From Coder to Collaborator:
Tips and Tricks for Being a Better Marketing Analyst
For SAS® Global Forum 2017

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ABSTRACT

Are you a marketing analyst who speaks SAS®? Congratulations, you are in high demand! Or are you?

Marketing analysts with programming skills are critical today. The ability to extract large volumes of data, massage it into a manageable format, and display it simply are necessary skills in the world of big data. However, programming skills are not nearly enough in today's world. In fact, some marketing managers are putting less and less weight on them and are focusing more on the softer skills that they require.

The tips and tricks in this paper will help ensure that you are not left out. We provide practical advice on how to go from being good at coding to becoming a true collaborator with marketing—taking your marketing analytics to the next level.

 In 2016, Emma Warrillow's presentation at SAS® Global Forum was very well received; this paper begins where 2016 leaves off and shares some further tips to help the analyst progress.

INTRODUCTION

 "I need to hire a marketing analyst," said my client. "I need them to be able to analyze customer data to support our marketing efforts. We do our work in a variety of tools, but we are primarily a SAS® shop."

We're not a recruiting firm, but from time to time our clients ask us to keep an eye out for an analyst they can hire. This request from our client seemed par for the course. However, after a brief pause, he shocked me with his final request, "but please don't refer anyone who is SAS® Certified!"

What?!

According to SAS®, "SAS® Certification credentials are globally recognized as the premier means to validate SAS knowledge. With a SAS® Certification credential, you will set yourself apart from others and prove that you have the SAS® knowledge to make a difference within your organization."

So why on earth would my client say he didn't want someone who was certified? Yet, he wanted his analyst to know SAS®?

After discussing it with my client and pondering my own experience, I think I know the answer.

It's not the certification that's the problem.

There is nothing inherently wrong with a marketing analyst getting SAS® Certified (or getting any other certifications); on the contrary, it is exactly, as SAS® says, a marvelous way to confirm your SAS® knowledge and prove to a prospective employer that you are a good programmer. *Please don't stop working on Certification*– my client is an anomaly, but the problem he is trying to avoid is NOT.

The problem lies with who is getting certified and their focus.

Marketing analytics is a complex blend of Art and Science. It requires strong skills in insight generation and interpretation - along with those programming skills.

Most hiring managers know that technical skills can be trained. They know that they can send you on a

course once you are hired. While most would far prefer to see that you had those skills already, they are concerned with far more than a list of certifications.

A few of my client's past hires were excellent programmers but lacked soft skills. This is too often the case with those who have taken the programming route to marketing analytics. In addition to developing excellent (certifiable!) programming, a good marketing analyst needs to have **communication skills, interpretation skills** and **storytelling abilities.**

This paper reveals some practical tips on how to develop these additional skills and become an invaluable resource, not just a certified one!

IF A TREE FALLS

"If a tree falls in a forest and no one is around to hear it, does it make a sound?"

Philosophers and scientists have oft-debated this topic. They argue that sound only recognizable as such when someone hears it. The same is true for analytics. Paraphrasing, we might say, "If an analyst does great analysis but no-one sees it, is it really great analysis?"

The hard truth is that you can do the most profound work in the world – come up with the most amazing results– and have it totally ignored. Therefore, a critical skill set for an analyst is the ability to communicate his/her results; sadly this skill set is often not developed.

TIP 1: Never just send the spreadsheet!

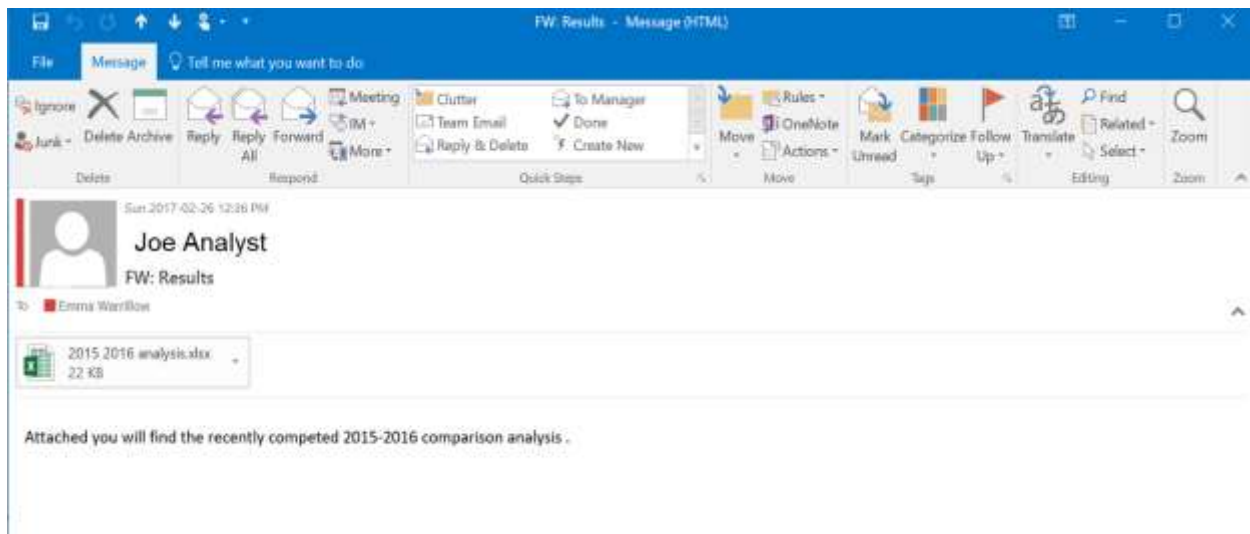I cannot tell you how often I receive an email like this one:

Figure 1. "Here is the spreadsheet"

Essentially, just a spreadsheet with no more explanation than "attached you will find the recently completed 2015-2016 analysis". Nothing more. When I open the attachment – assuming I do – I am greeted by 10 tabs with cryptic titles that are filled with reams of information.

I have news for you. The recipient of this email will invariably do one of three things:

1) **Ignore it.** Without more information in the body, they will likely not see it as important and skip over it intending to 'take a look later'. Chances are they never go back.

2) **Get frustrated.** They may open it but, when faced with the various tabs and figures, they will feel overwhelmed and close it. Chances are they will never open in again either.

3) **Misinterpret it.** Those that do open it, and who wade through the information, will likely try to interpret the results. Unfortunately, without any direction, they made read it incorrectly (assuming row percentages are column ones for example) or focus on the wrong things.

Instead I recommend whenever you share your results, you preface the information with an introduction by email. Not only should you describe what your analysis is about but also you need to guide the recipient's eyes. What do you want them to look at? To conclude? And, finally, what do you want them to do?

For example, rather than sending the above, consider something like:

I have attached the 2015-2016 comparison analysis where we looked at sales and product holdings on a month-by-month basis across the past two years.

You will note that, sales are up over 2015 levels. However, we started 2016 with sales below the 2015 levels – led primarily with reduced sales in product X. By April, the trend had reversed. It appears that the introduction of product Z has more than made up for dwindling X sales.

I recommend we take a deeper look at the customers for product X and Z. Are they the same customers?   We do no know if Product Z is cannibalizing Product X or whether we are attracting new customers with this product.

TIP 2: Be a POET

Laura Warren of Storylytics (https://storylytics.ca/), a training company based in Toronto that specializes in storytelling training for analysts, describes a technique she calls P.O.E.T. to tell a story of your analytic findings.   I find this approach a great guide for sharing analytic results.

She indicates that you need to clearly state the **Purpose** of the analysis, summarize what you **Observed** (directing the eye to the information you feel is most pertinent), **Explain** what you want the audience to get from the information, and finally provide them with the **Takeaway.**

I could use this technique to craft an email introduction like the one above.

Purpose

… the purpose of this [chart] is to …   *compare sales and product holdings on a month-to-month basis across the past two years.*

Observation

… to illustrate that ... [set up the data; build your story – direct the eye] …..
sales are up over 2015 levels.   However, we started 2016 with sales below the 2015 levels – led primarily with reduced sales in product X – but by April, the trend had reversed.

Explanation

… what this means to us is … *It appears that the introduction of product Z has more than made up for dwindling X sales.*

Take Away (or Transition)

… as a next step/our recommendation is … *take a deeper look at the customers for product X and Z.*

When an email is introduced in these terms, the recipient already knows what he is looking for. When he opens it, he will be drawn to look where you have directed him.

TIP 3: Brand your work

The analytic teams in many organizations have a PR problem.

Everyone sees the analyst coming – or sees an email like the one above - and their eyes glaze over! Sometimes, analytic teams are seen as difficult, hard-to-understand and out-of-touch. In other organizations, the analytic group is an after-thought; only brought in to the discussion when there is a specific request for data. In yet others, analysts are stuck in cubicles represented in meetings by their more outgoing marketing counterparts.

The challenge is that for analytics to be truly effective, analysts need to truly understand the business challenges and questions. To do this, you need to be invited to key meetings and to be a part of the discussion. You need to be viewed as a critical business partner.

And you need to be seen and heard. So, take a page from our friends in Public Relations and start talking.

Several years ago, I was speaking with a colleague who was working in an analytic team for a financial services institution. He was discussing how his team did excellent work but that no-one took any notice. He was determined to start getting the message out more consistently and more often. One of the things he did was to brand his team - the "Business Intelligence Competency Centre" or the BICC. Every report his team produces is branded that way so people start to recognize the impact they are having. This brand has become synonymous with trusted results, given the data governance standards the team has implemented. His company has reaped the benefits; more data-driven decisions are being made since more people are looking at the analysis.

As any PR professional will tell you, public relations is all about building and maintaining a reputation with the people you serve. For marketing analysts, this is about building a reputation within your organization so that they see you as a valuable contributing group. Branding your work –perhaps even creating a logo for it – means that every time your audience gets value from your work they know it was your team that created it.

If you were a third-party company like mine, you'd have logos on your deliverables, so why shouldn't the internal team?

We have a client with an analytic group that calls itself the CIA (Customer Insights and Analytics), another that refers to the MAD (Marketing Analytics and Data) Team. Have some fun with it. People are going to start to take notice!

ADD VALUE

As I mentioned, your analytic PR depends on your work providing real value to the organization. For the business, that doesn't mean great reports or models, but insights and relevant actionable advice. For many analysts, this can be a tall order.

The earlier tips will help ensure your work has gets read, provides relevancy and reinforces your role. But that is *still* not enough.   As I heard Catrina Boisson (Global Marketing and Customer Experience at IBM) say at a seminar this week, "Insight without action is just an academic exercise."

TIP 4: Don't be an order taker

Time and time again I am in meetings with analysts and their internal clients and see a missed opportunity.

In one recent meeting, a product manager and an analyst were meeting to discuss the targeting criteria for an upcoming direct marketing campaign. The analyst had done her homework and had prepared some counts to help facilitate the conversation. As is often the case, the product manager was the more extraverted person in the room and led the conversation. The discussion went something like this:

> Product manager: *Let's pull everyone who doesn't have product A, who has an email address and who is in the first three deciles of the product A propensity response model. How many people is that?*
>
> Analyst: *That would give you 60,000 customers.*
>
> Product manager: *That is not enough; let's go to deeper into the file, what if we target the first six deciles?*
>
> Analyst*: 100,000 with email addresses*
>
> Product manager: *OK, we want to do two tests so give us 20% as a no-contact control group, then two equal test cells to test the offers.*
>
> Analyst: *OK*

The product manager likely left the room feeling like they had gotten what they wanted; although I venture to guess they didn't leave feeling very confident or inspired. The analyst had her marching orders and knew it wouldn't take long to pull the list; however, she wasn't totally satisfied either since she wasn't convinced this was the right approach.

What value did the analyst really bring here? All these counts were probably accessible through a report somewhere, or at least they should have been.

The analyst *could* have brought a lot of value to the table – could have provided consultation rather than taken the order. Here's how it *could* have gone:

> Product manager: *Let's pull everyone who doesn't have product A, who has an email address and who is in the first three deciles of the product A propensity response model How many people is that?*
>
> Analyst: *That would give you 60,000 customers, but I have another suggestion. Our post campaign analysis from the last campaign showed that the propensity model has good lift in the top four deciles. That would give you just under 80,000.*
>
> Product manager: *That is not enough; let's go to deeper into the file, what if we target the first six deciles?*
>
> Analyst*: I don't recommend going any deeper, the ROI is too low. But I have another idea; we have found that people who purchased Product A more than 5 years ago, have a higher than average likelihood of purchasing a second time. We could test a cell of 20,000 of them. That would give you a total of 100,000 with email addresses*
>
> Product manager: *OK, we want to do two tests so give us 20% as a no-contact control group, then two equal test cells to test the offers.*
>
> Analyst: *For you to have statistically significant results, I recommend we look a little further at the test design. It may not make sense to have equal sized test cells. Can you tell me more about the two offers?*

You might have to say a bit more, but I can guarantee by leveraging past analysis and proper statistical design, the campaign will have better results – and measurable findings to apply to the next campaign. And you have continued to build your reputation as a valid (and valued) partner…. not an order taker.

TELLING THE TRUE STORY

Last year at SAS® Global Forum, I told the story of two workers in Europe and illustrated the impact of the difference in their minimum wage through the buying power expressed in Big Macs. The example was intended to show how much more likely you were to remember the story of two workers and fact that Sergey in Russia had to work for a full day to buy the same lunch that Pierre in Luxembourg can buy for after an hour of part-time work. We discussed how telling analytic stories can be tough – that data and stories often seem at odds

At the end of the talk, one of the questions centered around bias in storytelling. An audience member posited that when you tell a story, you are - by definition - somewhat biased. I want to address that today.

There is no question that storytelling has a reputation for exaggeration and falsehood – which feels in conflict with the exactitude that analysts pride themselves in. Mark Twain is oft-quoted by storytellers (especially those in sales) by way of reinforcing this idea; "never let the truth get in the way of a good story" is usually attributed to him (although it, like many Twain quotes, has never been verified[2]).

And while this adage may be true for fictional characters like Tom Sawyer and Huckleberry Finn, I argue truth in storytelling is critical for business impact.

TIP 5: Tell the truth

Peter Gruber in The Harvard Business Review wrote an excellent paper called "The Four Truths of the Storyteller". In summary, he outlined four truths that every story teller should consider – these truths are as relevant for analytic storyteller are they are for the tellers of tall tales.

Truth to the Teller – Be true to your story and how you feel about it. Gruber says, "Authenticity… is a crucial quality of the storyteller."[1]

Years ago, my aunt was involved in a study that tested correlations between various day-to-day products and unfavorable health outcomes. She called me one evening and *demanded* I stop using aerosol air freshener in my home. The story she shared contained more detailed analytic findings, but it was her emotion and her obvious feelings for my children's wellbeing that got my attention - and led me to take action.

Be true to yourself and your values -and tap into your emotions.

Truth to the Audience - For your story to truly resonate, you must understand the perspective of those that are listening to it.

I was recently involved in a project where the client asked us to help to understand what might be causing their low retention rates. We spent considerable time analyzing everything from their online renewal process, the customer profiles of those that did not renew, to the renewal campaign offers. Instead of uncovering what was causing problems in their retention – we discovered they did not have a problem with retention at all. The problem was with the metric being measured and the timing of some renewals. But to tell them this we had to start by acknowledging that the retention rates were low, and walk them through what we'd done to examine them – guiding them to the answers we had found.

Start from where they were and acknowledge that reality first.

Truth to the Moment – Gruber argues that you need to tailor the story to the situation and the specific audience.

Perhaps an all-company meeting has been called so you have half the time you expected. Rather than doing only half of your presentation, a good storyteller will adjust their story to focus on what is key.   You still need to be truthful in the telling of your story even though your 'moment' may be shortened. Similarly, the story you tell for your fellow analysts may be very different in length and content than what you tell the CMO.

The fundamental truth of the story should be the same but the form it takes will vary for the moment.

Truth to the Mission – This truth centers around what you want the audience to learn – and then to do. What was the intent of the analysis – what questions were you asking? Are you being true to that?

It is this final truth that I think can help us ensure that we are not falling victim to bias. I often tell the tale of a direct marketing campaign I was involved in years ago. It was in the early days of customer-centric marketing and we had decided that we were not going to hard-sell the customer, rather give a more relationship-focused message. By traditional metrics (response and ROI), the campaign was a total flop. However, my boss didn't want to share that story. She chose instead to focus her story on one campaign cell that had been very successful. While what she said was true, it wasn't true to the 'mission'; the meeting was called to review the post-analysis in order to determine how the next campaign should proceed.   Because her results appeared so rosy, the decision that was taken was to run the same campaign again, further eroding ROI and resulting in dwindling response rates. Our mission should have been to share the poor results while still showing the silver lining that could possibly be built on for the next campaign.

Being true to the mission means focusing on truth that will add value to the business – even if the truth isn't easy to hear.

CONCLUSION

After the last SAS® Global Forum, I had a great conversation with a SAS® programmer on the way home on the plane; he had recently started working in a marketing group, after previously being part of an IT one. He said he realized during the presentation that the way he was working was the reason why his work was feeling unsatisfying. He was being given tasks to do (and invariably to redo once the business saw the results and realized that wasn't what they wanted) not problems to solve. He said he was going to start asking WHY more often, and become a partner – providing insights and recommending solutions - rather than taking orders. I hope this year's tips provide him with some further development opportunities.

In short, transforming yourself from a Coder to a Collaborator will provide you with a more valuable role in marketing, more visibility in the organization and more job satisfaction. I hope you will take up the challenge!

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ACKNOWLEDGMENTS

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