

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

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.

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...

1.1.2 Say messages which detect, explain, or suggest

"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..."

1.1.3 Say messages of interest, avoid mundane messages

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

1.1.4 Support the message, substantiate the claim

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

1.1.5 Say your messages between two slides

"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% (-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

mEUR ΔPY
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 and Budget in 2011

1.3.2 Name line and column dimensions in table titles

Alpha Corporation Profit in mEUR Jan.-Mar. 2011
Alpha Corporation Profit in mEUR by country and by month Jan.-Mar. 2011

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

Sales Table 2011 actual
Staff statistics
Stock development (mill. USD)
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 cut
Around 100 units
Significant deviation
More than 5 tons
Much better than plan

1.4.2 Integrate explanations into charts

Headcount
Headcount

1.4.3 Link explanations to the table content

Comments
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

Unify

Standardize content

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
Sales Profit

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

Org. graphs
Networks
Maps

2.2 Unify components: Measures, dimensions, analyses

Measures: Loss, Contribution, Ratios
Dimensions: Flow, Profit, Stock, Sales, Volume
Analyses: Difference, Time span, Rolling, Average, First day, Last day, Sorting

2.2.1 Unify measures, shares, and ratios

Value measures (\$)
Volume measures (#)
Ratios

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

Periods
Grid
Axes
Frames
Applications

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

Categories
Areas
Colors
Shapes
Applications

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

Output
Products
Projects
Processes
Organization
Companies
Divisions
Accounts
Regions
Countries
Districts
Locations
Relations
Customers
Suppliers
Partners

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

Analyses
Symbol
Example
Application
"Year to date"

2.2.6 Unify analyses: comparisons and variances

Comparisons
Absolute
Relative
Differences

2.3 Unify elements: Data series, headers, etc.

2.3.1 Unify chart elements: data series, axes, and labels
2.3.2 Unify small charts
2.3.3 Unify table elements: headers, columns, and rows

2.3.4 Unify page layout: grids, frames, and spaces

Grids
Frames
Spaces

2.3.5 Unify colors, lines, and fonts

Colors
Lines
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 abbreviations: short long

Abbreviations
Short long
Definition

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

Characters
Symbols
Numbers
Units
Dates

Condense

Concentrate information

3.1 Use space:

No free room

3.1.1 Use existing space

Existing space

3.1.2 Use handouts consisting of more than merely copied slides

Handouts

3.1.3 Use empty space for additional information

Empty space

3.2 Condense data: More data per area

Condense data

3.2.1 Show overlay charts

Overlay charts

3.2.2 Show small multiples

Small multiples

3.2.3 Show multi charts

Multi charts

3.2.4 Show more elements

More elements

3.2.5 Show more details to avoid manipulation of scaling

More details

3.2.6 Show visual elements integrated within tables

Visual elements

3.3 Use small elements: Better overview

Small elements

3.3.1 Use small fonts

Small fonts

3.3.2 Use small charts

Small charts

3.3.3 Use small tables

Small tables

3.3.4 Use small icons, symbols, and highlightings

Small icons

3.4 Show interrelations: Causes and dependencies

Interrelations

3.4.1 Show more than two dimensions

More than two dimensions

3.4.2 Show clusters

Clusters

3.4.3 Show correlations

Correlations

Check

Ensure quality

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: Choosing displays

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

Small multiples

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

Bar or column charts

4.3.6 Compare without logarithmic scales

Compare without logarithmic scales

4.3.7 Use scaling bars to allow different scales

Scaling bars

4.3.8 Use flat display when comparing area sizes

Flat display

4.3.9 Use uniform class sizes of distributions

Uniform class sizes

4.3.10 Use creative charts to compare extreme values

Creative charts

4.3.11 Learn from the experience of others

Learn from experience

4.3.12 Exchange

Exchange

4.3.13 Exchange

Exchange

4.3.14 Exchange

Exchange

4.3.15 Exchange

Exchange

4.3.16 Exchange

Exchange

4.3.17 Exchange

Exchange

4.3.18 Exchange

Exchange

Enable

Implement concept

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

5.1.3 Realize where standardized visualization is needed

Standardized visualization

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 Involve people in charge of IT

Involve people in charge of IT

5.2.4 Involve people in charge of corporate design

Involve people in charge of corporate design

5.2.5 Plan rollout in defined steps

Plan rollout in defined steps

5.2.6 Use prototyping to prove usability

Prototyping

5.3 Realize the system: People and tools

5.3.1 Install professional project organization
5.3.2 Document useful information

5.3.3 Software functions

Software functions

5.3.4 Train the people involved

Train the people involved

5.3.5 Offer solution templates for objects and applications

Solution templates

5.3.6 Avoid redundant text: sentences, words, and characters

Avoid redundant text

5.3.7 Avoid redundant axis labels

Avoid redundant axis labels

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

Avoid redundant terms

5.3.9 Avoid redundant table content: sentences, words, and characters

Avoid redundant table content

5.3.10 Avoid redundant table content: sentences, words, and characters

Avoid redundant table content

5.3.11 Avoid redundant table content: sentences, words, and characters

Avoid redundant table content

5.3.12 Avoid redundant table content: sentences, words, and characters

Avoid redundant table content

Simplify

Avoid complication

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

Avoid frames and shades

6.1.3 Avoid lines, marks, and value axes without meaning

Avoid lines, marks, and value axes

6.1.4 Avoid layout concepts without meaning

Avoid layout concepts

6.1.5 Avoid colors without meaning

Avoid colors

6.1.6 Avoid colored or structured backgrounds without meaning

Avoid colored or structured backgrounds

6.1.7 Avoid special fonts without meaning

Avoid special fonts

6.1.8 Avoid gridlines in tables without meaning

Avoid gridlines in tables

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

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 table content: sentences, words, and characters

6.3.3 Avoid redundant table content: sentences, words, and characters

Avoid redundant table content

6.3.4 Avoid redundant table content: sentences, words, and characters

Avoid redundant table content

6.3.5 Avoid redundant table content: sentences, words, and characters

Avoid redundant table content

6.3.6 Avoid redundant table content: sentences, words, and characters

Avoid redundant table content

6.3.7 Avoid redundant table content: sentences, words, and characters

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Avoid redundant table content

6.3.9 Avoid redundant table content: sentences, words, and characters

Avoid redundant table content

6.3.10 Avoid redundant table content: sentences, words, and characters

Avoid redundant table content

Structure

Group content

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 overlaps
7.2.2 Define business measures without overlaps
7.2.3 Define report dimensions without overlaps

7.2.4 Define business measures without overlaps

Define business measures

7.2.5 Define report dimensions without overlaps

Define report dimensions

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

7.3.4 Build exhaustive structures in charts

Build exhaustive structures in charts

7.3.5 Build exhaustive structures in tables

Build exhaustive structures in tables

7.3.6 Build exhaustive structures in tables

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

7.4.1 Build symmetric structures

Build symmetric structures

7.4.2 Build logical structures

Build logical structures

7.4.3 Show structures in tables

Show structures in tables

7.4.4 Show structures in reports

Show structures in reports

7.4.5 Show structures in notes

Show structures in notes

7.4.6 Build well-structured reports and presentations

Build well-structured reports and presentations