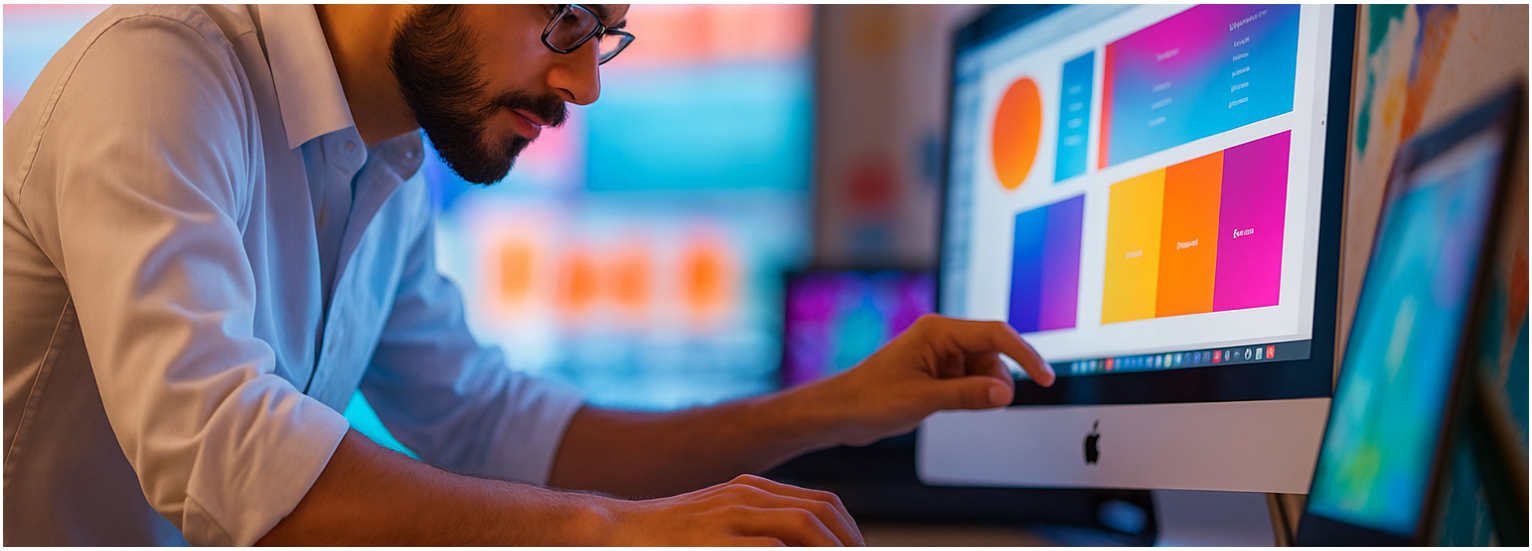


PowerPoint rules of the road - Rule 1: Format

It's not often that I rant (well, not *THAT* often at least) but I have a few things I have to get off my chest regarding slide deck creation (also known as PowerPoint). Like many of of my consulting and professorial colleagues, I spend a lot of time working in the medium of Microsoft PowerPoint and here's my confession: honestly, I love it. Call me a slide jockey; I don't care, but I really enjoy breaking down complex topics into simple, easy-to-digest presentations, graphics and stories targeted at a variety of audiences. From classrooms to board rooms, slide decks are powerful communication tools capable of conveying difficult topics simply, easily and effectively. But like all tools, in the hands of an untrained professional, slide decks can convolute and confuse even the simplest of ideas.

Over the years, I have developed a running list of practices and principles I observe when creating presentations, reports and decks. I don't know, let's call them *PowerPoint Rules of the Road.* They are really in no particular order, and by no means is this a comprehensive list; this is simply my attempt to document a combination of my pet peeves and tips I have found to be effective in a three-part series. I am sure I will add to this list over time – perhaps even publish version 2.0 – but I thought this would be a good place to start.

Before we dive in, I also recognize that not all presentations are created equal. Steve Jobs' product launch presentations at Apple were minimalistic and more like a choreographed Broadway play with well-placed scenery than a presentation. In the corporate and academic world, we step through complex topics, present data, explore issues, craft solutions and try to arrive at concrete decisions and actions. The recommendations below are generally focused on the latter scenario of corporate and academic settings versus the minimalist Apple-esque product launch.

Those with whom I have worked will surely recognize a few of these pearls of wisdom and some of you may have even contributed to the PowerPoint body of knowledge below. Please share your insights and any additional nuggets in the comments box below. I would love to hear how you build elegantly simple slide decks and presentations.

To help guide us, I have divided the tips into three domains that I will feature over the course of three articles:

Rule 1: Format *–The Look and Feel*

Rule 2: Flow *–The Storyline*

Rule 3: Fiber* *– The Main Point*

**Yes, I really wanted to use alliteration here. :)*

Format: the look and feel

Good format is basic hygiene of slide deck design. Many people, myself included, will not read a word on a slide until it has a format that does not fight with the fiber (aka the content). The format should reinforce the message rather than inhibit its comprehension. A good format is kind of like your morning routine

when you get up: shower, shave, brush your teeth, put on your clothes, etc. These are a few of the basic steps you need to take before you leave your home. Similarly, a well designed, consistent format requires certain steps before the file leaves your computer. You wouldn't leave your house without pants, right? (OK, don't answer that) Likewise, it's just common courtesy to take certain steps before sharing the deck with the world.

Stay within the lines.

All slide decks have a natural area in which content is supposed to live. Graphics gurus go to great lengths to build beautiful templates for us and they usually reserve the middle, center area for the content. Do not let your content creep into areas in which they are not supposed to (e.g. such as the footer, header, margins, etc.). If you need to feature a full screen slide to show a large graphic or chart, start with a blank slide or refer the audience/reader to the appendix. The point is: do as we learned in grade school and *stay within the lines.*

Pick a color scheme and stay with it.

Usually color schemes are determined based on branding guidelines. I have rarely encountered a large company that has not had its color scheme well thought-out. If a color scheme is given to you, use it and try not to deviate too far from the color scheme guidelines. If it is not given to you or if it does not exist, pick 5-7 colors you can use that are complementary to the primary colors in the logo or slide template. There are plenty of websites that will provide complementary color schemes for you based on the colors you specify. I personally, like **ColorSchemeDesigner.com**. Simply input your main color or colors and it will spit out a series of complementary colors to establish your color scheme. Once established, stick to it.

Fonts! For the love of all that is holy, FONTS!

Nothing distracts the reader **more** than changing fonts. You should establish a standard for fonts and use them throughout the deck. Again, most companies have already established their standard for font use so be sure to ask what you should use before you start changing a template. It is OK to have multiple fonts throughout as long as it is consistent. For example, the title may be Times font while the main body is Arial. As long as you stick to a consistent convention, you will be fine. It is also important to choose a font that is consistent with the tone of your message. **Comic Sans** should be avoided at all costs. No one should use that font…EVER! :) Just ask Dan Gilbert, owner of the Cleveland Caveliers, who wrote **an open letter to Cleveland Cavs fans** expressing his disappointment over LeBron James' decision to leave the team. If you were to read the note aloud in the correct voice that corresponds to the font, it would sound like **Bobcat Goldthwait**. Finally, before you go downloading proprietary or obscure True Type Fonts, you should know that not everyone has those installed on their computers. Unless you plan on PDF-ing the presentation before sending it, you should use a commonly accepted font so it renders consistently on a variety of machines.

No rounded corners unless you are designing buttons or thought bubbles.

I believe it was PowerPoint 2007 that introduced pre-canned shapes and formats that gave users a lot of power to control how shapes were styled. But as Spiderman taught us *with great power comes great responsibility*, yet many people began abandoning all sense of style consistency and rounded every corner and shape in their presentation. My rule of thumb is: unless it is called for in the template theme or overall scheme, I generally avoid rounded corners for my shapes unless, of course, it is a button, thought bubble or shape the requires rounded corners.

SmartArt is for the lazy and unimaginative.

SmartArt can be a great way to explore various ways of showing data but it can also constrain your thinking. I usually use SmartArt as a starting point and recreate the graphic using a model of my own. I have found that the SmartArt feature imposes rules on layout and styling and I spend more time fighting with those rules than creating the graphic to suit my needs. SmartArt has also become so overused nowadays that applying them without any modification is viewed as cliche. How many times have you seen the **Radial Cycle** or the **Staggered Process** and thought “Not again!” My one exception is organization charts; PowerPoint does a nice job of organizing and arranging org charts to fit your slide. Now don’t get me wrong, I still use SmartArt if, and only if, the graphic fits my needs exactly but I heavily customize it and really make sure it fits into the overall scheme of the presentation. Otherwise, I will create my own and encourage you to do the same.

Use shadows only if you want to make something hover over the page.

Even though you are working in a two dimensional world, you can use shadows to show layers hovering over various parts of your slides. But be sure to use the shadow format appropriately. Not everything should have a shadow; only the things you want to emphasize as “hovering” in the third dimension.

1996 called. They want their beveling and embossing back.

Remember 1996? Grunge rock, flannels, Web 2.0 and shinny happy buttons. Design trends have gone flat (just see iOS7 as proof) so, like the rounded corners suggestion above, save the beveling and embossing unless it is an integral part of your template or overall design.

Choose a border/line thickness and go with it.

1px, 2px, 3px, 4… Whatever thickness you choose, stay consistent and use it for your borders and lines.

Clipart is the tool of the devil. But nicely cropped, well placed photos can set the right tone.

When PowerPoint was released, it came packed full of corny clipart graphics that somehow made it into every presentation and report. My personal fav were animated gifs that seemed to scream, “hey look what I found on the internet!” I always discourage cliche clipart, and especially animated gifs, but I do believe that nice photos can set the right tone for a slide. Royalty-free images, stock photos and photo libraries can be a great resource to punctuate your point without looking cartoony.

Business does not equate to “Busy Mess”.

Overcrowded slides raise blood pressure. It’s a proven fact. Well, maybe not a *proven* fact, but lets call it my working hypothesis. Well constructed slides have to inform the audience without overwhelming. It is easy to pack content on to a slide so I always challenge myself by asking the question “does this slide clarify or confuse?” Too much content has the tendency to confuse. As a general rule: if you are projecting your slides, do not go below 14 pt font. If you are printing your slides in full page format, 8 pt is the smallest you should go. If you plan to print 2-6 slides per page, increase the font size dramatically. Keep in mind the visual capabilities of your audience as well; some audiences require larger print and will turn off their brains if they cannot read the text.

Leave your content room to breathe.

Whitespace helps your reader focus on the most important content on the slide. It provides a focus frame in which the most important things reside. Overcrowding a slide overwhelms the reader and makes it

more difficult to comprehend the message an decipher what is important and what is not. Powerful, content-rich slides do not have to be overcrowded.

Beware of the emotional response of colors.

Like bulls in a bullfight, executives generally get very excited when they see red or shades of red in a slide deck. Reds, oranges and yellows can elicit an emotional response if used incorrectly. Unless intentionally used as part of the color scheme, fiery shades of red can often distract and cause discomfort. Use these sparingly or get ready to respond to the inevitable question "…why is that red?"

Stay in alignment and use auto-arrange/distribute features.

If you go to the effort of using shapes on your slides, take the time to align and distribute them appropriately. It makes a noticeable difference when shapes are aligned and distributed evenly; it just looks more professional.

Tables are your friend; use them to lay out your content.

We generally think of tables for displaying columns and rows of data but tables can actually be a helpful tool for laying out your slide format. Use tables with transparent lines and backgrounds to keep everything aligned.

Leverage templates but customize them to suit your needs and your message.

Imitation is the best form of flattery and some of the best slides are those that you can reuse and

repurpose. But be sure to customize every slide to suit your particular needs or you risk making the wrong point to your audience. I keep a library of slides and formats I can call upon for various uses. I use these template slides often, but every time I do, I take a fresh look at it to make sure it is saying what I want it to convey – both in format and fiber.

Unless your last name is Disney, beware of overusing animation.

Slide animations can be a good way of making dramatic points during your presentation. They can also help you build up to a point or overlay content in layers. That said, when overused, they can be totally distracting and almost become comical. You also need to be aware if your audience will want printed copies of your presentations. If so, animations may not be the right feature to use. Often times I will break the layers on multiple slides to show a progressions rather than using animations. Doing so will allow the audience to follow along on their printed copies without losing the *build* of the animation.

Stay tuned for part two of ***PowerPoint rules of the road – Rule 2: Flow***.

justin greis

hi, i'm justin

(nice to meet you)



I post weekly **professional insights** and **personal stories** from my life as a management consultant, a dad, and an eternal optimist.

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