A Touch for Eyes

How to Use Visual Effects to Support Your Presentation

A PowerPoint Training Material

Course Objectives - Preface

Before the course, I want to stress on two things : First, I'm not an artist, so I don't teach you aesthetics; Second, I'm not an advertisement designer, so I don't teach you drawing fancy pictures, and, as a consultant instead, I strongly oppose to present super-fancy slides to clients because it will distract their attention on the contents. All what I teach are skills, rules, processes, etc., which help you to effectively and accurately communicate ideas.

After the course, you will be able to:

- Draw the PowerPoint slides more efficiently

- Produce meaningful, impressive and communicable presentations
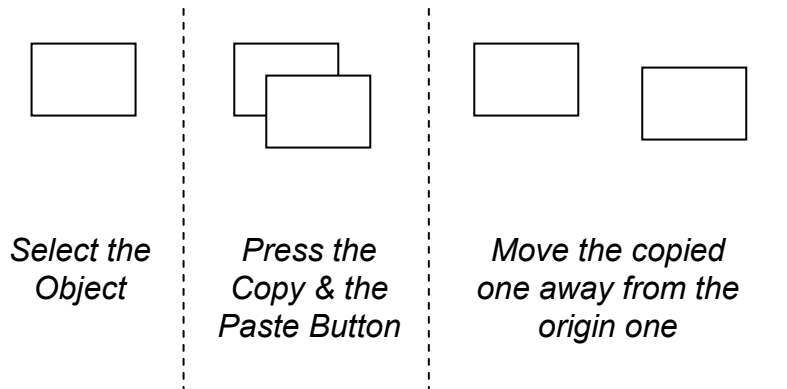
Basic Concepts

The "Common Senses"

- **The sense of efficiency**

- **The sense of space**

- **The sense of process**

The slide drawing could be divided into many small actions, and efficiency comes out of each action
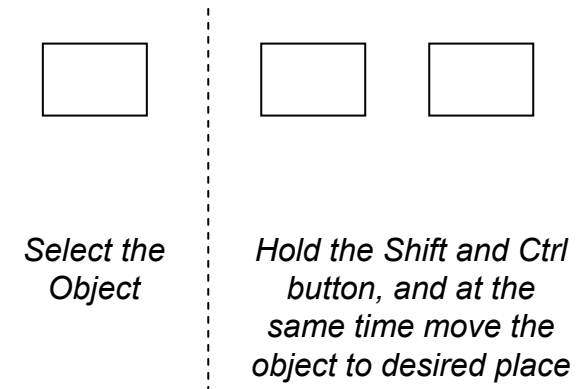
The sense of efficiency

How long does it take to copy an object? The prototype and the new one must be aligned.

Method 1

Select the Object	*Press the Copy & the Paste Button*	*Move the copied one away from the origin one*	*Select the align command in Draw Menu*

Method 2

Select the Object	*Hold the Shift and Ctrl button, and at the same time move the object to desired place*

Estimated time for completion: 16 seconds

Estimated time for completion: 2 seconds

Can you tell the difference? - 14 seconds.
Ah! Just 14 seconds, it doesn't matter. But when added together, it does matter:
Copy is a very common type of action in slide drawing, usually we will expect 20 or above such actions happening in one slide of medium complexity. So 14 seconds' difference means 280 seconds in one slide and 28000 seconds in a 100-page report, i.e. near 8 hours. And this is just one type of many actions.
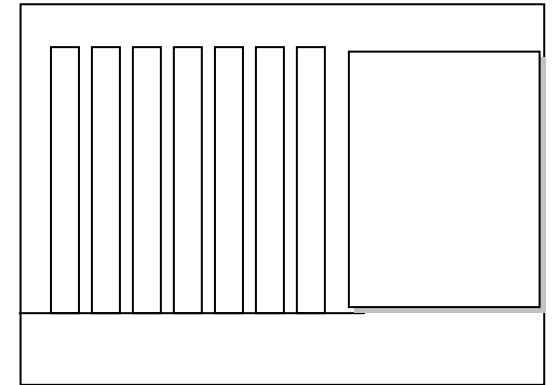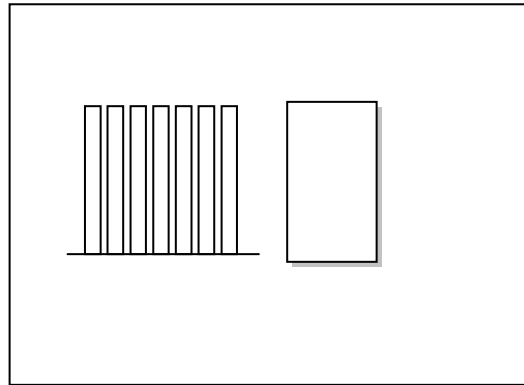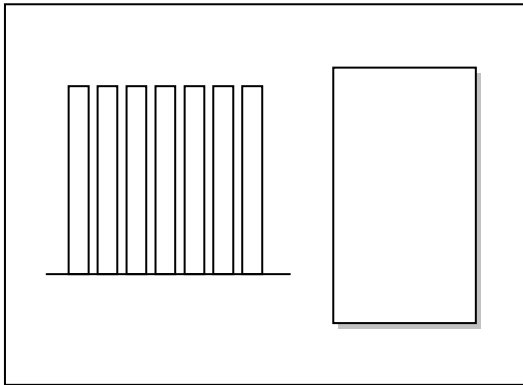
What does it imply?

The sense of efficiency

Find the most efficient way for *EACH ACTION* and bear this

in mind through the whole course of production

It is like building a house in a given land. Don't waste it, but don't overuse it

The sense of space

- The dash-box is the maximum space we can use in this template. Within this border, we must keep all objects balanced


- Please compare the slides above. Which one looks better?

So think about the whole picture in mind before drawing

The sense of space

- **Things you must meditate on before drawing a slide:**

    - How many messages you want deliver in this slide? In what order?
      (So you know where to put the objects)

    - How many charts, tables, pictures I will put in the slide?
      (So I will have ideas of the object sizes. When you become a deft PowerPoint user, you will have the sense of the size of each object as the whole picture formed in your mind. If there are too many objects in one slide, try to divide it to two.)

    - Is it likely that I will add something to the slide later on?
      (So Make the slide expandable, i.e. deliberately leave some spaces on the slide, but keep it balanced. See the example below.)
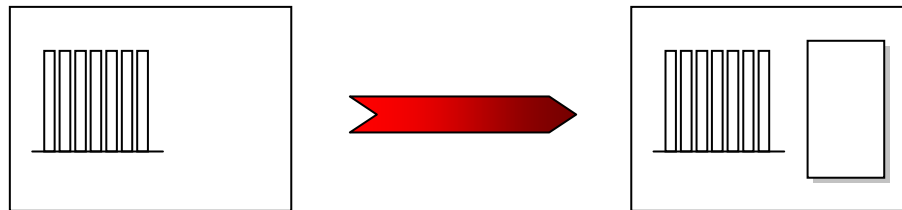
- **And drawing a sketch is a good tool for start**

How to draw a chart like this (A demonstration). No idea to start with? With a good process, you'll never afraid of it

The sense of process

Marketing Organization
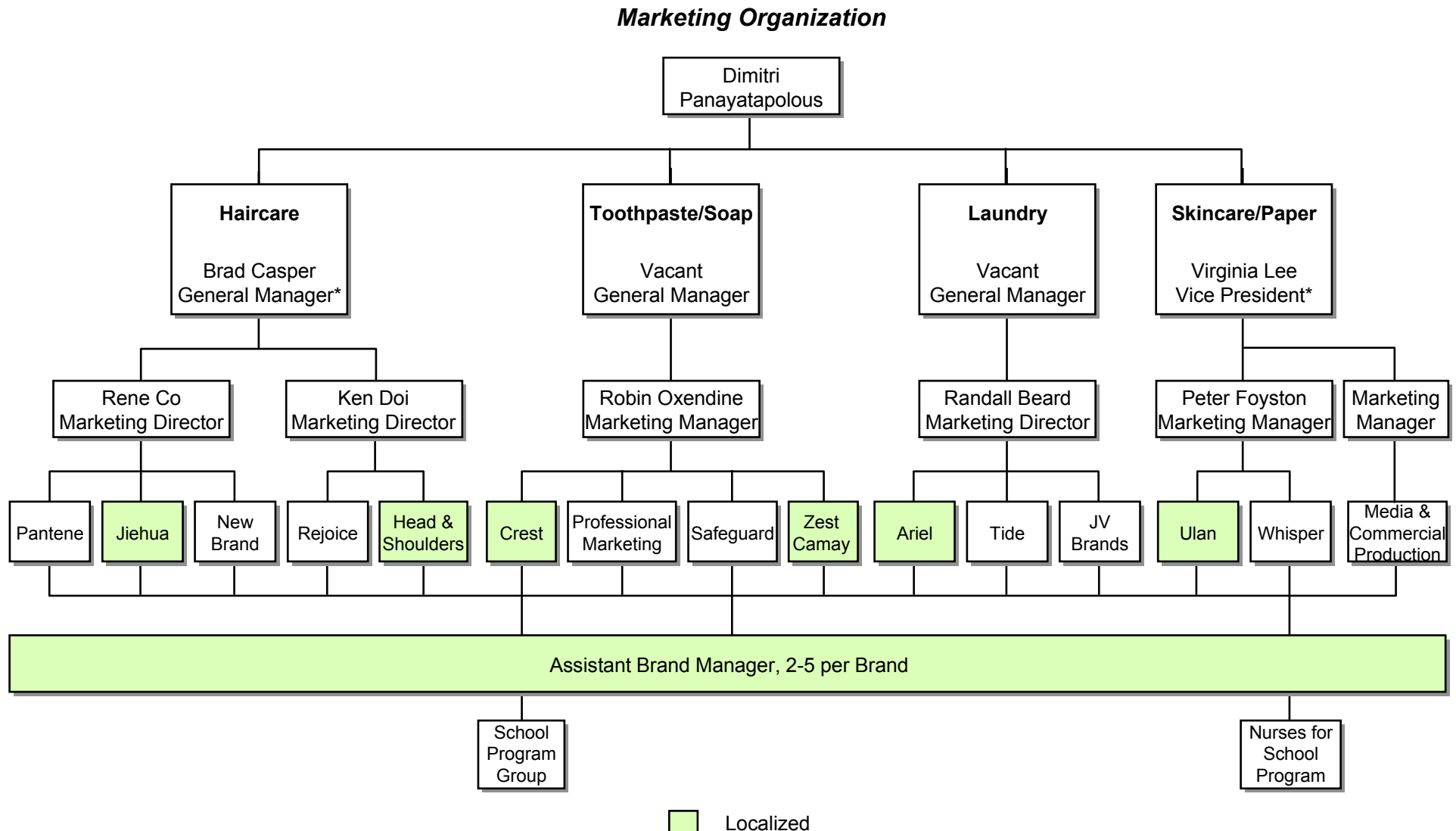
Like managing a business, a change in process will dramatically improve the performance

The sense of process

- **You don't need to type 300 letters per second; and you don't need to improve your cursor speed. Yet you can improve the efficiency of the production and the appeOwn companynce of the slides to great extent**

- **A good process can:**

  - Reduce the production time by half and two thirds

  - Ensure the slides well balanced

  - Make it easier to make changes

Don't forget to SAVE

When you complete a slide

## Or when you complete a complex object

Essential Skills

The skills here are those used most frequently in PowerPoint

- **Customize Your "Desktop"**

- **Use Shortcuts**

- **Move and Copy**

- **Select**

- **Switch Order**

- **Format Texts**

- **Format Lines**

- **Format Objects**

Why you need to customize your "desktop"

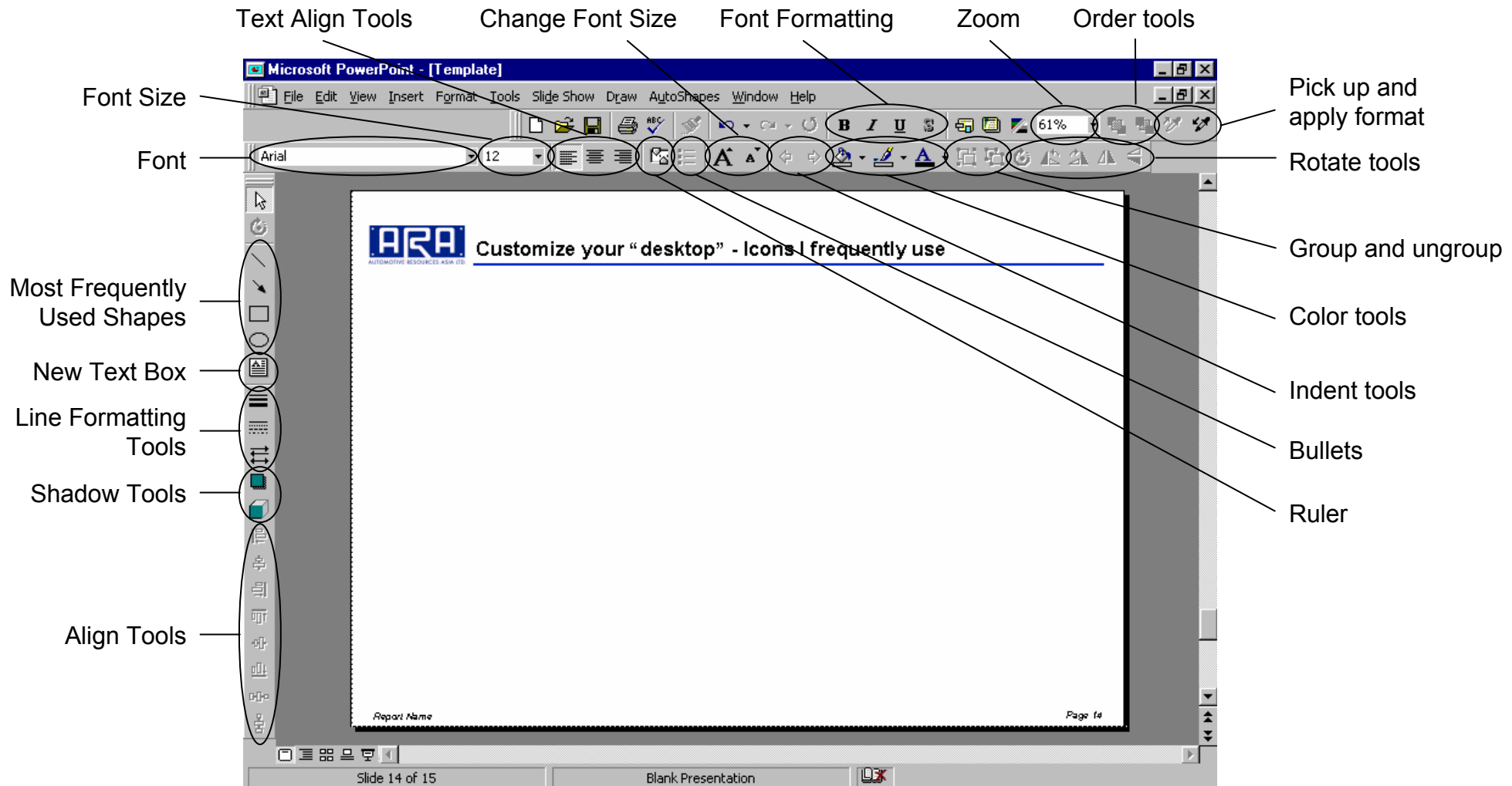**Customize Your "Desktop"**

- **The "Desktop" here is the interface between you and the PowerPoint. The purpose of customizing "desktop" is to make it a comfortable environment, so we are able to reduce the interference to your work to the lowest level**

- **How to customize the "desktop":**
  On the Menu Bar, Select Tools-Customize, then press Command Table. Move the icons to the active toolbars
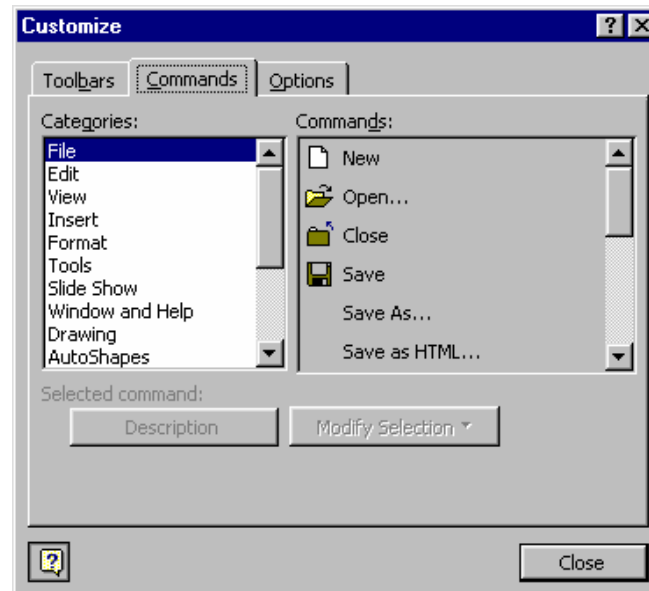
# Customize Your "Desktop" - Icons I frequently use

Customize Your "Desktop"

Customize your "desktop" - Default file

- **When we open a new document in PowerPoint, it normally brings up a blank page. In order to shape it to our desired format, we must do a lot of work to format the document. Can we store Own company's standard format to the PowerPoint? Yes, we can. Determine the format in the Slide Master, then press Save As, in the save box, select the Presentation Template as the Save As Type, and replace the Blank Presentation file. Now the Own company Format becomes you default. The Slide Master normally looks like this:**
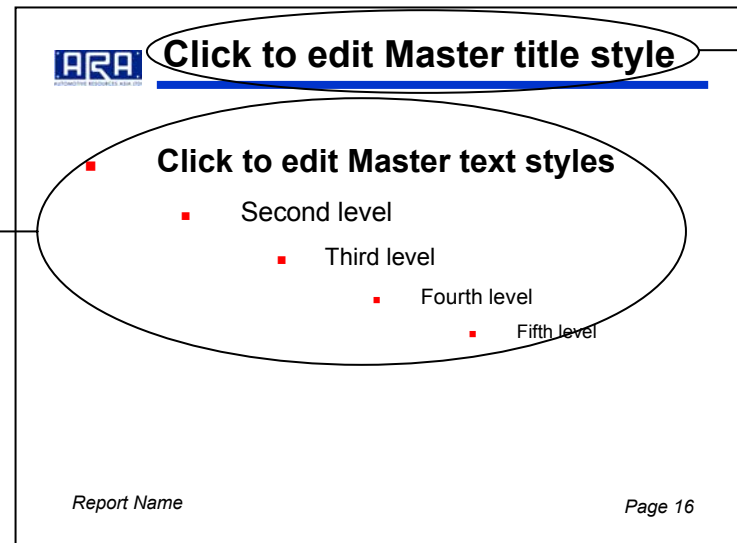
Master Text Styles defines the font type and can be customized into different levels

Click to edit Master title style

Title Style defines the title font type

- **Click to edit Master text styles**
  - Second level
    - Third level
      - Fourth level
        - Fifth level

We can also put some other objects in the Slide Master, such as page number, lines and logos

Report Name

Page 16

Some other issues

Customize Your "Desktop"

- **During slide producing, we often need to view the slides in full size. So make them appearing as big as it can be in order to show more details. That's why we just keep those most frequently used icons on the toolbars, and hide rulers when we don't need them. Based on my experience, only two horizontal and two vertical toolbars are allowed. Please compare two "desktops" below:**
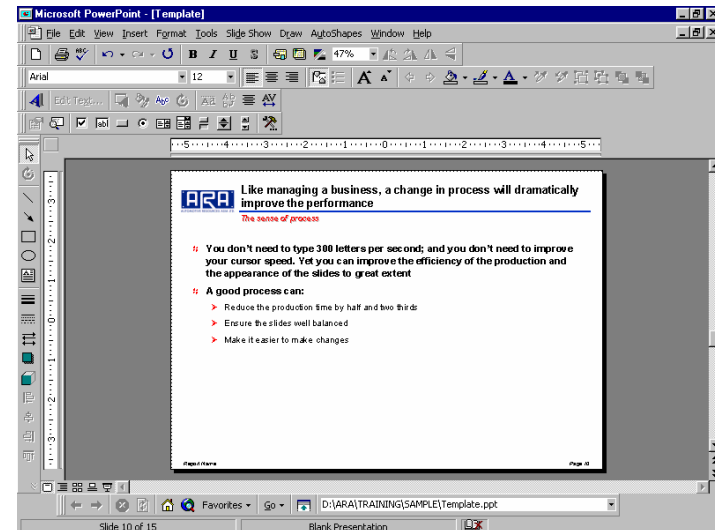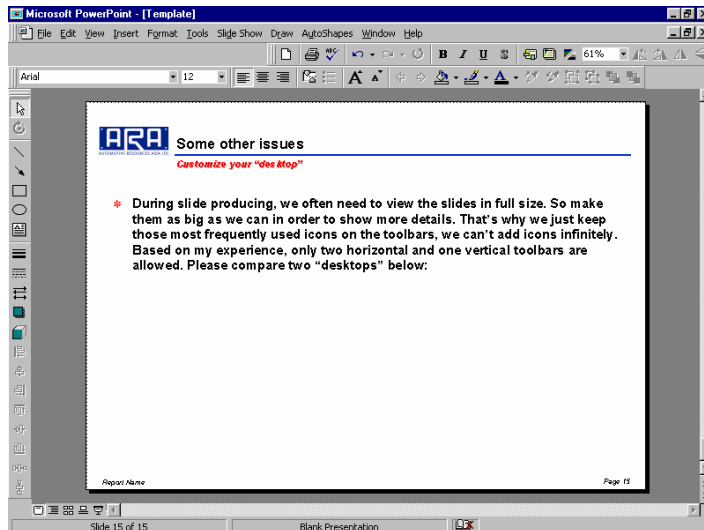
Some other issues (Continued)

Customize Your "Desktop"

- **You can move icons to other toolbars by simply press Alt key and move them simultaneously, or remove icons by press Alt key and move them outside toolbars simultaneously**

- **You can also add some group functions, such as Draw and AutoShapes to the menu bar**

Using shortcuts are the most efficient way in drawing

Use Shortcuts

- **Be familiar with some shortcuts:**
    - Ctrl-C: Copy
    - Ctrl-X: Cut
    - Ctrl-V: Paste
    - Ctrl-S: Save
    - Ctrl-A: Select All
    - Ctrl-Z: Undo
    - Ctrl-D: Duplicate
    - Ctrl-O: Open

- **These shortcuts are on your right hand, so they are very convenient to use while you are using right hand with the mouse. Practice them hard to remember them**

Move and copy are the most intensively used actions

Move and Copy

- **Use the mouse you can move the objects around freely. But if you want to move the objects vertically or horizontally, you must press the Shift key at the same time. Thus save the time to re-align them**

- **If you want to copy an object and move it to your desired place, you can do it in one action - press Ctrl and move the object to the place you want it be, see, a new object copied. Press Ctrl and Shift and move the object simultaneously, you can make the new object vertically or horizontally align with the original object. This is very useful in drawing organization charts and column charts**

When you want to edit an object or a group of objects, you need to select them
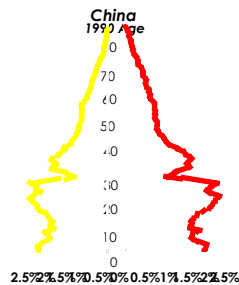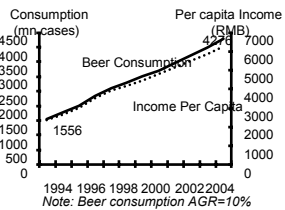
Select

- **Move the mouse to an object and click, you will select it. But if there is no fill in the object, you can only select it by clicking on its border, which sometimes is annoying. In order to make it easier for my work, I fill the object with white instead of filling it with nothing**

- **Holding the left button of the mouse and dragging the cursor over the objects you want to select, you can select all objects within the dragging area**

- **If you intent to select certain scattering objects, hold the Shift key and click on the object, you will select them one by one**

- **The shortcut Ctrl-A enables you to select all object in a slide, or all text within a text box**

- **In a text box, click left mouse button three times, you will select the paragraph; click twice you will select the word. The quickest way to select a text box is holding Shift key while clicking on anywhere on the text. By this way the text box is selected as an object, not a text body to edit**

This is tricky, but very efficient

Switch Order

- **Switch basic shapes: Select two shapes, group them, them press Flip Horizontal or Flip Vertical icons**

- **Switch complex objects:**

Group each object
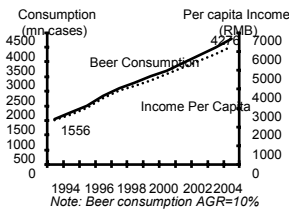
Group two object again
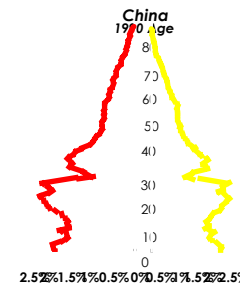
Press the Flip icon
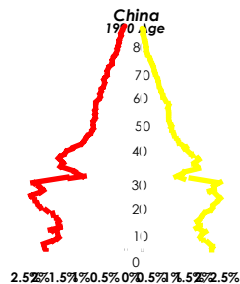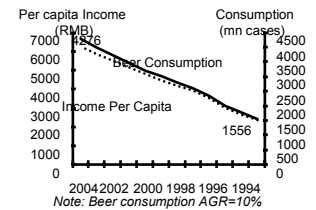
Press Ungroup icon once
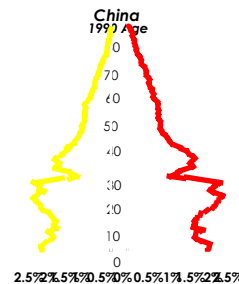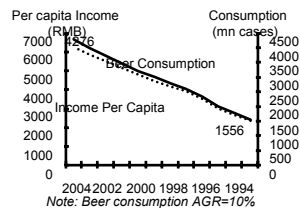
Press the Flip icon again
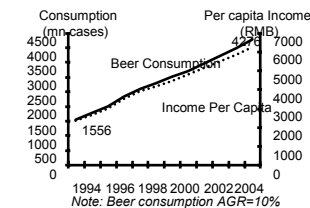
Exercises

- **Customize your "desktop", familiar with the icons**

- **Use shortcuts**

- **Move and copy**

- **Select**

- **Switch order**

Format Text - Font Size

Format Text

- **The icon on the toolbar lists some sizes for our selection. Can other sizes be applied? Yes! You can type any integer number in this icon box somewhere between 1 and 4000. But I never used the size bigger than 96 pl. and smaller than 6 pl.**

Format Text - Edit Bullets

Format Text

- **Bullets are very often used in PowerPoint slides. We can define the pattern, color and size of the bullets by selecting Format on the Menu and go on to the Bullet function. Monotype Fonts, Symbol and Wingdings fonts provide a very large pool for selection**
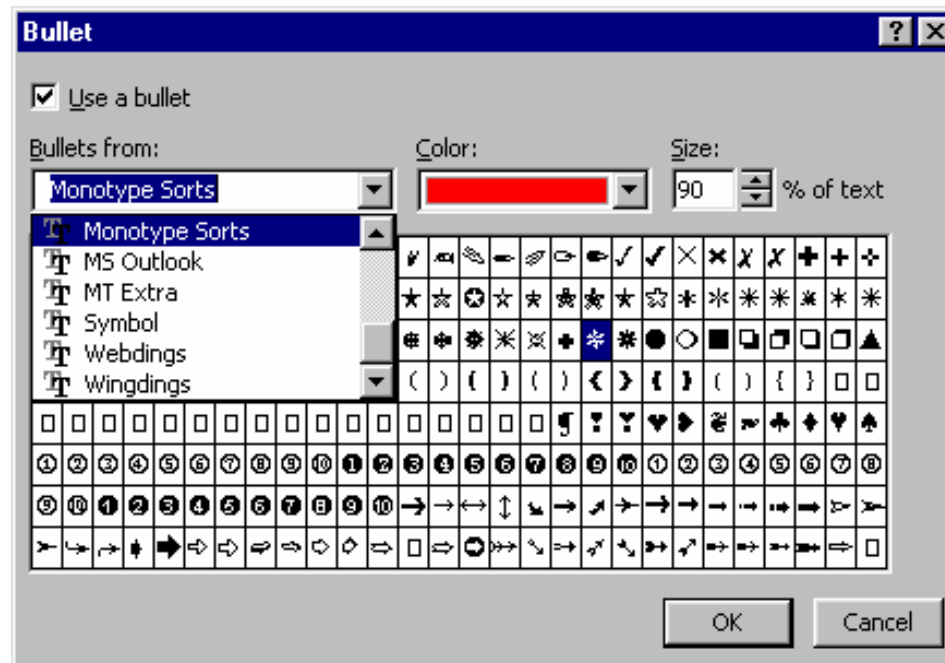
Format Text - Indent and Tabulate

Format Text

- **When you edit a text box, the horizontal ruler may appear like this:**

The upper triangle controls the indentation of the first line of a paragraph

These triangles control the level 2 text

Table mark controller

The bottom triangle controls the indentation of the second and the consequent line of a paragraph

Table mark
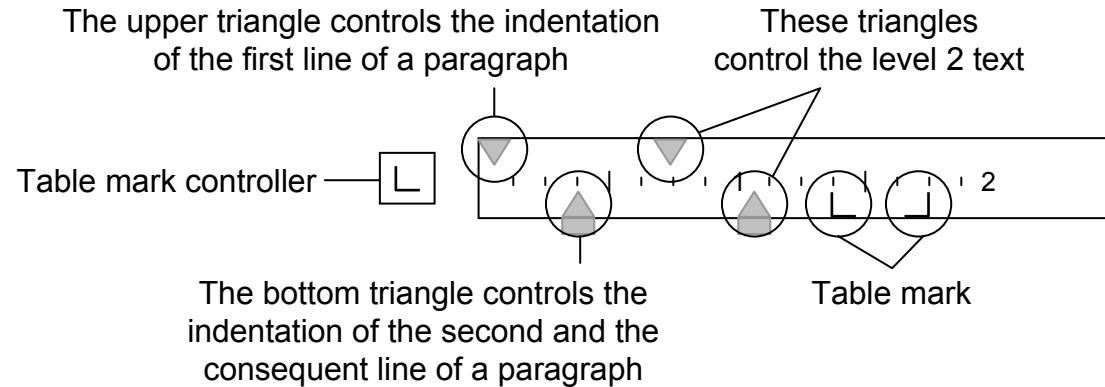
- **The triangles here are always used to adjust bullets, in order to make the bullets left aligned**
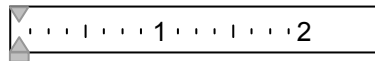
•The bullet without adjustment appears to be like this
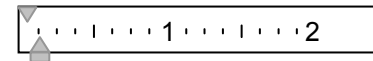
• The adjusted bullet is perfectly left aligned

- **Attention! Do not try to type space to align texts, it doesn't work and wastes time, it also makes it annoyance to modify the texts**

Format Text - Indent and Tabulate (Continued)

Format Text

- **Click on the ruler, you can define as many as you like the table marks on the ruler. The Table Mark Controller indicate the alignment pattern of certain table mark. For example:**

```
' ' ' | ' ' ' 1 ' ' ' | ' ' ' 2
```
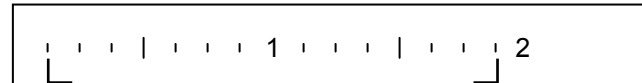
This is   This is
left aligned   right aligned
table mark   table mark

- **The function offers you a way to put table format in text boxes. And again. Don't try to align text by typing space in the text boxes**

Format Lines - Draw a line

- **It's simple. But if you hold the Shift key when you draw a line, it will be a level or perpendicular line, or 15^0, 30^0, 45^0, 60^0, 75^0 from the level**

- **How to draw a broken line like this:**
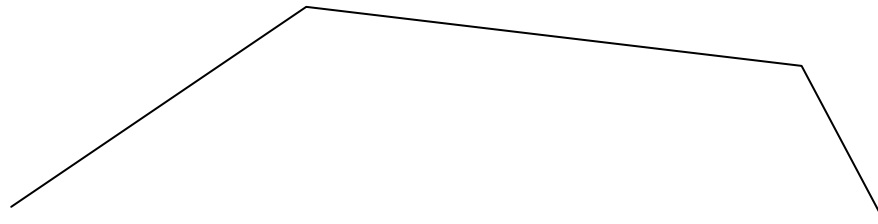
- **Please don't draw three straight lines and connect them together. It's very inefficient and very hard to edit. Use the Freeform function that PowerPoint provide us, you will find it very handy**

Format Objects - Amplify and shrink

Format Objects

- **I believe that everyone have been already know how to reshape objects. But if you want to keep them proportional to the original one, you need to hold the Shift key as you do so. Failing to do it will distort the object, it will turn a circle to an oval, or turn a square to a rectangle. Don't trust eyeball, it isn't accurate**

- **If you want to amplify or shrink complex objects, group them first. Then click the right mouse on the object and select Format Objects. Press the Size table. Under the Scale function, you can specify the exact percentage you want to increase or decrease the object sizes. Press the preview button you can preview the effect before making final decision**

Format Objects - Draw Irregular Object

Format Objects

- **Although the pool of Autoshapes provides us with a wide variety of shapes, sometimes you need shapes that aren't included in the selection. Use the Freeform function you can draw irregular shapes, such as this:**
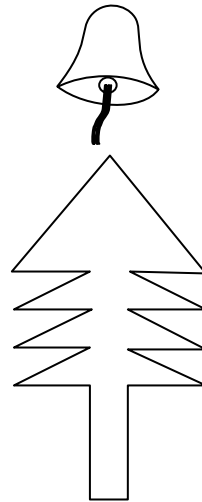
Jingle bell, jingle bell … Hahaha!

Format Objects - Change Shape

Format Objects

- **How to do this job?**

□ △ □ ▱ □ ▱ □ □
□ ▱ □ □ △ □ ○ □ ▱
□ △ ○ ○ □ ▱ □ □
○ □ ○ ▱ □ △ □ □
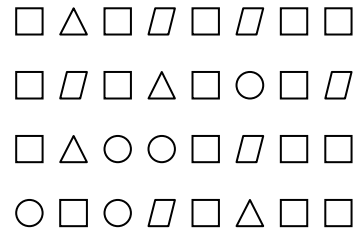
- **Draw a bunch of shapes and realign them? No, this is wasting time. The right way is:**

□ □ □ □ □ □ □
□ □ □ □ □ □ □
□ □ □ □ □ □ □
□ □ □ □ □ □ □
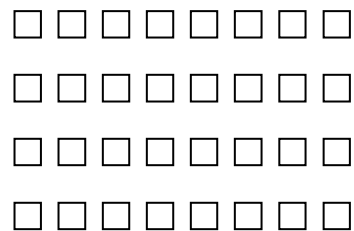
Draw and align a group of shapes of the same shape. This is faster. I will tell you how to do it within 30 seconds

□ △ □ ▱ □ ▱ □ □
□ ▱ □ □ △ □ ○ □ ▱
□ △ ○ ○ □ ▱ □ □
○ □ ○ ▱ □ △ □ □
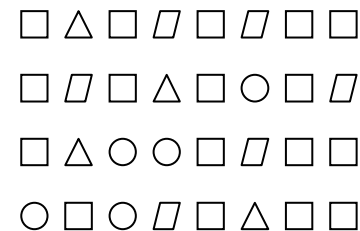
Select the shapes you want to change, use the Change Autoshape function under Draw menu and change the shapes

Exercises

- **Format text**

- **Format lines**

- **Format objects**

Essential Rules

Essential rules to give presentation better effects

- **The Rule for Text**

- **The Rule for Numerical Chart**

  - Column Chart

  - Pie Chart

  - Line Chart

  - Combined Chart

  - Others

- **The Rule for Qualitative Chart**

  - Organization Chart

  - Flow Chart

  - Matrix

  - Others

- **Special Effects**

The Rule for Text - Consistency

Consistency

- **Consistency makes the presentation more professional. As what I said before, we are not making fancy pictures, but communicable presentations. When clients familiar with you report style, they will be easier to follow your thinkings if we maintain the consistency**

- **Consistency includes:**

  - Consistent font type

  - Consistent title and subtitle font size and style, bullet style and alignment

  - Consistent font size and style for charts in the same slide

  - Consistent abbreviation and terminology

  - Consistent case, such as title case, sentence case, upper or lower case, etc.

  - Consistent narration style

Examples of Inconsistency

Consistency

Inconsistent font type, style
and font size

Title

- **Subtitle**

Inconsistent bullet
style and position

Title

↗ **Subtitle**

Examples of Inconsistency

Consistency

Title

. **Subtitle**

Sales Volume of Cars

Inconsistent
case style

Title

Sales volume of trucks

Subtitle
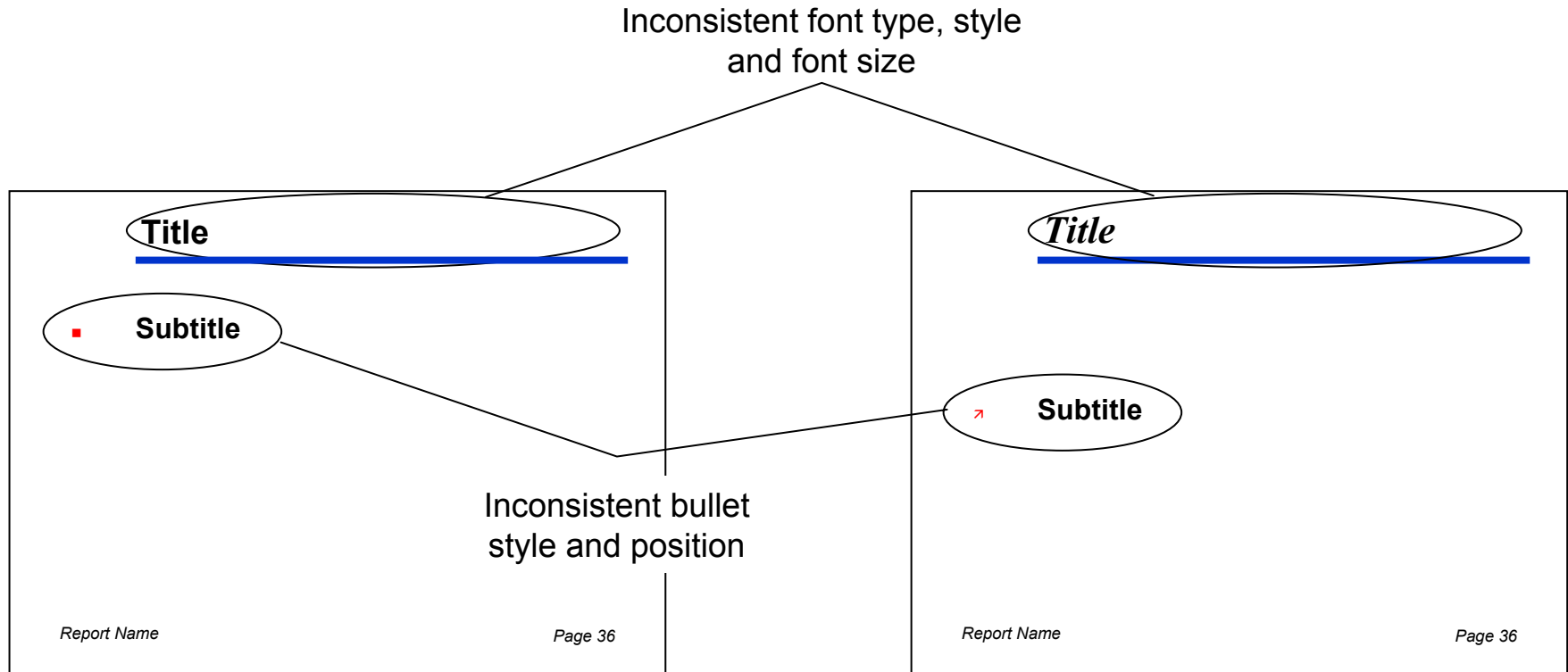
Inconsistent
narration style
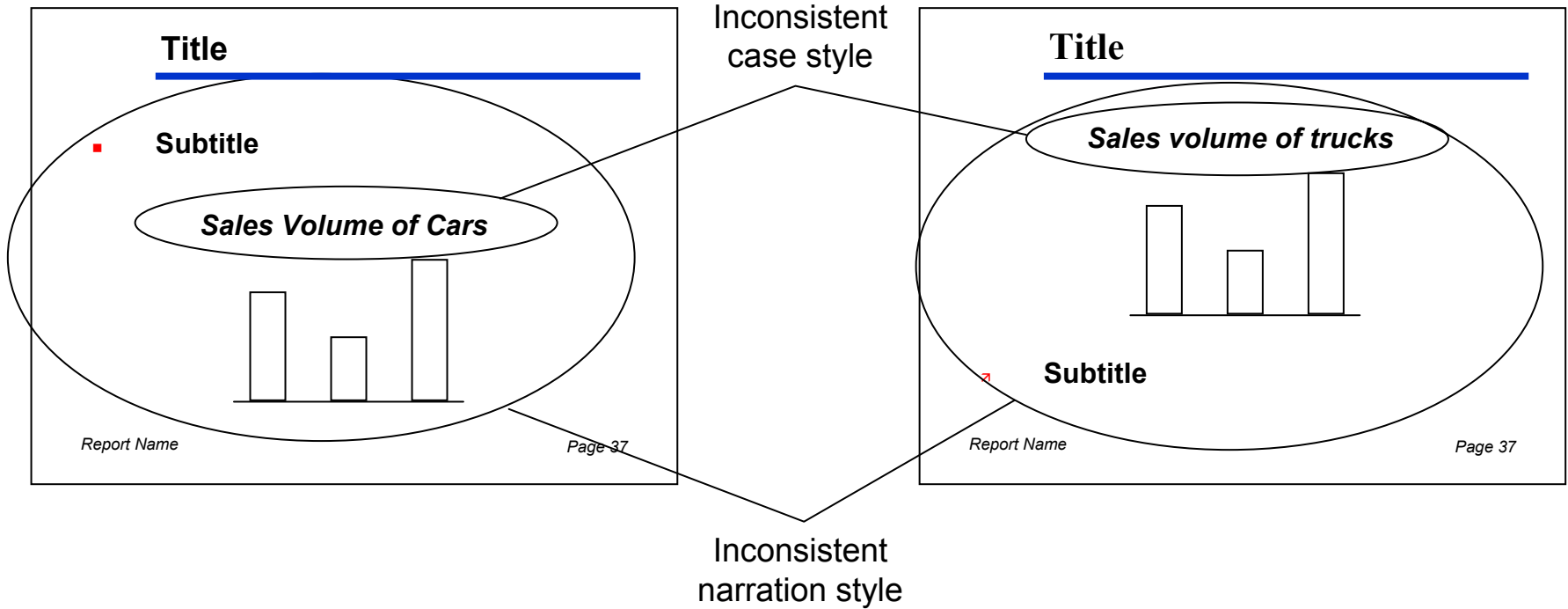
The Rule for Text - Font Size, Italic and Bold

Font

- **Text is plain in nature, that why I love to use different font size, italic and bold style to differentiate texts which serve different purpose**

- **The sizes of fonts are determined by the importance of the texts. Slide titles are assigned with the largest font size. Normally, no fonts in the slide main body can be bigger than the titles. According to my experience, 18-20 pl. is most suitable title font size. The sizes of subtitles and chart titles are slightly smaller than that of the titles, and they tend to be more flexible. We can shrink the size freely to avoid space constraints. Other texts in slides have the lightest weight. In a printed report, try your best to keep the font bigger than 10 pl., because font sizes smaller than that are uncomfortable to eyes; in a screen presentation, you'd better use 14 or higher pl. fonts**

- **The usage of italic and bold is very flexible. Be creative to use them with any important issue, or differentiate two text groups**

The Rule for Text - Font Size, Italic and Bold (Example)

Font

Title

- **Subtitle**

Sales Volume of Cars

Chart title:
bold, italic

Total Volume:
bold

1,000

1,100

1,300

| 45% |
| 20% |
| 45% |

Luxury

Category:
bold, italic

Percentage:
italic

| 60% |
| 25% |
| 25% |

Normal

| 20% |
| 30% |
| 30% |

Economy
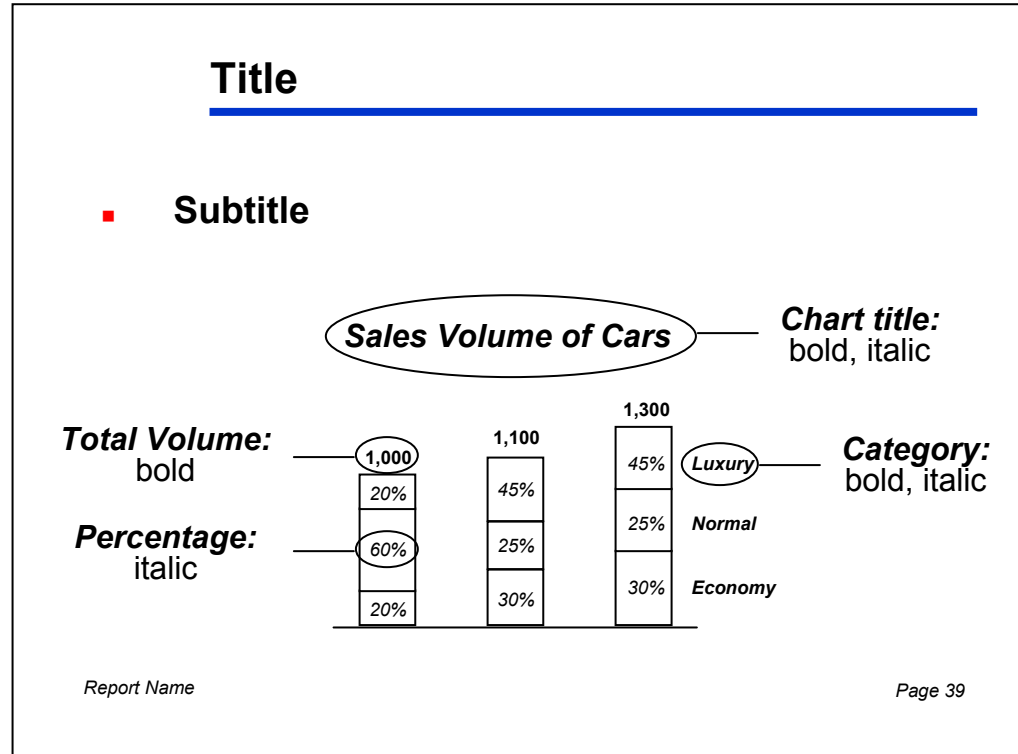
The Rule for Text - Bullets

Bullets

- **Unlike word documents, PowerPoint presentations use short and concise sentences to communicate central ideas. So putting them in bullet points is recommended**

- **Don't apply the same bullet type to all text in a slide. Subtitle and other less important issues should be different**

The Rule for Text - Widow

Widow

- **Widow means that only one, always short word in the last line of a paragraph**

- **We must try to avoid widow words from appearing, especially in more than one paragraph. Because it makes the paragraph unbalanced. Widow can be easily diminished by adjusting the text box, moving more words to the last line**

The Rule for Numerical Chart - Column Chart

Column Chart

- **Column chart is most often used chart type in presentation. It can be used to illustrate the numeric disparity among different items, such as different brands, models, customers, as well as timely trend. When used for a time period less than 5, it is better than line chart. The common rules for column chart are:**

  - Usually vertical scale labels are taken off from the column chart, by doing it we could use the saved space to make the chart bigger. Column values can be marked above each column. And I don't think we want our clients using ruler to measure values

  - Try to avoid using gridline, it makes the chart complicated and distracting

  - Use the same scale when you compare different column charts

  - Our reports will be printed in black and white, so fill the column white to make the page neat. Colors are given to the items which need emphasis, or used for different data groups

  - Column width must be kept same in different charts in one slide. Label fonts must be consistent too

  - Charts should be well aligned in one slide, that is, aligned vertical or horizontal axis, aligned labels, and aligned chart titles

The Rule for Numerical Chart - Column Chart (Example)

Column Chart

- **Could you tell me the places need improvement?**

Sales by Type
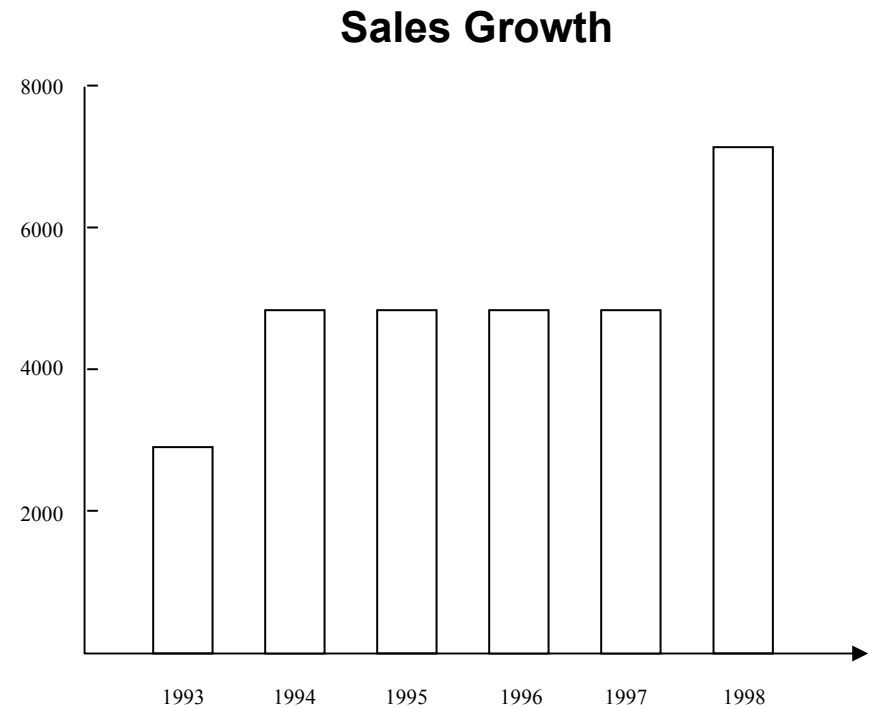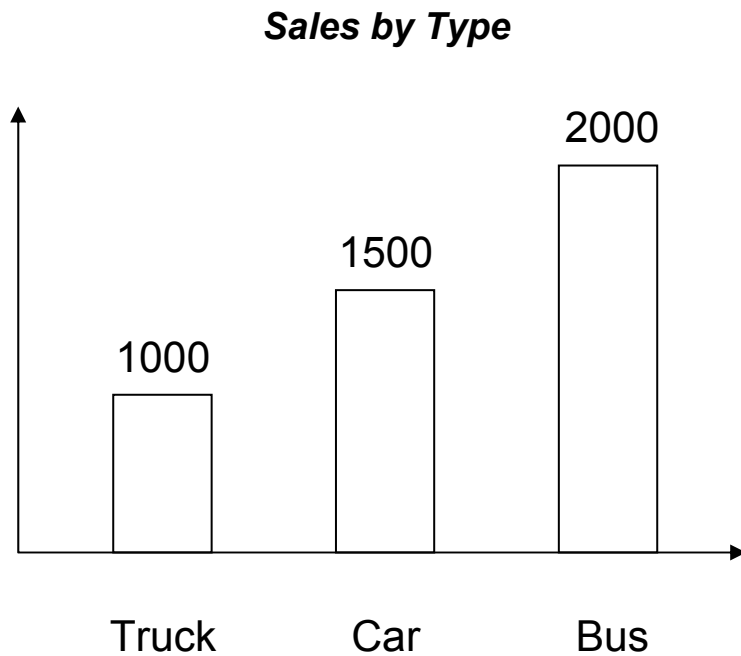
Sales Growth

The Rule for Numerical Chart - Column Chart (Example)

Column Chart

- **Improved slide**

Sales by Type

Truck: 1000
Car: 1500
Bus: 2000

Sales Growth

1993: 3000
1994: 5000
1995: 5000
1996: 5000
1997: 5000
1998: 7000
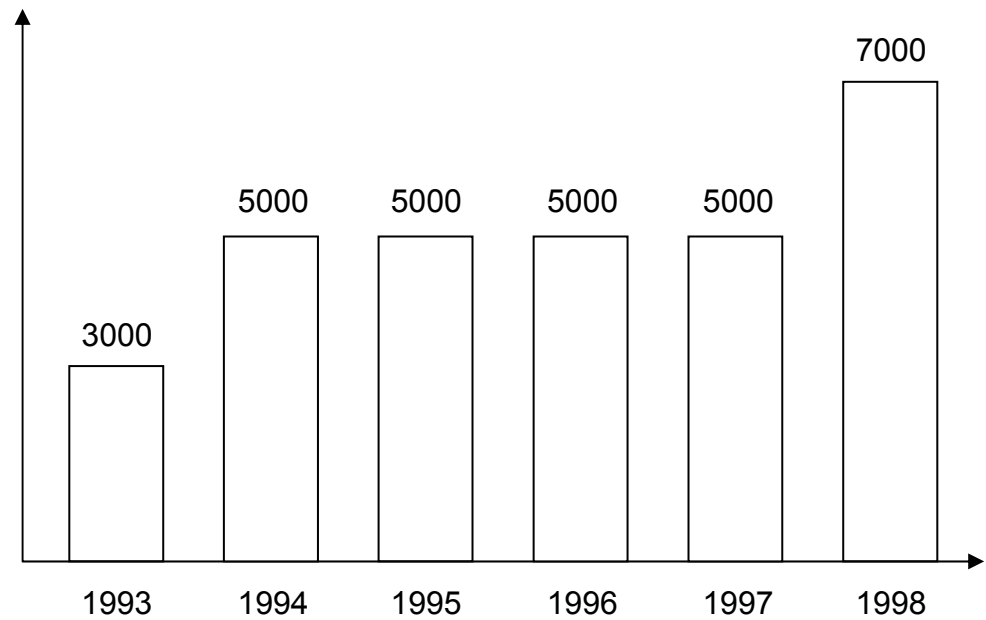
The Rule for Numerical Chart - Column Chart (Charts Imported from Excel)

Column Chart

- **Excel is a good tool to draw a numerical chart, and faster and more efficient than to manually draw the chart in PowerPoint. But visually the default features of Excel charts look unsatisfying. So we need to modify them to suit our standard. Please take look at a unpolished chart and a improved one:**
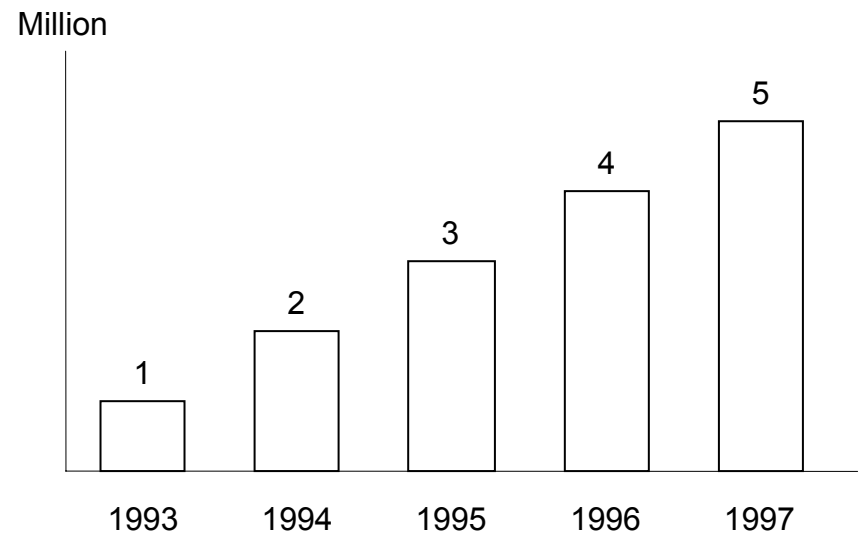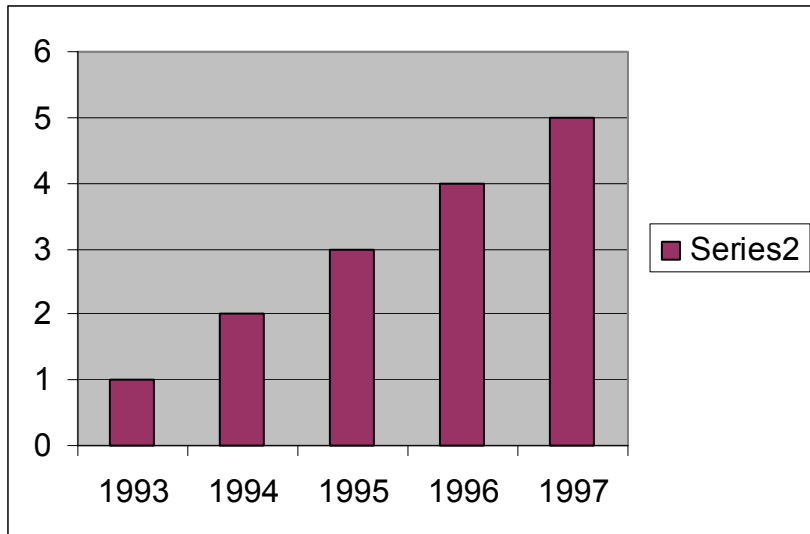
The Rule for Numerical Chart - Column Chart (Charts Imported from Excel)

Column Chart

- **Improved areas:**

  - No color in chart area

  - Since it is a single group data chart, I took out the legend

  - No gridline

  - No vertical axis labels. I put the labels above the column

  - Expanded column width, making column width bigger than gap between columns

  - No horizontal tick marks. In column charts, columns and their labels are sufficient to demonstrate values. Tick marks are used in other kind of charts, and should be put inside the axis

  - Change the default color

  - No borders

- **And, you don't have to modify the charts in PowerPoint. Excel is powerful enough to accomplish all the tasks. I will show you in the course**

The Rule for Numerical Chart - Column Chart (Continued)

Column Chart

- **Multi-category charts put different data groups in one chart, making it better for comparison**
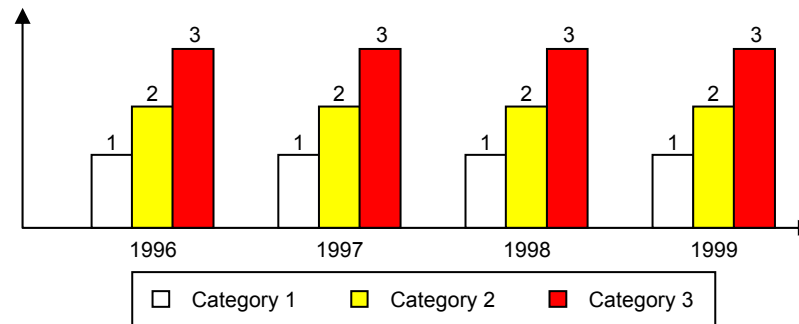
- **Rules for multi-category charts:**

  - Avoid put more than three categories on the chart

  - Use colors to differentiate categories, and use legend to illustrate them. Make colors distinguishable on black and white copy. The category needs emphasis is given the darkest color. Otherwise, make the sequence from light to dark

  - Make column gap bigger than a single column width, and smaller than combined width

  - Legend could be put below or beside the chart, use the same font as the chart font

The Rule for Numerical Chart - Column Chart (Continued)

Column Chart

- **Column chart could be modified to express percentage.**
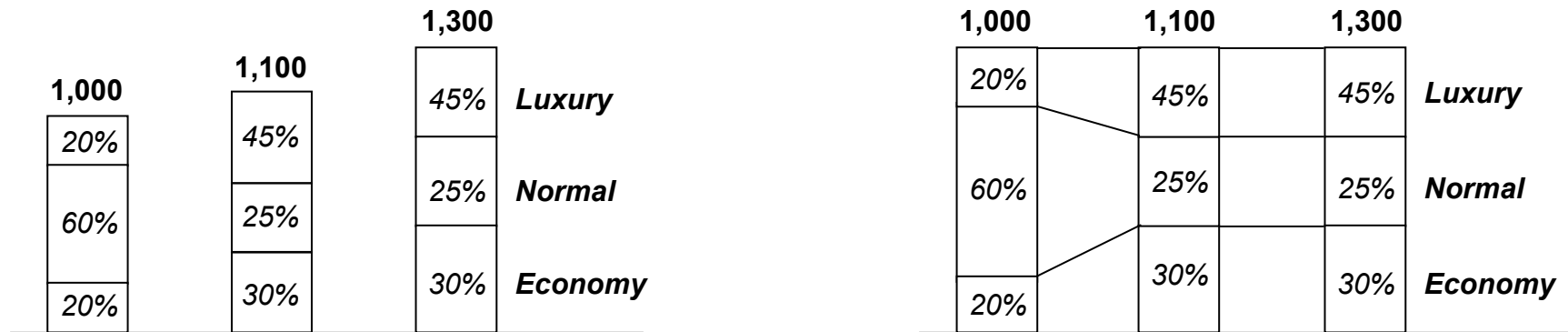
- **These two chart types both represent the percentage of different categories. The right side on more stresses on percentage than total values. Rules:**

  - 3 or 4 categories are enough, no more

  - Use labels beside the last column to demonstrate different categories rather than legend. Too many colors will make the charts hard to read. Yet you can fill one category with color to emphasis it

  - The font of total values and percentage must be different

The Rule for Numerical Chart - Pie Chart

Pie Chart

- **Obviously, the main purpose of pie charts is to communicate percentage. So they are often used to express share, such as market share, category share…**

- **The rules for pie chart:**

  - It is better to keep the items in a chart below 5, and no more than 8. Too many items are meaningless in most cases. To maintain the item number, we could combine small shares together and put them as others. In some extreme cases, such as illustrating a very fragmented market, you could put as many items as you like in the chart. But don't use it too often

  - It isn't a good way to fill items with different color and mark them by legend. In a black and white report, it's undistinguishable. Fill white color in the chart and mark the items with labels beside all pieces

  - If you want to emphasis one piece, fill it color or pull it out. You could also use visual signs such as arrow to stress it

  - Arrange the items in increasing or decreasing order if possible

  - If space limited, put the label inside the item pieces if possible

The Rule for Numerical Chart - Pie Chart (Continued)

Pie Chart

- **If you want, you can put the values in the item labels, and a total value below the pie chart**

Item 4
10%
100

Item 3
20%
200

Item 1
40%
400

Item 2
30%
300
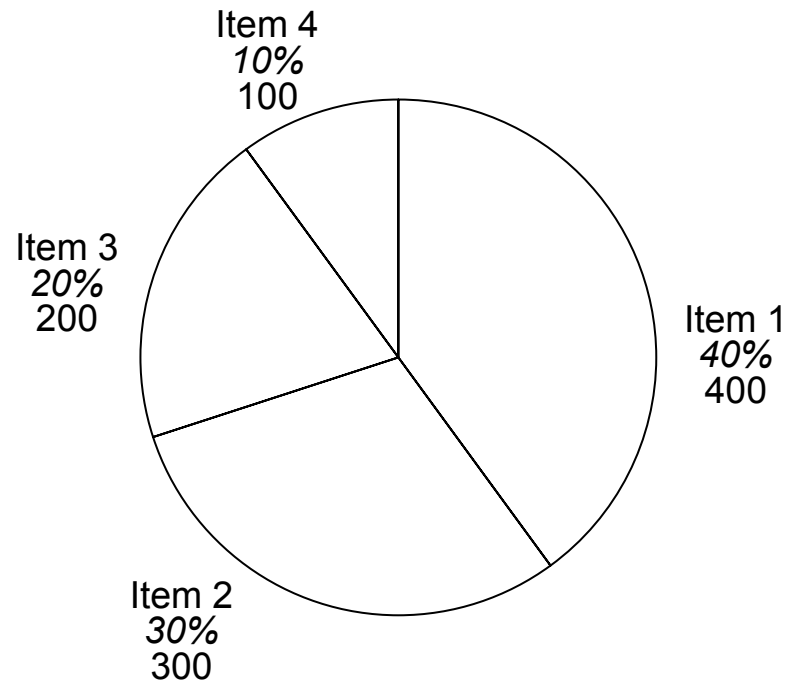
Total Value: 1000

The Rule for Numerical Chart - Line Chart

Pie Chart

- **Line chart is always used to illustrate trends, especially when time period is bigger than 5. It is also preferred in Pareto chart**

- **Rules for line chart:**

    - Use different kinds of lines (Solid, dotted, dashed) for different lines

    - Use the boldest line for the most significant trend

    - Please control the number of lines less than 3 or 4

    - Use legend or arrows to specify which line stand for

    - Use the same scale when you compare trends across several charts

    - Usually vertical axis scale labels are marked on the line charts and include zero value

    - When value is as important as trend, put dots on the line and label them

    - Don't use the default format in Excel, try to improve it

The Rule for Numerical Chart - Combined Chart

Combined Chart

- **In circumstance that simple chart can't fully express your idea, please consider combined chart. Please compare two charts below:**
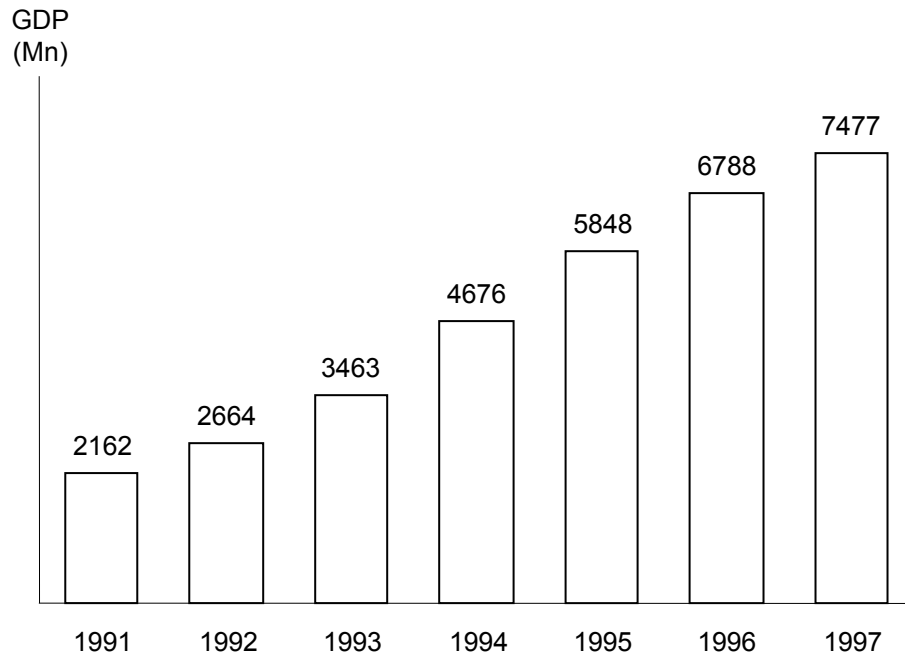
What this chart imply? China's GDP is growing. No one doubt it. Is this what you want your client to perceive?
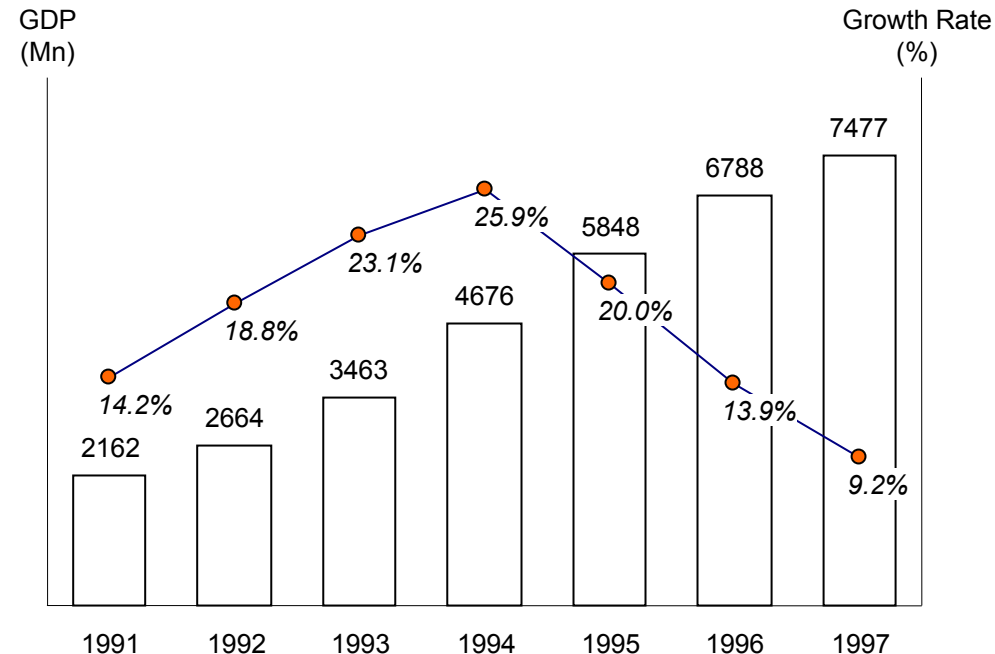
What this chart imply? China's GDP is growing, but the growth pace is slowing down. Yes, this is what I try to communicate.

The Rule for Numerical Chart - Combined Chart (Example)

Combined Chart

- **You can use combined chart to elaborate one component of the chart**
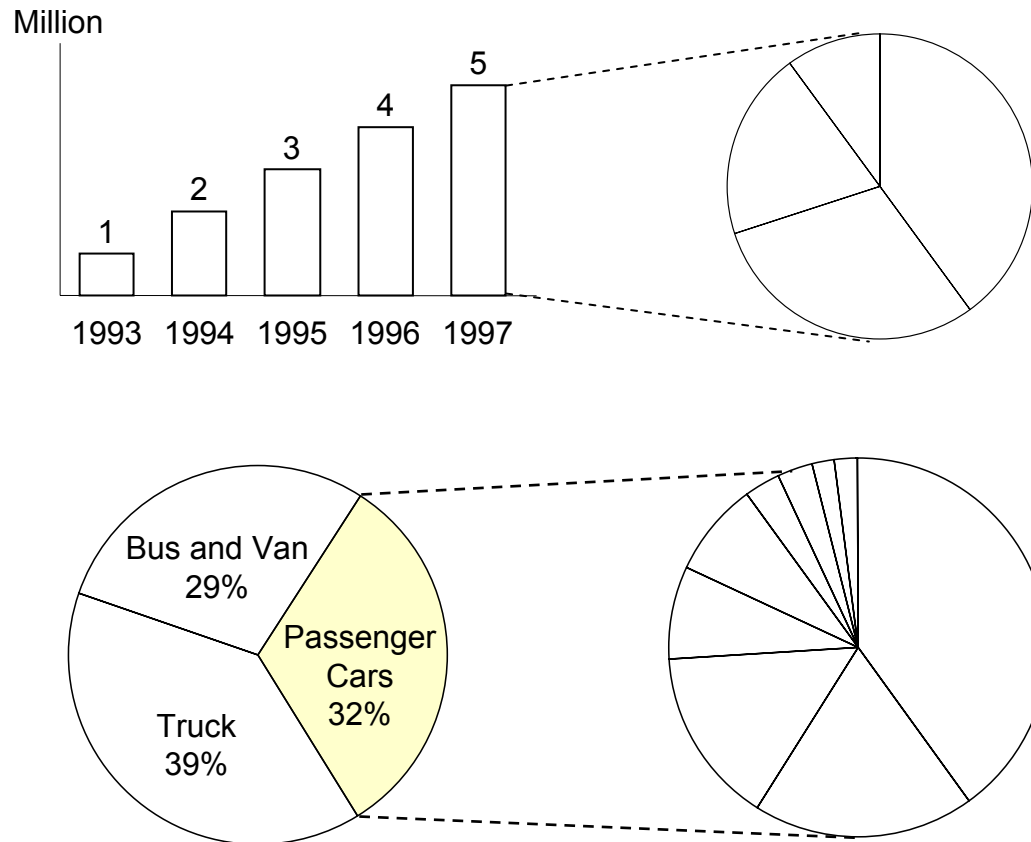
The Rule for Numerical Chart - Others

Negative Value

- **If you encounter negative value, here is an example for you reference**

- **X and Y axis across at the leftmost the lowermost position of the chart. Draw a zero value line. Columns of negative value extrude downward**
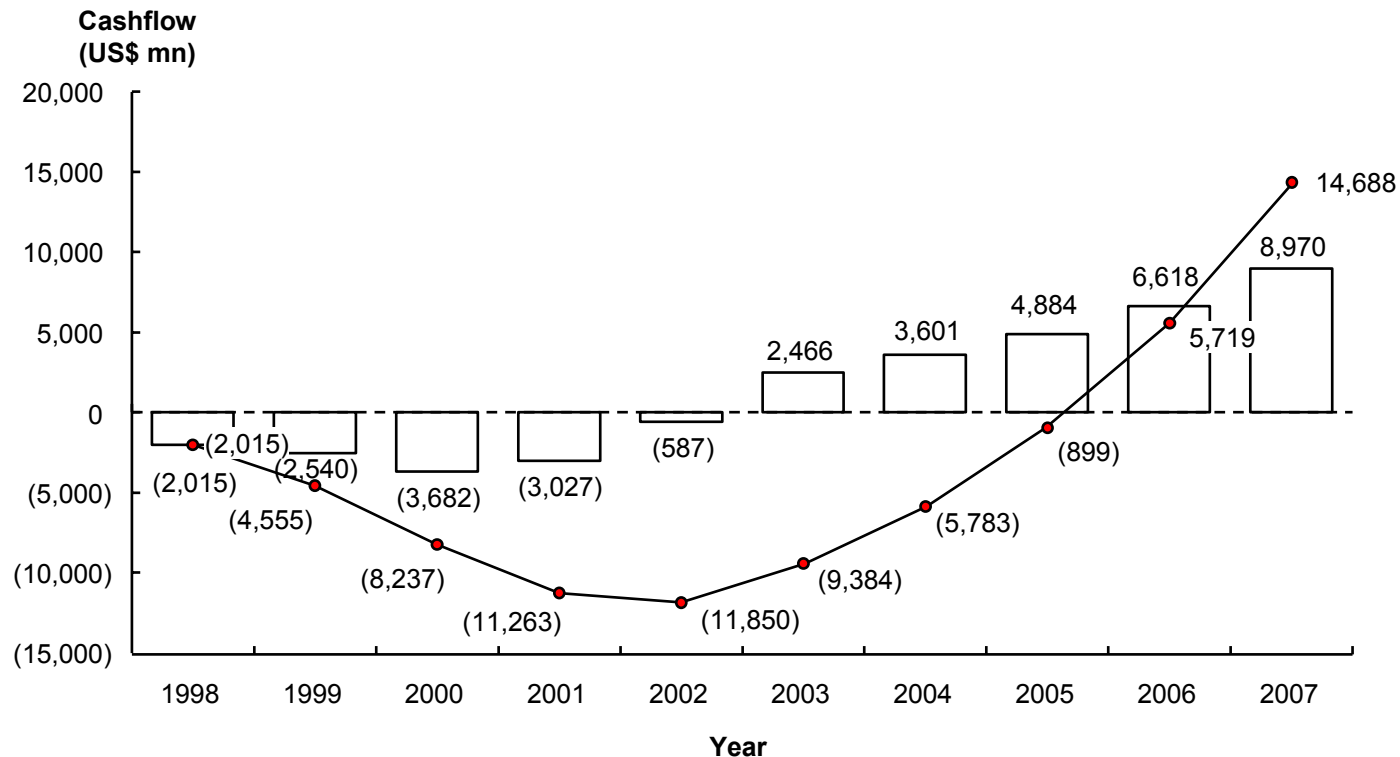
The Rule for Numerical Chart - Others

Area Chart

- **Area chart indicate the value as well as the portion of each category. In this type of chart, gridline and Y-Axis label are encouraged**
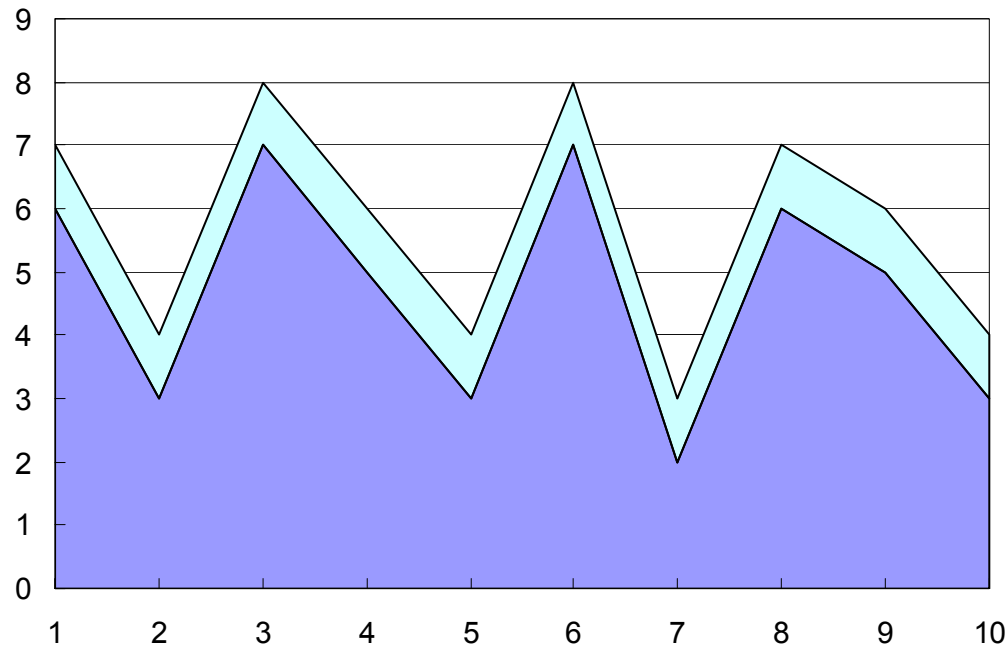
The Rule for Numerical Chart - Others

Gender Chart

- **The gender chart puts two group of data at both side of Y-Axis, making it better for comparison. Gender chart is not only used for gender comparison, it is suitable for any two groups having Yin-Yang feature. The gender can be expressed in line format, or in bar format**

China
1990 Age

80	
70	
60	
50	
40	
30	
20	
10	
0	

2.5% 2% 1.5% 1% 0.5% 0% 0.5% 1% 1.5% 2% 2.5%
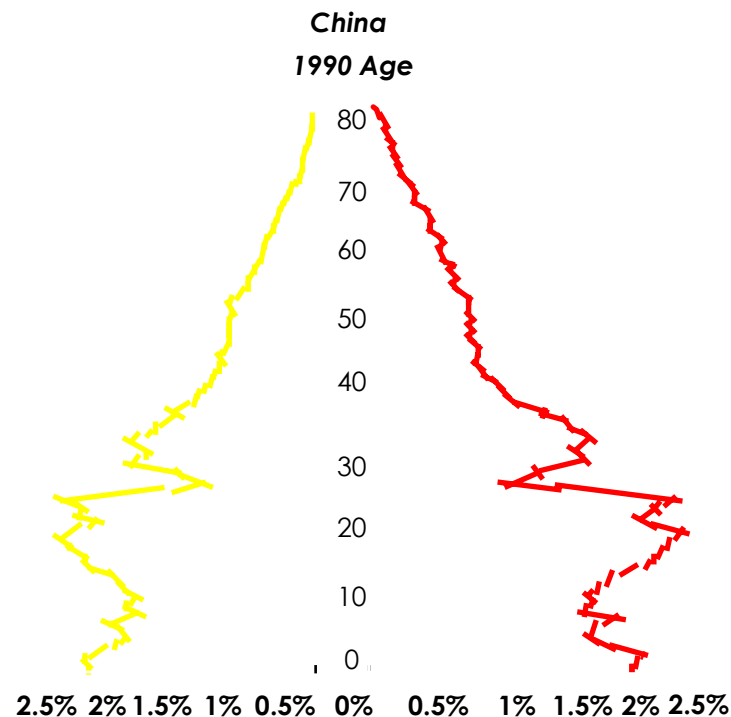
The Rule for Numerical Chart - Others

Bar Chart

- **A bar chart is like a flipped column chart. Sometimes if you want put two charts on one slide, and there are two many items on the charts, you could think of using bar chart. And it is more convenient to put some noting words or percentage in the bars than to put them in columns**
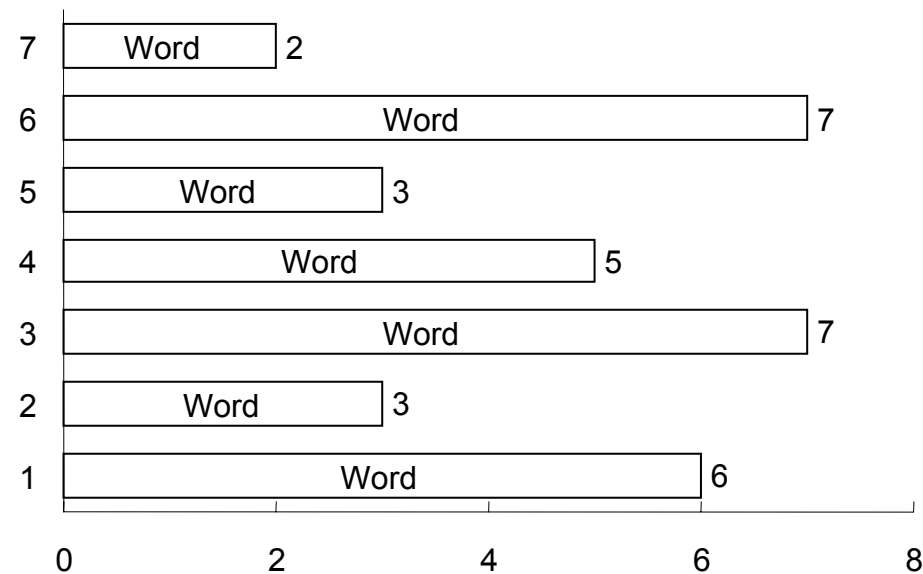
The Rule for Numerical Chart - Others

Dot Chart

- **Because dot chart has two dimensions, in statistics, it could be used to project the relationship between two factors. You could put a linear line to show the relationship**
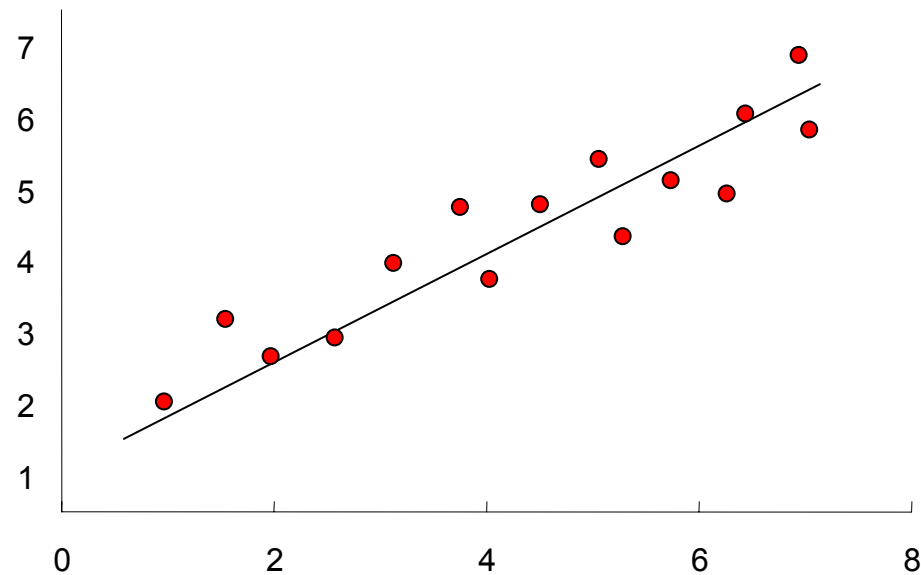
The Rule for Numerical Chart - Others

Bubble Chart

- **Bubble chart shows the position of each component. If you want to emphasize one component, fill it color. And note what they represent for**
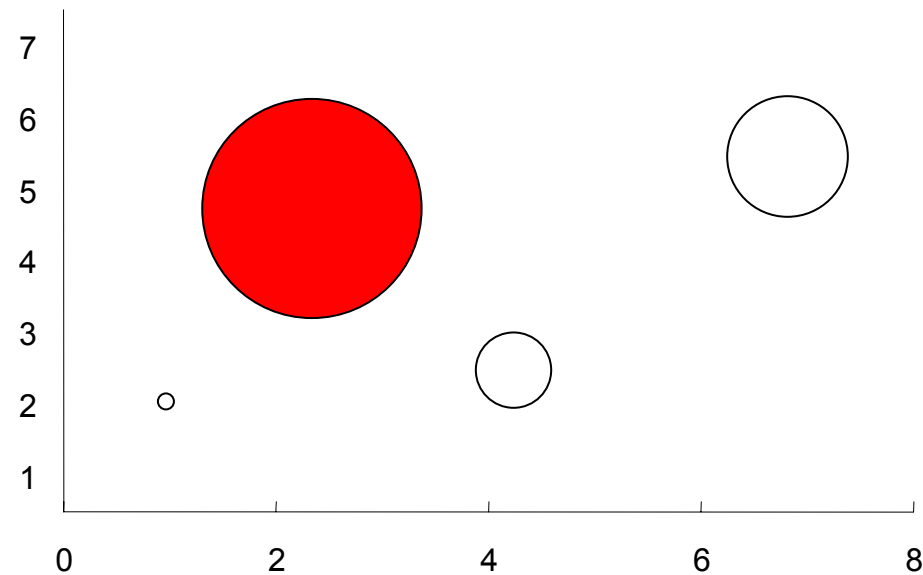
The Rule for Qualitative Chart

- **Qualitative charts tend to be more diversified. The purpose of qualitative charts in only one - to make things easier to be understood**

- **In the following pages I would introduce some common types of charts. But remember, there are no fixing formats, be creative**

The Rule for Qualitative Chart - Organization Chart

Organization Chart

- **I believe everybody here understands the usage of organization chart. So I will directly go to the rules for organization chart:**

  - Make different layers in the organization distinguishable. Try to horizontally or vertically align the objects of the same layer

  - Group units reporting to the same activities together

  - Use perpendicular or level lines instead of diagonal lines

  - Sometimes use ⌐⌐ lines to avoid confusion caused by cross lines

  - Keep the boxes in the same layers of same height and width if possible, sometimes you could expand the width if too many texts in the boxes

  - Use different kinds of lines to indicate different relationship

  - If the chart becomes too complicate, draw an overview chart and separate it to small parts in the following pages to explain details respectively

  - Texts should be better center aligned. And center the lines run through boxes

  - Maintain same gaps between layers

The Rule for Qualitative Chart - Organization Chart (Example)

Organization Chart

- **This is an extreme case. But sometimes one may make certain mistakes in the left chart. General principle: the clearer the better. We don't want our clients to probe in the labyrinth to unravel the mystery**
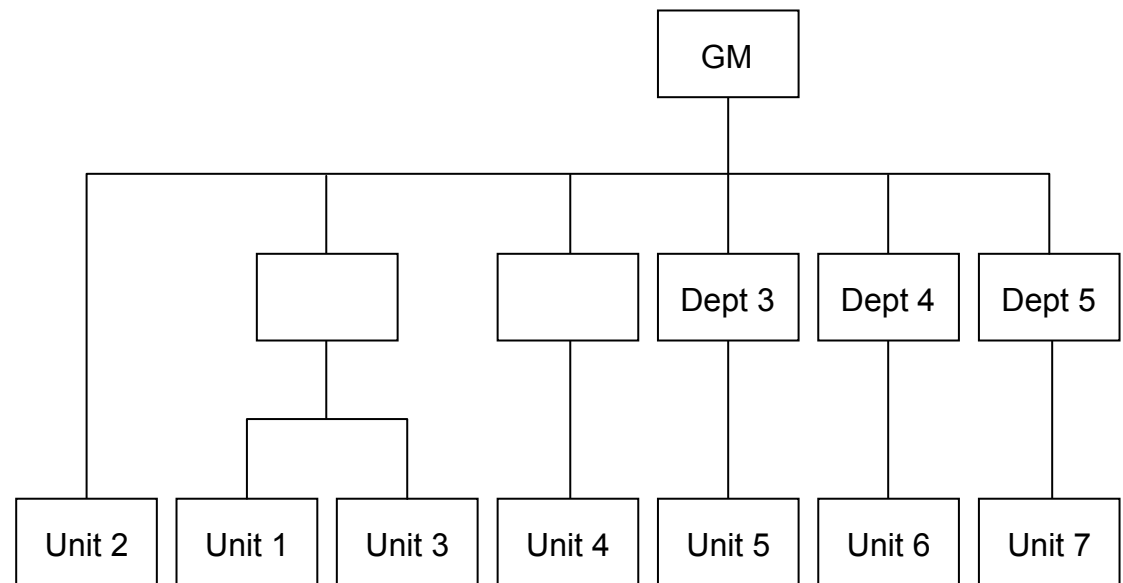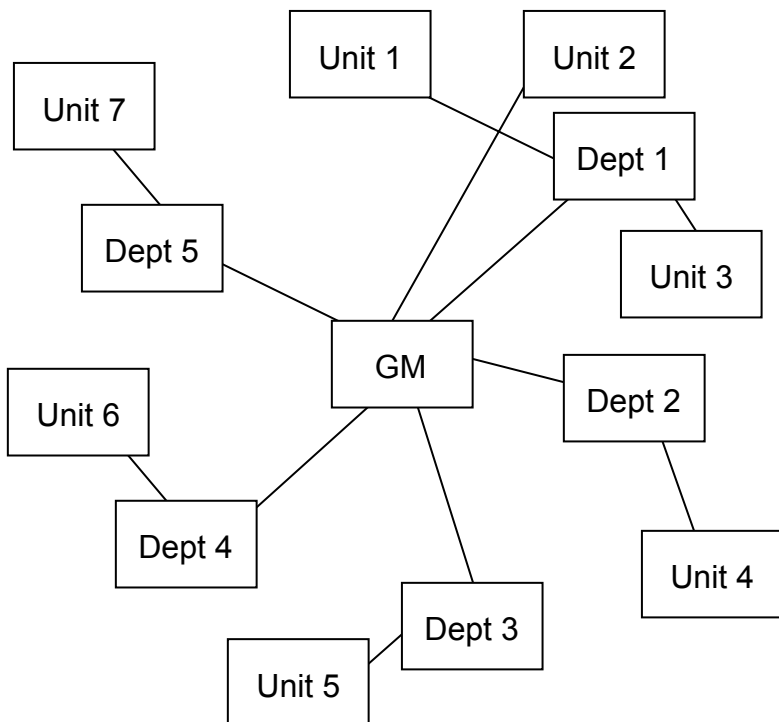
The Rule for Qualitative Chart - Organization Chart (Example)

Organization Chart

- **In circumstance when it is hard to align boxes in the same layer, you could arrange them like this**

```
                              ┌──────┐
                              │  GM  │
                              └──┬───┘
 ┌─────┬─────┬─────┬─────┬──────┼─────┬─────┬─────┬─────┐
┌────┐┌────┐┌────┐┌────┐┌────┐┌────┐┌────┐┌────┐┌────┐
│Dept││Dept││Dept││Dept││Dept││Dept││Dept││Dept││Dept│
│ 1  ││ 2  ││ 3  ││ 4  ││ 5  ││ 6  ││ 7  ││ 8  ││ 9  │
└─┬──┘└─┬──┘└─┬──┘└─┬──┘└─┬──┘└─┬──┘└─┬──┘└─┬──┘└────┘
 ┌┴───┐┌┴───┐┌┴───┐┌┴───┐┌┴───┐┌┴───┐┌┴───┐┌┴───┐
 │Dept││Dept││Dept││Dept││Dept││Dept││Dept││Dept│
 │ 10 ││ 11 ││ 12 ││ 13 ││ 14 ││ 15 ││ 16 ││ 17 │
 └────┘└────┘└────┘└────┘└────┘└────┘└────┘└────┘
```
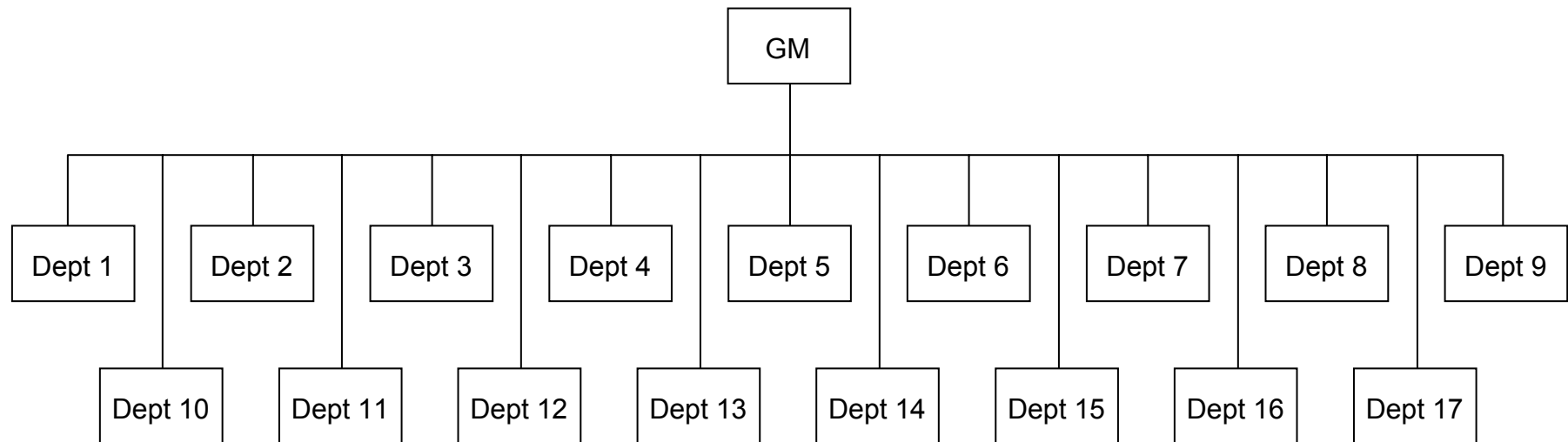
The Rule for Qualitative Chart - Organization Chart (Text in the Box)

Organization Chart

- **There are two ways to put texts in boxes - type the texts in the boxes, and put text boxes in the boxes. Someone prefers the former one, but I prefer the later one because it is easier to adjust texts in the boxes without changing the box shape**

| Senior HR Manager | ←→ | Senior HR Manager | | Senior HR Manager | ←→ | Senior HR Manager |

Method 1   **Method 2**
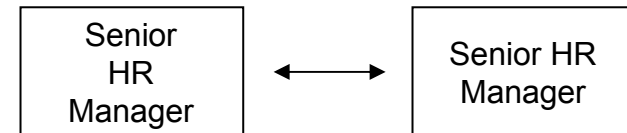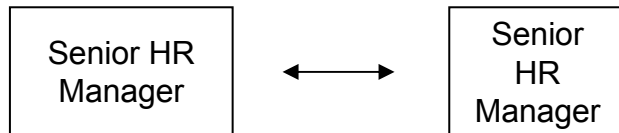
- **Someone like fill the boxes with none, but I prefer to fill them white**

Method 1

| Senior HR Manager | Senior HR Manager | Senior HR Manager | Senior HR Manager | Senior HR Manager |

| If the box covers the texts | Bring the texts to front | If the line runs across the border | Send the line to back and it will be perfect | You could easily adjust the position of the box without changing the length of the line |

Method 2

| Senior HR Manager | Senior HR Manager | Senior HR Manager | Senior HR Manager |

| You needn't worry that texts are blocked | You must ensure that line sharply touch the border | If you move the box, you must readjust the line too | |

The Rule for Qualitative Chart - Flow Chart

Flow Chart

- **Flow charts are often used for distribution and process map**

Distribution Map
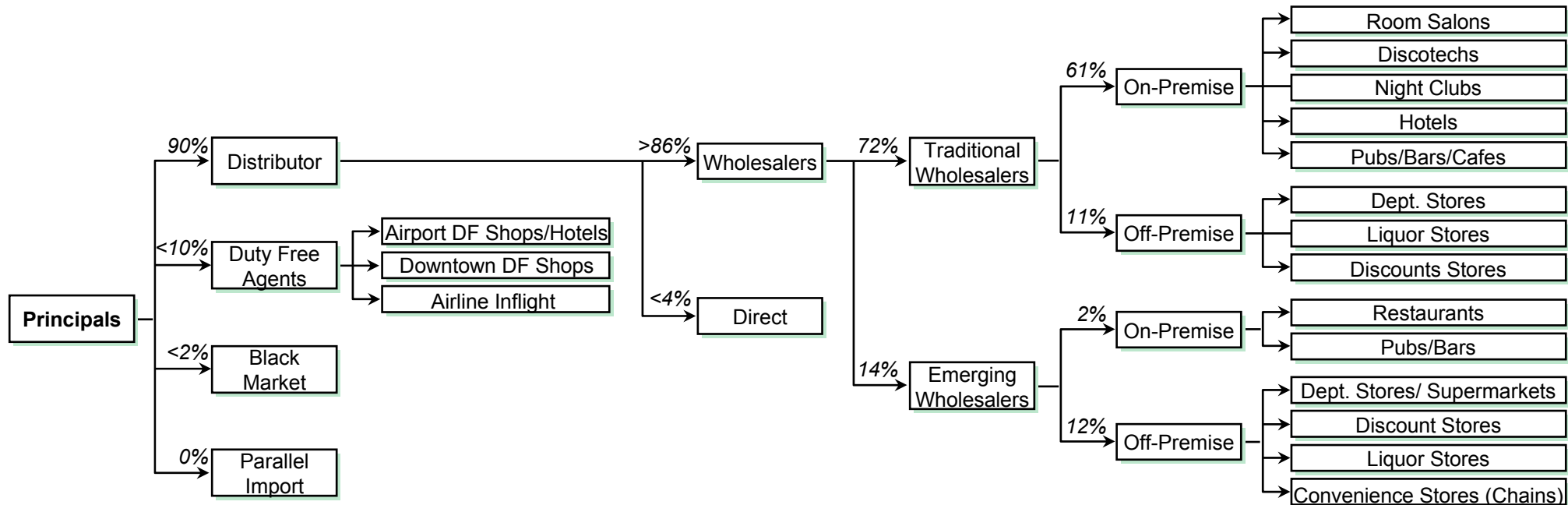
The Rule for Qualitative Chart - Flow Chart (Continued)

Flow Chart

Process Map

Asian Whisky Opportunity Assessment
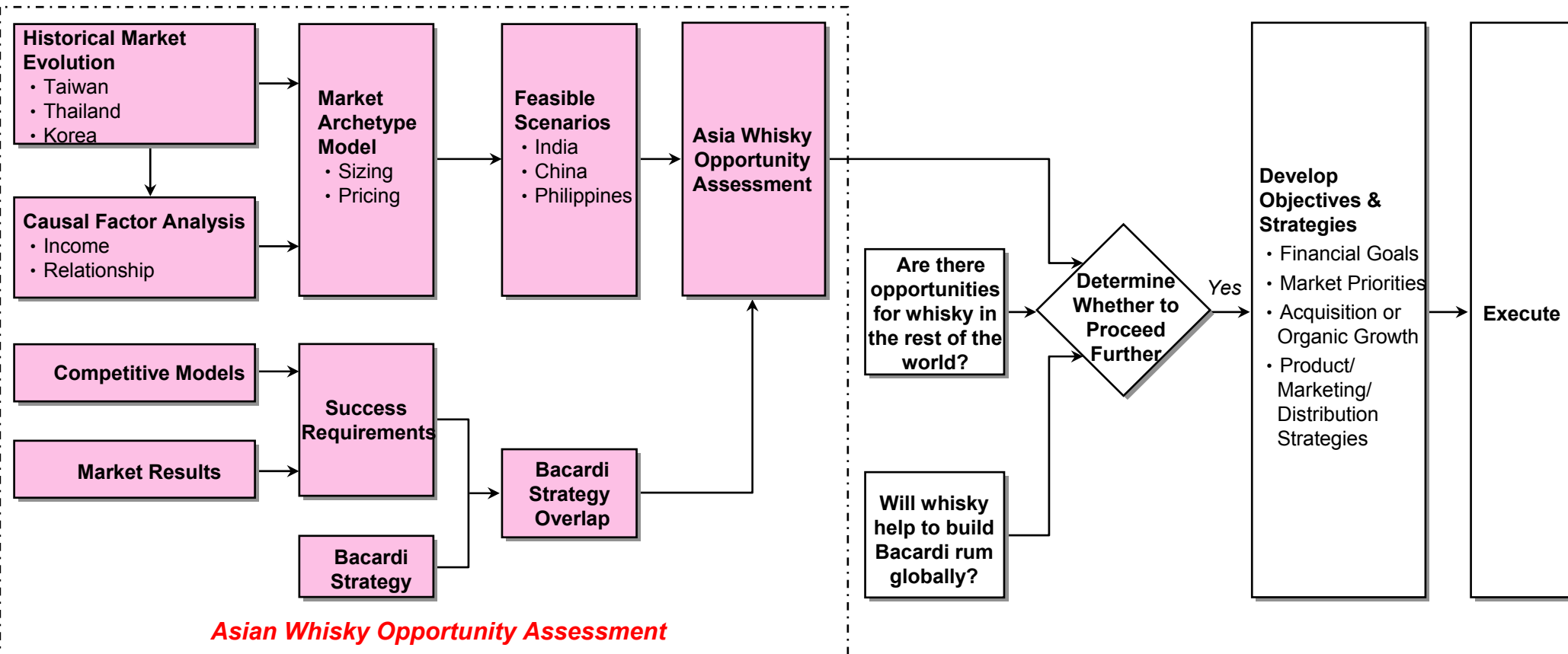
The Rule for Qualitative Chart - Flow Chart (Continued)

Flow Chart

- **Rules for flow chart:**

  - Use arrows to show the flow direction

  - Use different kinds of lines to indicate different type of flow

  - Use different box shapes to demonstrate different function

  - You can put percentage on the arrows to tell the distribution channel split

  - Some rules for organization chart are also applicable to flow chart, such as line format, the height and width of the boxes, etc. And make the charts easy to read

The Rule for Qualitative Chart - Matrix

Matrix

- **Matrix chart is a powerful tool for segmentation. It isn't limited in 2x2 type, you could freely apply 2x3, 3x3… formats. Make sure the axes are labeled clearly so that the reader immediately perceives "best" or "highest" as either upper left or upper right. Fill focused segment color if needed**
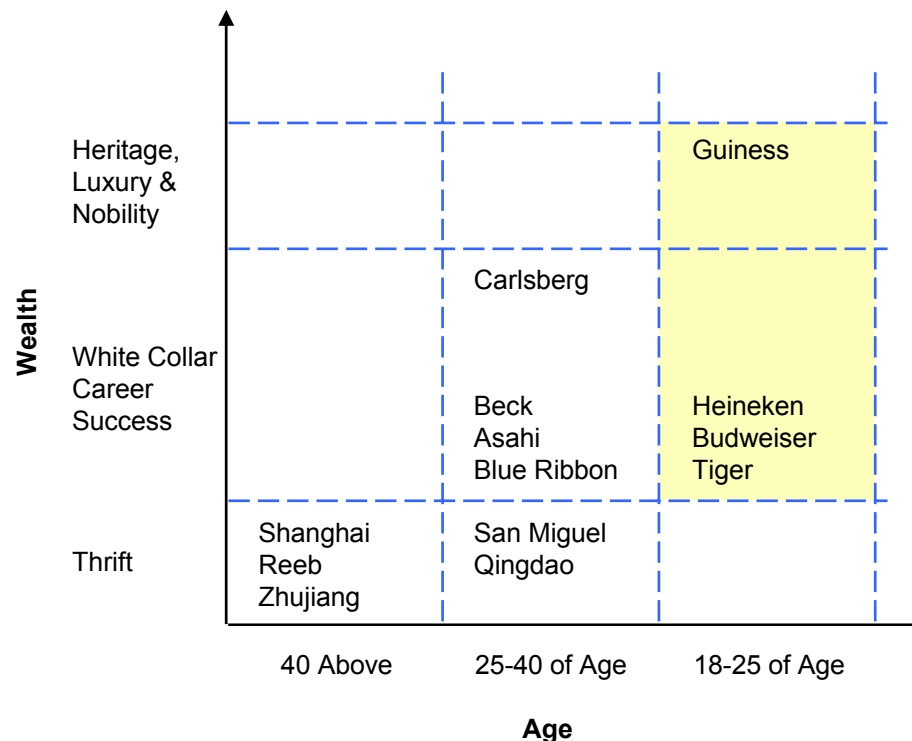
The Rule for Qualitative Chart - Others

Evolutionary Chart

■ **Evolutionary charts are best applied to describe activities in different time period**

	Early 1990's	Mid 1990's	Late 1990's
Cultural/ Political/ Socio- Economic	• Government strongly supported 'Frugality Campaign' directed against imports and luxury goods, including whisky • Recession hit the market, causing big companies to cut back entertainment expenditures • EC pressured Korea to put an end to discriminatory duties on imported alcohol	• Korean economy is steadily slowing down with productivity and product quality falling behind its industrial rivals like HK and Singapore • GDP increased 11%	
Regulatory Status	• Continued reduction of import duties • Media ads allowed for products with 17% or less alcohol content • KNTC still controlled the BIS channel	• Big 3's agreement dissolved • Mafia connection started to loose up • Market became more consumer pull driven • Non-traditional wholesalers are sharing volume in distribution but mainly in the off-premise outlets • On-premise outlets take up >80% of whisky sales volume • Whisky sales in the off-premise increased due to modern trade development • Import tariff continued to reduce	
Category Status	• Soju, Takju, Admix whisky/brandy, Korean whisky, beer • BIK produced Scotch whisky dominated the market • BIS's growth remained insignificant	• Government announces 'pOwn companyllel imports' are encouraged • Current import tariff structure favors BIS vs BIK	• Import tariff is expected to reduce due to pressure from WTO and EU

The Rule for Qualitative Chart - Others

Table Chart

- **Table charts are visualized texts. They use short words or numbers to let reader immediately perceive the key ideas**

	Johnnie Walker Black	Chivas Regal	Johnnie Walker Red	Spey Royal
Principal	• UD	• Seagram	• UD	• IDV
Distributor	• Riche Monde	• Seagram	• Riche Monde	• Master Brands
Volume (cases 1996)	• Growing, 650,000	• Declining, 115,000	• Declining, 248,000	• Growing, 325,000
Segment Share (%)	• Growing, 73%	• Declining, 24%	• Declining, 68%	• Growing, 63%
Retail Price	• 650 Baht/75cl 25 US$/75cl	• 690 Baht/75cl 27 US$/75cl	• 435 Baht/75cl 17 US$/75cl	• 210 Baht/70cl 8 US$/75cl
A&P Model				
ATL	• Heavy ATL investment, $6.23mn	• Relatively lower ATL, $1.86mn	• Heavy ATL only, $3.65mn	• ATL investment only, $2.04mn
On-Premise	• Dominates on-premise, $3.65mn	• Not active, $0.23mn	• Not active, 0	• No on-premise promotion
Off-Premise	• Image building promotion, $0.53mn	• Heavy investment, $1.00mn		
Distribution System	• Import whisky channel	• Import whisky channel	• Import whisky channel	• Import whisky channel, combined with local wholesale system

The Rule for Qualitative Chart - Others

Moon Chart

- **Moon charts are good visual tools for rating. Sometimes you can put explanatory words beside each item to give more details**

Whisky Channel Focus	Thailand		South Korea			Taiwan	
	Johnnie Walk Black	Spey Royal	Dimple	Imperial	Passport	Chivas Regal	Royal Salute
Strong Distribution and Trade Relations	●	●	●	●	●	●	●
A&P Model	●	●	●	◐	◔	●	●
ATL	●	●	●	●	●	●	●
On-Premise Promotion	●	○	◐	◐	◐	●	●
Off-Premise Promotion	○	○	◔	◔	◐	○	○
Position	●	○	○	◐	●	○	○
Price	○	●	●	◐	○	○	○
Packaging	○	○	●	●	◐	○	○
Perceived Taste/Quality	○	○	●	●	◔	○	○
First Mover	○	●	○	●	●	○	○

Page 71

The Rule for Qualitative Chart - Others

Mark-up Chart

- **Mark-up charts represent detailed components that build up prices, costs, etc. This is an example of price mark-up**
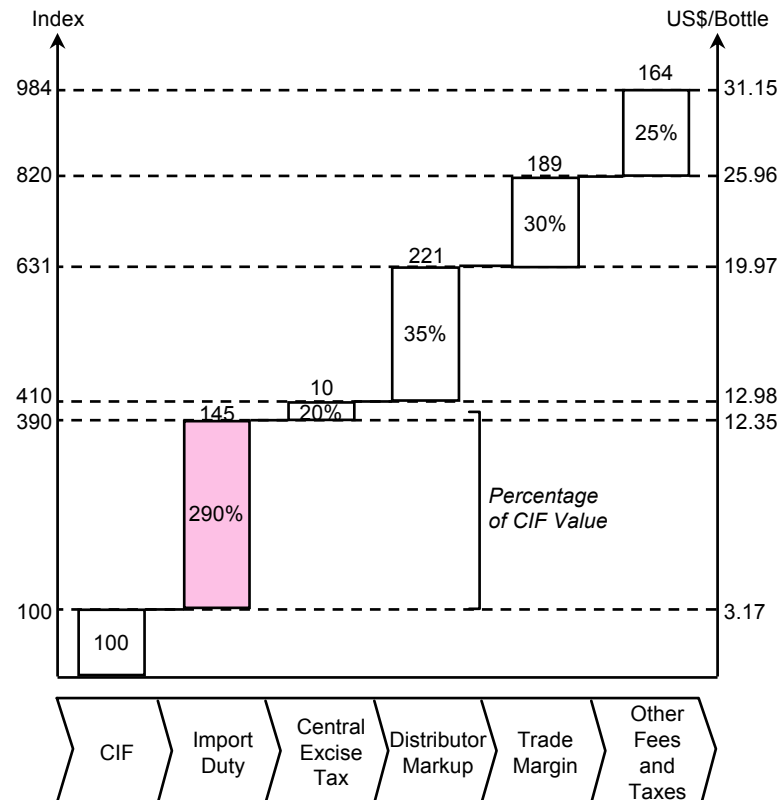
The Rule for Qualitative Chart - Others

Mark-up Chart

- **And this is an example of costs and prices mark-up**
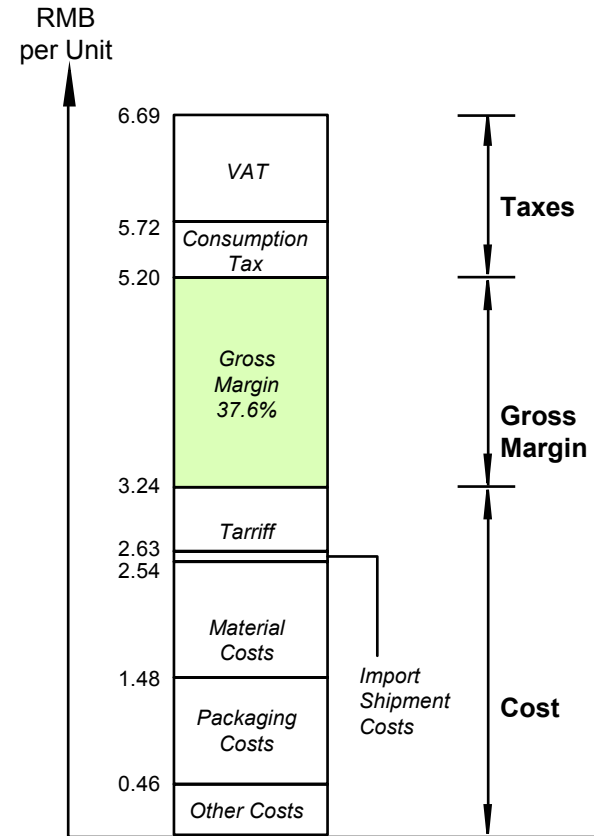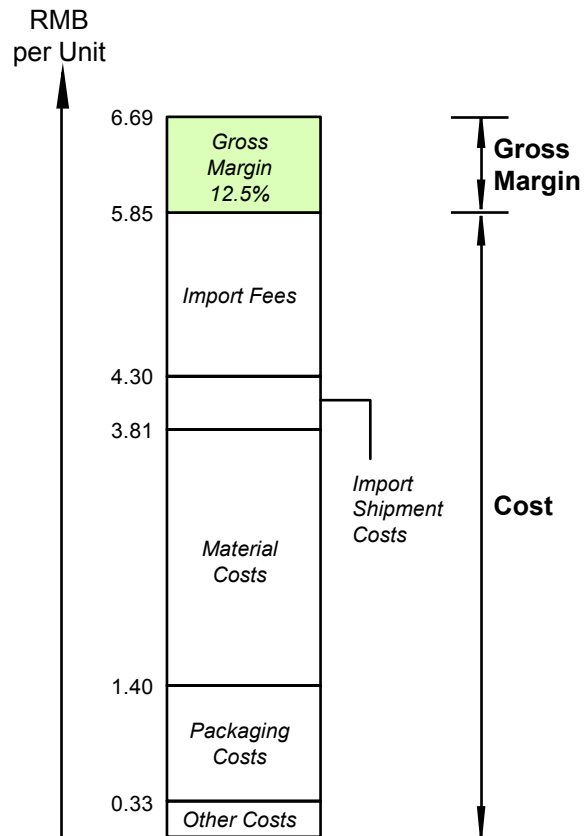
Special Effects - The Use of Color

The Use of Color

- **Special effects are some PowerPoint functions that visualize our presentation, make the slide more vivid and attractive. Color, of course, is one of the key visual functions to improve the appearance of the slides. But, you must avoid misusing colors:**

  - When you use colors, be aware of the shade of gray for some basic colors in black and white and deliberately arrange them to avoid confusion in black and white print-out

  - Use different color patterns if pure colors are not sufficient

  - If you want place texts in dark area, paint the texts white

  - Don't overuse colors in organization charts, flow charts, or in most numerical charts, simply fill them white is the best

Special Effects - The Use of Color

Gradient

- **I like gradient effect, it makes the slides more pretty**

Sample 1

Sample 2

Sample 3

Sample 4
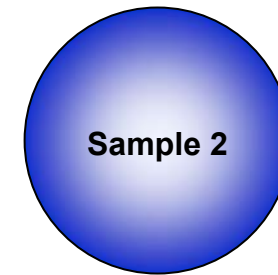
Special Effects - Emphasize

Emphasize

- **There are many means to emphasize, filling color is one, and some others:**

    - Use arrows pointing to the objects. Don't draw the arrows too big and awkward

    - Shadow the objects or texts. The thickness of shadows must be moderate. Decoration is good, but too much decoration is awful

    - Call out boxes. They also help to present more details

    - If you want emphasize a group of objects, draw a dash box around the objects

Special Effects - Others

Others
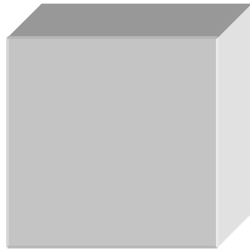
3-D   Texture   Pattern
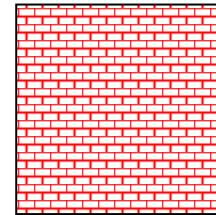
Exercise

- **Draw a column chart, a pie chart, and a line chart**

- **Improve the slide**

Processes

To begin with, you must understand things easy or difficult to change to save your time and optimize your process

Easiest
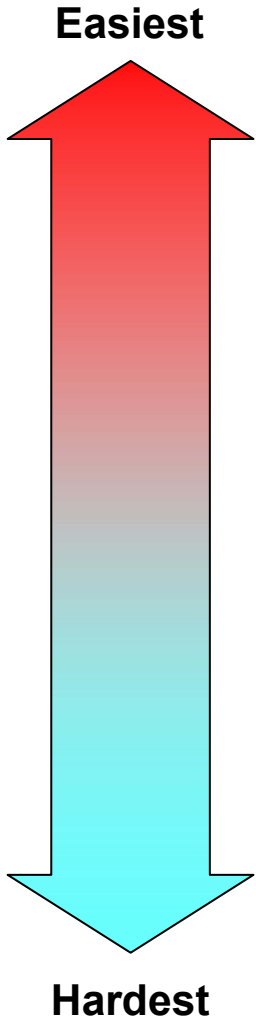
Text
: Xxxxxxxxxxxxx
: xxxxxxxxxxxxx
: Xxxxxxxxxxxxx
: xxxxxxxxxxxxx

Color

Size of Pictures, Cliparts and icons

Length and Pattern of a Single Lines and a single Autoshapes

Size of a Group of Lines and Autoshaps

Direction of Broken Lines
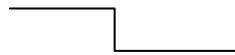
Sequence of Independent Charts

Size of Line Charts, Pie Charts, Column Charts, and Other Numerical Charts
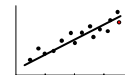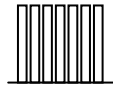
Sequence of Table Charts

Size of Org Charts, Flow Charts, etc.
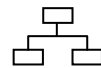
Additional Levels or Components in Org Charts, Flow Charts, Markup Charts, etc.

Sequence within Org Charts, Flow Charts, Markup Charts, etc.

Changes in Values of Numerical Charts

Hardest

How to apply this understanding?

- **We apply these rules to avoid unnecessary troubles:**

    - Take several minutes to think and identify the difficult level of each part of the slides before proceeding to work

    - Produce from things difficult to change to things easy to change

    - When modify slides, try to change easy ones

    - Use some ways to measure the graph

    - Better to draw a sketch for a complex chart before input it to PowerPoint, and leave some room if you perceive further changes to the chart

I will use this organization chart to demonstrate a good process

Marketing Organization

Dimitri Panayatapolous

Haircare
Brad Casper
General Manager*

Toothpaste/Soap
Vacant
General Manager

Laundry
Vacant
General Manager

Skincare/Paper
Virginia Lee
Vice President*

Rene Co
Marketing Director

Ken Doi
Marketing Director

Robin Oxendine
Marketing Manager

Randall Beard
Marketing Director

Peter Foyston
Marketing Manager

Marketing Manager

Pantene | Jiehua | New Brand | Rejoice | Head & Shoulders | Crest | Professional Marketing | Safeguard | Zest Camay | Ariel | Tide | JV Brands | Ulan | Whisper | Media & Commercial Production

Assistant Brand Manager, 2-5 per Brand

School Program Group

Nurses for School Program

Localized

Step 1 - Observe

- **You must already have a sketch on hand. Now you need to observe key features of the chart:**

    - This is a chart made of boxes, texts and lines, some boxes need to be filled with color. It has a title and a legend.

    - Vertical level: 6

    - Maximum components in one level: 15

    - Boxes in level 2 are perceived to be higher than boxes in other levels, while other boxes are possible to be in same height

    - Because there are too many contents in the chart, font size must be small, like 10 or smaller

Step 2 - Measure

- **First identify the bottleneck of this chart. Level 4 is the one. There are totally 15 components in the same level, making the level horizontally crowded. Pick out the box containing largest number of texts and width, draw it first**

Media & Commercial Production

Put the text (10 pl.) in the center and middle of the box, the anchor point should be put in the middle of the text box. Then group them together

- **Copy 15 boxes, align top, distribute evenly in width**

Media & Commerci Productio	Media & erci tio	Media & erci tio	Media & erci tio	Media & erci tio	Media & erci tio	Media & erci tio	Media & erci tio	Media & erci tio	Media & erci tio	Media & erci tio	Media & erci tio	Media & erci tio	Media & erci tio	Media & ercial tion

- **No enough space. Then change the font size to 9. Repeat the process again**

Step 2 - Measure (Cont'd)

Media & Commercial Production	Media & Production	Media & Production	Media & Production	Media & Production	Media & Production	Media & Production	Media & Production	Media & Production	Media & Production	Media & Production	Media & Production	Media & Production	Media & Production	Media & Production

- **Still no enough space. But size of 9 is the minimum tolerable size, you can't further reduce it. It means that you need reduce the width of the boxes with fewer contents to make room. In this case, it is possible**

Media & Commercial Production	Media & Commercial Production	Media & Commercial Production	Media & Commercial Production	Media & Commercial Production	Media & Commercial Production	Media & Commercial Production	Media & Commercial Production
Media & Commercial Production	Media & Commercial Production	Media & Commercial Production	Media & Commercial Production	Media & Commercial Production	Media & Commercial Production	Media & Commercial Production	

- **Although you can arrange the boxes like this. But in this case, which have 6 levels vertically, it doesn't allow us to do so**

Step 2 - Measure (Cont'd)

- **Input the text in the boxes (in the case that space is enough, you could input text later), reduce some boxes width, and make them evenly distributed. The measure of width is completed**

| Pantene | Jiehua | New Brand | Rejoice | Head & Shoulders | Crest | Professional Marketing | Safeguard | Zest Camay | Ariel | Tide | JV Brands | Ulan | Whisper | Media & Commercial Production |
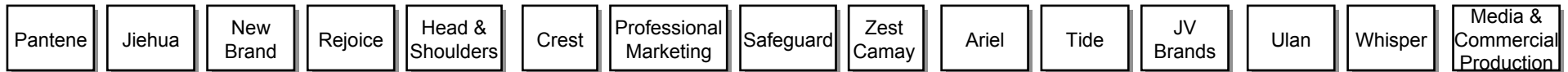
- **Now we start to measure the height. Level 2 and level 3 are two second most complex levels. So we produce one box of level 2 and one box of level 3**

Skincare/Paper

Virginia Lee
Vice President*

Peter Foyston
Marketing Manager

- **Copy level-2 boxes in level 2, and level-3 boxes in level 1 and 3. Copy level-4 boxes to level 5 and 6. Because space is abundant, you can make the font size to 10 in higher level. Level 5 and 6 are functions under level 4, the font size can't be bigger than 9. Keep the gaps similar between different levels. At this stage, don't care about the horizontal position of each box. See the next page**

Step 2 - Measure (Cont'd)

■ **Leave some space for chart title and legend, don't make the page two crowded**

Peter Foyston
Marketing Manager

Skincare/Paper	Skincare/Paper	Skincare/Paper	Skincare/Paper
Virginia Lee Vice President*	Virginia Lee Vice President*	Virginia Lee Vice President*	Virginia Lee Vice President*

Peter Foyston Marketing Manager	Peter Foyston Marketing Manager	Peter Foyston Marketing Manager	Peter Foyston Marketing Manager	Peter Foyston Marketing Manager	Peter Foyston Marketing Manager

Pantene	Jiehua	New Brand	Rejoice	Head & Shoulders	Crest	Professional Marketing	Safeguard	Zest Camay	Ariel	Tide	JV Brands	Ulan	Whisper	Media & Commercial Production

Media & Commercial Production

Zest Camay   Zest Camay

Step 3 - Input text, adjust box size if necessary,

Dimitri Panayatapolous

| **Haircare** Brad Casper General Manager* | **Toothpaste/Soap** Vacant General Manager | | **Laundry** Vacant General Manager | **Skincare/Paper** Virginia Lee Vice President* |

Rene Co Marketing Director

Ken Doi Marketing Director

Robin Oxendine Marketing Manager

Randall Beard Marketing Director

Peter Foyston Marketing Manager

Marketing Manager

Pantene | Jiehua | New Brand | Rejoice | Head & Shoulders | Crest | Professional Marketing | Safeguard | Zest Camay | Ariel | Tide | JV Brands | Ulan | Whisper | Media & Commercial Production

Assistant Brand Manager, 2-5 per Brand

School Program Group

Nurses for School Program

Step 4 - Draw the connectors of the "bottleneck" - level 4

Dimitri Panayatapolous

Haircare

Brad Casper
General Manager*

Toothpaste/Soap

Vacant
General Manager

Laundry

Vacant
General Manager

Skincare/Paper

Virginia Lee
Vice President*

Rene Co
Marketing Director

Ken Doi
Marketing Director

Robin Oxendine
Marketing Manager

Randall Beard
Marketing Director

Peter Foyston
Marketing Manager

Marketing
Manager

Pantene

Jiehua

New Brand

Rejoice

Head & Shoulders

Crest

Professional Marketing

Safeguard

Zest Camay

Ariel

Tide

JV Brands

Ulan

Whisper

Media & Commercial Production

Assistant Brand Manager, 2-5 per Brand

School Program Group
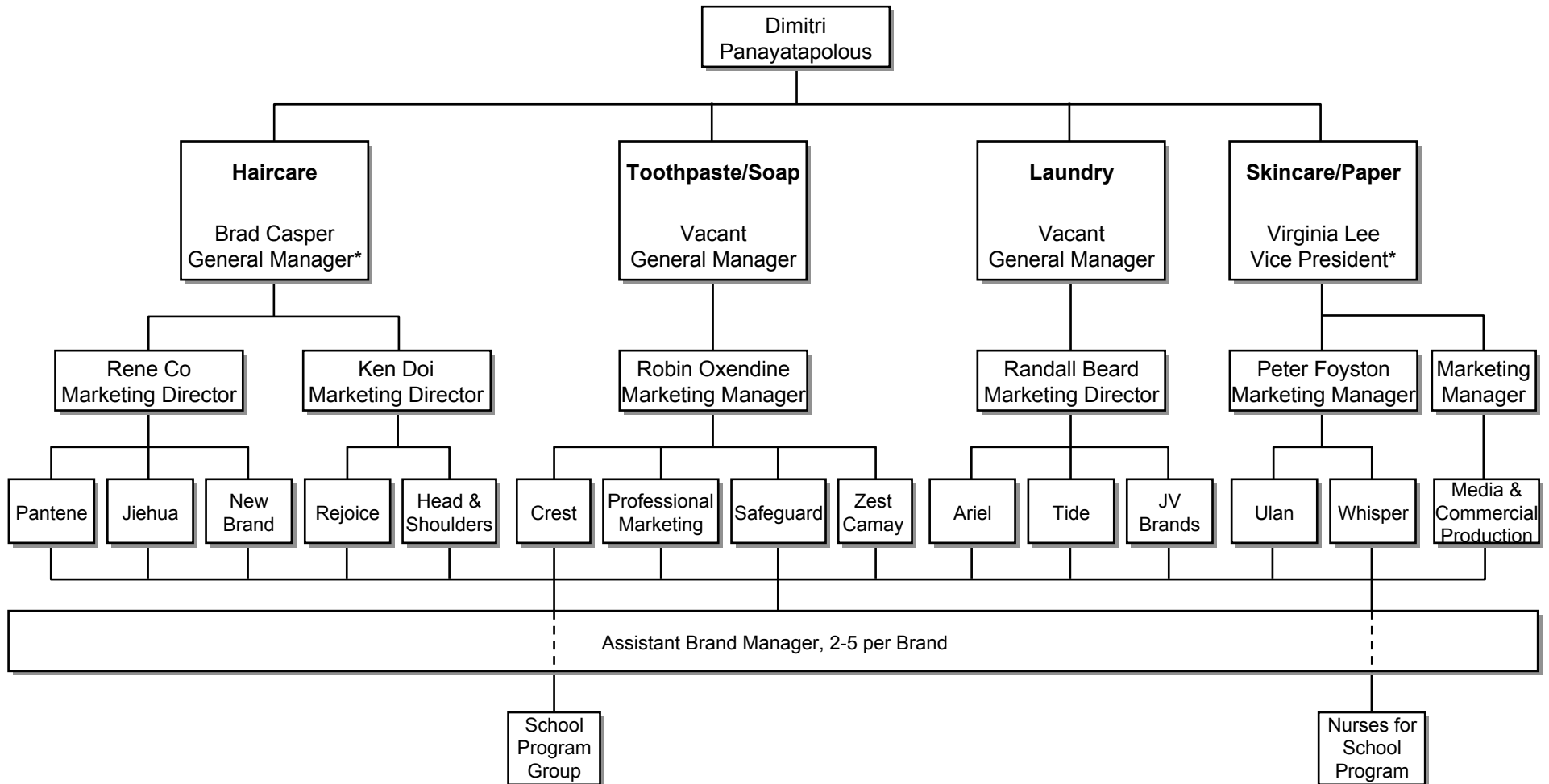
Nurses for School Program

Step 5 - Move the boxes in level 3 to the center of the connectors
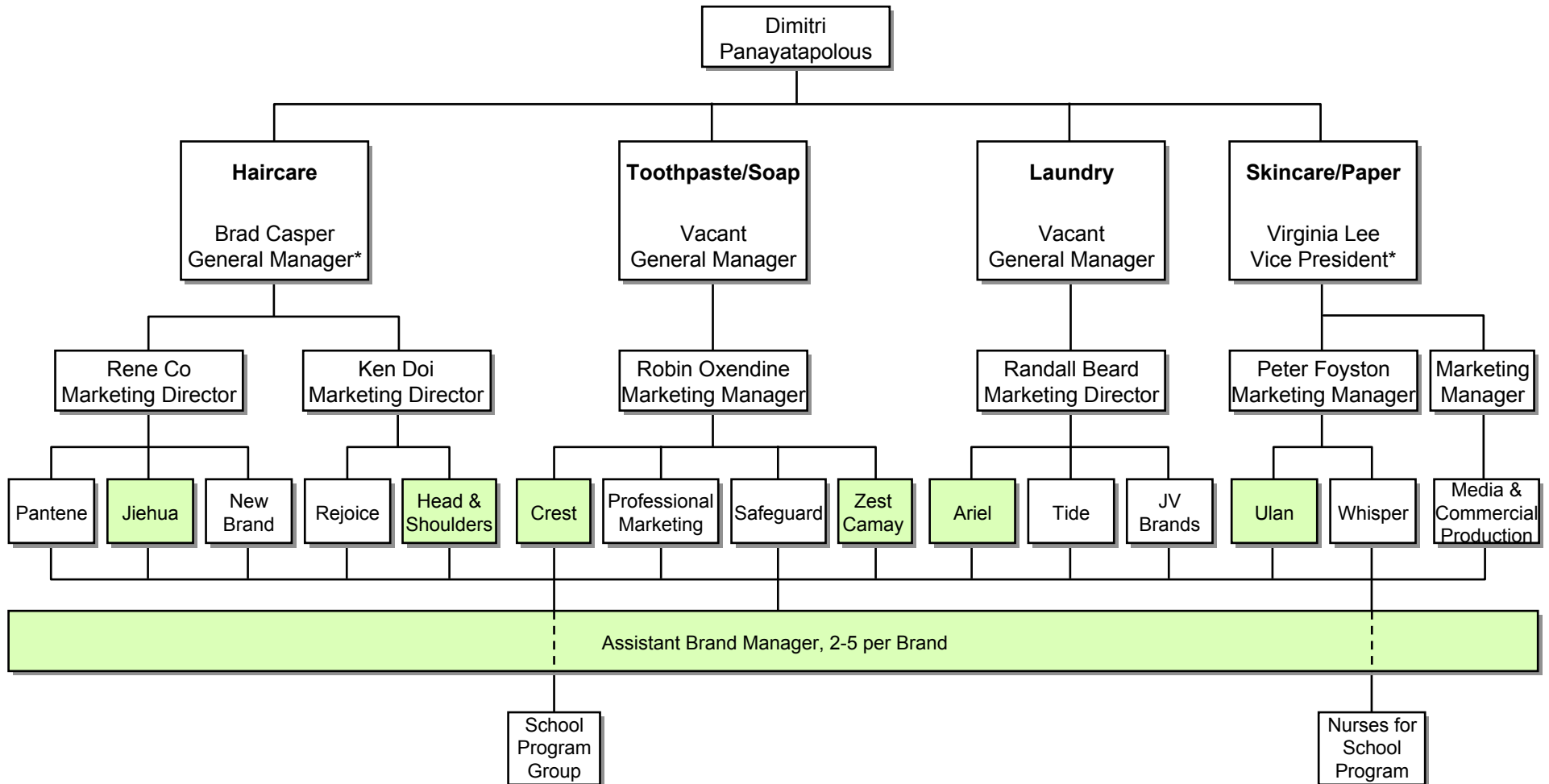
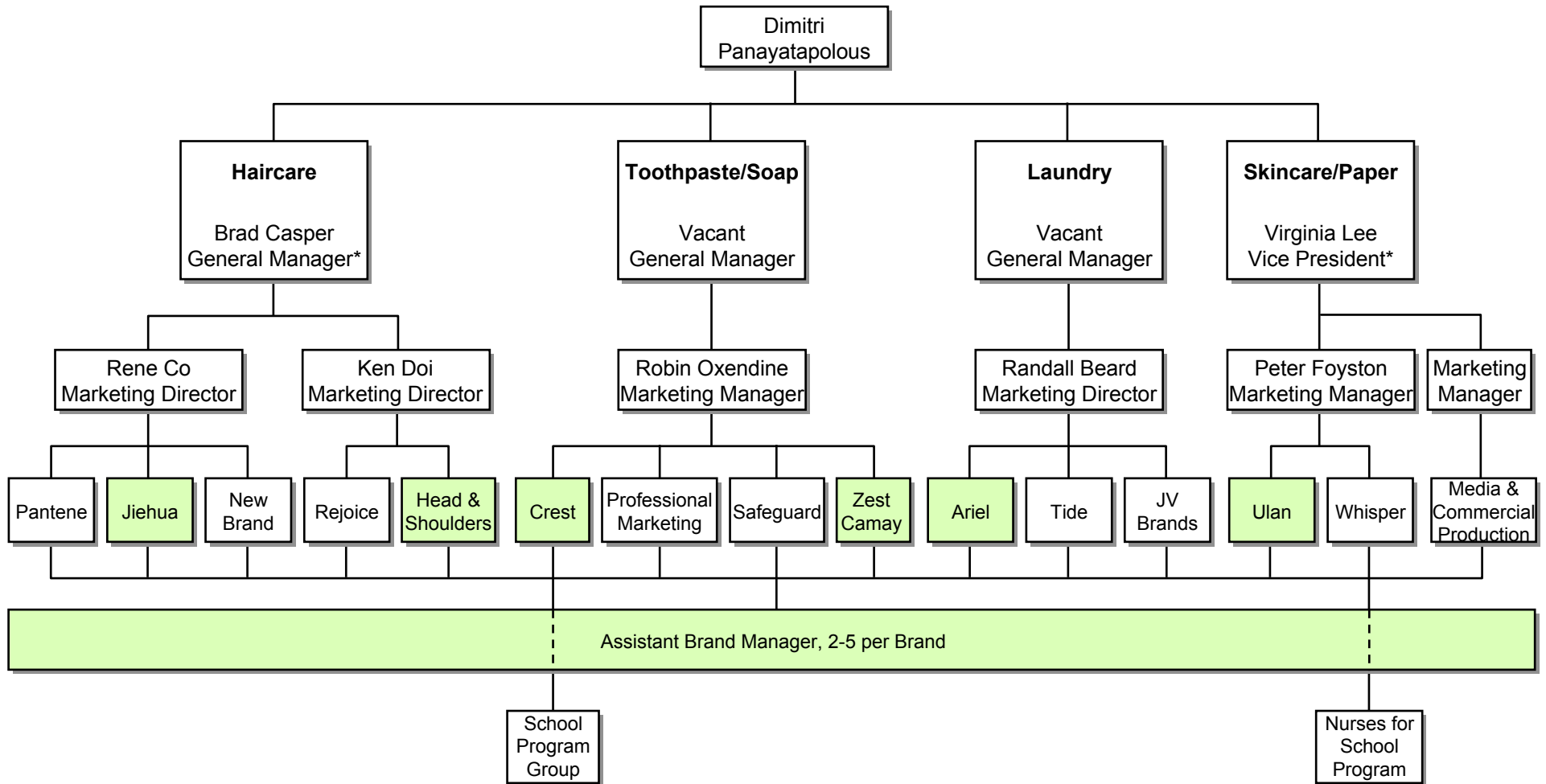■ **The rightmost box in level 3 is too wide, reduce its width**

Step 6 - Repeat step 4 and 5

Step 7 - Fill color to boxes

Step 8 - Put in title and legend

Marketing Organization

Dimitri Panayatapolous

Haircare — Brad Casper, General Manager*

Toothpaste/Soap — Vacant, General Manager

Laundry — Vacant, General Manager

Skincare/Paper — Virginia Lee, Vice President*

Rene Co, Marketing Director

Ken Doi, Marketing Director

Robin Oxendine, Marketing Manager

Randall Beard, Marketing Director

Peter Foyston, Marketing Manager

Marketing Manager

Pantene | Jiehua | New Brand | Rejoice | Head & Shoulders | Crest | Professional Marketing | Safeguard | Zest Camay | Ariel | Tide | JV Brands | Ulan | Whisper | Media & Commercial Production

Assistant Brand Manager, 2-5 per Brand

School Program Group

Nurses for School Program

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