

SUCCESS RULES

These 119 rules can help produce even better business reports and presentations. Many examples refer to financial topics, but they can be applied to other business areas, as well.
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Say Unify Condense Check Enable Simplify Structure

Deliver messages Standardize content Concentrate information Ensure quality Implement concept Avoid complication Group content

1.1 Express messages: Say what must be said

1.1.1 Say the message first, then explain it

The market for Project B is too small and we expect high competition. In addition, costs are above plan and the quality cannot be reached. Therefore, we should stop the project.

1.1.2 Say messages which detect, explain, or suggest

1.1.3 Say messages of interest, avoid mundane messages

1.1.4 Support the solution, substantiate the claim

1.1.5 Say your messages between two slides

1.2 Highlight messages: Underline what is important

1.2.1 Highlight your messages in charts, tables, and graphs

1.2.2 Systemize the different types of highlighting

1.2.3 Replace traffic lights with more meaningful visualization

1.3 Name title: Clear and complete

1.3.1 Name all title elements: all dimensions, measures, and units

1.3.2 Name line and column dimensions in table titles

1.3.3 Name titles without full words e.g. structure and development

1.4 Give explanations: Understandable texts

1.4.1 Explain with precise words

1.4.2 Integrate explanations into charts

1.4.3 Link explanations to the table content

1.4.4 Name sources and definitions

2.1 Unify applications and objects: Similar use of charts, diagrams, tables

2.1.1 Unify applications: presentations and reports

2.1.2 Unify objects: charts e.g. time, structure, and specialties

2.1.3 Unify objects: tables e.g. time, deviation, and cross

2.1.4 Unify objects: graphs e.g. org graphs, networks, and maps

2.2 Unify components: Measures, dimensions, analyses

2.2.1 Unify measures, shares, and ratios

2.2.2 Unify standard dimensions: time periods e.g. years, months...

2.2.3 Unify standard dimensions: scenarios e.g. actual, budget...

2.2.4 Unify individual dimensions: entities e.g. products, companies...

2.2.5 Unify analyses: accumulations, differences, averages...

2.3 Unify elements: Data series, headers, etc.

2.3.1 Unify chart elements: data series, axes, and labels

2.3.2 Unify table elements: headers, columns, and rows

2.3.3 Unify page layout: grids, frames, and spaces

2.4 Unify language: Sentences, words, and characters

2.4.1 Unify sentences: summaries, contents, and structures

2.4.2 Unify words: define meanings in a glossary

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3.1 Use space: No free room

3.1.1 Use existing space

3.1.2 Use handouts consisting of more than merely copied slides

3.1.3 Use empty space for additional information

3.2 Condense data: More data per area

3.2.1 Show overlay charts

3.2.2 Show small multiples

3.2.3 Show multi charts

3.2.4 Show more elements

3.2.5 Show more details to avoid manipulation of scaling

3.2.6 Show visual elements integrated within tables

3.3 Use small elements: Better overview

3.3.1 Use small fonts

3.3.2 Use small charts

3.3.3 Use small tables

3.3.4 Use small icons, symbols, and highlightings

3.4 Show interrelations: Causes and dependencies

3.4.1 Show more than two dimensions

3.4.2 Show clusters

3.4.3 Show correlations

3.4.4 Show correlations

4.1 Check data: Useful information

4.1.1 Use correct, complete, current, and relevant data

4.1.2 Use normalized data: inflation and currency adjusted

4.2 Select objects: Suiting display

4.2.1 Prefer quantitative charts over conceptual graphs

4.2.2 Give presentations without text or bullet slides

4.3 Check visualization: Correct chart type

4.3.1 Replace radar, funnel and other misleading structure charts

4.3.2 Use correct chart types for time and structure

4.3.3 Compare without logarithmic scales

4.3.4 Use small multiples instead of spaghetti charts

4.3.5 Use bar or column charts instead of pie and ring charts

4.4 Check scaling: No manipulation

4.4.1 Use proper visualization, do not cut axes

4.4.2 Use proper visualization, do not distort elements

4.4.3 Use flat display when comparing area sizes

4.4.4 Use uniform class sizes of distributions

4.4.5 Use creative charts to compare extreme values

5.1 Build awareness: Realize the need

5.1.1 Realize missing messages

5.1.2 Realize where standardized content is needed

5.2 Plan introduction: Evolution vs. revolution

5.2.1 Start from the top of the organization

5.2.2 Present alternatives, let senior management decide

5.2.3 Plan rollout in defined steps

5.2.4 Use prototyping to prove usability

5.3 Realize the system: People and tools

5.3.1 Install professional project organization

5.3.2 Document useful information

5.3.3 Train the people involved

5.4 Establish organization: Support and enhancements

5.4.1 Give centralized support for rules and tools

5.4.2 Present best-of solutions in central data base

5.4.3 Learn from the experience of others

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6.1 Avoid noise: Information instead of decoration

6.1.1 Avoid 3D visualization without meaning

6.1.2 Avoid frames and shades without meaning

6.1.3 Avoid lines, marks, and value axes without meaning

6.1.4 Avoid layout concepts without meaning

6.1.5 Avoid colors without meaning

6.1.6 Avoid colored or structured backgrounds without meaning

6.1.7 Avoid special fonts without meaning

6.1.8 Avoid gridlines in tables without meaning

6.2 Simplify content: Less is more

6.2.1 Simplify elaborate visuals

6.2.2 Simplify "special and transition effects" in presentations

6.3 Minimize redundancy: Focused information

6.3.1 Avoid redundant terms such as sum, total, and overall

6.3.2 Avoid redundant axis labels

6.3.3 Avoid redundant text: sentences, words, and characters

6.4 Omit distracting details: Concentration on the essentials

6.4.1 Omit labels for small values

6.4.2 Omit long numbers: use 3 digits in charts and tables

6.4.3 Show structures in tables

6.4.4 Show structures in reports

6.4.5 Show structures in notes

6.4.6 Build well-structured reports and presentations

7.1 Structure homogeneously: Similar structures

7.1.1 Use homogeneous elements

7.1.2 Use homogeneous statements

7.1.3 Use homogeneous wording

7.1.4 Use homogeneous characters

7.1.5 Use homogeneous forms

7.2 Structure without overlap: Mutually exclusive structures

7.2.1 Write tables of content without overlaps

7.2.2 Define business measures without overlaps

7.2.3 Define report dimensions without overlaps

7.3 Build complete listings: Exhaustive structures

7.3.1 Build exhaustive arguments

7.3.2 Build exhaustive structures in charts

7.3.3 Build exhaustive structures in tables

7.4 Structure applications: Reports and presentations

7.4.1 Build symmetric structures

7.4.2 Build logical structures

7.4.3 Show structures in tables

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