

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. Design: Anne Hichert, hichert.ch © 2013 HICHERT+PARTNER AG, Kreuzlingen, Switzerland. All rights reserved and any use permitted only with our express written consent.

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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.

We should stop Project B + Market is too small + Competition is very high + Costs are above plan + Quality cannot be reached

1.1.2 Say messages which detect, explain, or suggest

PowerPoint language: "Sales down", "Prices up", "Strategy change"

Statement: Sales are EUR 5 mill. below... Explanation: ...because of a 10% increase... Suggestion: ...therefore we should...

1.1.3 Say messages of interest, avoid mundane messages

"Our project has four phases", "We had a peak in April", "We should invest in five more people in order to...", "We can avoid the peak in April by using..."

1.1.4 Support the message, substantiate the claim

We offer suited solutions for every need: Designed to customer needs, Best of class functionality, Variety of different forms, Many different colors

1.1.5 Say your messages between two slides

"Sales decrease will continue", "...and affects our margin", "...therefore we should..."

1.1.6 Conclude the presentation with the overall message

"Thank you for your attention!", "...and I hope that I could get this message across", "...and then the audience says 'Thank you'."

1.2 Highlight messages: Underline what is important

1.2.1 Highlight your messages in charts, tables, and graphs

Sales decreased by 19%, Sales decreased by 19%

1.2.2 Systemize the different types of highlighting

Warning, Trend, Difference, 100% Line

1.2.3 Replace traffic lights with more meaningful visualization

Net sales, COGS, Contribution, Fixed costs, Profit before Tax, Tax, Profit after Tax

1.3 Name title: Clear and complete

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

Net Sales Development from January to July 2011, Alpha Corporation (mill. EUR), Profit ratio: In thousand Euros per Employee in Division D, Actual vs Budget in 2011

1.3.2 Name line and column dimensions in table titles

Alpha Corporation Profit in EUR, Alpha Corporation Profit in EUR by country and by month, Jan-Mar 2011

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

Sales table 2011 actual, Sales 2011 AC, Staff in FTE, Staff in mUSD, Cost structure by department, Profit trend-quarters Q1-Q4, ROI diagram, Margin Analysis Germany

1.4 Give explanations: Understandable texts

1.4.1 Explain with precise words

Relevant cost out, Around 100 units, Significant depletion, More than 7 tons, Much better than plan, Cost out of 3.6 mEUR, Between 98 and 102 units, Deviation of -9%, +5 or 7 tons, 3% above plan

1.4.2 Integrate explanations into charts

Headcount

1.4.3 Link explanations to the table content

Comments

1.4.4 Use long text in handouts only, avoid them in slides

Presentation slide, Handout, Slide

1.4.5 Name sources and definitions

Staff in FTE, Staff in FTE

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

2.1.1 Unify applications: presentations and reports

Title pages, Dashboards, Charts, Presentations, Reports

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

Time, Specialties, Structure

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

Time table, Deviation table, Cross table

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

Value measures, Shares, Ratios

2.2 Unify components: Measures, dimensions, analyses

2.2.1 Unify measures, shares, and ratios

Value measures (\$), Volume measures (#), Measures (Costs), Assets & Liabilities, Contribution, Profit, Flow, Profits/Losses, Days of stock, ROI, Equity, Sales Price, Stock

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

Periods, Grid, Axes, Frames, Applications

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

Categories, Areas, Colors, Shapes, Applications

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

Output, Organization, Regions, Relations

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

Analyses, Symbol, Example, Application

2.3 Unify elements: Data series, headers, etc.

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

Unify title (concept), Unify column (header), Avoid value (y) axes, Use axes for meaning

2.3.2 Unify table elements: headers, columns, and rows

Unify title (concept), Unify column (header), Avoid vertical grid lines, Highlight sums

2.3.3 Unify page layout: grids, frames, and spaces

Unify table (concept), Unify column (header), Avoid vertical grid lines, Highlight sums

2.4 Unify language: Sentences, words, and characters

2.4.1 Unify sentences: summaries, contents, and structures

Our market share will grow to five or six percent... Because of three models we are now able to reach... In Finance profit will reach again more than fifteen...

2.4.2 Unify words: define meanings in a glossary

Term, Abbreviations, Definition

2.4.3 Show clusters

Net Sales, Profit in %

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

23 kg, 100,000,000, 23 m, 1.2345, 20 sec, 22 tons, 1.2345, 221 kg, 1.2345, 1.5.2010, 01.05.2010, 05/01/10, 02/2010, 2010-05-01, 2010-05-01, 2010-02

3.1 Use space: No free room

3.1.1 Use existing space

Use handouts consisting of more than merely copied slides

3.1.2 Use empty space for additional information

Sales in EUR

3.2 Condense data: More data per area

3.2.1 Show overlay charts

Sales in EUR

3.2.2 Show small multiples

Alpha Corporation Sales in EUR

3.2.3 Show multi charts

Sales 2010

3.2.4 Show more details to avoid manipulation of scaling

Sales 2010

3.2.5 Show visual elements integrated within tables

Alpha Corporation Sales in EUR

3.3 Use small elements: Better overview

3.3.1 Use small fonts

ABC Productions, Inc. London

3.3.2 Use small charts

Market share

3.3.3 Use scaling bars to allow different scales

Market share

3.3.4 Use correct relations when comparing measures in maps

Market share

3.4 Show interrelations: Causes and dependencies

3.4.1 Show more than two dimensions

One dimension, Three and five dimensions

3.4.2 Show causes (and use scaling bars)

Profit

3.4.3 Show clusters

Net Sales, Profit in %

3.4.4 Use uniform class sizes of distributions

Net Sales, Profit in %

3.4.5 Use creative charts to compare extreme values

Net Sales, Profit in %

4.1 Check data: Useful information

4.1.1 Use correct, complete, current, and relevant data

Correct, Complete, Current, Relevant

4.1.2 Use normalized data: inflation and currency adjusted

Normalized data

4.2 Select objects: Suiting display

4.2.1 Prefer quantitative charts over conceptual graphs

Quantitative charts

4.2.2 Give presentations without text or bullet slides

Text slide, Bullet slide

4.3 Check visualization: Correct chart type

4.3.1 Replace radar, funnel and other misleading structure charts

Radar charts, Funnel charts

4.3.2 Use connect chart types for time and structure

Connect chart types

4.3.3 Combine tables and charts

Combine tables and charts

4.3.4 Use small multiples instead of spaghetti charts

Small multiples

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

Bar or column charts

4.4 Check scaling: No manipulation

4.4.1 Use proper visualization, do not cut axes

Proper visualization

4.4.2 Use proper visualization, do not distort elements

Proper visualization

4.4.3 Use flat display when comparing area sizes

Flat display

4.4.4 Use uniform class sizes of distributions

Uniform class sizes

4.4.5 Use creative charts to compare extreme values

Creative charts

5.1 Build awareness: Realize the need

5.1.1 Realize missing messages

Reports, Presentations, Exhibits (Slides)

5.1.2 Realize where standardized content is needed

Standardized content

5.2 Plan introduction: Evolution vs. revolution

5.2.1 Start from the top of the organization

Start from the top

5.2.2 Present alternatives, let senior management decide

Present alternatives

5.2.3 Plan rollout in defined steps

Plan rollout

5.3 Realize the system: People and tools

5.3.1 Install professional project organization

Project Management, Steering, Team, Budget, Schedule

5.3.2 Document useful information

Documentation, Structure of reports and presentations, Glossary, Table and chart concept, Notation rules, Layout of reports and presentations, Software details

5.3.3 Train the people involved

Training plan, Content, Message, Notation, Software, Development

5.3.4 Offer solution templates for objects and applications

Sales reports, Reports and presentations

5.4 Establish organization: Support and enhancements

5.4.1 Give centralized support for rules and tools

Support functions, Technical application, Visual realization, Written text, Personal presentation

5.4.2 Present best-of solutions in central data base

References, Reports, Presentations, Charts, Tables, Unifid display, Graphs, Texts

5.4.3 Learn from the experience of others

Exchange, Across the organization, With consultants, In external seminars, In user meetings

6.1 Avoid noise: Information instead of decoration

6.1.1 Avoid 3D visualization without meaning

3D visualization

6.1.2 Avoid frames and shades without meaning

Frames and shades

6.1.3 Avoid lines, marks, and value axes without meaning

Lines, marks, value axes

6.1.4 Avoid layout concepts without meaning

Layout concepts

6.1.5 Avoid colors without meaning

Colors

6.1.6 Avoid colored or structured backgrounds without meaning

Colored or structured backgrounds

6.2 Simplify content: Less is more

6.2.1 Simplify elaborate visuals

Elaborate visuals

6.2.2 Simplify "special and transition effects" in presentations

Special and transition effects

6.3 Minimize redundancy: Focused information

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

Redundant terms

6.3.2 Avoid redundant axis labels

Redundant axis labels

6.3.3 Avoid redundant text: sentences, words, and characters

Redundant text

6.4 Omit distracting details: Concentration on the essentials

6.4.1 Omit labels for small values

Omit labels

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

Long numbers

6.4.3 Show structures in tables

Tables

6.4.4 Show structures in reports

Reports

6.4.5 Show structures in notes

Notes

6.4.6 Build well-structured reports and presentations

Well-structured reports

7.1 Structure homogeneously: Similar structures

7.1.1 Use homogeneous elements

Homogeneous elements

7.1.2 Use homogeneous statements

Homogeneous statements

7.1.3 Use homogeneous wording

Homogeneous wording

7.1.4 Use homogeneous characters

Homogeneous characters

7.1.5 Use homogeneous forms

Homogeneous forms

7.2 Structure without overlap: Mutually exclusive structures

7.2.1 Write tables of content without overlap

Tables of content

7.2.2 Define business measures without overlaps

Business measures

7.2.3 Define report dimensions without overlaps

Report dimensions

7.3 Build complete listings: Exhaustive structures

7.3.1 Build exhaustive arguments

Exhaustive arguments

7.3.2 Build exhaustive structures in charts

Exhaustive structures in charts

7.3.3 Build exhaustive structures in tables

Exhaustive structures in tables

7.4 Structure applications: Reports and presentations

7.4.1 Build symmetric structures

Symmetric structures

7.4.2 Build logical structures

Logical structures

7.4.3 Show structures in tables

Tables

7.4.4 Show structures in reports

Reports

7.4.5 Show structures in notes

Notes

7.4.6 Build well-structured reports and presentations

Well-structured reports