have a conversation with your leader about what they actually need.**

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PHASE TWO · 20 MINUTES PLUS GROUP WORK

The Caldwell Weekly Update

Six raw inputs, a Thursday afternoon, and the brief to make it half the length.



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THE SCENARIO

Caldwell Group

- Mid-market professional services and technology company, 800 employees.
- The CEO is preparing for a quarterly board meeting in 10 days.
- Three divisions: Consulting, Software Products, and Managed Services.
- The COO, your executive, gets a weekly operational update from you every Friday. The CEO reads it too.
- Last week's update was 1,400 words, pasted from three spreadsheets. The CEO replied with one line: half the length and twice as useful.

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THE BRIEF FROM THE CEO

Every update I get this quarter must be half the length and twice as useful.

— Said to the COO. Passed to you.

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SIX INPUTS · ONE WEEKLY UPDATE

The Raw Materials

Revenue by division, Q3 to date

3 tables. Consulting 4.2m, up 3 percent. Software Products 2.1m, flat. Managed Services 3.6m at 18 percent margin, down from 22, floor 20.

Headcount by function

812 heads. Attrition 11 percent annualised, up from 9. 14 open roles, 6 in Managed Services.

Project delivery status, 23 projects

19 green, 3 amber, 1 red: Helix infrastructure, Managed Services, three weeks late.

Email chain: the delayed release

Slips three weeks. Two division heads disagree on why. 0.4m moves into Q4.

Risk register extract

18 items copied from the corporate framework. Unchanged for two quarters.

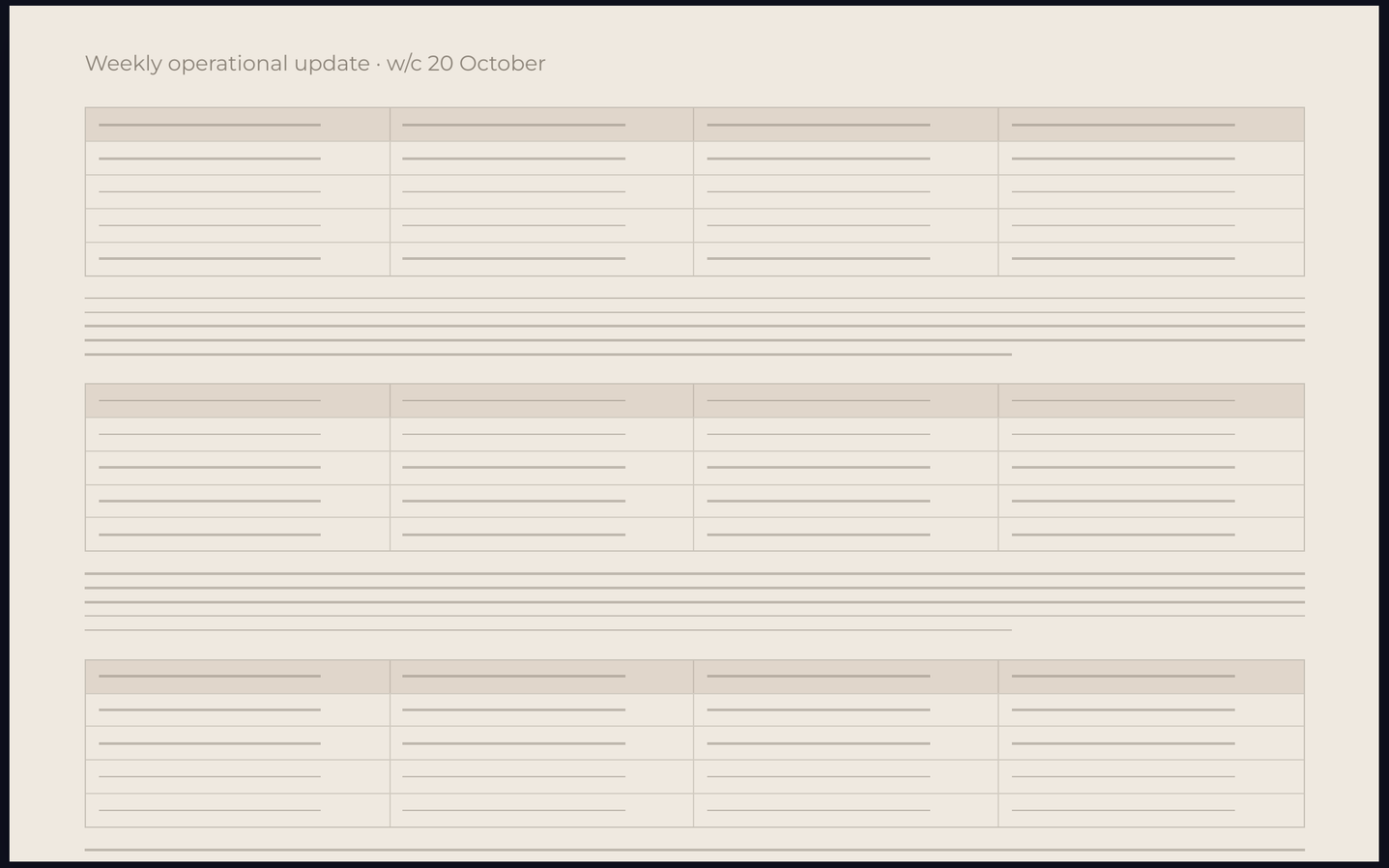
Corridor remark, CEO's EA

The CEO keeps asking about Managed Services margin.

A note from the COO: Make this tighter. I trust your judgement.

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What last week's update looked like



1,400 words.

Three pasted tables.

No headline. No ask.

Everything that arrived, in the order it arrived.

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15:00

GROUP ACTIVITY

In your groups · 15 minutes

Triage the Inputs

01 Open The Executive Update Builder, step 2.

02 Mark every input In the update, Link it, or Leave out. Watch the word counter. The update is 700 words.

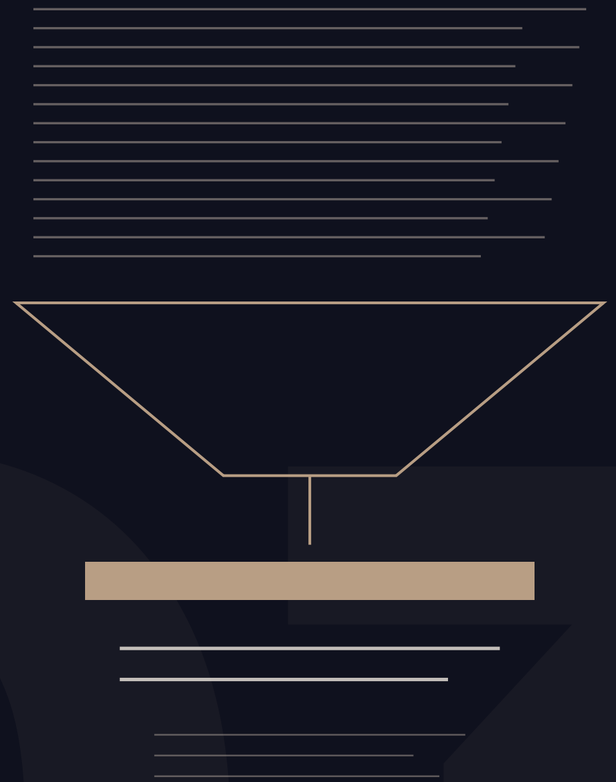
03 If you keep something in but will rewrite it shorter, change its word count to match.

04 Write what is missing that your executive is already being asked about.

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PHASE THREE · 20 MINUTES PLUS GROUP WORK

Simplifying Without Losing Meaning



First, share back the structure your group rebuilt.

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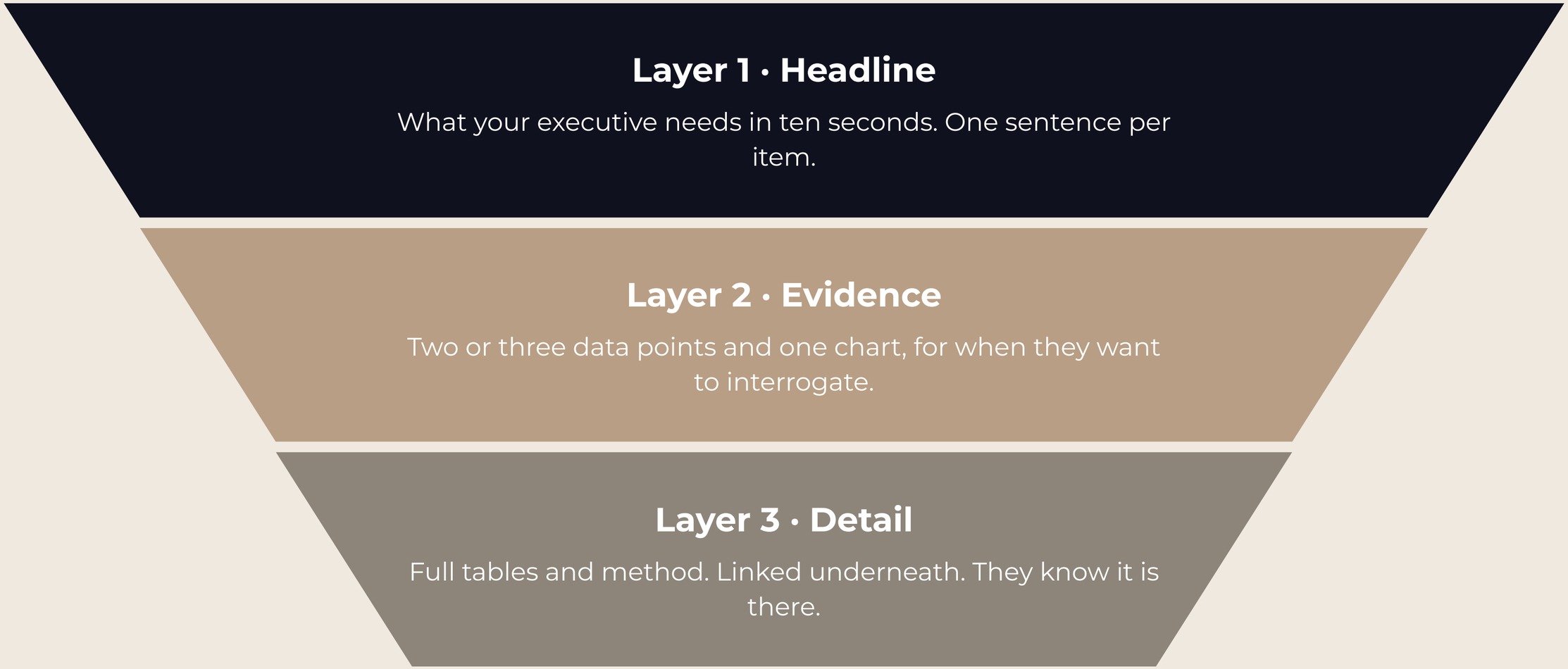
THE SIMPLIFICATION PARADOX

Making something shorter is harder than making it longer.

Cutting requires you to understand what matters, not just what exists.

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The Hierarchy of Information



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Label, statement, headline

LABEL

Q3 Revenue

Names the topic.

STATEMENT

Revenue was 4.2m in Q3

Reports the number.

HEADLINE

Q3 revenue down 12 percent, driven by APAC. Recovery plan in place.

Delivers the point.

The tool grades every headline you write. Keep going until it says Headline.

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APPLIED TO THE CALDWELL UPDATE

From Everything to What Matters

3 revenue tables	→	**One line per division and a single margin chart. Tables linked underneath.**
23-project RAG list	→	**One line: 19 green, 3 amber, 1 red. Detail only on Helix.**
18-line risk register	→	**Anything that moved, in one line. Otherwise a link.**

1,400 → 700 words

Same information available. A completely different two minutes.

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10:00

GROUP ACTIVITY

In your groups · 10 minutes

Write the Headlines

01 Open step 3.

02 Write a Layer 1 headline for every input you kept.

03 Keep rewriting until the coach says Headline on each one.

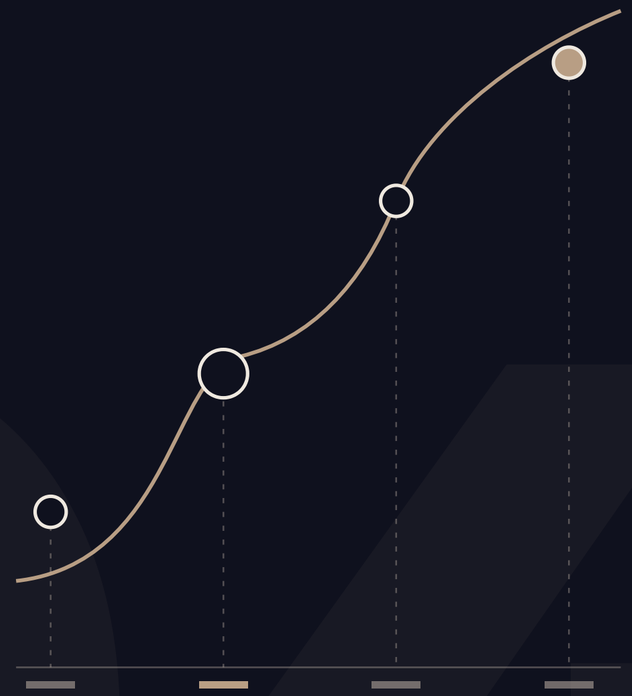
04 Add two or three evidence points underneath. Not ten.

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PHASE FOUR · 15 MINUTES

Building the Narrative Layer

The narrative is not decoration. It is control.



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WHY NARRATIVE MATTERS

What Narrative Does

An update without narrative is a collection of numbers waiting for someone to misinterpret them. You decide what the numbers mean before someone else does.

- It connects isolated data points into a coherent story.
- It frames the numbers in terms of decisions, not just performance.
- It pre-empts the questions the reader would ask.
- It signals what is important, what has changed, and what needs attention.

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A STRUCTURE FOR EXECUTIVE REPORTING

The Narrative Architecture

The Setup	Where were we? Context from the last quarter or period.
The Shift	What changed? The data point or trend that matters.
The Implication	What does this mean? Interpretation, not just description.
The Path Forward	What are we doing about it? Action, owner, timeline.

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The Architecture in Practice

WEEKLY UPDATE · MANAGED SERVICES

SETUP	Managed Services delivered 22% margin in Q2, in line with the annual target of 20-24%.
SHIFT	Q3 margin dropped to 18%, driven by unplanned infrastructure costs on the Helix contract and a three-week onboarding delay that pushed revenue into Q4.
IMPLICATION	The drop is recoverable but depends on Q4 onboarding completing by 15 November. If it slips, full-year margin lands at 19%, below the 20% floor.
PATH FORWARD	Helix overrun is contained. Onboarding has a dedicated lead and weekly COO check-ins. Recommending you treat this as a watch item, not an intervention point.

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WHAT NARRATIVE SHOULD NEVER BE

Three Anti-Patterns

Spin

Making bad numbers sound good. Your executive will find the truth, and trust the messenger less for the attempt.

Repetition

Restating the number in words. “Revenue was 4.2m. This means revenue reached four point two million.”

Hedging

So many caveats that the reader cannot find the point underneath them.

The tool flags all three as you type.

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Why the eye agrees with you

People judge position and length far more accurately than angle or area. Sorted bars beat pies. (Cleveland and McGill, 1984.)

Colour, size and position are processed before reading begins. One accent tells the eye where to look. (Pre-attentive attributes; Ware.)

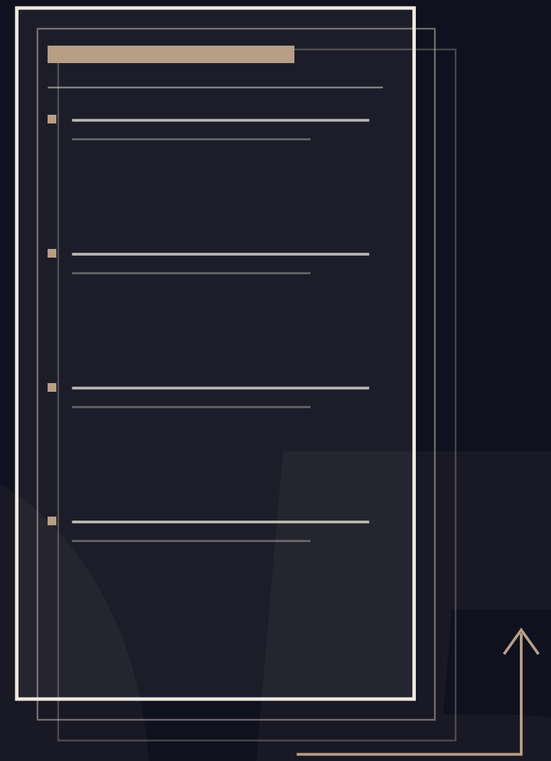
Every mark that does not carry data competes with the ones that do. Remove it. (Tufte, data-ink.)

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PHASE FIVE · 25 MINUTES

The Executive Update

Put the question, the hierarchy and the narrative together, and send it.



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15:00

GROUP ACTIVITY

In your groups · 15 minutes

Write the Update

01 Open step 4. Give one item the full narrative: Setup, Shift, Implication, Path Forward.

02 Write what you need from your executive.

03 Open step 5. Enter the real numbers. Tick one accent.

04 Open step 6. Your Executive Update is built. Read it as the COO would.

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SHARE BACK · EXECUTIVE UPDATES

2:00

Swap laptops. Read it as the COO.

Pass your laptop to the next table.

Two minutes. Read their update as the COO would, between two meetings.

Write two lines: the one thing that landed, and the one question you would still ask.

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Save it. It is yours.

Print to PDF, download the update, or copy it as text straight into Friday's email. It saves in your browser, so it will be there on Monday.

connectedassistants.com/ea-ignite-2026-executive-update

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DEBRIEF AND REFLECTION

What Changed

01 How did the narrative change what the numbers meant?

02 What was the hardest thing to leave out?

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THE POINT OF ALL OF IT

The goal is not to give your executive less information. It is to give them better information.

— The difference is you.

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WHAT CHANGES FROM HERE

The Five Shifts

Data requests	→	**Strategic questions**
Comprehensive	→	**Hierarchical: headline, evidence, detail**
Flat structure	→	**Narrative architecture**
Reporting numbers	→	**Shaping understanding**
Forwarding the inputs	→	**Owning the story they tell**

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FOUR CONCRETE ACTIONS

What to Do on Monday Morning

01 Before your next report, ask yourself what decision it supports. If you do not know, ask.

02 Take one recurring report and rewrite its opening paragraph as a Layer 1 headline. Lead with the insight.

03 Find one table or section nobody uses for decisions. Link it underneath and see if anyone notices.

04 Open The Executive Update Builder on this week's real update. Twenty minutes. Send the update, not the spreadsheets.

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WHAT YOU TAKE WITH YOU

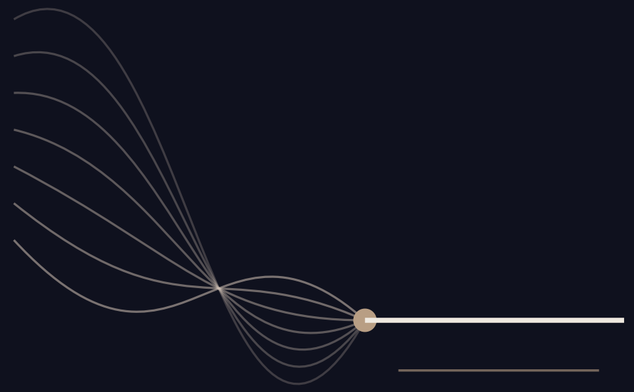
Key Takeaways

- How to identify the strategic question behind executive data requests.
- Techniques for simplifying complex datasets without losing meaning.
- Approaches for structuring executive-ready dashboards and updates.
- Methods for presenting insight rather than simply reporting numbers.
- How strong data communication strengthens influence in leadership environments.

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DATA STORYTELLING LAB

Thank you



You decide what the numbers mean before someone else does.

Meg Steinschauer
Founder, Connected Assistants

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STAY CONNECTED

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Sources for graphical perception, visual attention and the data-ink principle. Select a title to open its source.

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