TOM KY TRAN

Buckeye Business: A Presentation Design Workshop for BUSML 4203 Marketing Projects

24 | February | 2023

WORKSHOP OVERVIEW

Here's how we'll spend the next 90 minutes together.

5 mins Introductions.

5 mins Discussion of pre-read

5 mins Q&A.

10 mins Pro PowerPoint tips

45 mins Presentation design clinic

10 mins Group presentations

10 mins Voting and award ceremony



INTRO

Nice to meet you! I'm Tom, and I'll be your coach for this PowerPoint Presentation design workshop.



Got my BA and MBA at





Worked at or with



Abbott

Microsoft

















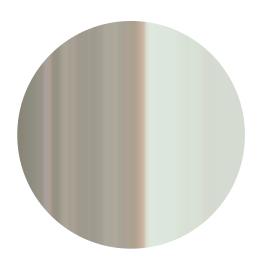
This business presentation design workshop will be especially useful for those who are...



Early Career Ambitious



Content Creators/Creatives



Non-Business Majors

It's not for people in more traditional industries including investment banking and consulting.









There's tons of existing online courses targeted for these traditional industries. My 3 top recommendations are: Firm Learning, Analyst Academy, and Slide Science on YouTube.

99% of everyday business presentations should fall in the middle of the spectrum. This is the sweet spot.

We're Here











Strategy **Consulting** Academic/ Scientific

Brand Marketing Plan Shark Tank Pitch

TFD Talk

More data/charts More words per slide Part of a discussion More of a document More serious More business-y

Mix of data and pictures Mix of quant and qual A document that will be presented to small audience

More pictures/video Fewer words per slide Part of a performance More of visual support More entertaining More variety on slides

Source: UC Berkeley and TED.



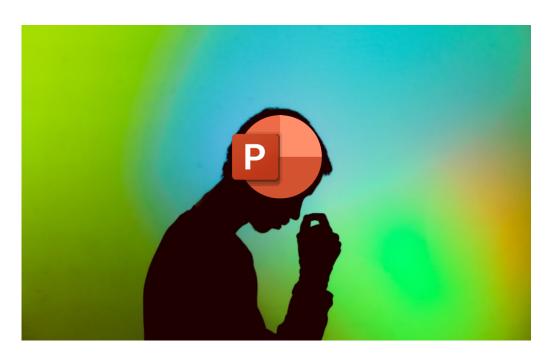
GUIDING PHILOSOPHY

There is a time and place for TED Talks or the Steve Jobs type of keynote presentation. That's a different beast.



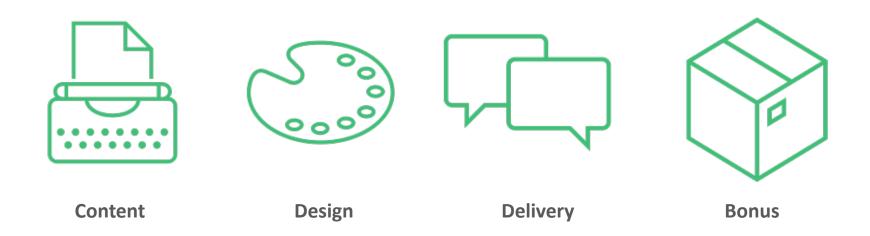
	, ,	Ти Вочна Симентов Само			
	TED Talk Presentation	Business Presentation			
Final Product (a	PowerPoint Presentation lka slide deck, or simply "deck")	PowerPoint Presentation (aka slide deck, or simply "deck")			
Content Style Lots of vide	os, pictures, and multimedia; Some charts	Charts, data, frameworks, models, and text			
Presenter's Goal	Entertain, inspire, or educate	Get buy-in and create action			
Delivery	Large auditorium	Small/Medium conference room			
Primary audience size Hundreds of cu	rious attendees eager to learn something new	A few executives, key managers, and related stakeholders (5-10 people)			
Secondary audience Millions of peop	The functional teams (i.e. Sales and that will be executing the str				
How it's shared	Link to video on YouTube	The deck is almost always emailed as a PDF attachment			

Show results based on insightful analysis and actionable recommendations—all delivered via your presentation.



- Command PowerPoint the way you command Final Cut or Premiere Pro
- Craft a story or narrative that resonates with businesspeople or brand managers
- Use data to inform and persuade your audience to accept your recommendations.
- Design a deck that's both on-brand for you but professional and familiar for your business-oriented audience
- Impress your client with the quality of your work and the benefit from implementing your recommendations.

Here's what we're going to cover in our time together.



PRESENTATION SOFTWARE

What's the best presentation software program you should be using? The answer is Microsoft PowerPoint.



Content



THE BASICS

If you remember these fundamentals, then you're more than halfway to a great presentation.





Audience

Goal



High growth brand wants to try a new marketing channel and work with you

External: Brand managers

Show them you understand their brand and why they should be excited to work with you



Sales were down and your brand was losing share, but you were able to help turn it around

Internal: Your CEO, Director, or **General Manager**

Show them what worked and why. Ask for more funding to double down.

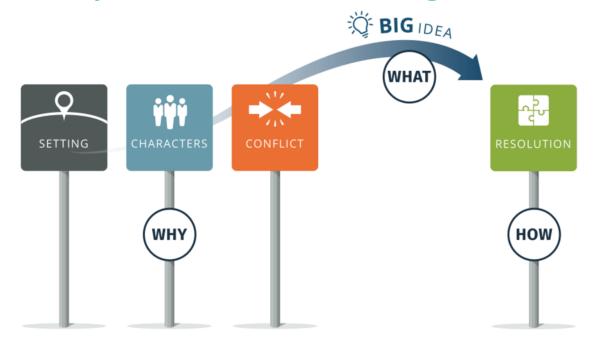


Sales are up but it seems like there are some category trends that you're benefitting from

Internal: Managers and peers across different functions including sales, finance, & supply.

Get everyone aligned to take advantage of the opportunity.

Every great presentation has a compelling storyline, otherwise, it's just another deck of forgettable facts/figures.



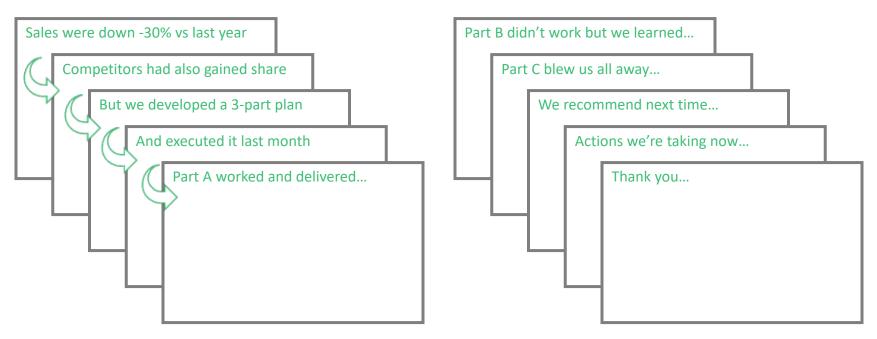
To develop the storyline for your deck, start with an outline. Each bullet is your slide headline. Write 10-15 bullets.





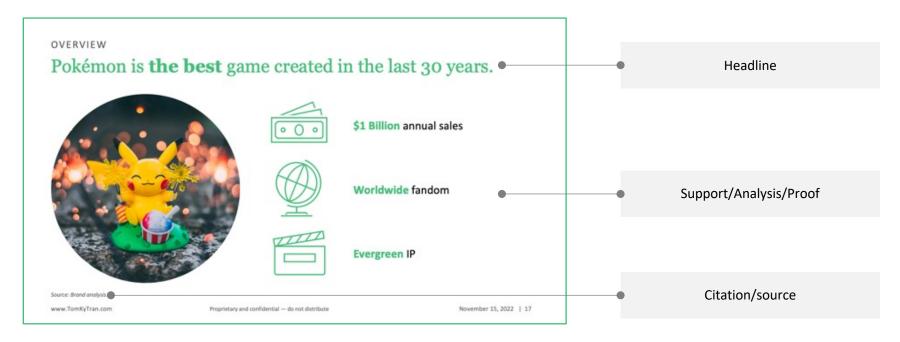
You can keep it old school and do it with pencil and paper; or do what works for you and open up Word or PowerPoint. Whatever you do, don't just start making slides in PowerPoint just yet.

Your story should flow so that a reader could follow along reading just the headlines with or without you being there.



Source: Slide Science www.TomKyTran.com

Each slide should have a clear so-what in the headline and content in the body that elaborates or supports the headline.



The headline is the most important part of your slide. Use it to let your reader know what the key takeaway is.

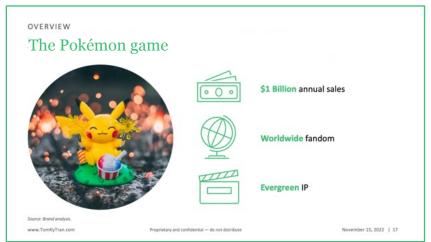
Not-so-good Headlines	Great Headlines			
Describes the content on the slide "Results from Q4"	Gets straight to the point with the key message "New TV campaign drove the biggest Q4 in company history"			
Repeats data or information already on the slide "Q4 sales were +25%"	Gives context to data and explains why the reader should care "Q4 sales were driven by new distribution and early holiday shopping"			
Doesn't have a point or is super obvious "We launched a new product"	Makes a point and has a point of view "No major brand would have taken the same risk at launch the way we did"			
Are written in passive voice "Sales goals were achieved by Brand X"	Are written in active voice "Brand X achieved all key milestones"			
Force the reader/audience to work for the insight "Sales trends"	Help the reader/audience understand the key message quickly "New collab doubled daily subscriber acquisition"			

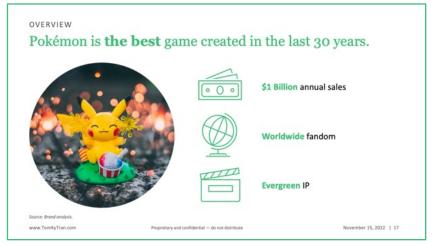
HFADIINES

Headline on the right makes a claim that can be debated. It has a point of view. It's much better than the original.

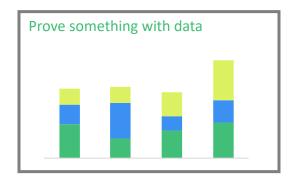




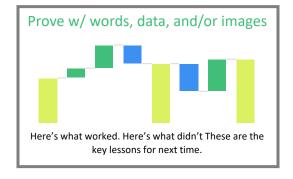




There are basically 3 categories of slides you'll create:



Prove something with words Option A Option B Benefit 1: It's awesome Benefit 1: It works Benefit 2: It's cheap Benefit 2: It's premium Benefit 3: It's fast Benefit 3: It's consistent



Quantitative

Qualitative

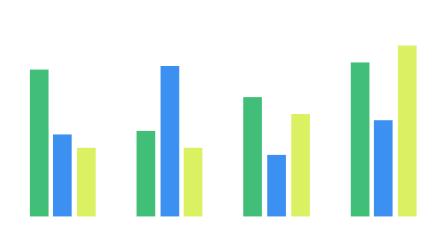
Combo

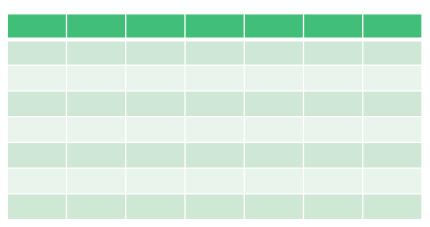
SLIDE CONTENT

On a quantitative slide, you will want to support your headline with a clear, impactful, and obvious chart or table.

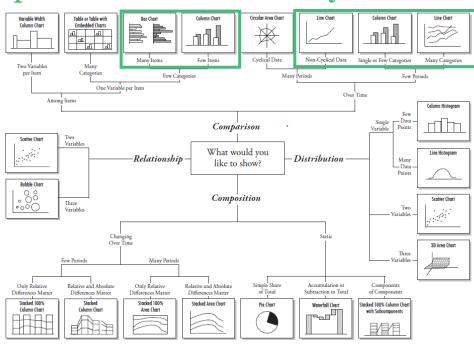
Use a chart to visualize data and support the claim that you're making in the headline.

Use a table when there's a lot of data points that need to be viewed and compared quickly





Bar, column, & line charts are good enough for most quantitative slides. Easy to make and easy to understand.



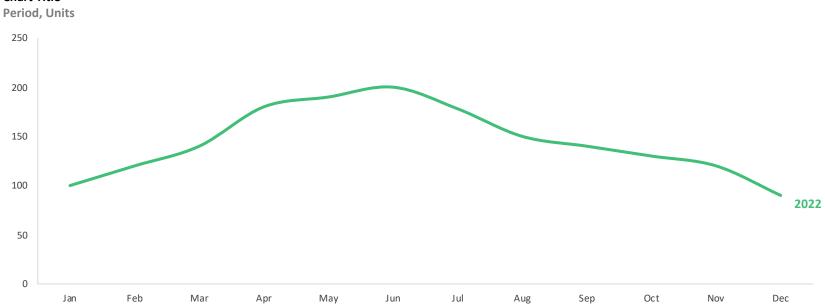
Use this diagram as a guide to help you decide what kind of chart best illustrates your data.

Master the line, bar, column charts.

Source: A Abela 2006. a.v.abela@gmail.com.

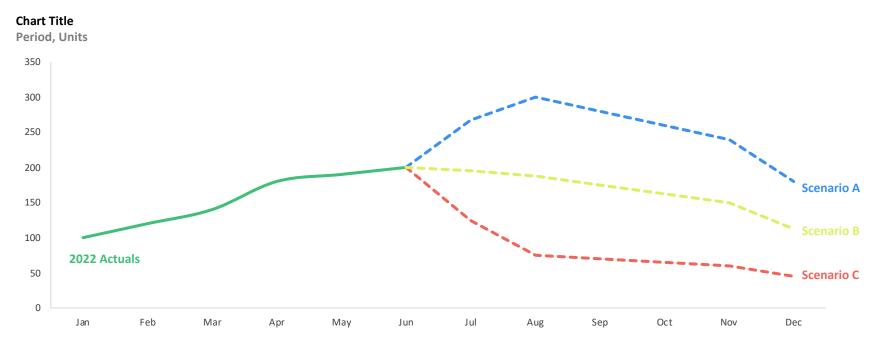
Use a line chart to show how something (sales, users, etc.) changes over a longer period.





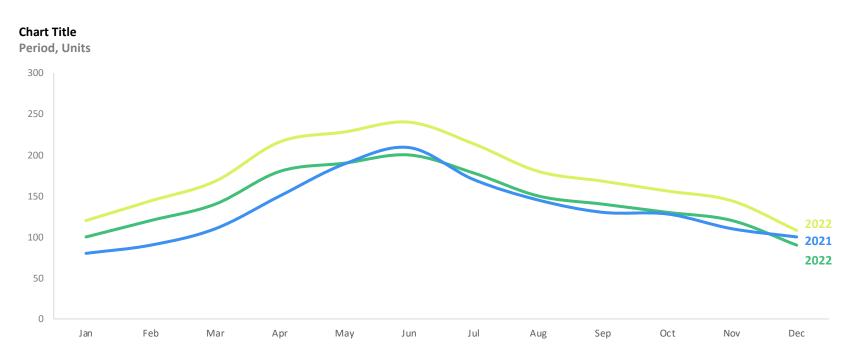
Source:

Use a dotted line to show your forecast for future scenarios.



Source:

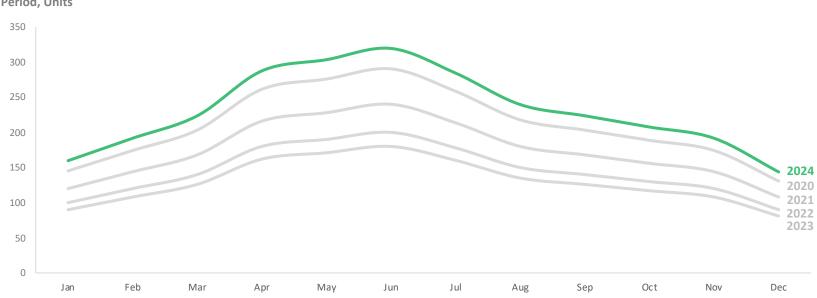
Use different colors to compare how different categories trend over time.



Source:

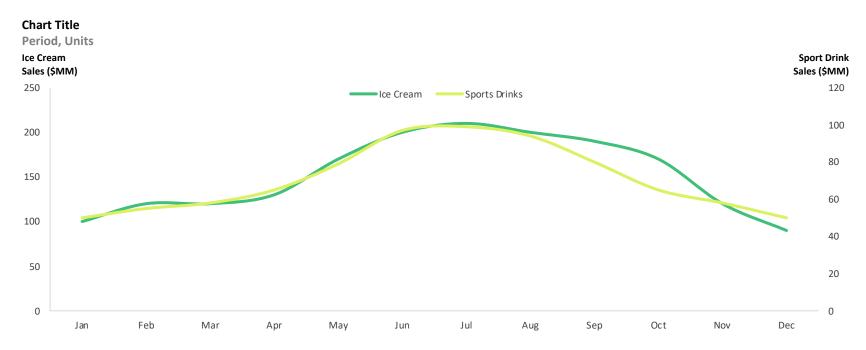
Use color to highlight the category that your audience should pay attention to if there are >3 categories.





Source:

Use a combo chart with 2 y-axes to show how two categories move together or are affected by the same underlying driver.



Source:

Use a bar chart to compare many items/categories. IE, our brand is top 3 in customer service response time.

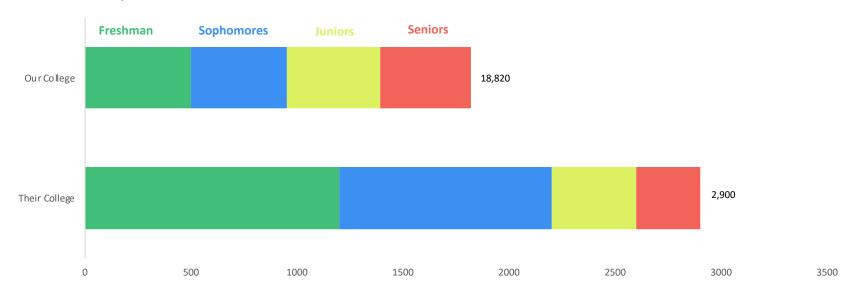




Use a stacked bar chart to show the composition of a category versus another when the absolute number matters.

Our College Starts with Fewer Students but graduates a Higher Percentage of students

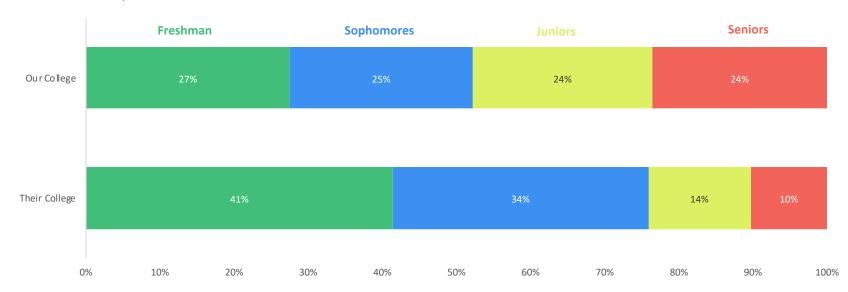
2022 Academic Year. Number of Full Time Students



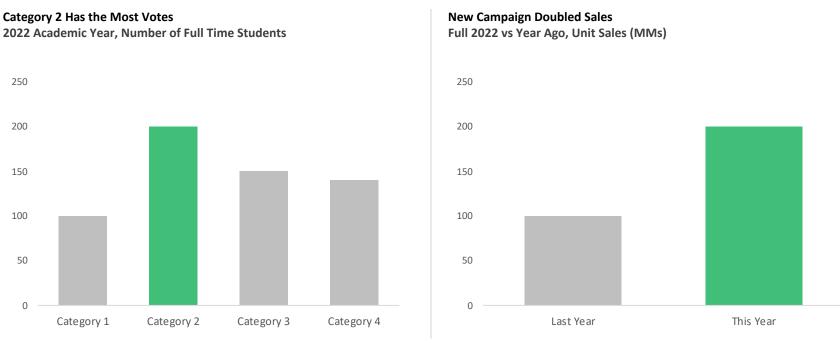
Use a 100% tacked bar chart to show the composition one category versus another when the percentage matters.

Our College Starts with Fewer Students but graduates a Higher Percentage of students

2022 Academic Year. Number of Full Time Students

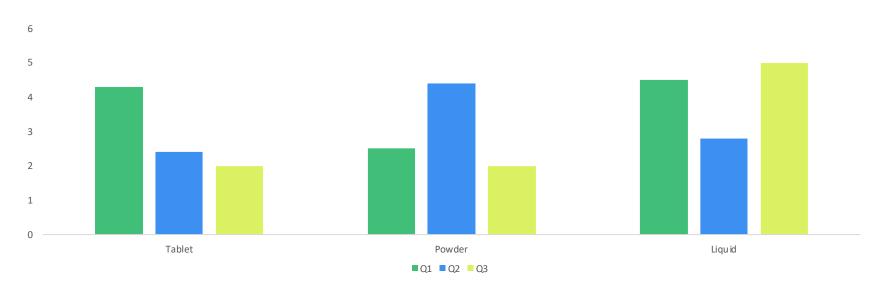


Use a column chart to compare a few categories. It's also great for showing how much better something has gotten.



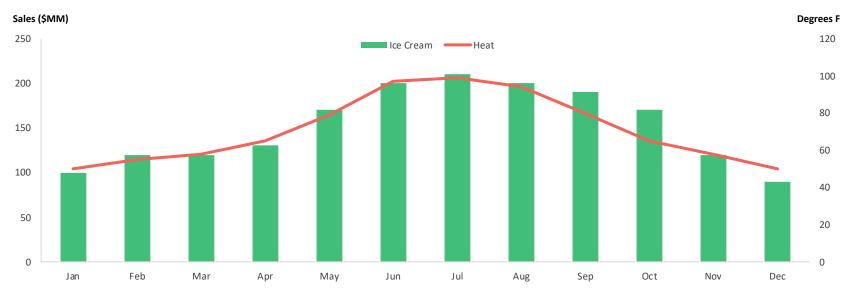
Use a clustered column chart to show performance over time for different segments of the overall set.

Gatorade Sales by Form 2022 Q1-Q3, \$MMs



Use a combo chart with 2 y-axes to compare how 2 different variables/categories behave over the same time period.





Use a table when it's important to be able to look up a value quickly in order to make comparisons.

Chart Title Period. Units

	us	Canada	Mexico	China	Japan	Vietnam	Spain	France
Widget 1	2,688	475	2,750	2,983	1,340	836	2,065	2,885
Widget 2	884	1,866	2,397	2,448	984	1,705	106	829
Widget 3	109	2,833	957	122	1,206	2,692	1,477	636
Widget 4	1,503	235	1,160	1,395	953	2,608	842	2,344
Widget 5	1,548	1,019	412	2,556	1,792	83	2,185	2,065
Widget 6	2,595	2,186	42	1,740	2,219	2,966	2,082	1,026
Widget 7	2,373	2,960	352	2,539	152	730	2,872	2,294
Widget 8	12	8	1,256	583	1,011	2,409	1,957	748
Widget 9	1,511	1,267	2,491	1,657	357	2,925	62	162

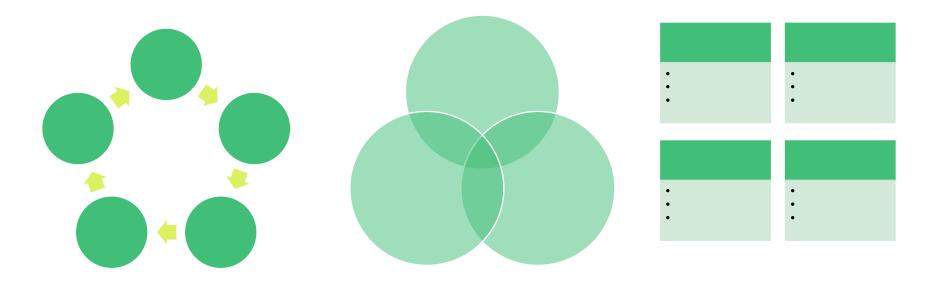
Make all the table cells white in order to give it a cleaner look and use color highlight the key insight/trend.

Chart Title Period, Units (000s)

Item	US	Canada	Mexico	China	Japan	Vietnam	Spain	France
Widget 1	2.7	0.5	2.8	3.0	1.3	0.8	2.1	2.9
Widget 2	0.9	1.9	2.4	2.4	1.0	1.7	0.1	0.8
Widget 3	0.1	2.8	1.0	0.1	1.2	2.7	1.5	0.6
Widget 4	1.5	0.2	1.2	1.4	1.0	2.6	0.8	2.3
Widget 5	1.5	1.0	0.4	2.6	1.8	0.1	2.2	2.1
Widget 6	2.6	2.2	0.0	1.7	2.2	3.0	2.1	1.0
Widget 7	2.4	3.0	0.4	2.5	0.2	0.7	2.9	2.3
Widget 8	0.0	0.0	1.3	0.6	1.0	2.4	2.0	0.7
Widget 9	1.5	1.3	2.5	1.7	0.4	2.9	0.1	0.2
TOTAL	13.2	12.8	11.8	16.0	10.0	17.0	13.6	13.0

Qualitative slides are generally more text-heavy and used to support a headline that isn't numbers or metric-driven.

Diagrams are a great way to illustrate a concept or idea.

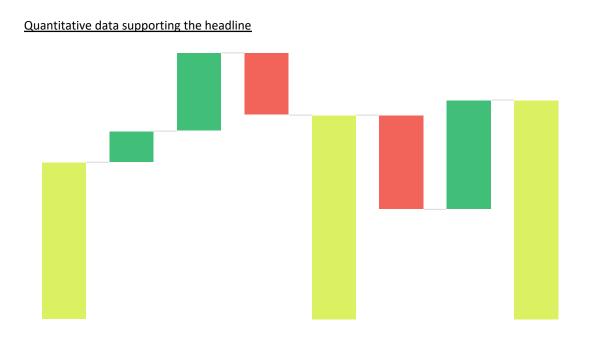


QUALITATIVE SLIDE

Information organized in a table is one of the most common qualitative slides you will end up making.

	Name	Influencer Fee/Post	Famous For	Recommendation	Notes
60	Mr. Furball	\$2000			
300	Mr. Surprise	\$3000			
	Mr. Sleepy	\$4000			
	Mr. Whatchudoin	\$4000			
A Co	Mr. Perfect	\$1000			

Many slides will use both quantitative and qualitative data in order to support the headline/thesis.



Qualitative commentary

Here's what went well

- Tailwind 1
- Tailwind 2
- Tailwind 3

Here's what we didn't expect

- Headwind 1
- Headwind 2
- Headwind 3

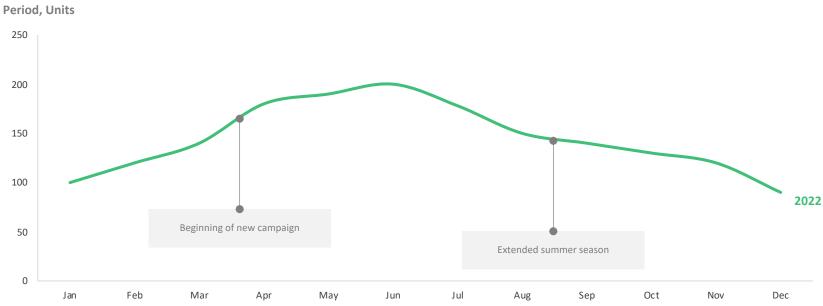
This is what we learned for next time

- Lesson 1
- Lesson 2
- Lesson 3

COMBO QUANT & QUAL

Add text boxes on your charts to add commentary and explain why something happened.





Source: Sample data. www.TomKyTran.com

Pictures can play a very powerful role in the presentation. Find images that strengthen your message not distract.



QUALITATIVE SLIDE

Content on a qualitative slide must support the headline and move the overall story forward in some way.



CONTENT RECAP

The three big ideas when it comes to content are...



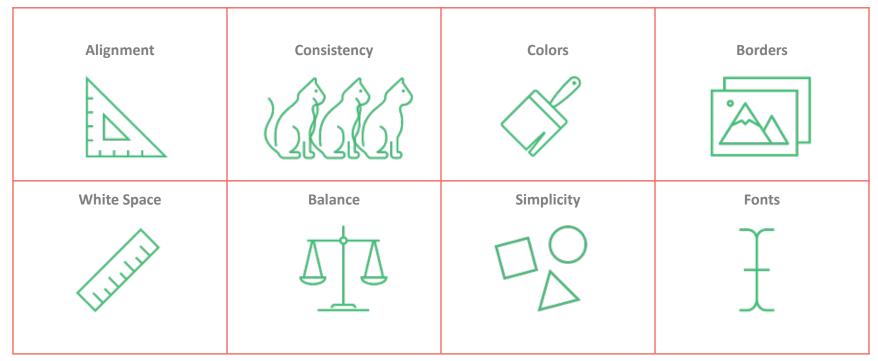
Get to the point, quickly

Use data to build a case

Always think about story

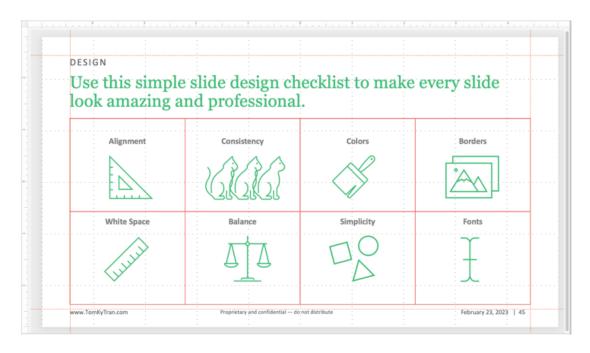
Design ()

Use this simple slide design checklist to make every slide look amazing and professional.



DESIGN: ALIGNMENT

Alignment is what gives your slide that print magazine quality feel. Things just look and feel right.



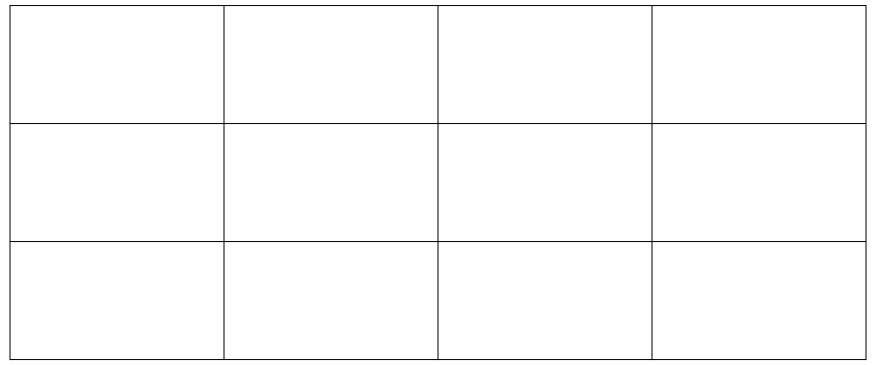
Look at the underlying structure that was used to align elements on the checklist slide:

- Grid as a starting point
- **Temporary lines**
- Table structure
- Ruler as reference
- Page margins

DESIGN: ALIGNMENT			
Easiest way to	get this right is	to simply insert	a table. Use it
to get everythin	ig aligned. Ther	n delete the tabl	e when done.

DESIGN: ALIGNMENT

Easiest way to get this right is to simply insert a table. Use it to get everything aligned. Then delete the table when done.



Try using the 5x5 table below to align your body content. When done, simply delete the grid.

DESIGN: CONSISTENCY

Consistency across the deck is a sign of quality and professionalism. Fonts, colors, headlines, etc.



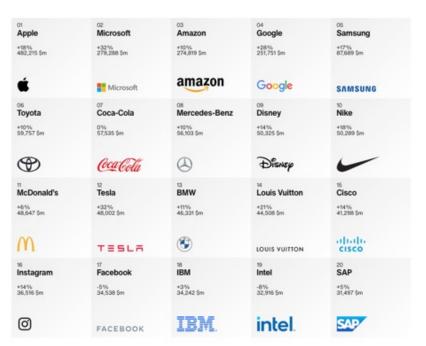


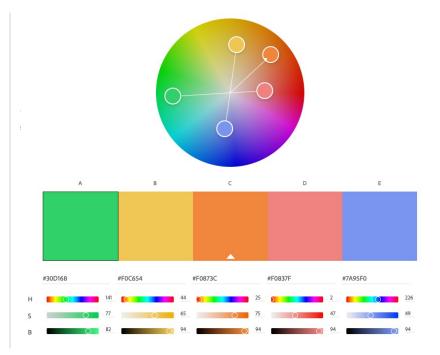




DESIGN: COLORS

Method 1: Use your brand's approved colors. Method 2: Use any online color pallet creator (i.e. color.adobe.com).





DESIGN: COLORS

Save the colors into PowerPoint as a theme. Use one primary color and other colors as accent colors.



DESIGN: BORDERS

Try not to put anything in the "no-fly zone" of a slide. A white border helps frame the slide and looks professional.

www.TomKyTran.com February 25, 2023 | 52

DESIGN: BORDERS

A common exception to this rule is for (1) pictures which can bleed off the edge and for (2) footer elements.



DESIGN: WHITE SPACE

Use white space as a design element.



DESIGN: BALANCE

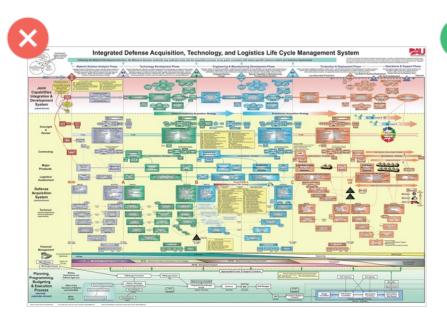
Practical ways to achieve balance in your slide design: use a template, use a grid/table, and use a visual hierarchy.

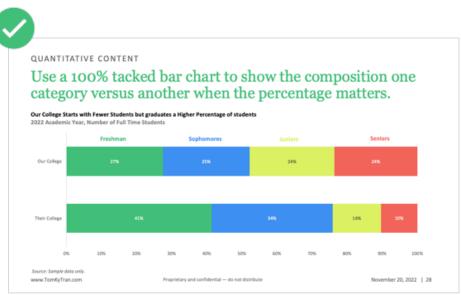
Important things in bigger text with color for emphasis

Everything else in 8pt text

DESIGN: SIMPLICITY

Keep it simple.





DESIGN: FONTS

There are three quick ways to approach selecting a font



Georgia Calibri



Use your brand's official font

Use the pre-approved fonts from the brand team or those that are in the PowerPoint template.

Copy the fonts in this deck

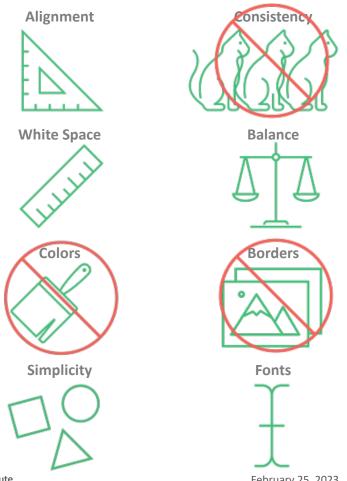
Use Georgia for all headlines and Calibri for everything else.

Look up font pairings online

Look at Canva's blog for ideas on complimentary font pairings. Or just google "font pairings"

Source: Canva.

Once you're comfortable, don't be afraid to take risks and break *some* of the rules we went through.



DESIGN









Let your imagination and creativity take over.



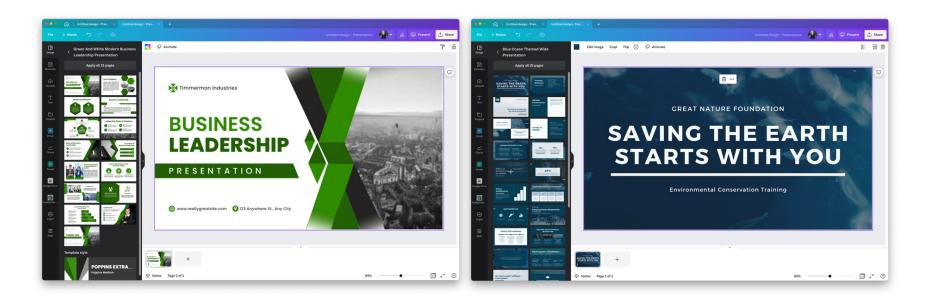




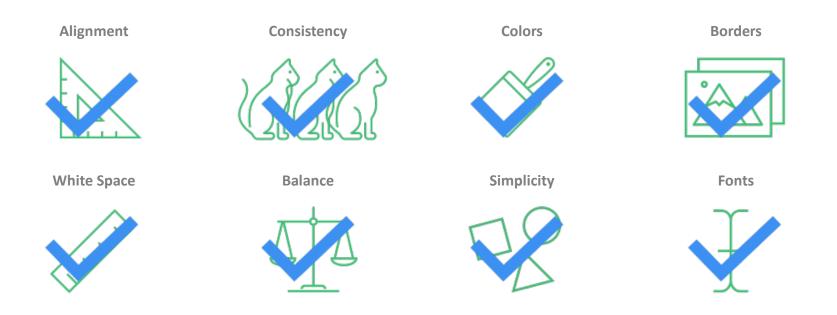


DESIGN

Look for inspiration on Canva. They have amazing designs that you can recreate in PowerPoint.



In summary, if you remember to follow this checklist, your slides will have that professional look and feel everyone wants.



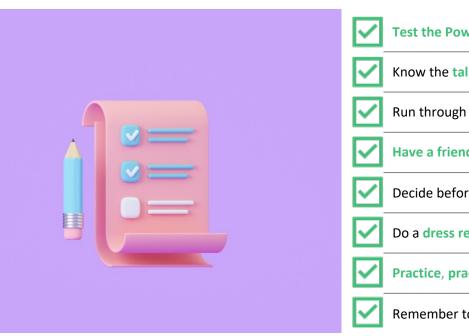
Delivery

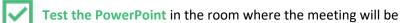
If it's meant to be read, then send the final as a PDF. If it's meant to be used by others in the org, then send the PPTX.





Go through this checklist before the big meeting so that the focus is on your story and your message.





- Know the talking points on each slide and will not be reading off the slides
- Run through the presentation with key stakeholders so there's no surprises
- Have a friend in the meeting ask you a question you're prepared for
- Decide beforehand who will be clicking through the slides
- Do a dress rehearsal the day before with a few trusted coworkers
- Practice, practice (with a script if necessary)
- Remember to have fun and be enthusiastic

Bonus 💬

BONUS SHORTCUTS

My favorite and most used 14 keyboard shortcuts.

Short Description	Windows Shortcut	Mac Shortcut	Pro Tips
Duplicate slide	Ctrl + Shift + D	Command + Shift + D	Use when you want to create a duplicate of a slide for testing or experimentation or if you want to reuse an existing slide as the basis for a new one.
Select Multiple Objects	Shift + Mouse click	Shift + Mouse click	Useful when you want to move or modify several objects at once. Forget about selecting everything by drawing a box around it.
Copy and Paste—Fast	Control + Mouse click	Control + Mouse click	Fast and easy way to duplicate an object or move it to a different location on your slide.
Duplicate Objects	Ctrl + D	Command + D	Useful when you want to create a copy of an object with the same formatting as the original.
Copy and Paste Formatting	Ctrl + Shift + C/V	Command + Shift + C/V	Quick way to ensure consistency in the formatting of your objects and text.
Move Objects in a Straight Line	Shift + Mouse drag	Shift + Mouse drag	Useful when you want to align an object with other objects on the slide.
Draw Straight Line	Line tool + Shift	Line tool + Shift	Useful when you want to draw a line that is perfectly horizontal or vertical.
Group Objects	Control + (Shift) + G	Command + Option (Shift) + G	Treat multiple objects as a single entity, such as when you want to move or resize them as a group. Add Shift to ungroup.
Align Text	Ctrl + E/L/R	Command + E/L/R	Useful when you want to ensure that your text is aligned properly and looks neat and organized.
Make Text Bigger/Smaller	Ctrl + Shift + >/<	Command + Shift + >/<	Useful when you want to adjust the size of your text for better readability quickly.
Enter Slide Sorter View	Alt + V + D	Command + 2	Useful when you want to make large-scale changes to your presentation or get an overview of your entire presentation.
Draw a Perfect Circle or Square	Shift + Shape tool	Shift + Shape tool	Useful when you want to draw a shape with precise dimensions or ensure that a shape is symmetrical.
Jump to Specific Slide in Presentation Mode	Type slide number + Enter	Type slide number + Enter	Useful when you want to skip ahead to a specific slide or go back to a slide you've already seen.
Make Screen Black or White	B/W key	B/W key	Useful when you want to focus your audience's attention on what you are saying or take a quick break during your presentation.

BONUS

Always add the page number in the Slide Master so you can easily move around the presentation.





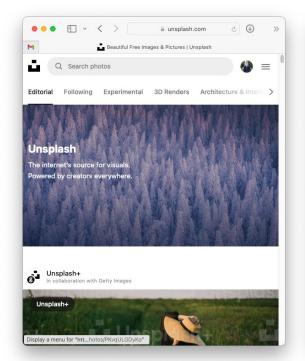
BONUS

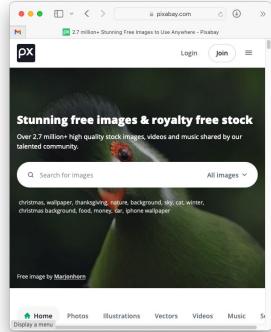
Create a mood board of presentations that have been well received by the team. Or simply presentations you like.

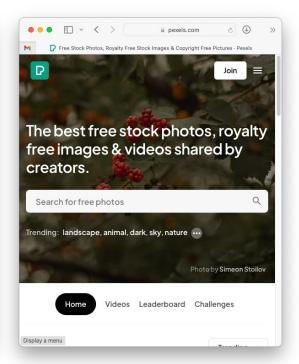




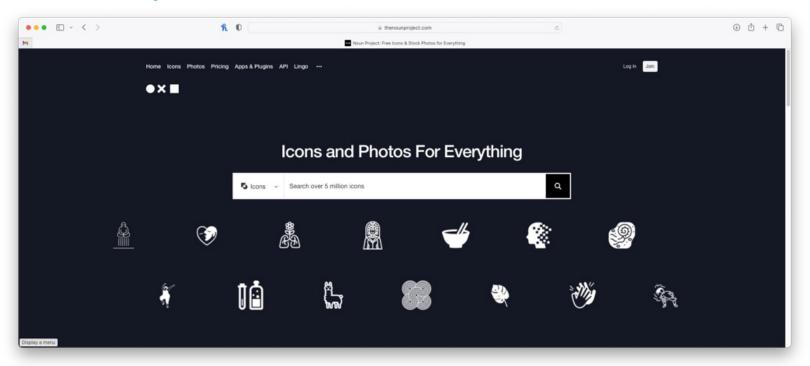
For high quality images, forget about Google image search. Use Unsplash.com, Pixabay.com, or Pexels.com.



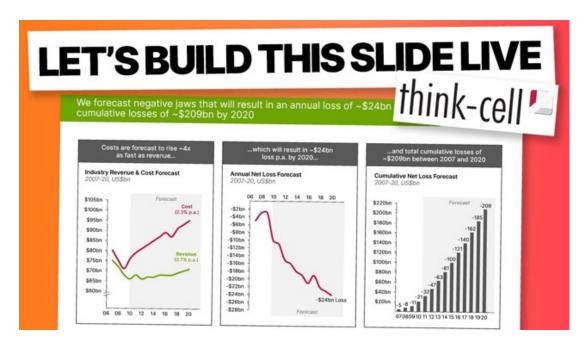




For icons, use TheNounProject.com or PowerPoint's built-in icons. To stay fresh, find icons that haven't been overused.



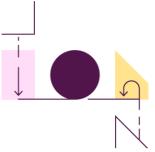
Think-cell is a must have add-on if you're making advanced charts. Slide Science on YT the best Think-cell tutorials.



- Steep learning curve but well worth it
- More powerful than PowerPoint charts
- Very fun to use after a while

BONUS

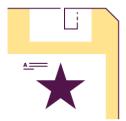
The second must-have PowerPoint plugin is BrightSlide by Bright Carbon. By the way, it's completely free!



Align with precision

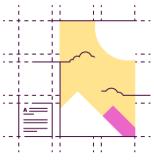
www.TomKyTran.com

We've given PowerPoint's align tools a makeover. Align objects to other objects, to gridlines, or to the slide itself and BrightSlide will remember your preference the next time you open a presentation. Clever.



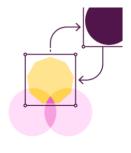
Save animation combinations

Created an amazing animation combination? Maube it's in-your-face razzle-dazzle or perhaps a subtle flourish. Whatever animations you've combined, with BrightSlide you can save the sequence to your very own animation library.



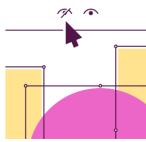
Easy custom grids

Take the guess work out of setting up grids. BrightSlide's Guides tool allows you to preview your grid set-up in real time, so you get the layout you want with minimum effort, helping you create beautiful, balanced slides.



Swap objects with ease

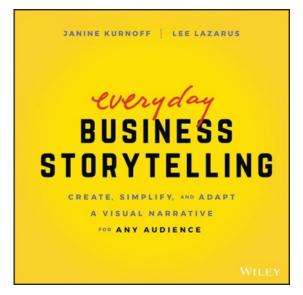
Want to switch out an icon without ruining the layout of a slide? BrightSlide can help with that. Our Swap Objects tool allows you to swap the positions of two objects keeping your layout intact.

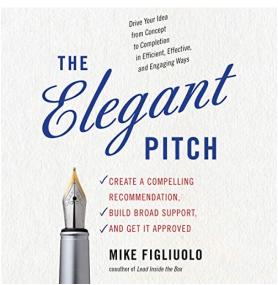


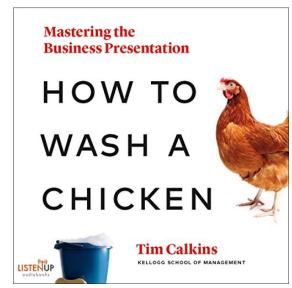
'So long' to the Selection Pane

How many hours have you spent scrolling down the selection pane? We know, it's too painful to think about. Reclaim that time with BrightSlide's help using our Show and Hide buttons. Scroll no more friends, scroll no more.

These books will help you with crafting the narrative arc of your story so that you will create a memorable presentation.

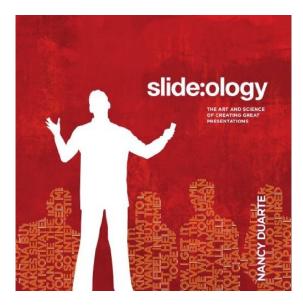


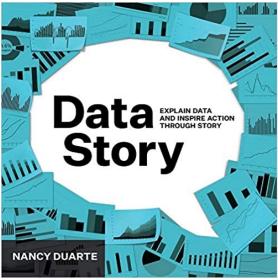


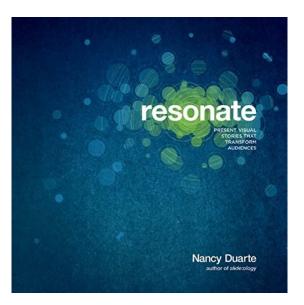


BONUS

Any of Nancy Duarte's presentation books. She runs a famous presentation design agency in California.







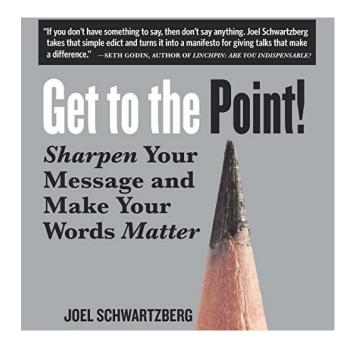
BONUS

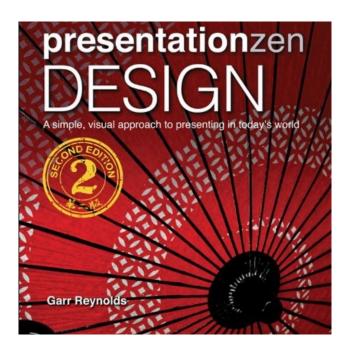
My books for improving data visualization:





Two final helpful books. Learn to write better and learn more about design principles but applied to presentations.





BONUS

Help me make this class better by answering these two simple questions. Email me at TomKyTran@gmail.com.





What did you like most about the workshop?

What's one thing that could be better?

Thank you Now get out there and put these ideas into practice!