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Keywords: customer insight, storytelling, customer data, customer journey

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Opinion Piece

Managing customer insight creatively through storytelling

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Abstract

This article explains the need for a storytelling approach in customer insight management. It outlines a useful training methodology to help customer insight specialists improve how they explain insights to colleagues and how they can support colleagues who need to use storytelling.

Journal of Direct, Data and Digital Marketing Practice (2015) **17**, 77–83.
doi:10.1057/dddmp.2015.45

In a world awash with data, a strange phenomenon is occurring. A few years ago, the viewpoint in marketing was ‘let’s bring all the data we can into a single view — or at least a less fragmented view — and we’ll have all the insight we need in order to make, implement and see through all our marketing, sales and service decisions, from the highest level of strategy to the most intricate operational level’. And what has happened? Of course, we are in a better position. We do see and know more, we do take better decisions, we know more about whether a decision was right and whether it worked. Where the decision is automated, partly or fully, it works better, for example in web-based self-service or in programmatic advertising. We have teams whose job is ‘insight’, not ‘data’. The job title of the decade is ‘insight manager’ or, even better, ‘insight director’. We have brilliant software to extract data and transform it into beautiful and persuasive images, so even the least numerate senior manager or colleague will understand it.

Yet, again and again, we hear clients say, ‘we just presented to the board. They said our slides were so complicated they didn’t understand what we were saying. So we cut the number of slides and presented them the topline data, with the assurance that underlying data was available, but they still didn’t get it. What should we do?’

One approach is to present data as a story. This mirrors storytelling in advertising, where placing a product in a story or series of stories (the origin of soap operas) works well. However, many insight people do not naturally link stories with data. They believe that facts speak for themselves. To change their approach to incorporate storytelling, they need training. This article outlines a training approach that we are using with clients.

Data by itself rarely creates change. No matter how good your diagrams or spreadsheets, they rarely change someone’s mind. Getting the person

It is all about influencing

you are communicating with to visualize what the data means is one focus of storytelling. It reminds us of the (now dated) story of a life insurance salesperson who, when selling face-to-face in the consumer's home and encountering resistance, produced a miniature coffin and put it on the table. The salesperson would turn to the husband and say, 'you're in there' (regrettably, male longevity is still shorter than female) and then turn to the wife and ask, 'what are you going to do?' The wife would remain silent for a bit and then turn to the husband, who would start to speak. The salesperson would say, 'shut up — you're in there' and point to the coffin. The wife would realize that she would not know what to do. Of course, today this would not work, partly because women are more often in charge of finances and better at planning than men.

Understand how stories influence

Many managers have been on negotiating or influencing courses. We recommend that insight professionals do so as well. You need to know not only how to tell stories, but also how to use them to influence. There is not room here to discuss what you learn in detail, but the essential influencing elements for storytelling include:

- identifying the other person's point of view and needs, partly by open-ended questioning techniques;
- understanding how the other person wants to work with you; whether they see you just as a source of data or insight, or as a problem identifier or solver; what openings they are giving to deepen the dialogue with them and how to spot those openings;
- understanding what drives people, for example whether they like to hear about co-operation or conflict, whether they prefer serious or humorous approaches, and how they are influenced — whether they are 'tough battlers', 'friendly helpers' or 'logical thinkers'.

Story and storytelling

A story is a narrative (ideally with a plot), true or fictitious, designed to interest, amuse or instruct the listener or reader. It is a tale, a narration of an incident or series of events, an anecdote, perhaps an unusual, exciting or daring experience. The art of storytelling is as old as language, perhaps older, if cave paintings are a guide. The human brain responds in a special way to stories (<http://psycnet.apa.org/?&fa=main.doiLanding&doi=10.1037/0022-3514.79.5.701>, <http://www.sparringmind.com/story-psychology/>, <https://hbr.org/2014/10/why-your-brain-loves-good-storytelling/>, <http://lifehacker.com/5965703/the-science-of-storytelling-why-telling-a-story-is-the-most-powerful-way-to-activate-our-brains>). Stories evoke emotion and interest. Stories persuade. Stories amuse. Stories get people on your side. The best stories are simple, but well told. Robert McKee, a creative writing instructor known for his 'Story Seminar' that was developed when a professor at the University of Southern California, suggests that, 'given the choice between trivial material brilliantly told versus profound material badly told, an audience will always choose the trivial told brilliantly' (http://www.goodreads.com/author/quotes/27312.Robert_McKee).

It takes two — teller and audience

Good storytelling demands understanding of the viewpoint of the audience, perhaps even the audience's audience to whom your story may be forwarded.

To have good uptake and lasting impact, it may benefit from viral attributes — simple messages, easy to read and pass on. A good story takes an audience on a journey, one that may last over several stories. For an audience to engage, it must care enough about your story to want to give it attention and then perhaps forward it. They may not care about your main message, but love the way you put it, perhaps finding it funny or interesting. If it is a multi-part story, they must care enough to look forward to the next part. An audience that cares is more likely to be open to the change in their behaviour you wish to create. So, in all storytelling, keep your focus on what the audience is seeing or hearing, not on what you are telling or want to tell.

Who tells stories?

Stories are told by all sorts of people, such as customers, celebrities, experts, your people, your business partners and, increasingly, bloggers. Industry experts provide excellent stories that reflect various, sometimes conflicting, value propositions. Social media sources are great for content (YouTube, blogs, case studies, TED talks, etc). People who work in customer insight are often quite technical in their outlook, perhaps used to dealing with data and analysis or producing and preparing complex reports, possibly uncomfortable with storytelling, with bringing data and analysis to life. The main point is that stories tap into our human and social need to relate to why the data has meaning.

The flow of a story

Most stories are not fully positive or negative, but contain a mix — and perhaps a sequence — in which things move from good to not so good and back to good. Charity aid storytelling often depicts bad situations to be remedied by work funded by your donations, for example. Writers talk about the arc of a story (<http://www.dailywritingtips.com/how-to-structure-a-story-the-eight-point-arc>, https://en.wikipedia.org/wiki/Story_arc), which runs: stasis, trigger, the quest, surprise, critical choice, climax, reversal, resolution. The arc is visible in children's stories, for example in 'The Lion, the Witch and the Wardrobe', the trigger is the first visit through the wardrobe, then the quest (for the lion Aslan), the surprise (capture of brother), the critical choice (effectively to continue the quest), the climax (the battle), the reversal (death of Aslan) and the resolution (resurrection of Aslan, triumph of good over evil). You can see how audience emotions might rise or fall as they become more engaged, waiting for the resolution. The 'lost scarf' story (<https://www.youtube.com/watch?v=hWimDK4tpg0>) used by Nationwide in its recent advertising is a good example.

Translating insight into stories

For insight managers, the aim may be to persuade leaders to 'see things differently' or 'do the right thing', but insight is also used to support marketing communication, in which case marketing communications specialists will ask insight specialists, 'tell us about the stories that are in your customer data'. You can translate insights about and from customers and partners into stories for customers and also for front-line staff and others who manage customers directly. These insights can be about many topics, such as moments of truth, or being satisfied by service or problem management, such as successful turnaround of complaints or claims. These are often called 'references' or 'case studies'. Good ones are repeated again and again because they resonate. They are more than just references.

Good and bad moments of truth

Take stories about ‘moments of truth’, a concept formulated in 1984 by Richard Normann and popularized by the CEO of Scandinavian Airlines.¹ Each moment of truth is a story — good, bad or indifferent. Many stories posted by customers are about bad moments of truth, while many posted by companies are about good moments of truth. This by itself suggests a gap in communication, as well as performance. Perhaps companies should post realistic stories, not all good or bad. One area to explore for stories is the customer lifecycle. Figure 1 suggests the kinds of stories that could be told, whether by sales or marketing to customers or by insight people about customers, to help senior managers understand how the cycle is working or not.

Getting comfortable with storytelling

To tell stories, you need to be comfortable with storytelling. One way to do this is to tell your own stories. We ask trainees to tell a story based on, for example, when they realized what they wanted to do in life or for the rest of their life; family milestones (births, marriages, divorces, deaths); highlights in social life (celebrations, parties, meeting celebrities); holidays (the best/worst they ever had); a new job, skill, car or experience; neighbourly (or not) relations; something that made them laugh or cry; or a memory from the distant past that still stands out vividly today. We also ask them what their favourite story is, why they like telling or hearing it, or which are their favourite storytellers.

What the story needs to achieve

Another exercise we ask them to do is to explore what they need their stories to do, for example summarize lots of facts brilliantly or quickly; bring out emotions or other ‘soft factors’ triggered by a few facts; get people thinking positively about solutions, not problems; give other people (departments, seniors) stories to re-tell or a language to use; tell people that if they need more stories told they should come to you; or educate them to start telling stories to make themselves more effective. We warn them that, if they want to tell more insight-based stories to communicate better to a particular group, they may need their permission, so they need to get it, perhaps by agreeing to a test. (The surprise strategy is also not a bad approach.)

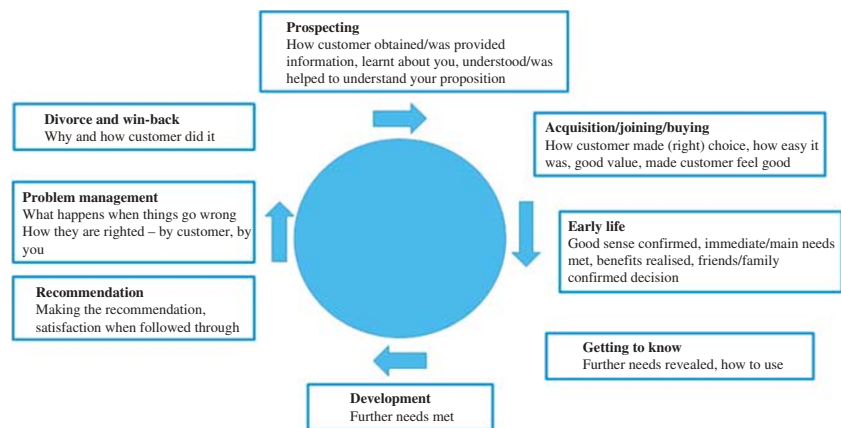


Figure 1: Customer lifecycle stories

Managing the storytelling process

Table 1 provides a logical view of what the process of using storytelling could look like. We do not have the space to describe all of this, so in this paper we focus on planning — Stages 1–5. The execution of storytelling (Stage 6 onwards) is a well-documented process, but readers who want to know more about it should contact the authors.

Understand what a good story is

A story is represented by more than a bit of text, a picture or a video. It is more than a case study. It expresses something as related creative expositions, connecting places, people, events, themes, times, products, services, benefits, costs and the like. A good story captures and holds attention, awakens interest, encourages involvement, develops understanding and stimulates emotions in those for whom it is prepared. The emotions it evokes can be anything from happiness to sadness, from empathy to antagonism, from suspense to confidence, from curiosity to reassurance, from shock to a feeling of relaxation. A story can create aspirations. It may be dramatic, challenging, compelling, (un)believable, engaging, unexpected, relevant, relatable, everyday or epic, or thought-provoking (about the meaning of what is presented).

Talk about consequences

A customer insight story is about customers — what they do/think/feel, how they relate to your company, how they have responded to your company and so on. Customer insight stories are similar to technical stories; for example, stories about the consequences of not maintaining a big computer system or an aircraft properly may be more powerful than logical explanations about what to do.

Decide why you need the story

There are many reasons for telling a story. Do you want to use stories to build your brand, reinforce organizational strategy and culture, or empower staff? Do you just want to make ideas stick or motivate more by being persuasive? Are you telling it to capture implicit knowledge that might otherwise be lost? Do you want to use storytelling to build emotional intelligence or capital? In sorting out why you want to tell a story, you also need to work out the value of feelings and perceptions for your teams, for customers as individuals or groups.

Benefits of the story

You also need to think about the benefits your audience may gain from the story. For ‘internal customers’ for insight, the benefits may include understanding a complex situation and/or its importance, stimulating creativity in thinking about a problem or seeing a way to a solution, or communicating to others. For customers, a story can help them make the ‘right’ choice, be more confident about making a decision or about a decision already made, reduce stress, understand the value to be obtained

Table 1: A logical view of storytelling

1.Understand what a story is	9.Create the story — the medium
2.Decide why you need a story	10.Create the story — the storyboard and testing
3.Decide what is tellable and find it	11.Create the story — delivery
4.Decide on target audience and what you want them to feel, think or do	12.Save the story
5.Decide how you want your story to work	13.Communicate the story — channel/media
6.Decide on the domain/overall content	14.Evaluate the story
7.Decide on the plot and message	15.Prioritize
8.Write the brief for the story	

from a brand/product, or give reasons to recommend to other customers. For frontline staff, the benefits include feeling like a member of the team, understanding the company culture or marketing/sales/service strategy better, being more confident in or having better ideas about handling or motivating customers, achieving recognition (through stories about staff), or connecting or working better with staff in other functions/departments. For business partners, benefits can include understanding better how you work, how to work with you and the benefits you provide, or providing a basis for them to communicate with their people.

Conscious listeners

Your story may be about the essence of what it is to be a customer, adding value to an otherwise rather dry description of a persona (visualizing a segment as a customer). But beware the caricature, whether of the persona or the story. Personas can be a simplistic summary — if you simplify too much, it may lead to people making the wrong decision. Your audience should ideally be ‘conscious listeners’ and know the role of a story and the difference between a story and hard data.

Sources of stories

Stories come from many sources, such as inbound contact (calls, emails and texts), forums, customer blogs (on your own or third-party websites), events, frontline staff (who may need to be encouraged to solicit them and to relay them by explaining, encouraging, training, using, praising and even running competitions), customer or partner panels, training, or social media postings. More formal sources include market research, customer databases, advertising research, public relations, complaints or customer service. Some people are better than others at extracting and using these stories, but all sources must be listened to. You can invent stories, but this can be dangerous if they are revealed to be fiction.

Who needs stories?

Decide on the target audience/market and what you want them to feel, think and/or do. Points to consider here include who ‘needs’ stories versus your need to tell them, what effect you want it to have on them, and what outcomes or responses you want to generate, for example whether you want customers to become more involved or understand more, or whether you want your people or partners to be more committed or understand you. In other words, consider what you want them to think, feel or do, and whether this will make sense to them and fit with how they want to act or think about the world.

How the story should work

Conventional rhetoric, intellectual process, statistics, facts and quotes rarely work by themselves. Stories can work in many ways. They include play-acting, reminiscing, anecdotes, funny incidents, bringing an idea or set of facts or perceptions to life, demonstrating lessons learnt, providing interesting or insightful observations, creating dramatic narrative, or sharing hope or experience. A well-told story can encourage, channel or frame particular responses. It can become self-propagating, so your target audience passes it to others without changing core meaning, perhaps with embroidery or addition of humour, as seen in so much YouTube sharing. People respond in different ways to different stories, even to different types of story, and also to different ways of telling them. Some like to read stories, others like to hear them, while others like to have them acted out.

Making storytelling work for you

So far, so good — nice principles and ideas. But how do you make it work for your business? Here are our recommendations:

1. Identify just a few (two or three) areas where you think storytelling will pay. For example, you may decide that the time has come for your advertisements to tell stories (or more powerful stories), or for your social media presence to carry more stories, or for your front-line staff to listen to and tell more stories, or for your senior managers to describe policies in terms of stories, for example how they want customers to be, think, respond.
2. Source the stories. This starts the implementation — staff and customer stories spread like wildfire when they are good and right for the time, for your culture, for your need. Create a storytelling section on your Intranet; run competitions for the best stories; issue your people with notebooks for them to write down stories they come across or want to tell; run sessions where you and your people practise storytelling.
3. Learn why they work. Really try to understand why certain stories resonate with an audience. Try to find other stories that use the same approach or techniques. Become better at identifying effective storylines.
4. Use a planned approach, as suggested above, from sourcing/building/delivering/linking to functional need/building response and listening mechanisms/building ways to measure. Train your people to tell and manage stories.
5. Check how stories look to your target audiences. Do they involve, engage and motivate? Are they even understood?
6. Make sure you have storykeepers and storytellers in place. If you do not, assign responsibility, train and motivate them.
7. Build the skills of storytellers — structure, writing styles, telling and presenting. Many people do not know how to put a story together, or may have lost the art they once had when young. Build and encourage. Telling stories is for everyone, but not everyone is necessarily a master storyteller, so identify those who show promise and pair them up with those who are able to transfer the approach.
8. Identify great storytellers and include them in the relevant teams.
9. Practice storytelling to overcome reticence and build skills.
10. Make way for stories. If agendas are tight, there may seem to be no time and stories may be relegated to the web or the phone, but this is a great way to lose stories.
11. Make sure everyone who needs to know the most important corporate and customer stories do actually know them and can (if necessary) retell them.
12. Build stories into marketing, sales, service, partner management and other programmes.

reference

1. Carlzon, J. (1987) *Moments of Truth*, HarperCollins, New York.