Secrets to Effective Communication for Statistical Consultants

August 5, 2013
Section on Statistical Consulting, Statistics Without Borders
Joint Statistical Meetings (JSM)
Montreal, Canada
Quote of the Day

“Communication works for those who work at it.”

John Powell
## Panelists

<table>
<thead>
<tr>
<th>Name</th>
<th>Institution</th>
<th>E-Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Alan Salzberg</td>
<td>Analysis &amp; Inference, Inc.</td>
<td><a href="mailto:asalzberg@analysisandinference.com">asalzberg@analysisandinference.com</a></td>
</tr>
<tr>
<td>Dr. Jack Schuenemeyer</td>
<td>Southwest Statistical Consulting, LLC</td>
<td><a href="mailto:jackswsc@q.com">jackswsc@q.com</a></td>
</tr>
<tr>
<td>Dr. Elena Randou</td>
<td>Dept. of Mathematical Sciences, George Mason University</td>
<td><a href="mailto:rantou.elena@gmail.com">rantou.elena@gmail.com</a>, <a href="mailto:rantou.elena@gmu.edu">rantou.elena@gmu.edu</a></td>
</tr>
<tr>
<td>Dr. Ralph Turner</td>
<td>HealthCore</td>
<td><a href="mailto:RTurner@healthcore.com">RTurner@healthcore.com</a></td>
</tr>
<tr>
<td>Colleen Mangeot</td>
<td>Biostatistical Consulting Unit, Cincinnati Children’s Hospital</td>
<td><a href="mailto:Colleen.Mangeot@cchmc.org">Colleen.Mangeot@cchmc.org</a></td>
</tr>
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## Organizer/Chair

<table>
<thead>
<tr>
<th>Name</th>
<th>Institution</th>
<th>E-Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Isabella R. Ghement</td>
<td>Ghement Statistical Consulting Company Ltd.</td>
<td><a href="mailto:isabella@ghement.ca">isabella@ghement.ca</a></td>
</tr>
</tbody>
</table>
We would like to thank the following colleagues for their invaluable help in shaping up this session:

<table>
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<tr>
<th>Name</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Dr. A. John Petkau</td>
<td>Department of Statistics, University of British Columbia</td>
<td><a href="mailto:john@stat.ubc.ca">john@stat.ubc.ca</a></td>
</tr>
<tr>
<td>Mary Ann Ritter</td>
<td>Statistics Department, University of Michigan</td>
<td><a href="mailto:ritterma@ix.netcom.com">ritterma@ix.netcom.com</a></td>
</tr>
<tr>
<td>Dr. Jeffrey A. Bakal</td>
<td>Faculty of Medicine and Dentistry, University of Alberta</td>
<td><a href="mailto:jbakal@ualberta.ca">jbakal@ualberta.ca</a></td>
</tr>
<tr>
<td>Dr. David Bristol</td>
<td>Statistical Consulting Services, Inc.</td>
<td><a href="mailto:drbris1@gmail.com">drbris1@gmail.com</a></td>
</tr>
<tr>
<td>Dr. Nicole C. Close</td>
<td>EmpiriStat, Inc.</td>
<td><a href="mailto:nclose@empiristat.com">nclose@empiristat.com</a></td>
</tr>
</tbody>
</table>
Audience Makeup

How many of you are:
- Consultants with < 5 years of experience?
- Consultants with 5 to 10 years of experience?
- Consultants with 10+ years of experience?
- Aspiring Consultants?
Audience Background

How many of you consider yourselves:

- Great communicators?
- Good communicators?
- Communicators in need of some assistance?
Audience Needs

Please turn to the person next to you and share in the next 60 seconds what you hope to gain from this session.
Session Setup

We will share secrets to effective communication for preventing or solving real-world problems faced by statistical consultants.

We will provide you with additional resources at the end of the session.

We will provide you with an opportunity to ask questions during the question period.
In the context of statistical consulting, effective communication is the *successful interface* between the *client needs* and the *consultant deliverables.*
Why is effective communication important?

• Key to business success.
• Generates trust and respect.
• Builds expertise.
• Generates repeat business.
• Helps prevent/resolve conflict.
Effective communication is a **learnable skill** but also an **attitude of mind**.

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<th>Communication as a Learnable Skill</th>
<th>Communication as an Attitude of Mind</th>
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<td>- Non-technical skills</td>
<td>- Having a positive and flexible mindset</td>
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<td>- Technical skills</td>
<td>- Being of service (but not a servant!)</td>
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<td>- Being on the client’s side</td>
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Secret # 1 (Colleen)

Establish rapport with the client.

• What is Rapport?
  Rapport occurs when two or more people feel they are in sync or on the same wavelength because they feel similar or relate well to one another

• Why is Rapport important?
  It builds trust and trust is the foundation of relationships.

• How do you build Rapport?
  - Mirroring and Matching
  - Be familiar with different communication styles and adapt
Secret # 2 (Ralph)

Maintain a professional attitude throughout the consulting process.

- Don’t make excuses.
- Follow through on promises.
- Be punctual for your meetings.
- Answer e-mails and phone calls promptly.
- Confirm everything in writing.
- A sincere apology is sometimes appropriate.
- Respect the client’s expertise in their field.
- Aim to under-promise and over-deliver.
- Maintain your professional standards and integrity.
Ask about client’s preferred means of communication and desired frequency of communication.

- Will the client need an initial meeting?
- Will the client need status updates at various stages of the project?
- Will the client need to meet in person or via phone to discuss final results?
Secret # 4 (Ralph)

Ask the client to explain the importance of the project to them or their company.

- What is the bigger context?
- How will your results impact the client or their company?
- How will your performance affect your ability to get repeat business?
Secret # 5 (Elena)

Uncover the client’s real needs.

- Ask as many questions as necessary, but be mindful that the client is a busy professional.
- Rather than asking open-ended questions, offer some possible answers that the client can choose from.
- Pay close attention to what the client says but also to what they don’t say.
- Focus on what you need as a professional from the client to get the job done.
- Don’t get drawn into the client’s lack of purpose, organization or management.
- Do not work with clients who insist that you should produce their desired outcome.
Confirm deliverables with the client.

- Do all deliverables make sense? If not, work with the client to identify proper deliverables.
- Does the quality of the data support the deliverables?
- Does the statistical analysis plan support the deliverables?
- If budget is limited, can the deliverables be prioritized?
Confirm time estimates and deadlines with the client.

- Break the project down into several manageable tasks.
- Be accurate in your assessment of how long each task will take to complete.
- Allow for the possibility that things will take longer than expected (assume that if anything can go wrong, it will).
- Allow for back-and-forth communication with the client.
- Factor in all other current demands on your schedule, as well as any future demands.
What should be included in a contract

- Information needed from a client
- Client deliverables
- Time schedules
- Software
- Confidentially
- Invoicing
Secret # 9 (Jack)

What to look out for in your contract

- Penalty provisions
- Review by an attorney of larger contracts/agreements
- Written assurances that some provisions do not apply to you
Inform the client on possible approaches for solving their problem and use your professional expertise to recommend the optimal approach.

Optimal approach should:

- Take into account the client’s level of statistical literacy;
- Relate to the client’s needs and concerns;
- Achieve the right balance between simplicity and complexity;
- Reflect time and budget constraints.
Secret # 10 (Elena) – ctd.

Remember that the client is usually interested in understanding:

- The *core message* of the optimal approach;
- The *key statistical concepts* involved in this approach.

Consultants can convey the *core message* and the *statistical concepts* pertaining to the optimal approach using communication tools such as:

- Conversation
- Presentation
- Charts
- Tables
- Graphs
- Reports

All of these communication tools need to target the particular level of statistical literacy of the client. They should be simple and to the point and should not contain useless technical details.
Secret # 10 (Elena) – ctd.

Statistical concepts that often pose challenges to clients include:

- Statistical Significance
- Sample Size
- Correlation
- Bias
- Odds Ratios
- Multicollinearity
- Independent samples vs. matched pairs
- Continuous versus binary responses

When explaining these concepts to the client, remember that the client’s intuition is not always their best friend.

The use of handouts, visuals and other supplementary materials will improve the client’s understanding of what the consultant has to say.
Secret # 11 (Alan)

Keep the client in the loop about any anticipated or unanticipated challenges that you encounter while working to solve their problem.
Secret # 12 (Elena)

Provide regular updates to your client on the number of hours spent working on the project.

- Keep track of hours worked on a project

- Update client on a regular basis on hours spent on their project and what was accomplished (*clients want to know what was accomplished, not just how long it took*)

- Avoid waiting until the project is complete to communicate hours spent on project to client (*clients generally do not like surprises*)
Secret # 13 (Colleen)

When communication isn’t working, it’s time to reflect, get motivated, and take action.

Conflict is inevitable and difficult for everyone. The secret is to find effective ways to address it.

- **Know your current response.**
  - Avoid, Give in, Passive-Aggressive, Bully the other person, Compromise, Problem Solve Together, Honor the Other Person

- **Get motivated to deal with the conflict. It takes effort to change.**
  - What does it cost you and/or the client?
  - What’s good about it or could be good about it for you and/or the client?
Secret # 14 (Colleen)

Once motivated to improve communication, take action and focus on what is doable.

- Use Truth Talk to discover what’s going on for you.
- Find the 1% you agree with and agree 100% with it.
- Focus on the real want or need. (revisit secret 4 and/or continue to explore this)
- Consider taking a break or calling it like it is.
- Consider using a coaching model such as GROW (goal, reality, options, way forward)

****Communicate in person or by phone if at all possible.
Secret # 15 (Colleen)

Use reflection after meeting with your clients to understand what worked/didn’t work.

- What was great about the meeting?
- What did you do well? *(list 3-5 items)*
- What would you do differently? *(limit to 1 item)*
Secret # 16 (Alan)

Present your findings in a clear and impactful way.

- KISS (Keep It Simple Stupid)
- For longer written documents or reports, include tables or figures when you need to present more than 2 or 3 numbers.
- The tables and figures should flow with the text and serve to highlight or further explain the concepts.
- Put any necessary math or complex calculations in the appendix or footnotes.
Secret #16 (example)

An estimate is precise if it consistently produces the same result in repeated applications. An estimate is accurate if it approximates the true difference or value being estimated. We call an inaccurate estimate “biased” and an accurate method “unbiased.”¹ To demonstrate these concepts, consider the following four figures, showing the results of four dart throwers.²

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¹ The statistical term bias, unlike the lay term, does not imply intention.
Secret # 17 (Alan)

Be clear about the limitations and implications of the findings you produce for your clients.
Remember

Effective communication is a **learnable skill** but also a **state of mind**.

Act like an effective communicator and you will become one.

Your communication skills will be challenged every now and then – use challenges as an opportunity to grow and learn new things.

When encountering a challenge, remain positive, objective and open-minded so that you can make the best decisions possible for you and your client.
General Communication References

• The Coward’s Guide to Conflict, Empowering solutions for those that would rather run than fight, by Tim Ursiny, PhD. (www.advantagecoaching.com)

• You Already Know How to Be Great, by Alan Fine Covers the GROW model (www.insideoutdev.com)
General Communication References

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• **Improve Your Communication Skills, Rev. 2nd Ed.**
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• **Communication Skills for Effective Management**
  by Owen Hargie, David Dickson and Dennis Tourish
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  by Mark Bowden (McGraw-Hill, 2011)

• **Listening: The Forgotten Skill A Self-Teaching Guide, 2nd Ed.**
  by Madelyn Burley-Allen (Wiley, 1995)
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• Beyond "Hello": A Practical Guide for Excellent Telephone Communication and Quality Customer Service
  by Jeannie Davis and Pat Landaker
  (Now Hear This Inc, 2000)
Technical Communication References

• Effective Communication Skills for Scientific and Technical Professionals
  by Harry E. Chambers (Perseus Publishing, 2001)
Presentation References

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• **Slide:ology**
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  *45 Key Steps for Better Managing E-mail Overload*
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  by Louise Pile (Delta Publishing, 2004)
Social Media Communication References

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  by Susannah Gardner and Shane Birley
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• How To Tweet, The Basics
  *Dos and Don'ts for Newbies (Using Twitter)*
  by Kathi Flynn

• Become really effective on Twitter in just 5 days
  by Andrew Knowles (Writecombination Ltd, 2013)
Thank you!

Thank you for attending our session!

If you have any questions related to this session, please e-mail the panelists or the session chair.
# Contact Information

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<td>Dept. of Mathematical Sciences, George Mason University</td>
<td><a href="mailto:rantou.elena@gmail.com">rantou.elena@gmail.com</a></td>
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