

Experimenting with PowerPoint reports

In the last set of reviews, we saw a number of slide packs or PowerPoint reports. These are a different way of presenting advice – and a useful alternative to standard papers. They use many of the techniques in A3s – but in longer form!

Many consulting firms have used them for years. Traditionally they are done in PowerPoint, using standard A4, and are in landscape form.

In this Masterclass we provide hints, simple tips and tricks covering when to try a slide pack instead of a traditional paper, and how to make it a good one.

Slide packs are a different way of presenting information

They allow you to break away from traditional written papers, and allow you to present more information and analysis than would be possible in an A3.

They encourage the use of colour, diagrams, graphs, and tables, and allow for considerable creativity in displaying information.

They can be easily read on tablets.

They mirror aspects of website design. As we get more used to accessing information in this way, and there are more digital natives, this will become much more the norm in advice type papers and reports.

Remember these are not presentations. They are reports. The standard templates you use for presentations won't work as they are designed to be simple and clear.

There are a variety of templates on the internet – find one that suits. Over time you will need to develop your own organisational style and set of templates.

Slide packs may be best in specific circumstances

We've not often seen slide packs used for formal decision-making at Council. But we can see that they could be.

But we've seen them used to good effect, in the following circumstances:

- **To support a discussion on a complex issue** amongst Councillors, particularly in a Committee or workshop type setting.
- **To present the conclusions** of data analysis, research or an evaluation, and its potential implications. Typically, this is at an early stage of a thinking about an issue and is attempting to challenge existing thinking and set a programme for future work.
- **As regular performance reports functions or projects** – they allow for a simple dashboard of indicators, and then more detailed commentary if targets have not been met, e.g. health and safety reports, financial reports.
- **Reporting back on the results of consultation and engagement processes** – so that the results can be displayed in themes/issues as well as by different stakeholder groups.
- **To run through complex sets of policy decisions** on the same or related topics, e.g. bylaw changes, Plan changes, rates settings, fees setting, and in the development of strategies.

Structure is important in aiding readability

Develop a logical and well-ordered structure. Effectively you are putting an argument across, so it needs to start somewhere, and finish somewhere. The purpose and conclusions must be easy to spot.

Slide packs lend themselves easily to story boarding the content, and using active headings and subheadings.

A low-tech way of working out the best way to structure it is on a whiteboard, with sticky notes. They can be easily moved around so that pieces of content can be fitted into the structure of the pack.

Make sure you add in navigation points e.g. an introductory slide which sets out the content; clear section numbering; or a diagram which shows how the different parts of the pack can fit together which then is used throughout the pack.

Make sure there is a careful peer review of any slide pack before it is finalised. Choose someone to do this who has a real flair for design and for PowerPoint. But also test it on someone who knows little about the topic to see if the chosen layout works in getting the points across.

Tips and tricks

Some things to remember about the layout:

- **Don't make it too text heavy** – break it up by using a variety of visuals.
- **Use a range of different ways of displaying information** – charts, tables, diagrams, maps, pictures, timelines, process diagrams etc. Make it look interesting.
- **Don't use too many different fonts** – it makes it hard to read and can look messy. But remember to use different heading sizes – just as you would in a paper to delineate major headings, subheadings and the text. Make sure the text doesn't get too small and become illegible. Avoid complex, hard to read fonts and small type-faces. Similarly take care with italics – they can be hard to read.
- **Use colour** – start with your organisation's standard colour palette. That makes sure the colours don't clash and gives a house look and feel. But don't go mad: too many colours are like too many fonts – plain confusing.
- **Write as crisply as possible** – use bullet points, short sentences, short paragraphs, and informative headings.

- **Not too simple** – or you might have to reconsider the format.
- **Leave white space** – people like to write notes.
- **Don't make it too long** – otherwise there is a danger of death by PowerPoint. As with any paper, being succinct is important.
- **Don't use a highly coloured background** – this can make it hard to read or write on.
- **Check that it works electronically** – if you distribute papers electronically, and people use devices in meetings, make sure it works in the format you use.

Some people won't like them

While most are receptive to a well done slide pack, some just prefer plain old papers.

You have to take into account the preferences of your key customer.

Electronic papers bring out the best in slide packs

They fit the format perfectly.

Slide packs can be more technologically advanced than a traditional paper as you can use hyperlinks to other parts of the presentation, to other documents, or to external websites.

They can also provide for electronic appendices – so if readers want to know more about a particular issue, a hyperlink can be included.

You can also embed multi-media into them, e.g. video clips; 360s of designs, structures, maps, etc.

Actively develop the skills amongst your team

You'll also have to invest in developing some standard templates. Some people are better at design than others. It's worth investing in these people and helping them become experts, so they can assist others in the team.

Others may not have the same natural abilities or interest in visual design. But it's still helpful for them to learn the basics, so some further PowerPoint training might be in order.

Typically, your communications people and website designers have expertise in design which can be applied to slide packs. Use them to help design and/or to peer review your slides.

Try to build up a library of great slide packs from your own organisation or from others. Published reports are often a good source of design and presentation ideas. Keep these so others can adapt and use them if required.

PowerPoint has a lot of features to help you with design, e.g. SmartArt, Shapes, quick links to your picture libraries. There is a range of standard infographic templates and symbols which can be found on the internet or purchased through Microsoft,

Consider accessibility issues

Some of the design innovations that we are talking about can be challenging for people with visual impairments.

If partially sighted, being able to use slide packs in electronic form can be a godsend as they are easily expanded on a tablet making them easier to see and read.

However, some features can prove tricky for those who rely on assistive technology to turn papers into other formats that they can absorb. There is good information about tips and tricks on the Blind Foundation website.¹

And for more technical information see the Government's accessibility standards for websites.²

Give it a try

It's hard work producing really good slide packs. You have to keep working at it. But stick at it, as they can be extremely effective if done well.

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¹ <https://blindfoundation.org.nz/how-we-can-help/businesses-and-professionals/accessible-documents-and-websites/>

² <https://webtoolkit.govt.nz/guidance/about-the-standards/about-the-web-accessibility-standard/#context>