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
Deliver messages

1.1 Express messages: Say what must be said
1.1.1 Say the message first, then explain it
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 message, substantiate the claim
1.1.5 Say your messages between two slides
1.1.6 Conclude the presentation with the overall message

1.2 Highlight messages: Underline what is important
1.2.1 Highlight 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 Write titles without fill 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 Use long text in handouts only, avoid them in slides
1.4.5 Name sources and definitions

Unify
Standardize content

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...
2.2.6 Unify analyses: comparisons and variances

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
2.3.4 Unify colors, lines, and fonts

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
2.4.3 Unify characters and symbols: numbers, units, and dates

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Condense
Concentrate information

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 causes (and use scaling bars)
3.4.3 Show clusters
3.4.4 Show unusual themes

Check
Ensure quality

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 Combine tables and charts
4.3.4 Use small multiples instead of spaghetti charts
4.3.5 Use bar or column charts instead of pie and ring charts
4.3.6 Compare without logarithmic scales
4.3.7 Correct relations when comparing measures in maps

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

Enable
Implement concept

5.1 Build awareness: Realize the need
5.1.1 Realize missing messages
5.1.2 Realize where standardized content is needed
5.1.3 Realize where standardized visualization 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 Involve people in charge of IT
5.2.5 Involve people in charge of corporate design
5.2.6 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 Use software to guarantee standardization
5.3.4 Train the people involved
5.3.5 Offer solution templates for objects and applications
5.3.6 Collect best of solutions in central data base

5.4 Establish organization: Support and enhancements
5.4.1 Give centralized support for rules and tools
5.4.2 Learn from the experience of others

Simplify
Avoid complication

6.1 Avoid visual 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
6.2.3 Simplify crude lines and forms

6.3 Minimize redundancy: Focused information
6.3.1 Avoid redundant terms such as sum, total, and overall
6.3.2 Avoid redundant text: sentences, words, and characters
6.3.3 Avoid redundant axis labels

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 Omit unnecessary labels

Structure
Group content

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 arguments
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
7.4.4 Show structures in reports
7.4.5 Show structures in notes
7.4.6 Build well-structured reports and presentations