

SWRC 2025

# The Golden Couple: CRM and Storytelling



# Courtney Kearney, CPSM

*Founder & Owner*





*Where are my  
Lego nerds?*

**Raise your hand  
if you love Lego**





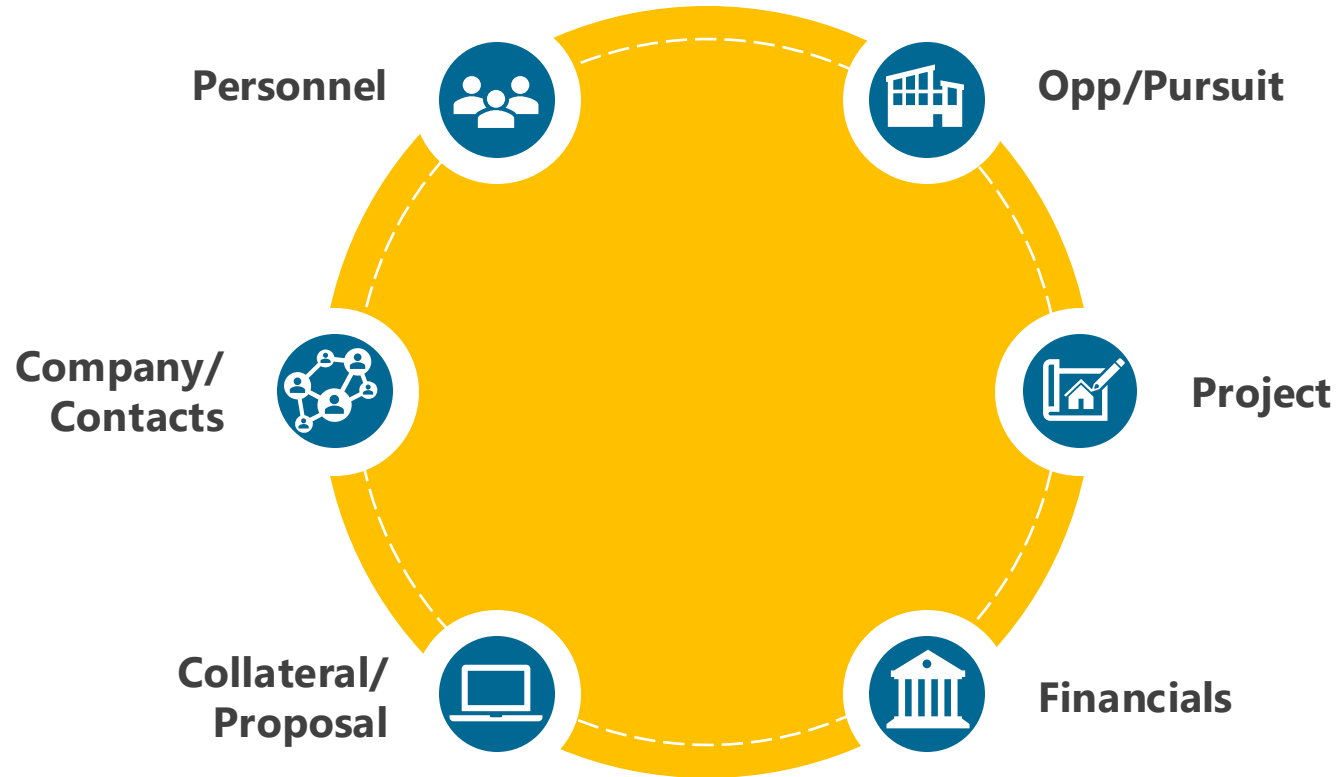
# CRM & Storytelling



**Who thinks**  
**Lego is like data?**



# Common AEC Data Sets



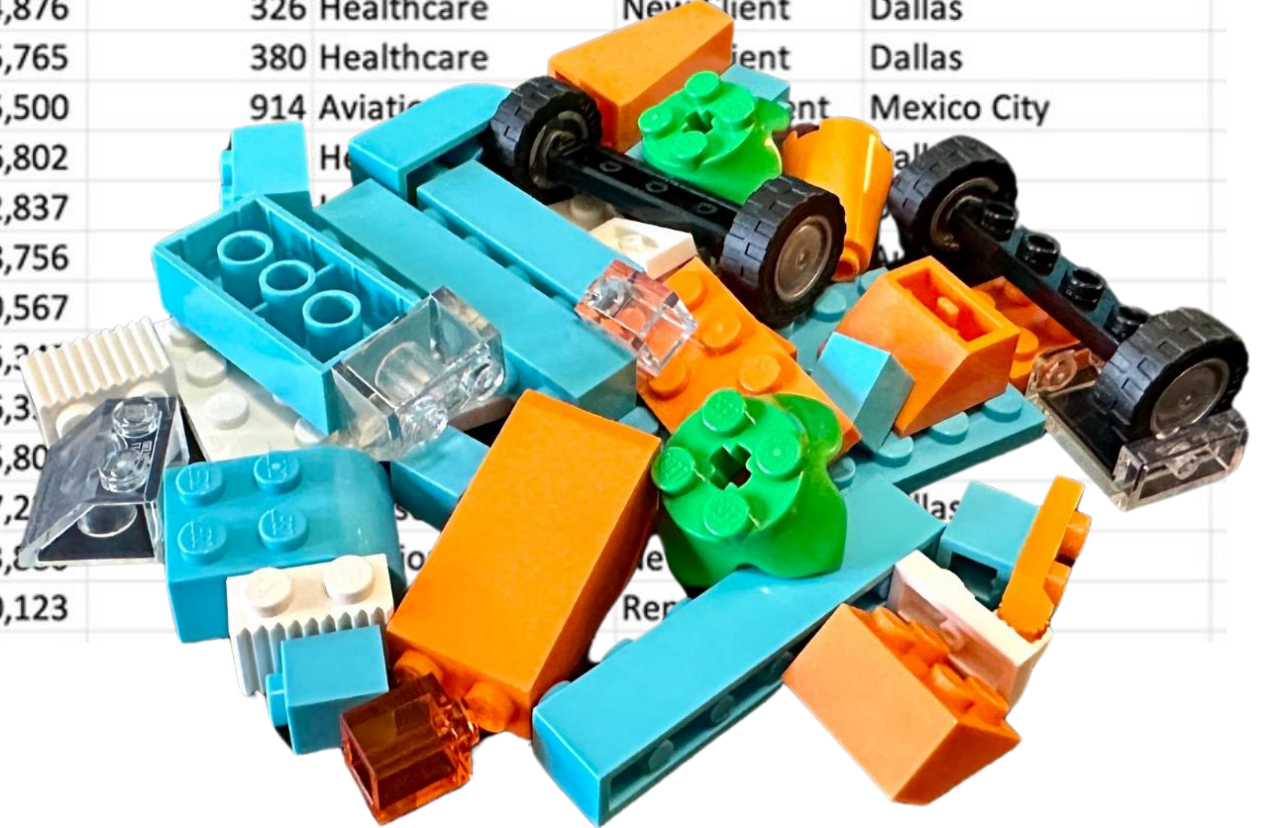
# Pursuit Data

	A	C	D	E	F	G	H
1	Opportunity Num	Stage	Firm Estimated Fe	Days in Stag	Firm Org Division	Prospect Type	Firm Org Office
2	22-0002	01-Prospecting	\$123,987	535	Healthcare	New Client	Dallas
3	21-0002	01-Prospecting	\$123,456	1102	Aviation	Repeat Client	Austin
4	23-0003	01-Prospecting	\$234,876	326	Healthcare	New Client	Dallas
5	23-0001	01-Prospecting	\$345,765	380	Healthcare	New Client	Dallas
6	21-0026	01-Prospecting	\$555,500	914	Aviation	Repeat Client	Mexico City
7	21-0044	01-Prospecting	\$246,802	654	Healthcare	Repeat Client	Dallas
8	21-0029	01-Prospecting	\$192,837	654	Landscape	New Client	Dallas
9	21-0010	01-Prospecting	\$908,756	985	Landscape	Repeat Client	Austin
10	21-0009	01-Prospecting	\$890,567	985	Aviation	New Client	Austin
11	21-0028	01-Prospecting	\$765,345	914	Healthcare	Repeat Client	Dallas
12	21-0012	01-Prospecting	\$136,332	985	Municipal	New Client	Dallas
13	22-0012	01-Prospecting	\$135,801	405	Healthcare	New Client	Dallas
14	23-0008	02-Prospecting (Converted Lead)	\$247,221	254	Landscape	Repeat Client	Dallas
15	20-0005-001	02-Prospecting (Converted Lead)	\$2,643,880	277	Aviation	New Client	Boca Raton
16	21-0027	03-Received RFP/RFQ	\$5,000,123	914	Commercial	Repeat Client	Atlanta

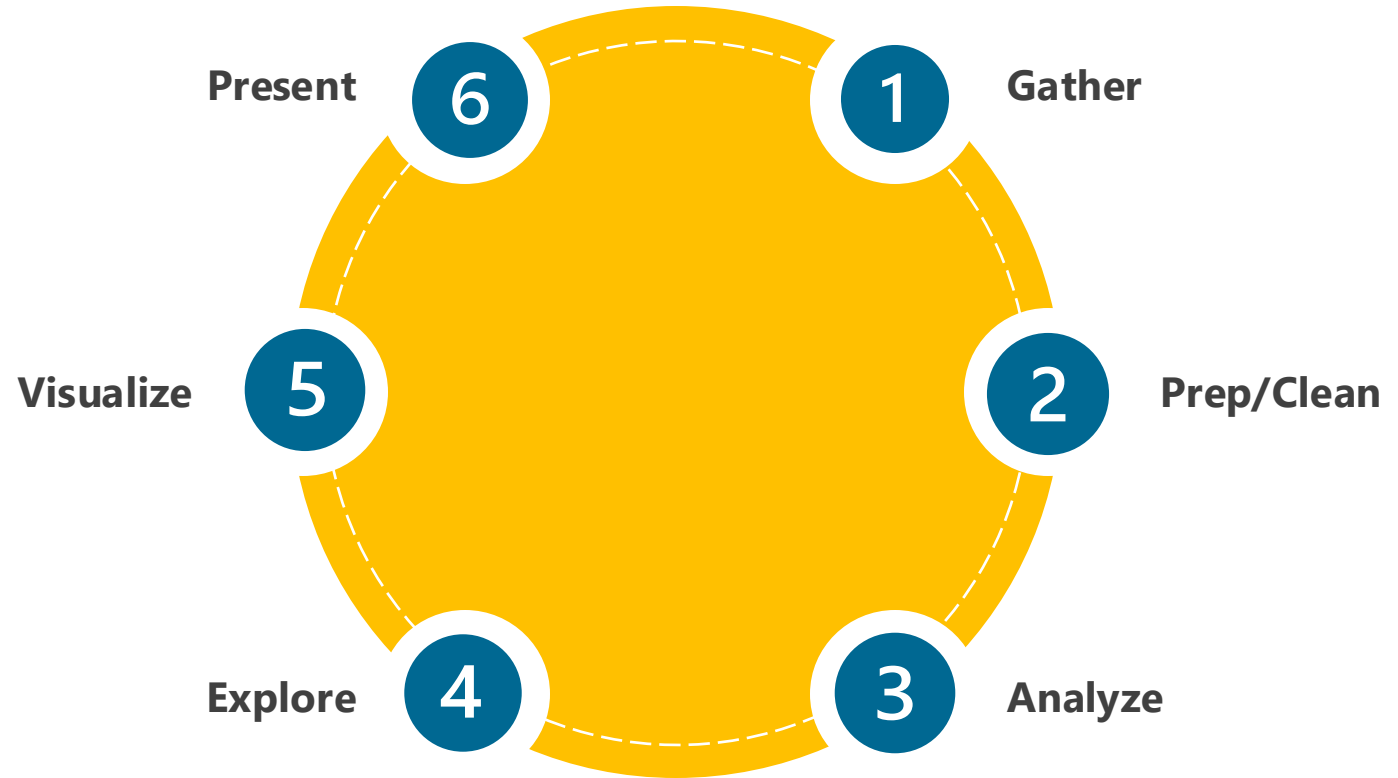


# What if every cell was a Lego brick?

	A	C	D	E	F	G	H
1	Opportunity Numb	Stage	Firm Estimated Fe	Days in Stag	Firm Org Division	Prospect Type	Firm Org Office
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9	21-0010	01-Prospecting	\$908,756		Healthcare	New Client	Dallas
10	21-0009	01-Prospecting	\$890,567		Healthcare	New Client	Dallas
11	21-0028	01-Prospecting	\$765,211		Healthcare	New Client	Dallas
12	21-0012	01-Prospecting	\$136,300		Healthcare	New Client	Dallas
13	22-0012	01-Prospecting	\$135,800		Healthcare	New Client	Dallas
14	23-0008	02-Prospecting (Converted Lead)	\$247,200		Healthcare	New Client	Dallas
15	20-0005-001	02-Prospecting (Converted Lead)	\$2,643,000		Healthcare	New Client	Dallas
16	21-0027	03-Received RFP/RFO	\$5,000,123		Healthcare	New Client	Dallas



# Data Steps





## Gather. Enough Data

- It's not about collecting the most data
- It's about making sense of it
- Connecting the dots across multiple sources

## Prep. Processing Data

- Removing duplicates
- Handling missing values
- Standardizing formats





## Analyze. Identify

- Trends and patterns
- Outliers or erroneous data
- Main takeaway

## Explore. GenAI Tools

- Executive summaries with key takeaways
- Gain deeper insights
- Alternative perspectives





## Lego Steps

1. **Gather** – Box sets with individual bags
2. **Prep** – Instruction book
3. **Analyze** – Pull the pieces
4. **Explore** – Sort
5. **Visualize** – Connect
6. **Present** – Challenge accepted





## Prep. Sorting Data

Which column of data will you sort by?

- Alphabetically by Company Name
- Decreasing/Increasing by Dollar Value
- Sequential by Opp/Project Number

	A	C	D	E	F	G	H
1	Opportunity Numb	Stage	Firm Estimated Fe	Days in Stag	Firm Org Division	Prospect Typ	Firm Org Office
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## Prep. Sorting Bricks

How will you sort the bricks?

- Color
- Size





# Analyze. Data Outliers

- Typos
- Data point(s) significantly different from the rest
  - Dollars in the **millions** except one, which is in the **hundreds**

	A	C	D	E	F	G	H
1	Opportunity Numb	Stage	Firm Estimated Fee	Days in Stage	Firm Org Division	Prospect Type	Firm Org Office
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# Analyze. Brick Outliers

- All the orange and green





# Visualize. Data

How will you show your data?

- Table
- Chart / Graph
- Diagram / Gauge
- Infographic / Flowchart
- Map (Heat, Area, etc.)





# Visualize. Bricks

How will you display the bricks?

- Height
- Depth





## Present. Bricks





## Present. Bricks





# Remember Our Brick Outliers



**It's important to  
understand your data!**



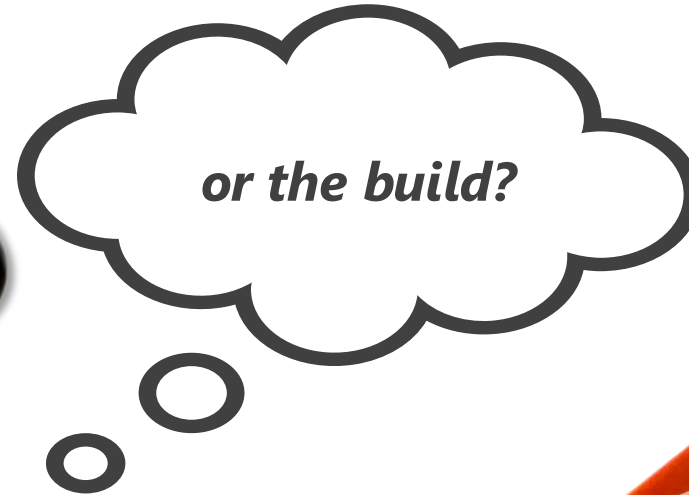




**The power of data  
is not just the  
visualization, it's  
*the story you tell!***









**Data Storytelling  
Requires Context**



# Context Components



## Purpose

What are you trying to accomplish by sharing the data?  
What action do you want to drive with the story?



## Audience

The 'who' determines your objective, tone and call to action.  
What level of data literacy do they have?



## Delivery

How will this be presented?  
Slides, print, website, social media, etc.



## Depth

How much detail is necessary?  
Keep focused on why the data matters!



# Finding Context Using GenAI



**Raise your hand if you  
are using GenAI for data**



# Hand not raised?

Scan, enter, scroll to the bottom



# Using GenAI

## Gather



- Explain your type of business
  - Ask what data you need to gather and track
  - Ask what data you could be tracking
- Explain the platforms
  - What systems you're using
  - Ask how it can help you pull the data step-by-step
- Use GenAI for data collection



# Using GenAI

## Analyze



- Upload anonymized data in spreadsheet
  - Find insights and key takeaways
  - Understand the purpose of the data set
  - Understand your audience
  - Find the call to action
  - Tailor your data story to be impactful tying insights and call to action together



# Using GenAI

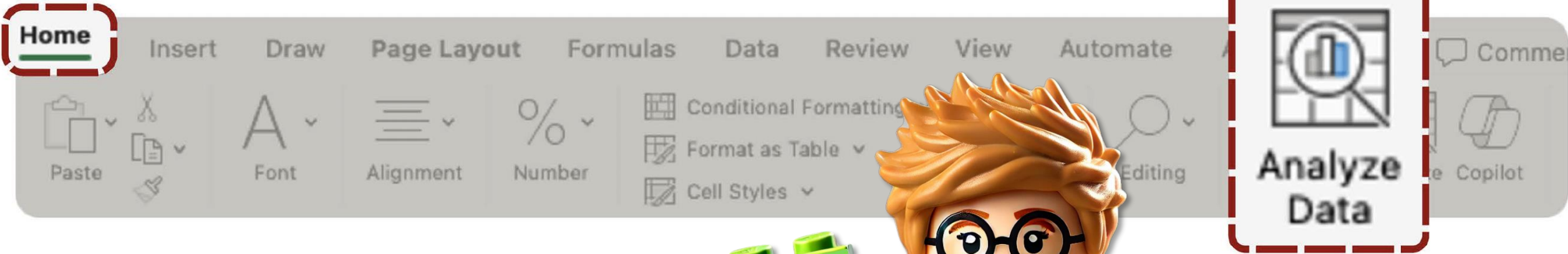
## Visualize



- Use GenAI to suggest the best visualization
  - Bar, scatter plot, heatmap etc.
- Alternatively, upload the visualization and ask how to improve it
  - Improve for clarity, effectiveness, etc.
- Utilize GenAI tools you have access to in platforms you use regularly



# Built-In Tools





# Using GenAI

## Develop



- Create prompt templates
- Use your data and GenAI to create
  - Turn opportunity data into GNG matrix
  - Create a custom GPT from the matrix to run all future proposals through



# Using GenAI

## Gather



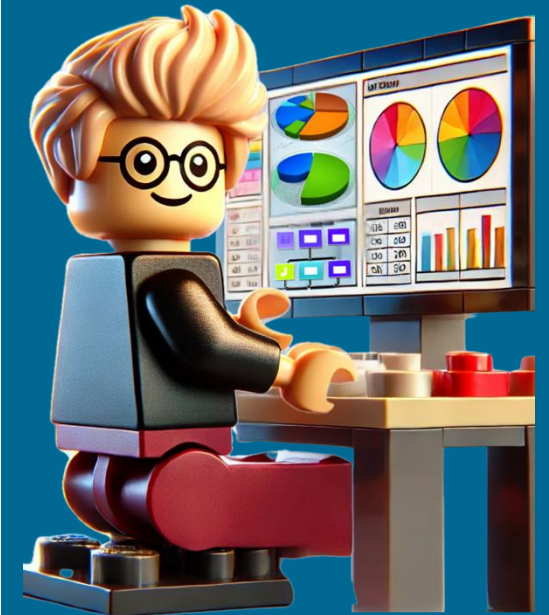
## Analyze



## Visualize



## Develop



# Using GenAI



# The Human Element

## Find the Story



- Ask the right questions to find the story
  - Utilize Storytelling with Data's Big Idea worksheet
- Practice Statio
  - A meditative pause during transitions



# When to Pause

## Statio



- Post assignment
  - Ask those clarifying questions
- After every data step
  - Gather, prep, analyze, explore, visualize



# Types of Pauses

## Statio



- Solo
  - Eye test, breathwork, repetitive task, movement, outside
- Collaborative
  - Colleague, FoM, chatbot of choice



# Case Studies



# Case Study #1 – Monthly Sales

**Gather**



	5 Yr Avg	2024
Jan	\$ 75,000	\$ 90,000
Feb	\$ 90,000	\$ 100,000
Mar	\$ 70,000	\$ 75,000
Apr	\$ 72,000	\$ 82,000
May	\$ 31,000	\$ 62,000
Jun	\$ 15,000	\$ 20,000
Jul	\$ 34,000	\$ 44,000
Aug	\$ 33,000	\$ 35,500
Sep	\$ 50,000	\$ 55,000
Oct	\$ 33,000	\$ 38,000
Nov	\$ 21,000	\$ 42,000
Dec	\$ 50,000	\$ 60,000



## Analyze



### What can I help with?



Monthly Sales.xlsx  
Spreadsheet

Can you help me understand the data and provide insights from the data? What are the key takeaways? I will be creating a data story and my audience is composed of marketers.



Search

Deep research



## Analyze



The dataset appears to contain monthly sales data, with columns representing:

- **Month** (in the first column, though it's unnamed)
- **5-Year Average Sales** (historical reference data)
- **2024 Sales** (current year sales figures)

I'll clean and analyze the data to extract key insights, trends, and comparisons. [↗]

Monthly Sales Data

	Month	5Yr_Avg	Sales_2024	% Change
1	Jan	75000	90000	20.0
2	Feb	90000	100000	11.1111111111111
3	Mar	70000	75000	7.14285714285714
4	Apr	72000	82000	13.8888888888889
5	May	31000	62000	100.0
6	Jun	15000	20000	33.3333333333333

I've cleaned the data and added a percentage change column to show how 2024 sales compare to the 5-year average. Let me know if you want further breakdowns, trends, or visualizations to support your data story. [↗]



## Analyze



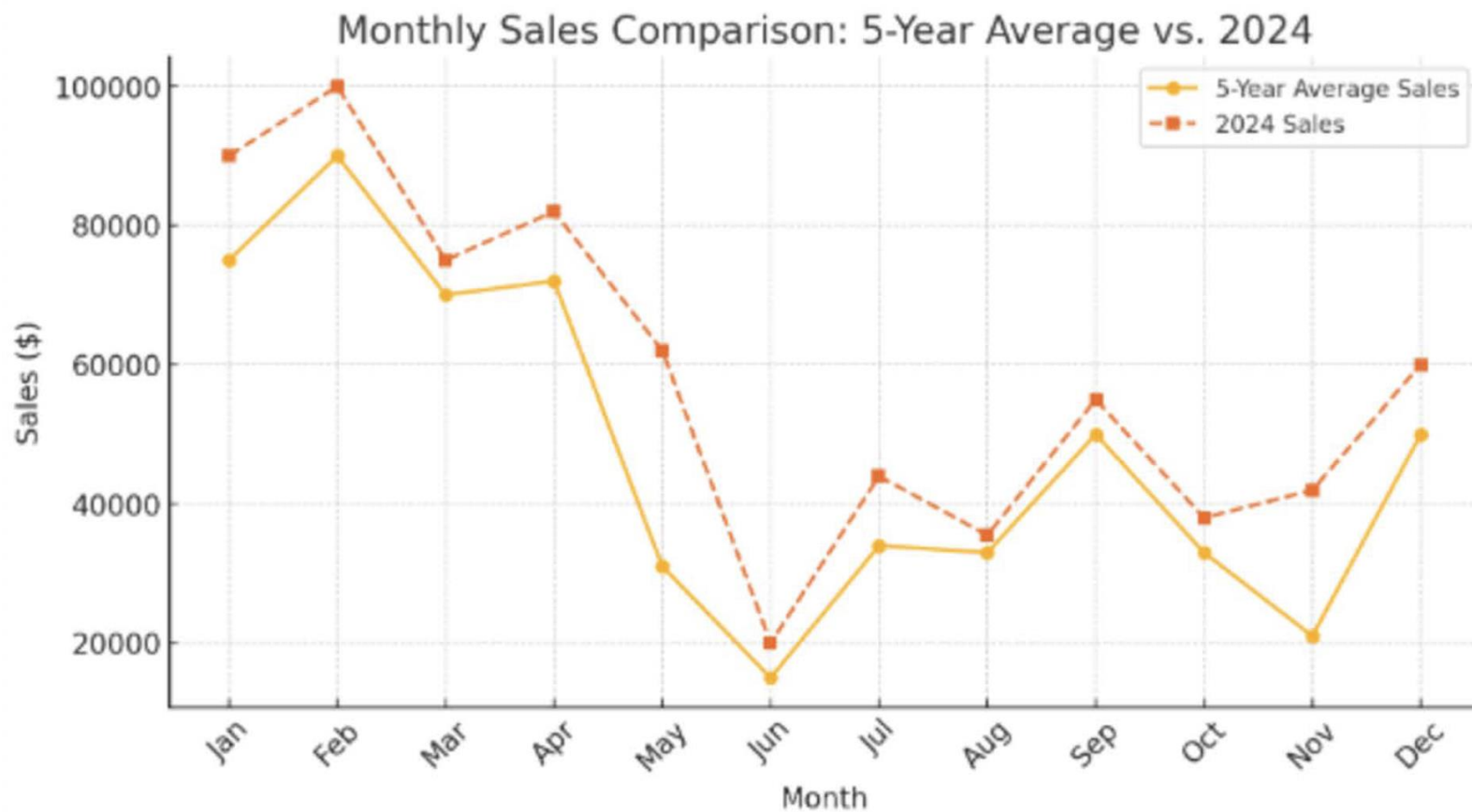
- Further breakdowns:
  - **January and May** show significant growth compared to the historical average.
  - **March has the smallest increase**, indicating a relatively stable trend.
  - **May stands out with a 100% increase**, which could be due to seasonal demand, a successful campaign, or an external factor.



## Visualize



### Monthly Sales Comparison: 5-Year Average Vs. 2024



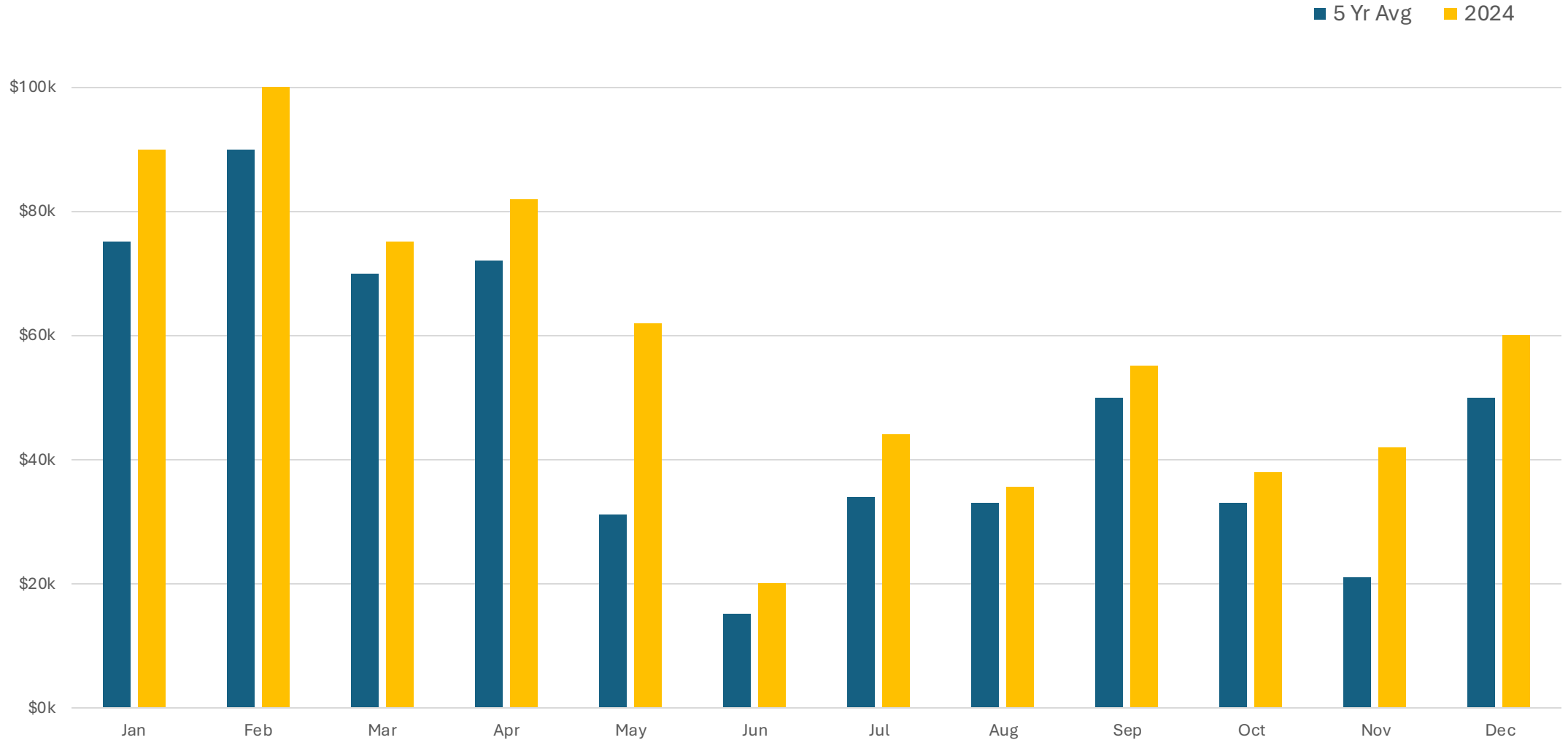
## Find the Story



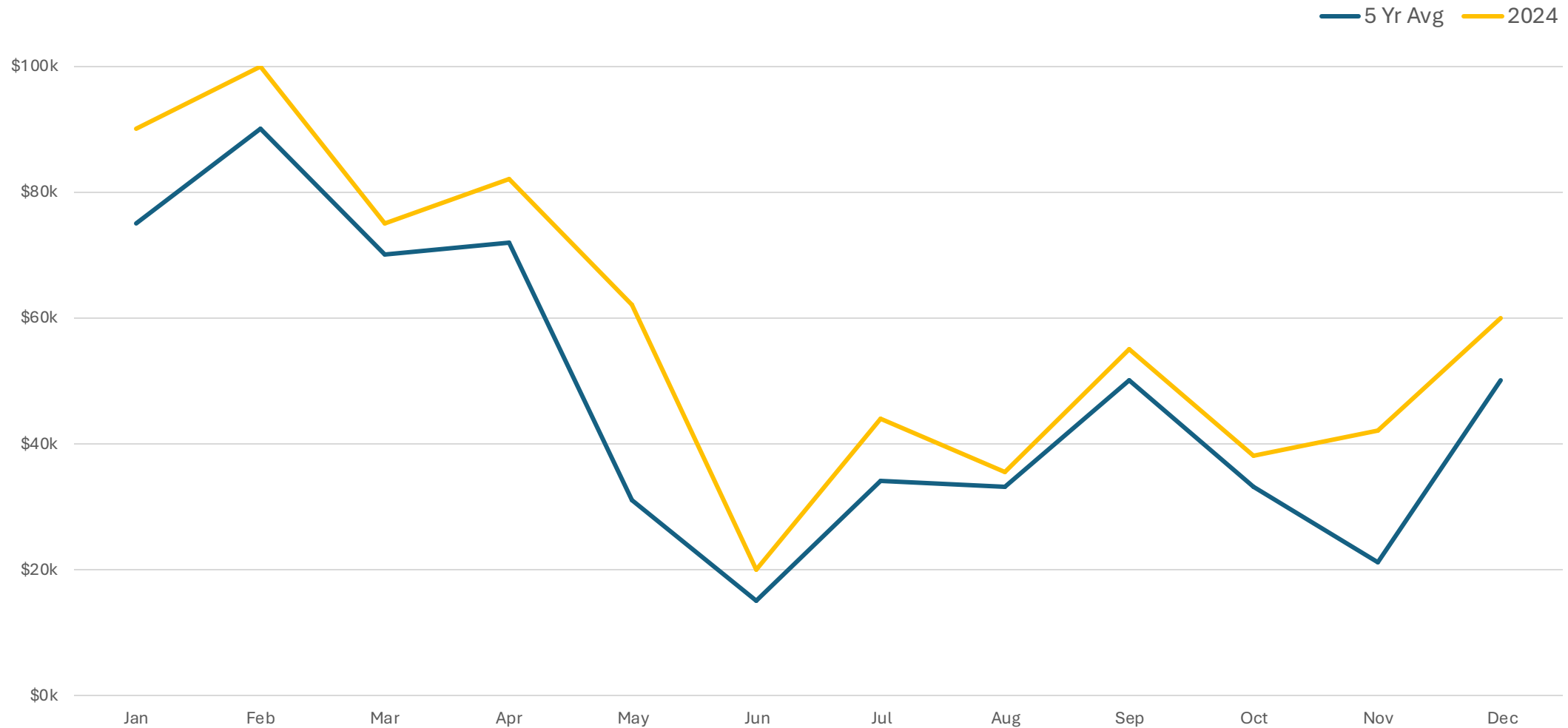
- **Overall Positive Growth** - Every month in 2024 shows an increase compared to the 5-year average.
- **January and May Show Exceptional Growth** - January sales are up 20% and May has the highest jump at 100%.
- **Steady but Moderate Increases in Other Months** - February (11%), March (7%), and April (14%) show consistent, yet smaller growth.
- **May is a Breakout Month** - The 100% increase in May suggests a major influencing factor such as seasonal demand, promotions, or market expansion.
- **Potential for Campaign Optimization** - Months like March with minimal growth (7%) might benefit from targeted marketing efforts.
- **Momentum to Maintain** - Sustaining the growth trend will require analyzing customer behavior, reinforcing successful campaigns, and adjusting strategies.



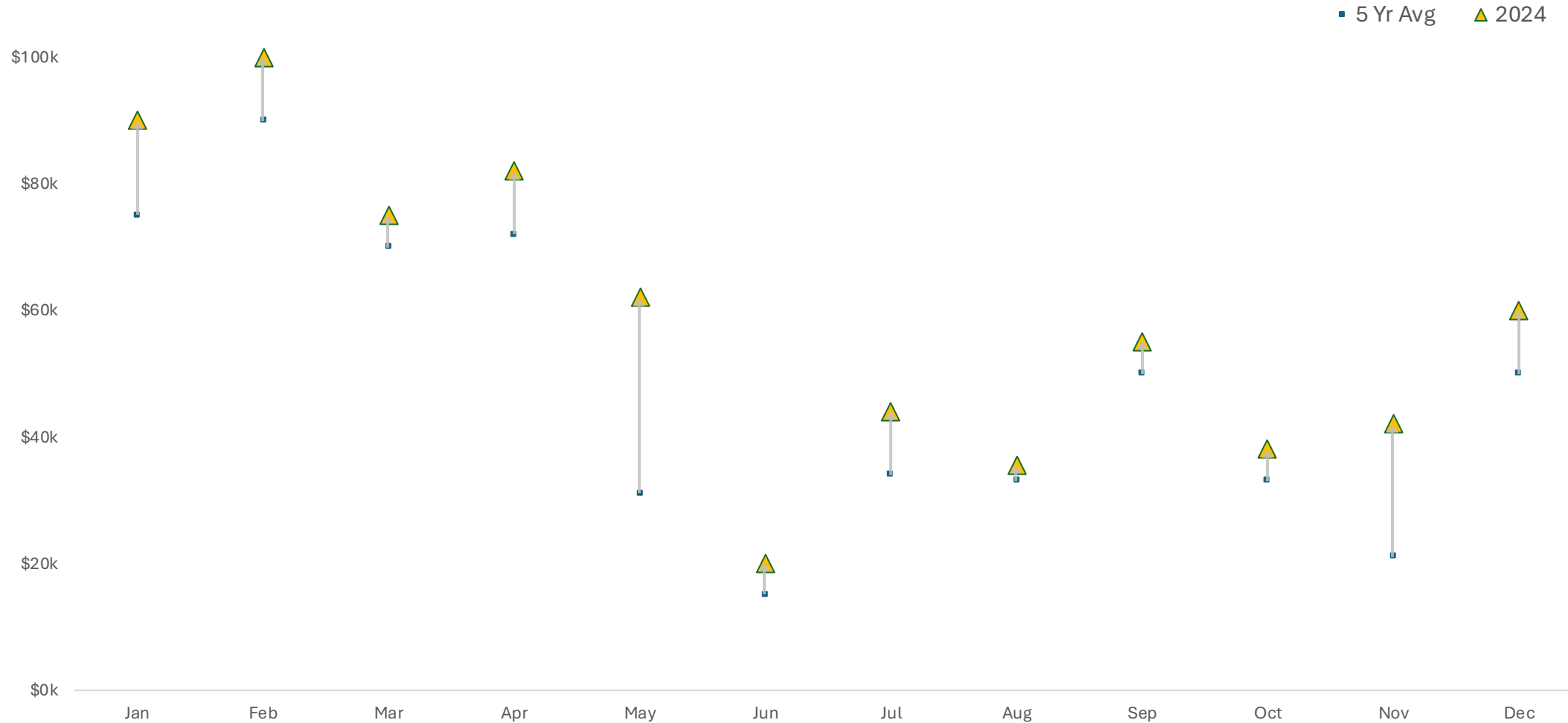
# 2024 Revenue Was Above Average All Year



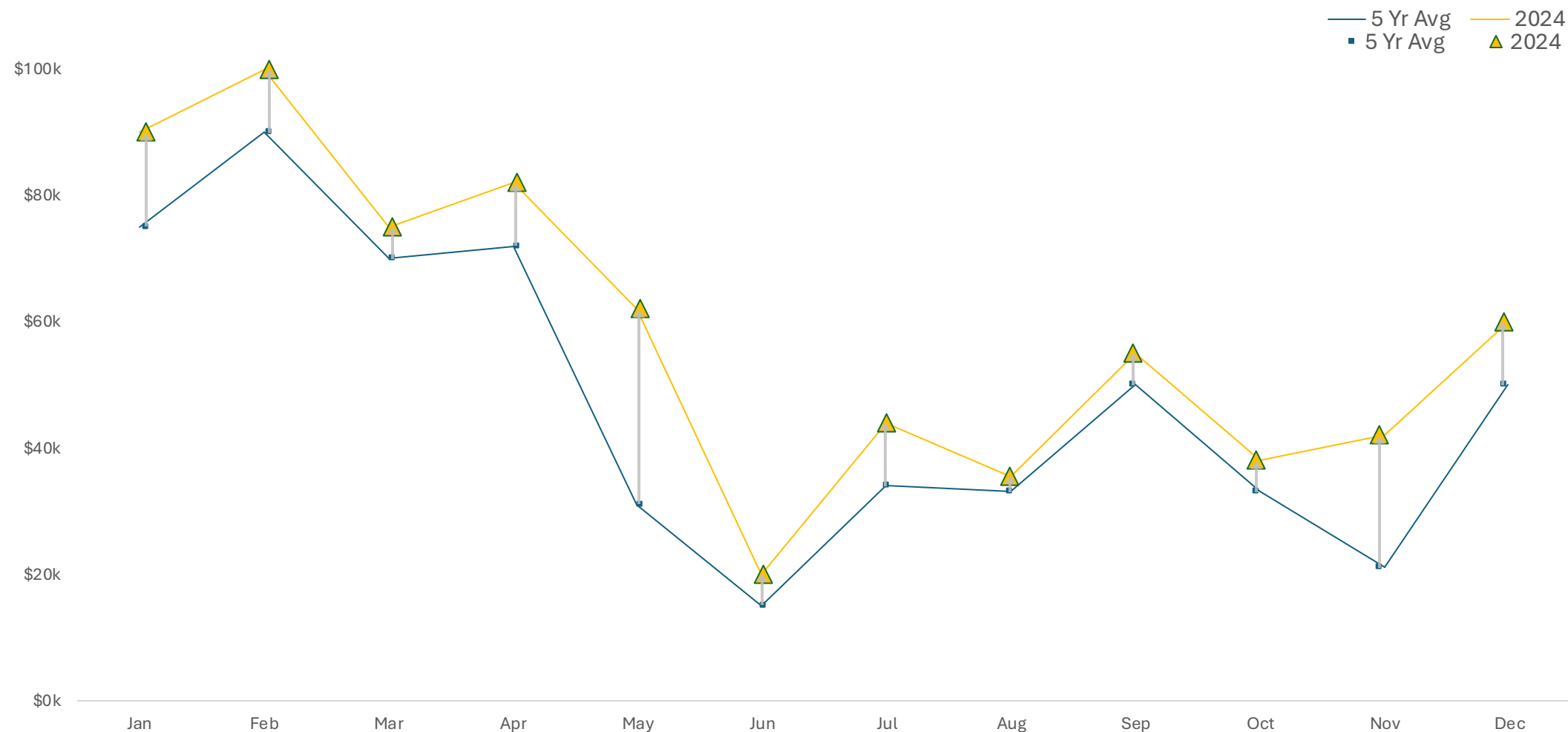
# 2024 Revenue Was Above Average All Year



# 2024 Revenue Was Above Average All Year



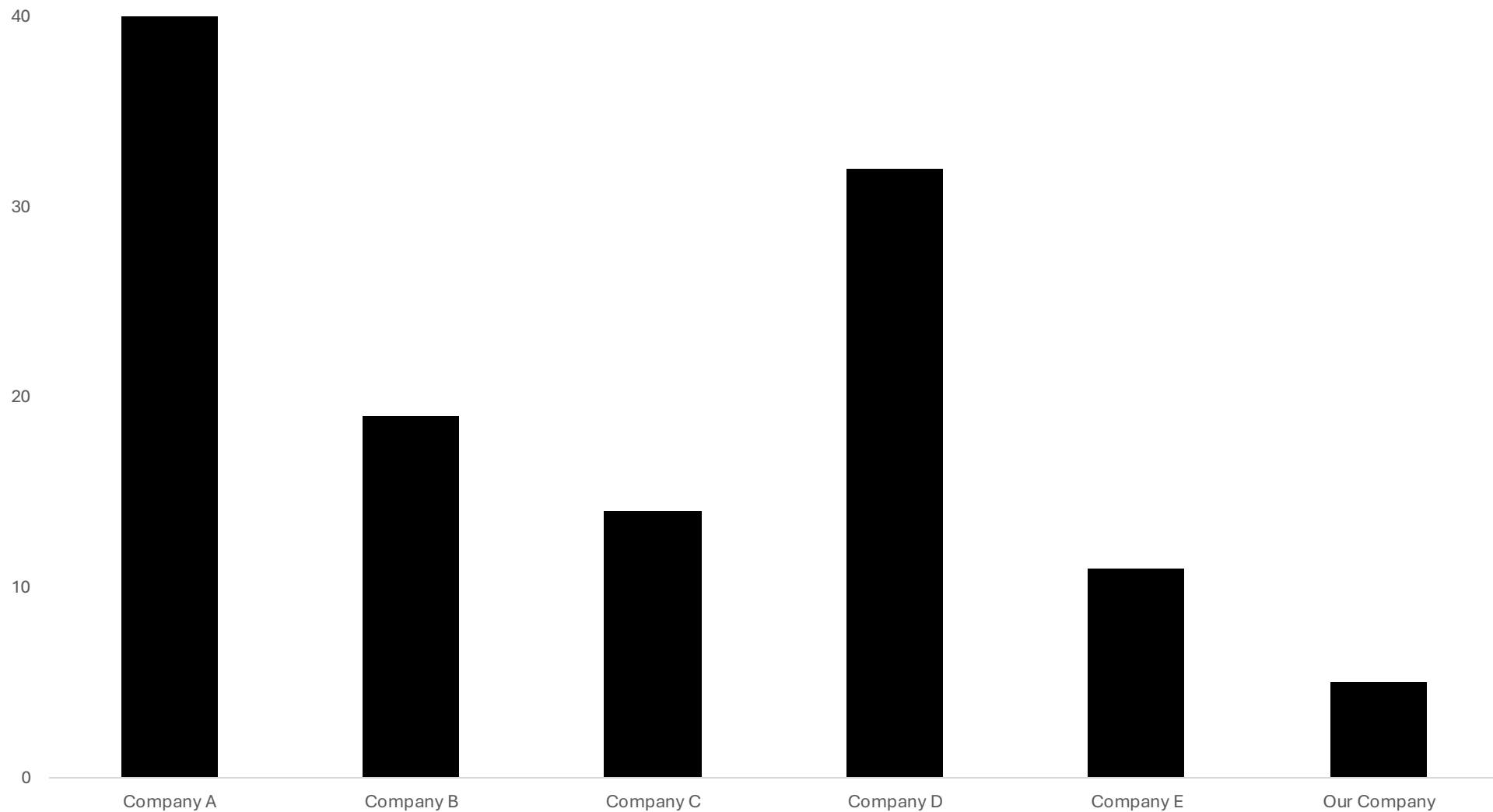
# 2024 Revenue Was Above Average All Year



# Case Study #2 – OSHA Violations



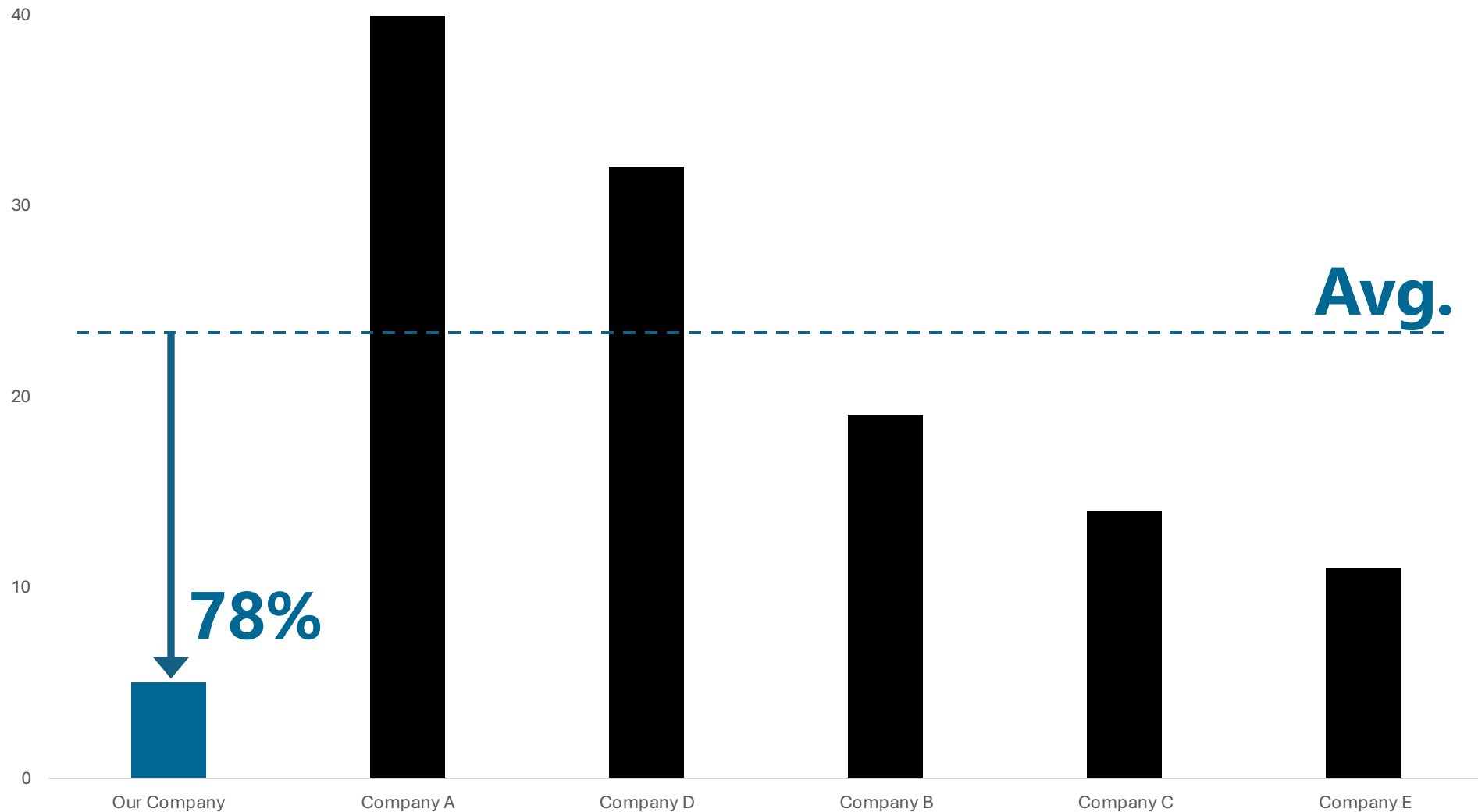
# OSHA Violations



# OSHA Violations



# Our Company has the Fewest OSHA Violations!



# Case Study #3 – Client Survey Results

## Find the Story

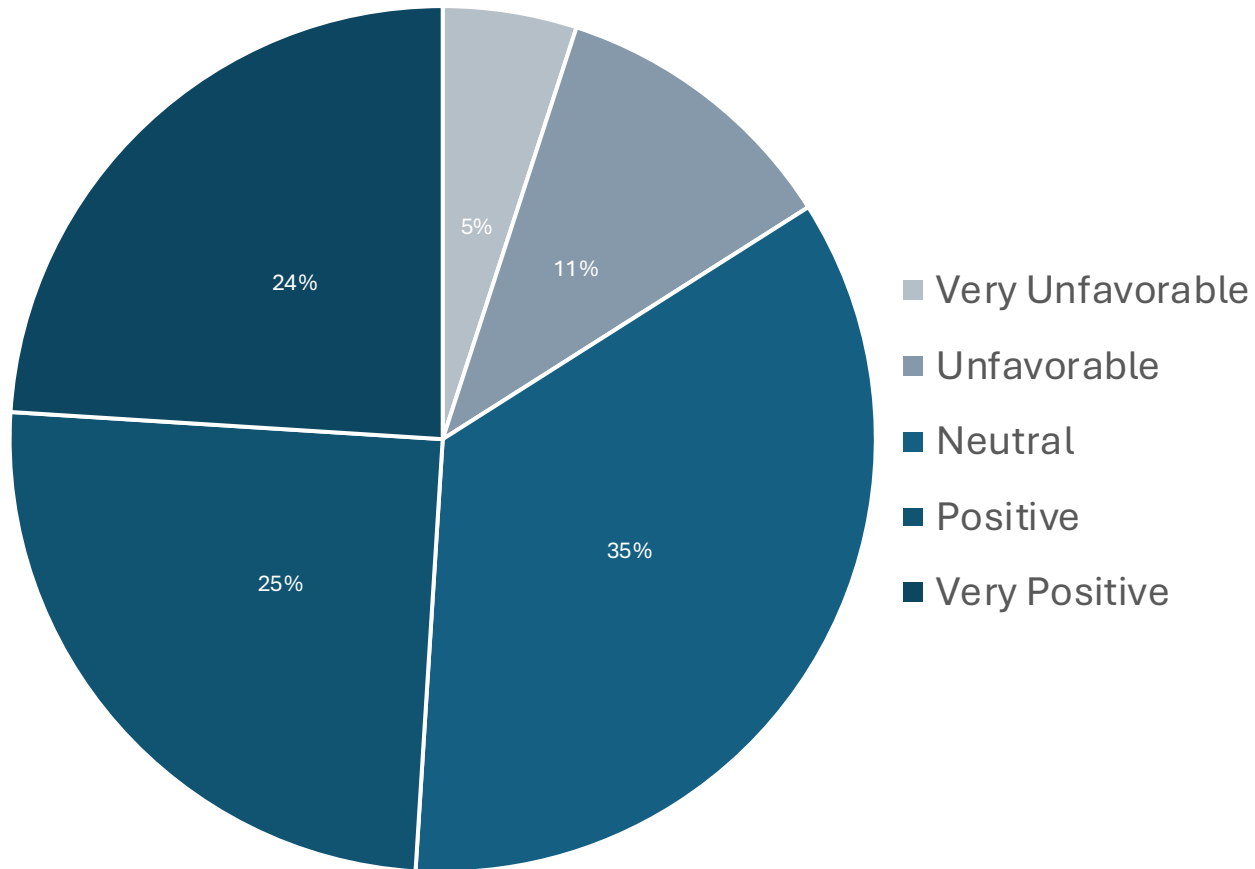


- Survey was sent to gauge the opinion of companies before and after working with us
- One question survey on a 5-point scale
- Two datasets
  - Pre = Results before becoming a client
  - Post = Results after finishing their first project with us

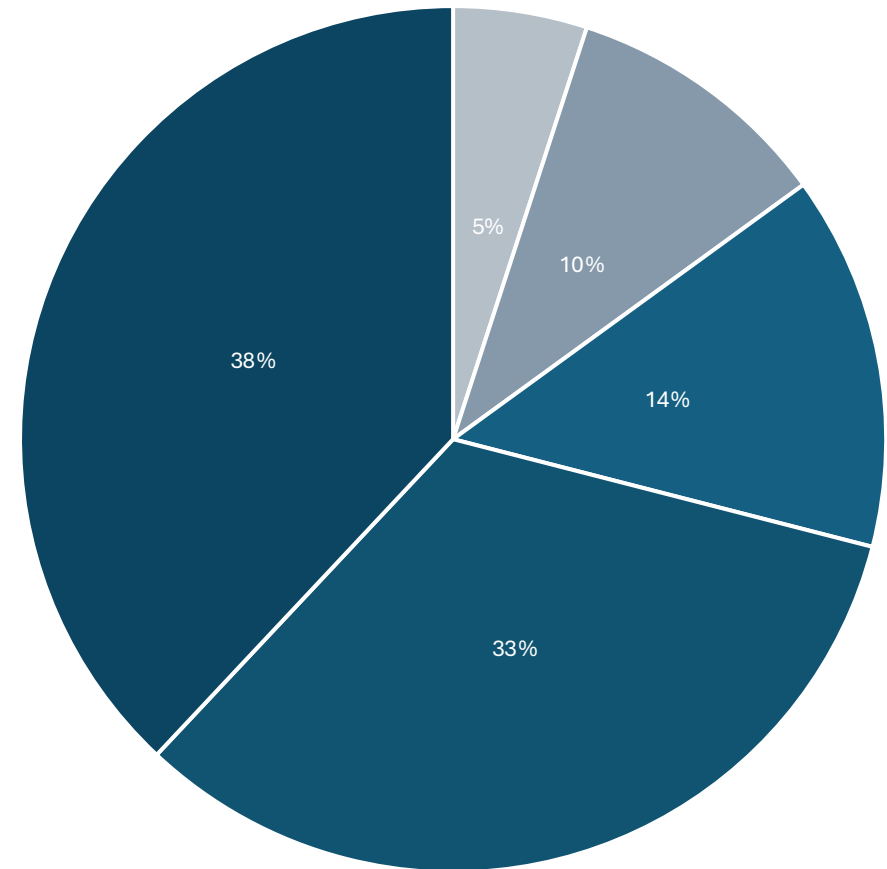


# Client Survey Results

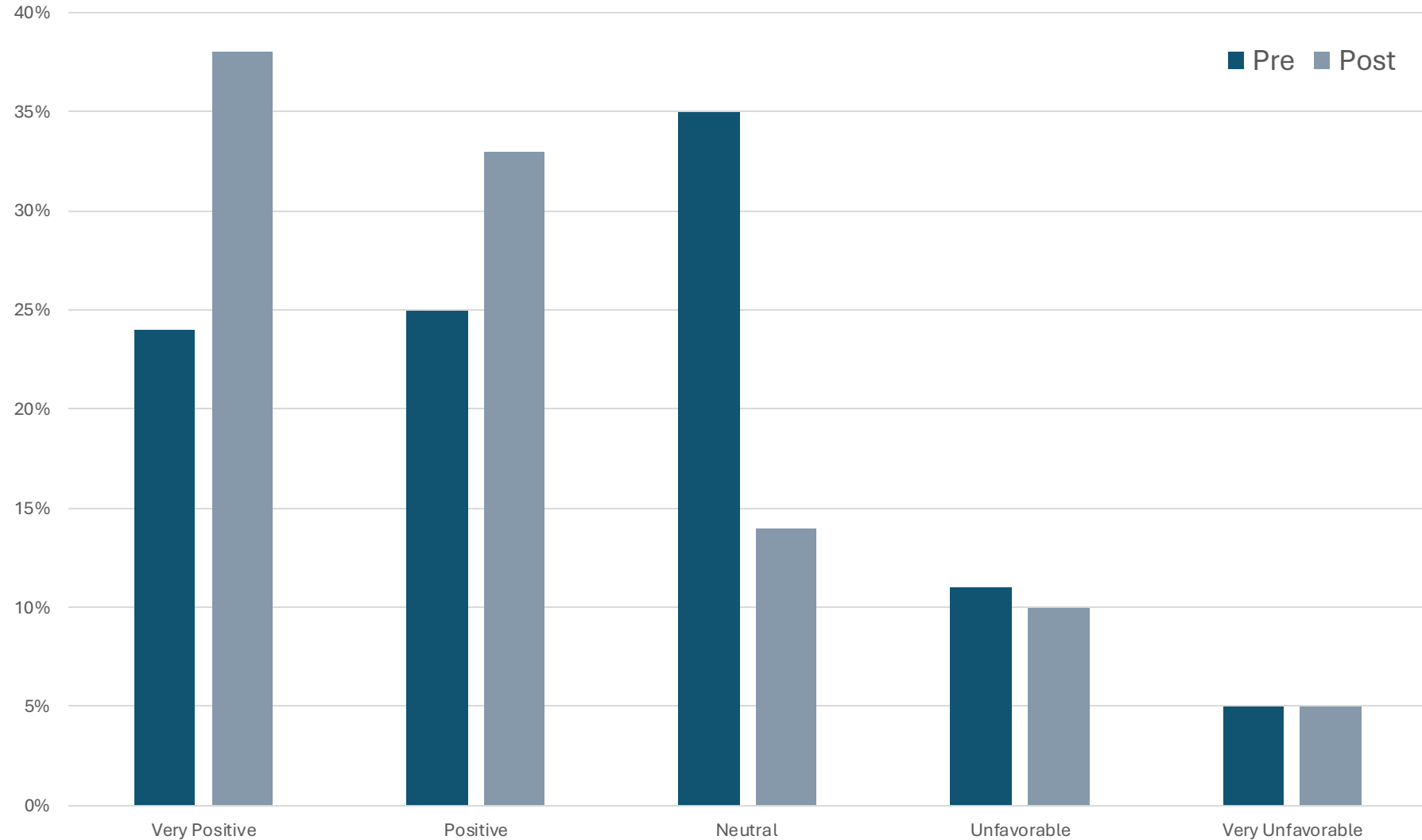
Pre-Project



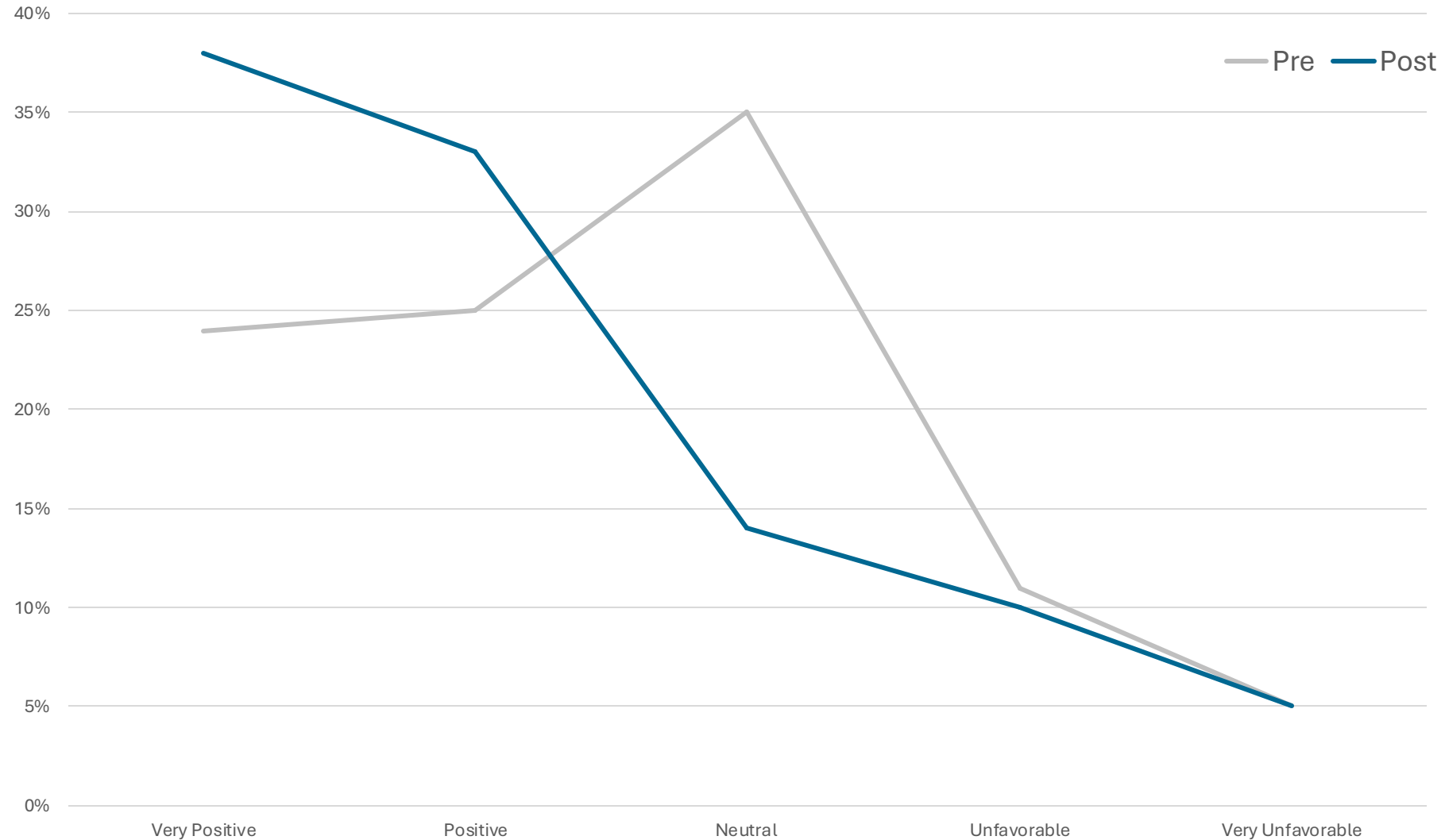
Post-Project



# Client Survey Results



# Client Survey Results



# What's the Story?

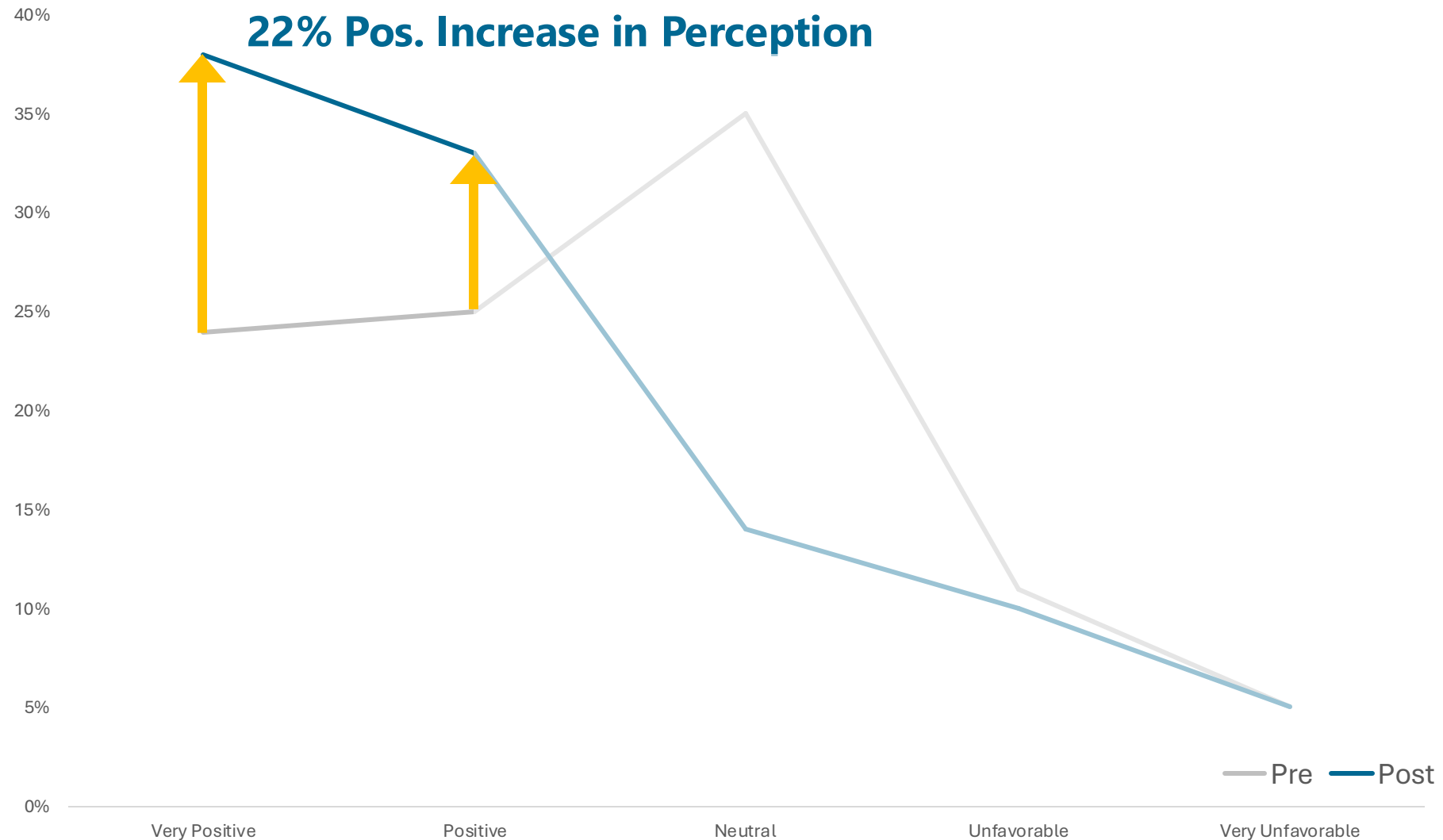
ChatGPT 4 ▾

**Improved Positive Perception:** There have been improvements in positive perception, with 24% of respondents reporting a 'Very Positive' perception of the company after engaging with its services (24%). The 'Positive' category also saw an increase from 14% pre-project to 24% post-project, indicating a significant shift in public opinion.

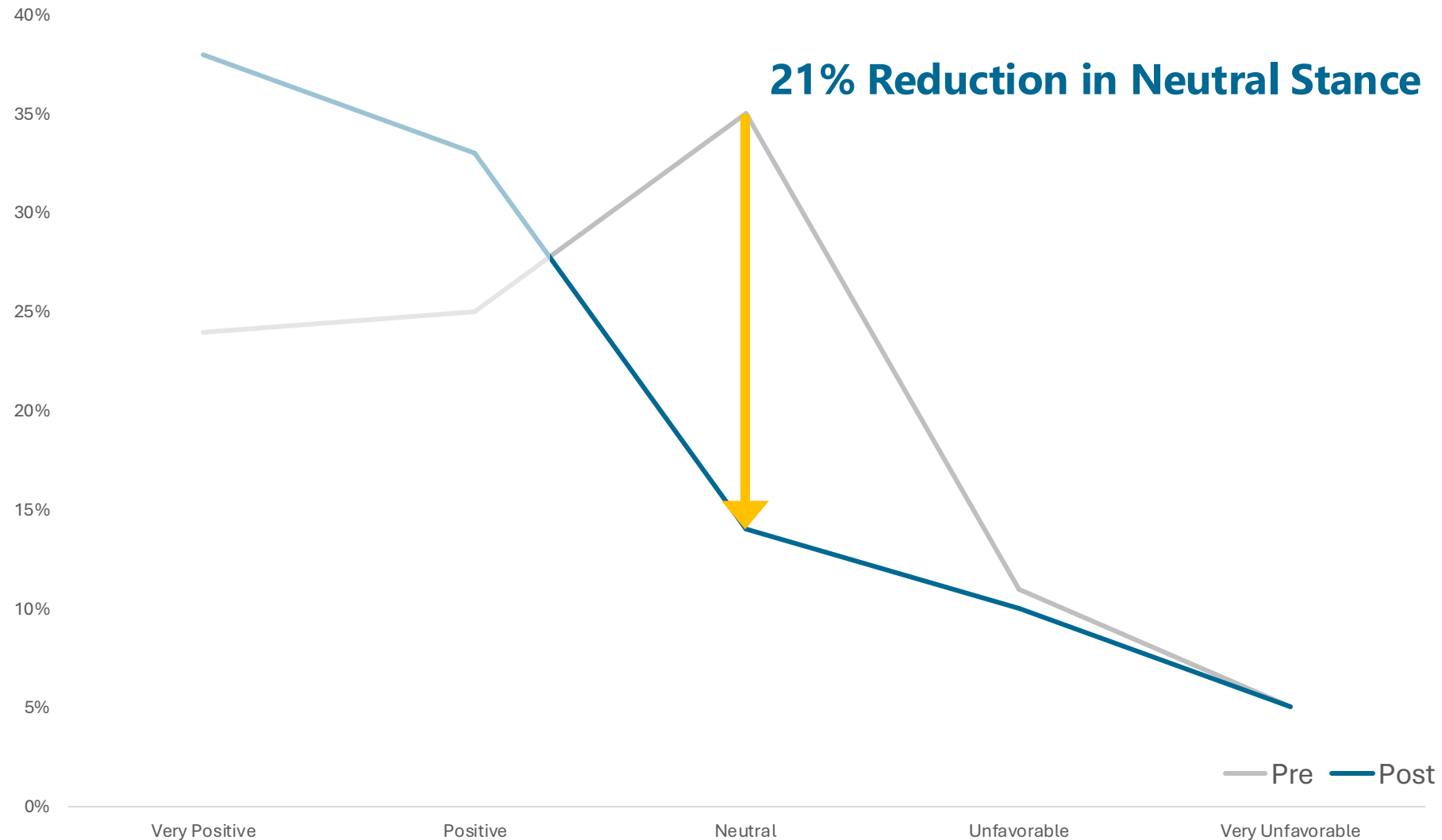
**Reduction in Neutral Stance:** The 'Neutral' category decreased from 24% pre-project to 14% post-project, indicating that a smaller portion of the public held a neutral view of the company after engagement with its services.

**Stable Negative Perception:** Both the 'Somewhat Negative' and 'Very Negative' categories remained relatively unchanged, indicating that the company's negative perception was stable among those who already had a negative view.

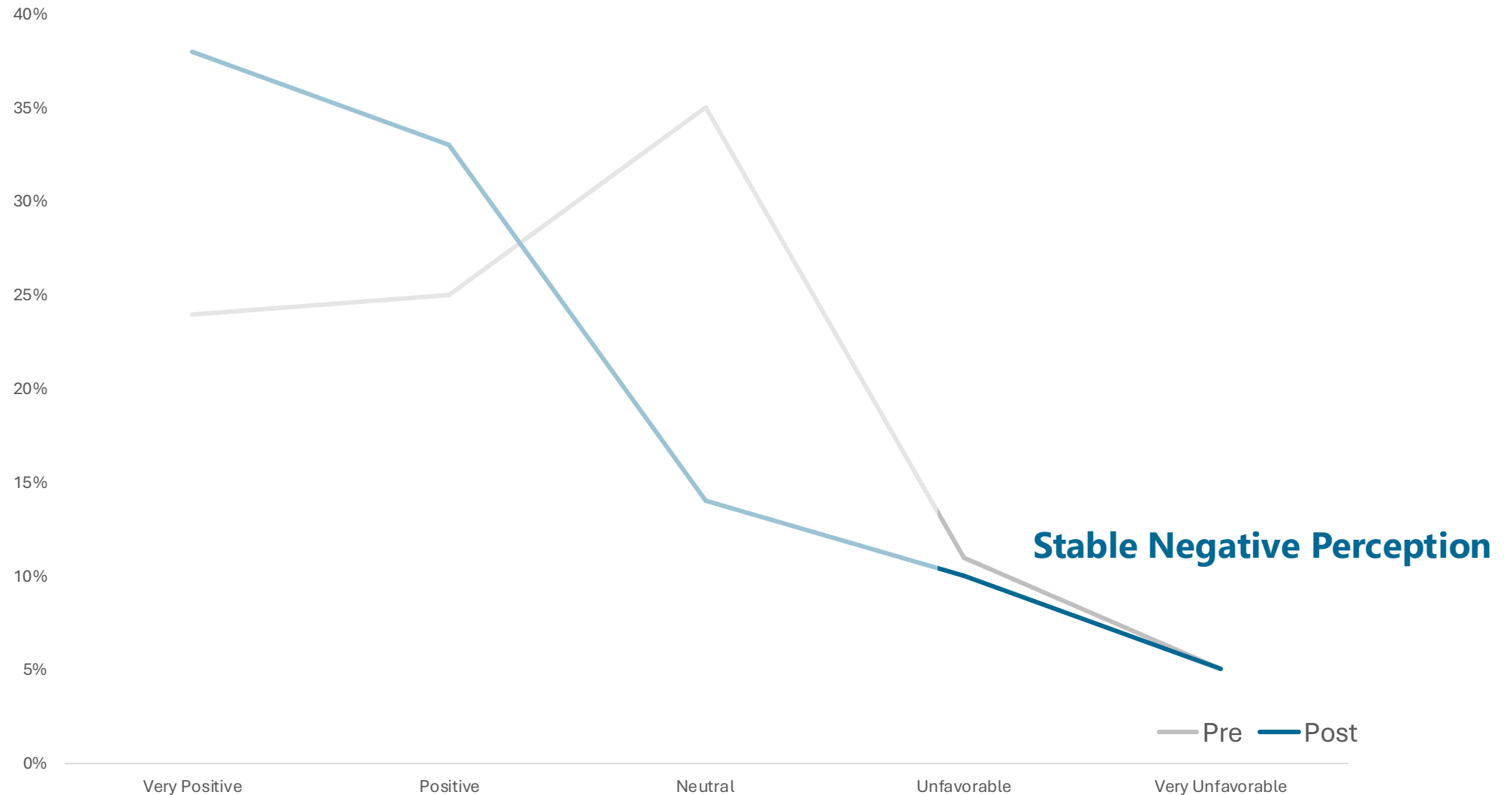
# Presenting the Story



# Presenting the Story



# Presenting the Story

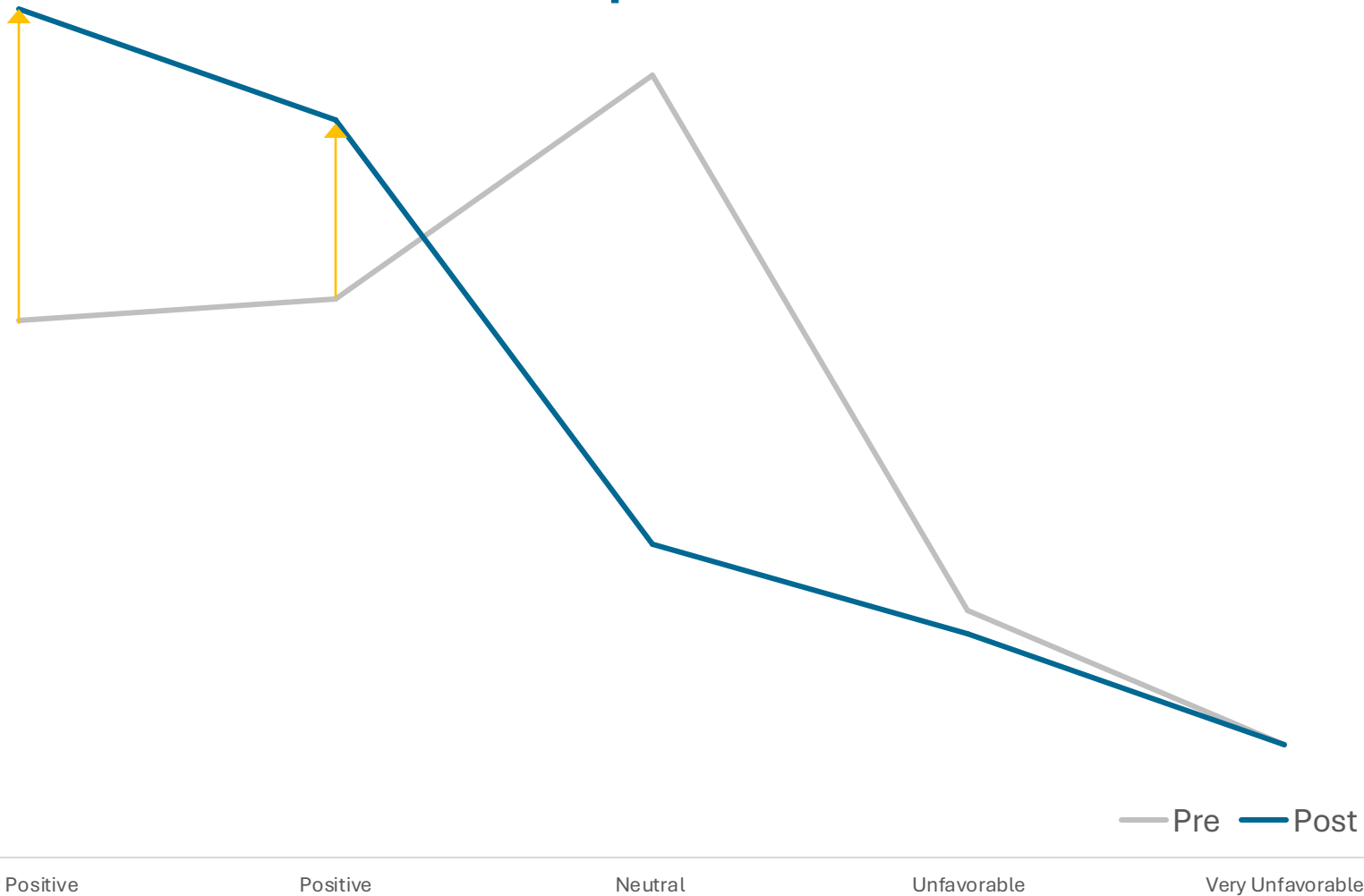


# Presenting the Story



What if it will  
be printed?

## 22% Pos. Increase in Perception



## Working with us is a positive experience!

Prospects were given a survey to gauge their opinion of our company before working with us (pre) and again after becoming clients and finishing their first project (post). The results show an overall shift towards client satisfaction and favorability.



I hope you can  
agree the golden  
couple is your CRM  
*Data & Storytelling!*



# Additional Resources

Scan the Code



- Download Slides
- Book a Discovery Call
- Purchase *CRM or Die*
- Attend Our Free Events
- Sign Up for Our Emails
- And More!



Any  
Questions?





**Please Complete  
the Speaker Eval  
in the App**



# Thank you

