The importance
and art of synthesis
in data-driven organizations

Vanguard

What sets Vanguard apart?

Size

Structure – we're actually owned by our customers

Culture

Why synthesis?

Only half of the available information in organizations is actually used for decision-making

Among the top 5 ways cited to reverse this trend:

- Improve the way in which information is presented
- Make information easier to find

SYNTHESIS IS ACTUALLY
THE MOST IMPORTANT THING IN LIFE

— **Dax Bamania Productivity Promoter,**
a book for leaders of tomorrow which can help
every reader find the most efficient person
within

Getting into the mindset
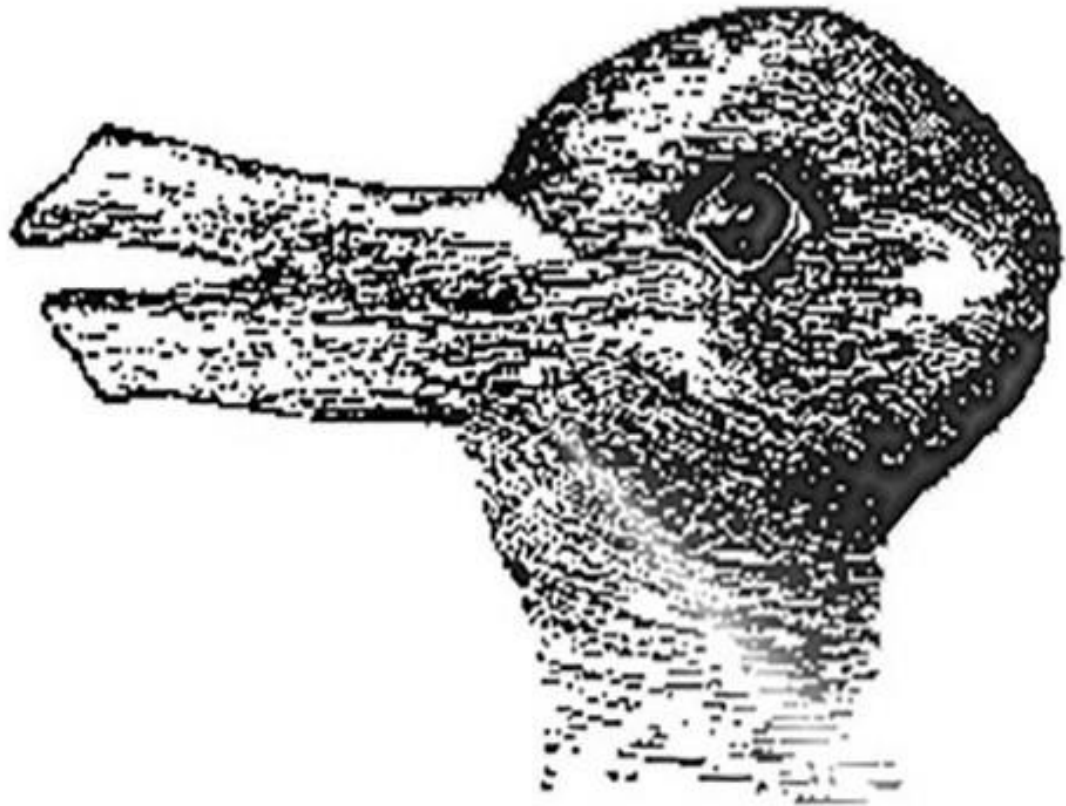
Patience

Perspective

Habit

Step 1: Patience

Quell your need for speed

Cherish the emerging picture

Don't derail

Step 2: Perspective

Always listen

Have something for everyone in the room

Ask for feedback

Step 3: Habit

Deliver little gifts of synthesis – e.g., list key highlights of report in body of email along with attached report

Triangulate key findings from other sources in *all* research reports

Synthesize when vetting research requests – i.e., what do we already know about this topic? Do we know enough *not* to do more research?

Help, I've been asked to synthesize!

How to synthesize

Step 1: Determine the business goals and identify the research you will synthesize

Step 2: Copy and paste findings that you think are important from each report into a spreadsheet, organized by topic, question, report, etc.

Step 3: Review and highlight those findings that you think are the most important

Step 4: Copy and paste the slides from each report that contain a highlighted key finding into a working deck

Step 5: Organize by affinities, patterns, and themes

Step 6: Summarize your findings

Synthesis Type I – Overall Topic

	A	B	C
1	Page Number	Important Findings	Comments
2			
3	3	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Suspendisse posuere in lectus id ullamcorper. Nam rhoncus ligula ut turpis volutpat vulputate. Sed sed porta purus. Aenean bibendum semper pulvinar. Aenean et scelerisque diam.	Consider graphic on slide 6 of Appendix
4			
5	5	Curabitur commodo ante in facilisis ultricies. Pellentesque tincidunt diam eget urna consequat placerat.	
6			
7	11	Donec pellentesque hendrerit orci, in aliquet arcu ullamcorper sed. Donec feugiat neque nec odio posuere consequat. Nunc faucibus nunc id nunc bibendum, porta maximus mi consequat.	Follow-up with Maya about Phase 2 findings
8			
9	23	Integer posuere egestas quam, vitae ullamcorper felis aliquet ac. Fusce ut ante suscipit, efficitur ligula et vehicula dui. Vivamus malesuada leo ut hendrerit tincidunt	
10			
11	35	unc ornare porttitor orci vel efficitur. Aenean pulvinar risus non iaculis tristique. Interdum et malesuada fames ac ante ipsum primis in faucibus. Aenean placerat orci erat, et vehicula nibh feugiat et.	
12			
13	35	urabitur vestibulum luctus felis, vitae sollicitudin elit suscipit sed. Morbi fringilla turpis a pulvinar egestas. Nullam elementum mauris sed malesuada pharetra.	
14			
15	37	Phasellus sollicitudin pretium rutrum. Donec vel justo pellentesque, volutpat lacus sed, pretium sem. Donec tempus lorem dolor, sodales elementum mi cursus a. Maecenas nec malesuada sapien. Vivamus velit velit	
16			

Study

Brand Tracker   Client Journey   Messaging Optimization   Segmentation

READY   100%
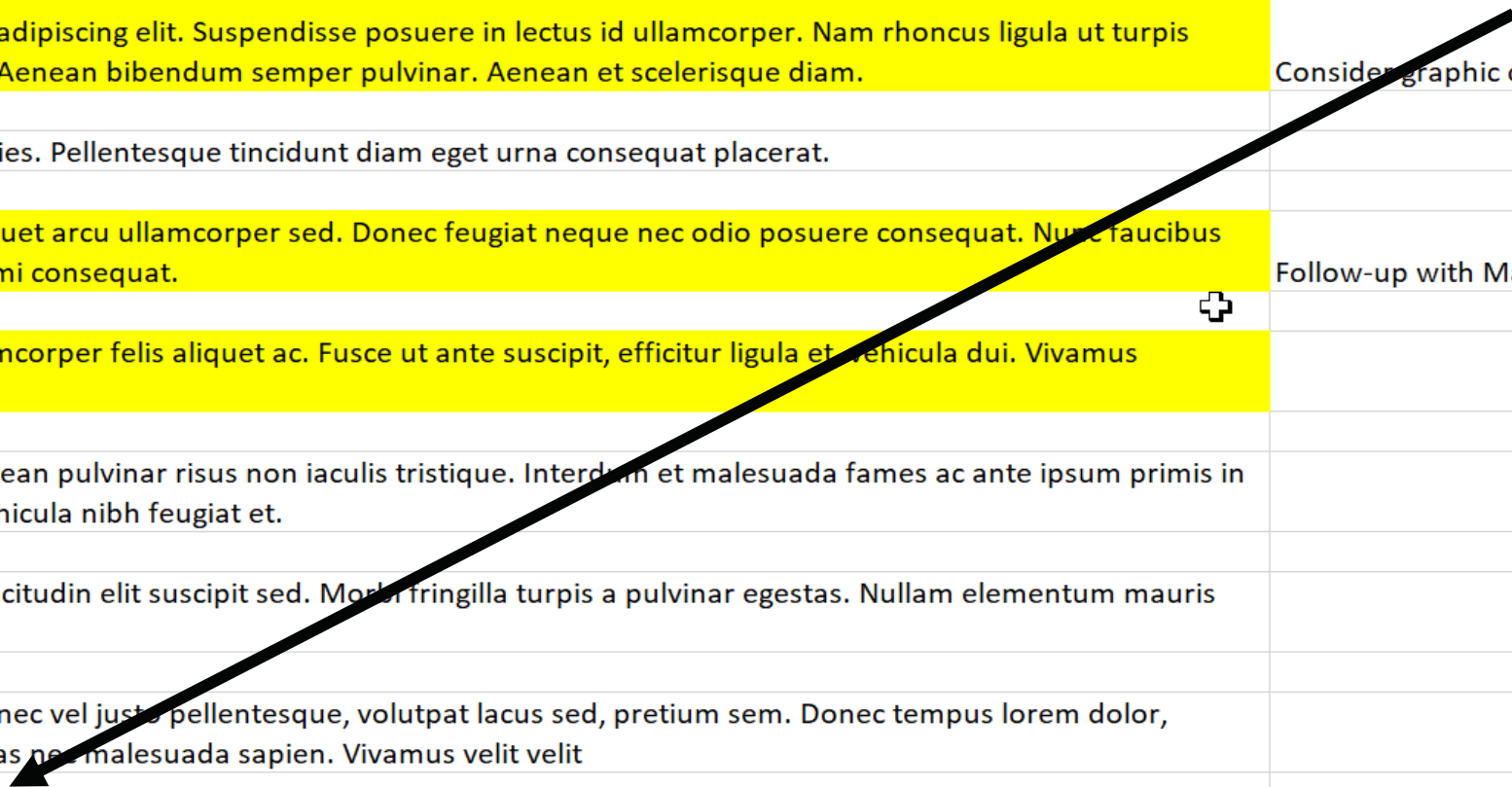
Themes in the story of X

1 Lorem ipsum dolor sit amet, consectetur adipiscing elit.

4 Vivamus velit velit, interdum a eleifend ut, faucibus congue justo.

2 Curabitur commodo ante in facilisis ultricies. Pellentesque tincidunt diam eget urna consequat placerat.

5 Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos

3 Nunc ornare porttitor orci vel efficitur. Aenean pulvinar risus non iaculis tristique.

6 Aenean maximus quam vitae mauris bibendum sagittis.
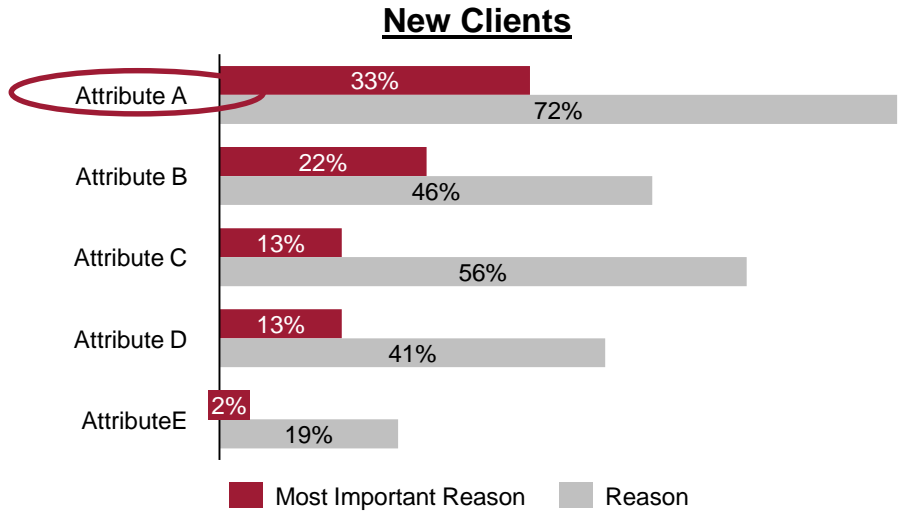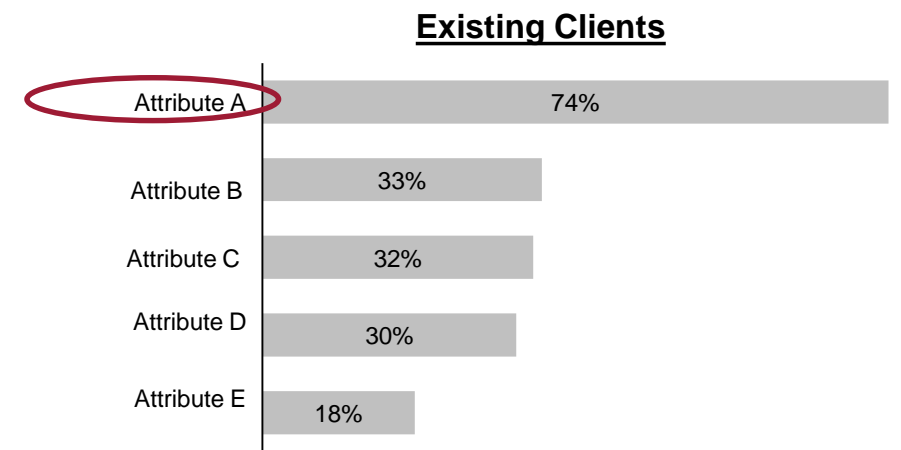
Synthesis Type II – By "sub" question, topic, cohort, etc.
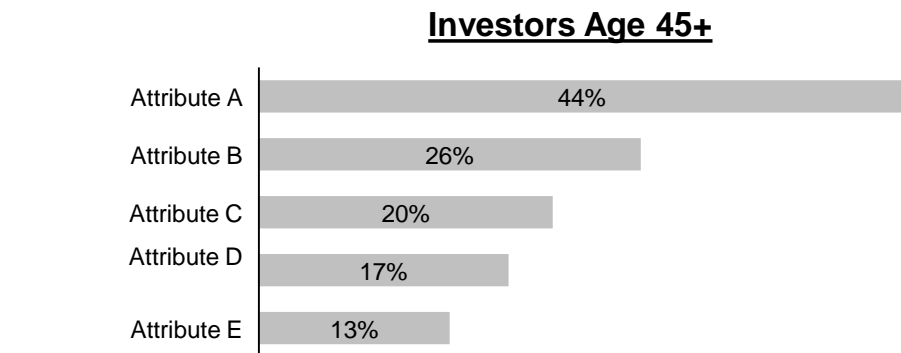
Why Do Investors Come to Vanguard?

A

Est amet sint et aspernatur earum aut molestias voluptatum eos adipisci dolor.
Hic ducimus voluptas et rerum laudantium a laudantium quia eum eligendi consequatur sit perferendis earum non maiores sint ut voluptatem dicta.

Existing Clients

- Attribute A — 74%
- Attribute B — 33%
- Attribute C — 32%
- Attribute D — 30%
- Attribute E — 18%

New Clients

- Attribute A — 33% / 72%
- Attribute B — 22% / 46%
- Attribute C — 13% / 56%
- Attribute D — 13% / 41%
- AttributeE — 2% / 19%

Legend: ■ Most Important Reason   ■ Reason

- Lorem ipsum dolor sit amet. Ut voluptas aliquid rem eius quia est libero voluptatum. Ut sequi commodi aut internos fugit et dicta voluptatem quo dolorem quam sed internos quia qui magni voluptatem cum neque Quis.

- A pariatur atque ut quia consequuntur vel suscipit corporis. Sed doloremque praesentium et rerum iste ut repellendus repellat et unde maiores hic labore consequatur sed distinctio officia id sint perspiciatis?

- Aut quisquam ipsa est nostrum assumenda qui quae corporis eos quia deserunt! Sed numquam maxime et earum rerum.
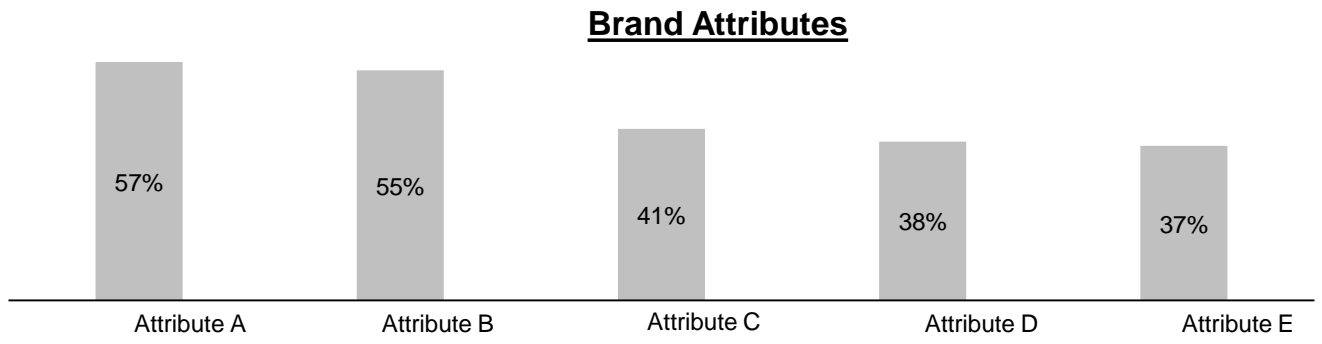
B

Et optio impedit et quas rerum qui blanditiis libero quo exercitationem nihil ab rerum eligendi.

Investors Age 45+

- Attribute A — 44%
- Attribute B — 26%
- Attribute C — 20%
- Attribute D — 17%
- Attribute E — 13%

"Fugit et dicta voluptatem quo dolorem quam sed internos quia qui magni voluptatem cum neque Quis."

- Sit impedit quia eum neque inventore eos temporibus maxime aut blanditiis tempora aut voluptatem reiciendis.

C

Sit provident mollitia aut sunt illum et dolor doloribus. Est cumque dicta eum natus nemo rem molestiae cumque et tempora voluptate qui omnis itaque et quod voluptatem.
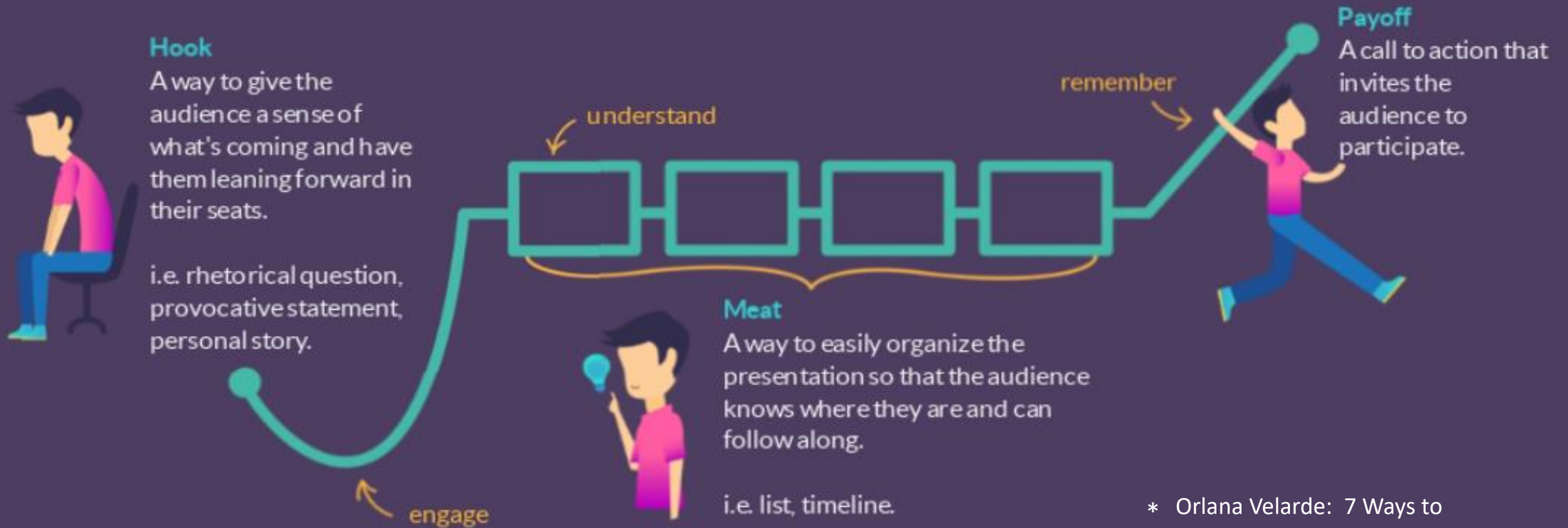
Brand Attributes

- Attribute A — 57%
- Attribute B — 55%
- Attribute C — 41%
- Attribute D — 38%
- Attribute E — 37%

- Sit magni dolor non veritatis consequuntur non dolores dolorem id quia deleniti et culpa enim nam illum harum.

A word about storytelling!

7. Hook, Meat and Payoff *

This presentation structure, like **The Drama** is deeply founded in the art of storytelling. While the Hero's Journey is more of a literary technique; **Hook, Meat and Payoff** is more like a spoken word progression.

Hook
A way to give the audience a sense of what's coming and have them leaning forward in their seats.

i.e. rhetorical question, provocative statement, personal story.

understand

remember

engage

Payoff
A call to action that invites the audience to participate.

Meat
A way to easily organize the presentation so that the audience knows where they are and can follow along.

i.e. list, timeline.

Synthesis is *critical* and requires an investment of your time, but…

- makes research more valuable
- makes you more appreciated
- makes you a subject matter expert
- helps you and your company succeed

...and don't forget the storytelling!

Vanguard

Questions?