K2's Road to Excellence with PowerPoint – Part 1

This is the first in a series of sessions in Office that will provide you with the information you need to become a PowerPoint expert. More and more accountants and business professionals are using PowerPoint to deliver financial data to clients, customers, or co-workers. What seems at first to be an easy-to-use application consumes an extraordinary amount of time unless you know the tips and tricks to make the process less cumbersome. This session will focus on building your PowerPoint skills.

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Ten Minutes until Your First Presentation!

So you got the assignment. You didn't ask for it, but you got it anyway. Your boss has informed you that you need to prepare a presentation to be delivered to your company's Board of Directors tomorrow morning – it's five o'clock now and you have a parent-teacher conference scheduled at your child's school tonight. Therefore, sometime this evening – squeezed in between dinner, the school meeting, and sitting in rush-hour traffic – you've got to prepare a presentation using an application – PowerPoint – about which you don't really know that much. Relax, it's going to be easy – we promise! In this chapter, we're going to show you how to prepare your first presentation in ten minutes or less. As for the parent-teacher conference and rush-hour traffic, sorry, but we can't help you with those.

How to Get Started

First, spend a moment collecting and organizing your thoughts relative to the presentation. A few moments of planning will pay big dividends later when creating the presentation. Consider the following characteristics of the presentation up-front to ensure success down the line.

What's the Purpose of the Presentation?

Is the purpose of the presentation to inform? To persuade? To sell? Presentations have a purpose, and that purpose impacts how the presentation is developed and delivered. If the purpose is to convey good news to the audience, then the presentation is likely to be more upbeat and colorful and contain more special effects. On the other hand, if the presentation is to deliver disappointing news, then a more solemn approach is probably the appropriate choice. Always match the purpose of the presentation and the intended audience to the format and tone of the PowerPoint slide show.

Who is the Audience?

The intended audience will have a significant impact on how the presentation is built. If the presentation is intended for a Board of Directors meeting, you are likely to be much more conservative in the use of colors, sound effects, animations, and slide transitions than a presentation where the intended audience is a sales team.

How Much Time is Allotted to the Presentation?

Know in advance how much time is reserved on the meeting agenda for the presentation and match the number of PowerPoint slides to the time slot. You can't deliver 100 slides in a thirty minute presentation! A good rule of thumb is to **plan on two to three minutes per slide**; of course, this will vary depending upon the number of questions you receive from the audience, whether you will be demonstrating software or other products or services in conjunction with the presentation, and other factors. You should also plan for contingencies – that is, what if immediately prior to the presentation you find out the allotted time was cut in half? If this happens, you will likely want to hide slides or to create a Custom Show in order to match the number of slides to the newly allotted time.

Is There an Accompanying Report?

Did someone – possibly you – prepare a written report that will be in the hands of the audience when the presentation is delivered? If so, the order of the presentation should follow the order of the report very closely, if not exactly, because the audience will likely be perusing the report while you are delivering the presentation. Further, the presentation will probably contain fewer details and specifics since those items are presumably contained in the written report. In other words, if there is an accompanying written report, then the presentation is used only to supplement the written report and to highlight key items. On the other hand, if there is no accompanying written document, then the presentation likely will need to contain more details and specifics and will probably be of greater length.

Will the Presentation be Delivered Live?

If the presentation is to be delivered live, then the presenter has greater control over the audience and can help to minimize distractions. However, if the presentation is to be distributed and run in a stand-alone fashion as described on page **Error! Bookmark not defined.**, then additional considerations come into play. To illustrate, if the presentation is to be run stand-alone, then every point must be made crystal clear through the use of narration. Additionally, care must be taken to make slides such that they are compatible with virtually all standard monitor resolutions.

What Level of Customization is Required?

Before creating your presentation, consider whether adding custom logos to slides will enhance the presentation. For instance, if you are scheduled to deliver a presentation to a customer or client, adding the logo of the customer or client to each slide in the presentation gives the appearance that the presentation was truly created for that particular customer or client. If you find that adding custom logos and similar objects to each slide is required, you will want to accomplish this task by modifying the presentation's Master slides, discussed beginning on page **Error! Bookmark not defined.**.

Is There a Need to Embed Objects into the Presentation?

Does your presentation make a number of references to external objects, such as Excel spreadsheets or PDF files? If so, you may wish to embed these objects into the presentation so that you can "drill down" to the details while delivering the presentation.

For instance, suppose you are to deliver a presentation summarizing your company's financial performance over the past year. You may wish to have the annual financial statements in an Excel spreadsheet that is embedded into the PowerPoint file so that if someone asks a detailed question regarding the financial results, you can click on the embedded object and open the Excel-based financial statements as part of the presentation, enabling you to show the audience the source of the data.

The items listed above are only a partial list of the considerations that should be weighed before creating a presentation. Remember, a little time invested up-front will pay big dividends later.

After reflection on the items above, you're ready to move forward with creating your presentation. Where do you start?

Creating a Presentation

There are more choices for getting started with PowerPoint 2013. You can use a template, a theme, a recent presentation, a not-so-recent presentation, or a blank one. Start by opening PowerPoint. Upon doing so, if you see a blank slide in front of you, then you're in the right place. If not, select **New** from the **File** tab of the Ribbon (or from the **Office Button** if you are using PowerPoint 2007) to open the **New Presentation** window. On this window, select **Blank Presentation** as shown in **Figure 1**.

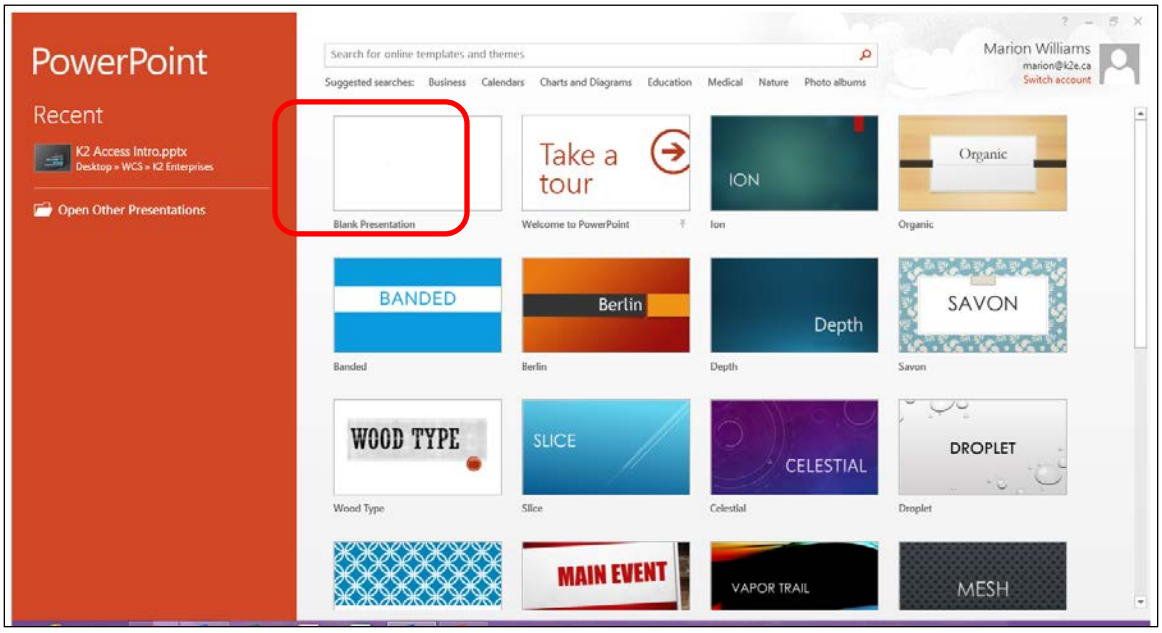

Figure 1 - New Presentation Window – PowerPoint 2013

You should now have a blank title slide in front of you as shown in **Figure 2**. In the area which is labeled "Click to add title," go ahead and do just that – click and add a title for the presentation. Follow that by

clicking in the area that reads “Click to add subtitle” and enter a subtitle for the presentation. Upon completing these steps, your title slide may now look like that shown in **Figure 3**.

Figure 2 - Blank Title Slide

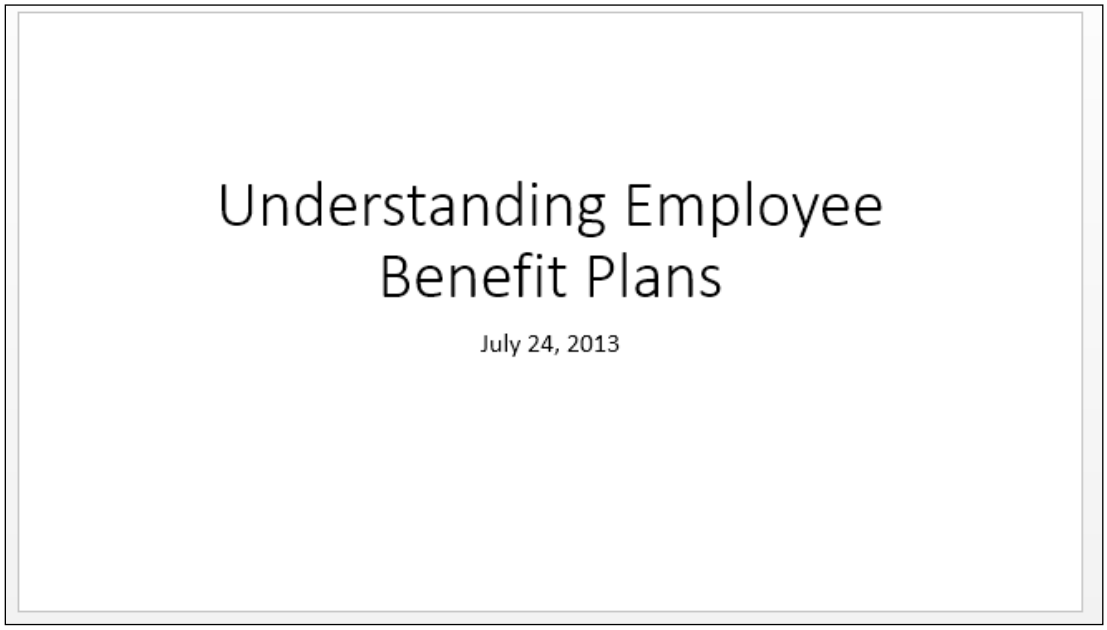

Figure 3 - Sample Completed Title Slide

Before going any further, it is probably a good idea to go ahead and save the presentation. To do so, just click the save icon on the **Quick Access Toolbar** or select **Save** from the **File** tab of the Ribbon (or from the **Office Button** if you are using PowerPoint 2007). Because this is the first time this presentation is saved, you will be prompted to enter a name and location for the file. It is a good idea to save a presentation every few minutes or when creating a new slide to avoid the possible loss of data.

PowerPoint's **AutoRecover** function can also help you recover data in the event your computer "crashes" while building a presentation. AutoRecover is accessed by selecting **Options** button from the **File** tab of the Ribbon and then choosing the **Save** option. If you are using PowerPoint 2007, you can access AutoRecover by clicking the **Office Button**, **PowerPoint Options**, and **Save**.

Adding Slides to a Presentation

With the title slide prepared, you're ready to add more slides to the presentation. To do so, click **New Slide** from the **Home** tab of the Ribbon as shown in **Figure 4**.

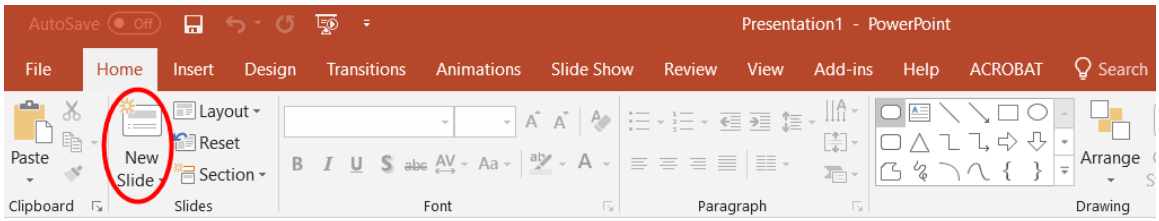

Figure 4 - Inserting a New Slide into a PowerPoint Presentation

By default, a new **Title and Content** slide will appear as shown in **Figure 5**. Instead of a Title and Content slide, a different layout may be selected by clicking the down-arrow immediately below the **New Slide** icon on the **Home** tab of the Ribbon**.**

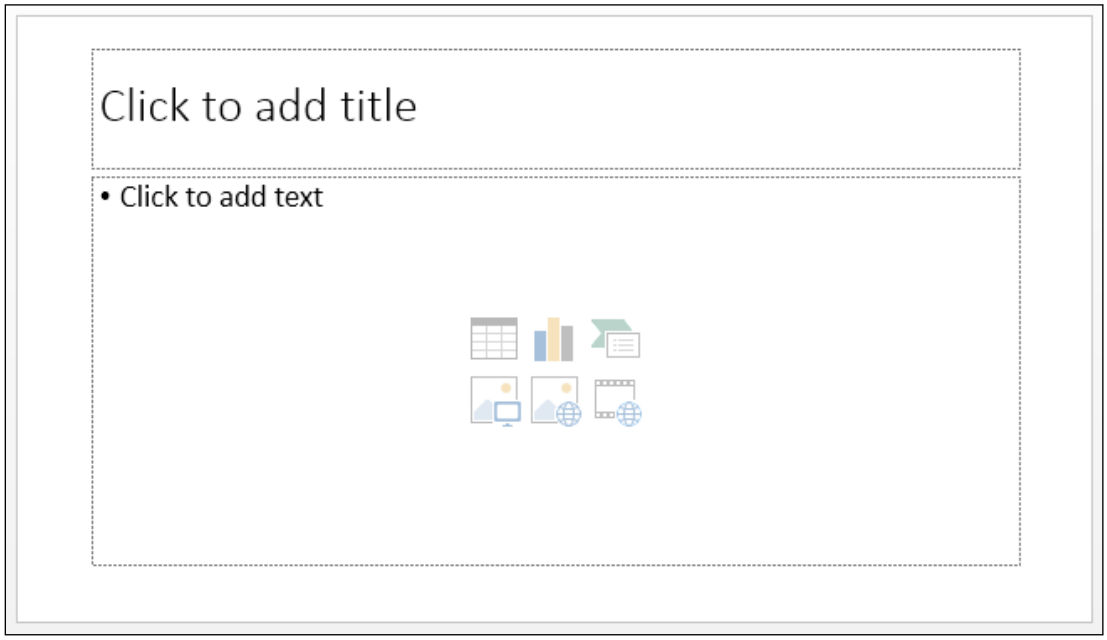

Figure 5 – Title and Content Slide Layout

From the resulting **Office Theme** window, a different layout may be selected as shown in **Figure 6**.

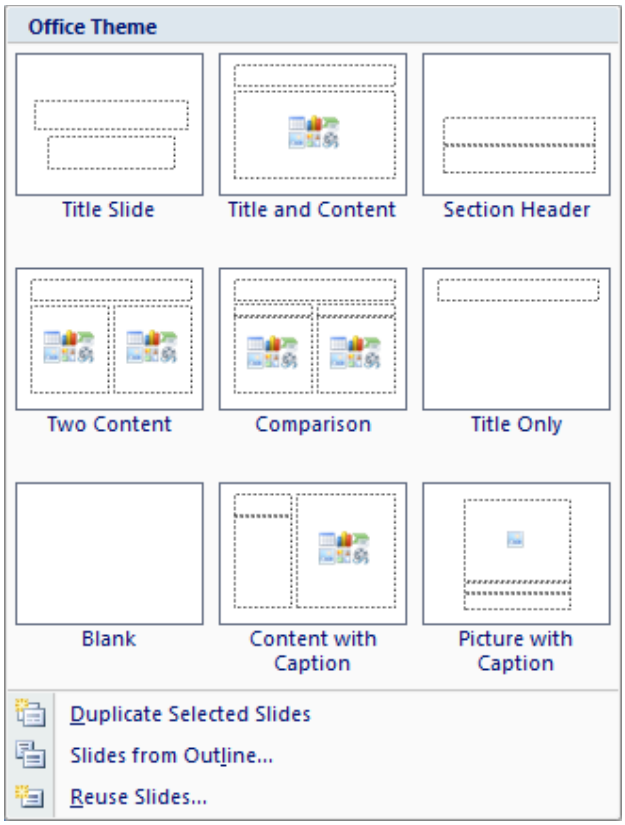

Figure 6 - Slide Layout Themes

Regardless of the layout of the slide, simply click where prompted and enter the appropriate text for the slide, as was previously done with the title slide. Once completed, the slide may look similar to that depicted in **Figure 7**. Continue to insert slides and add text as necessary to complete the presentation, being sure to save periodically along the way. Of note: be careful not to place too much information on a slide, causing the slide to appear crowded. A good rule-of-thumb is **to place no more than 28 words, in addition to the title, on a slide and never use a font size smaller than 28 points**.

Figure 7 - Sample Title and Content Slide

Implementing a "Look"

Following the steps outlined above, continue to add slides until you've created all of the slides you need for your presentation. It is now time to change the "generic" slide design that is created by default. No problem. PowerPoint provides a number of predefined themes that can be used to make the slides more cosmetically appealing.

To access the predefined **Themes**, select the **Design** tab of the Ribbon and choose one of the **Themes** as shown in **Figure 8**.

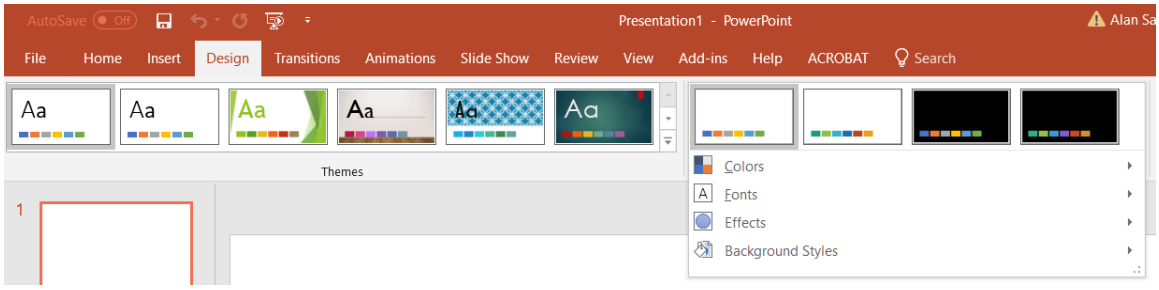

Figure 8 – Available Presentation Themes

To apply a design **Theme** to the entire slide show, simply click the desired **Theme** from the gallery. The characteristics of that Theme are automatically applied to all slides in the presentation as shown in **Figure 9**.

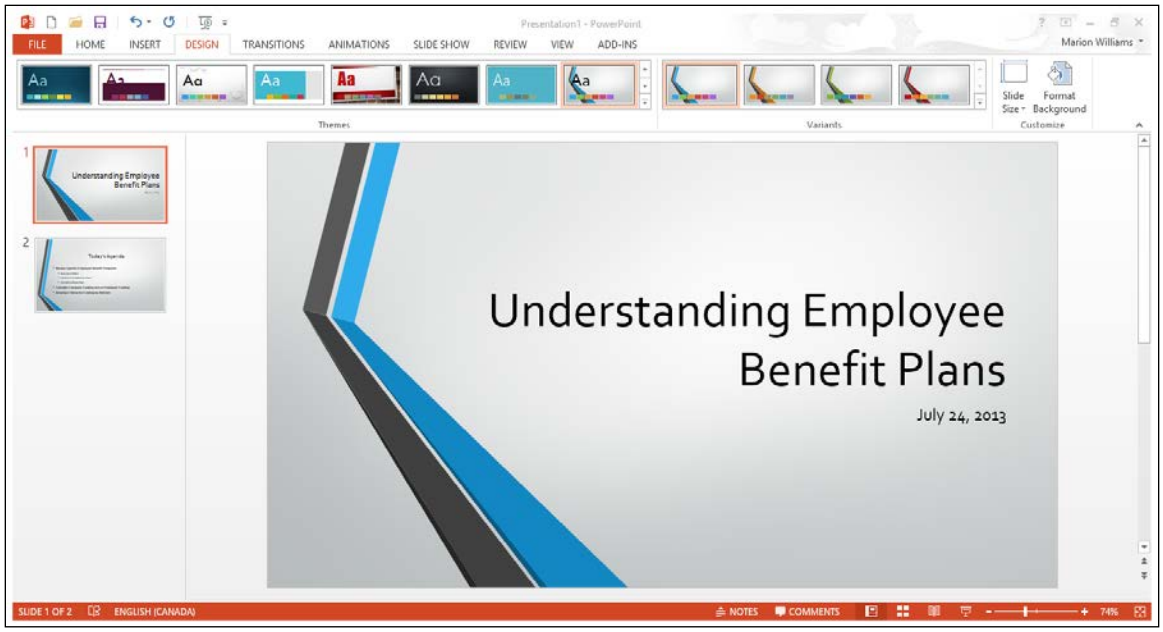

Figure 9 - Applying a Theme to a Presentation

Alternatively, to apply a Theme to only one slide or a grouping of slides, right-click on the **Theme** and choose the appropriate option from the menu displayed in **Figure 10**.

Figure 10 - Applying a Design Template to Individual Slides

That's it! You've created your basic presentation in a matter of minutes. Sure, you still might want to apply animations, transitions, and special effects, but those are considered optional and, in many cases, can actually detract from the message you're trying to convey. Now go ahead and save the presentation so that it will be accessible in the morning; remember, you've got a parent-teacher conference scheduled.

Creating and Maintaining Clean, Concise, and Consistent Slides

With a little background in how to create basic PowerPoint presentations, let's begin to consider how to ensure that the presentation appears to be both professional and polished. In addition to containing superior content, there is perhaps no better way of ensuring this than to have clean, concise, and consistent slides. Fortunately, a number of tools are available in PowerPoint to assist in this endeavor; in this chapter, several of the more pertinent of these tools are discussed.

Understanding Templates

When building a presentation, it might be tempting to select one of PowerPoint's predefined presentation formats, including those from **Microsoft Office Online**. These **Template** options are available from the **New Presentation** window shown in **Figure 11**.

Templates provide users with "canned" presentations which can be customized with specific information relative to the presentation at hand. Templates provide a framework of both formatting and content on which users can build presentations. Users select the presentation type, presentation style, and presentation options and add their own data to create their presentations.

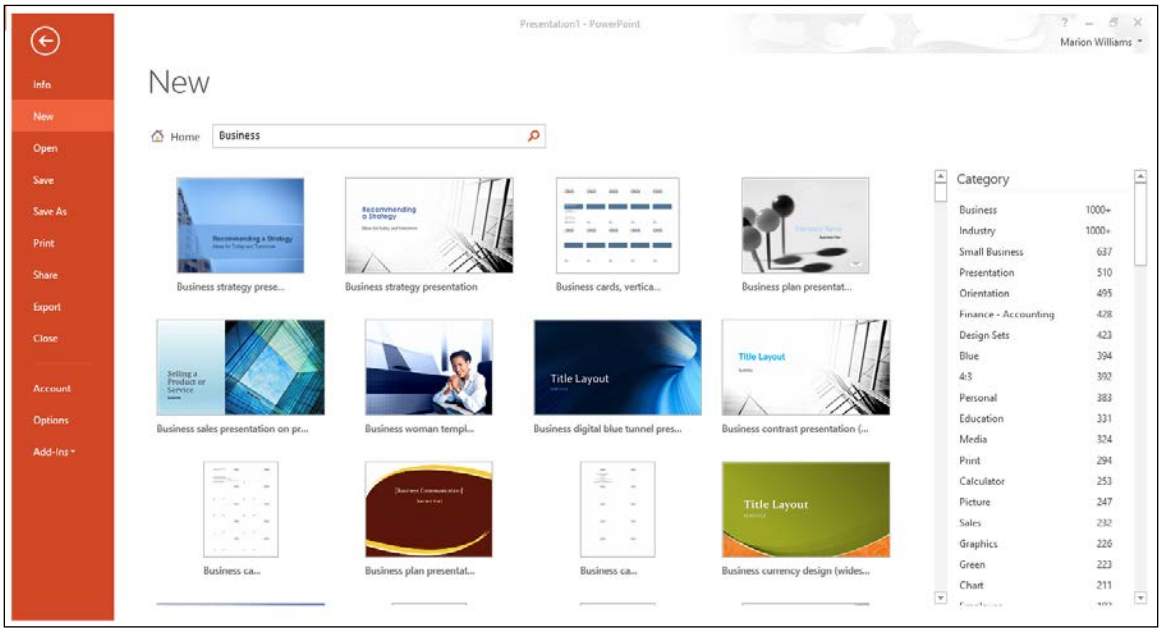

Figure 11 - AutoContent on the New Presentation Task Pane

For example, the thumbnail slides shown in **Figure 12** are representative of the slides created by many of the templates available to users. These slides often contain a good mix of colors, layouts, and graphics and provide a reasonable starting point from which effective presentations can be constructed, particularly so for inexperienced PowerPoint users. However, experienced PowerPoint users will likely find using a combination of PowerPoint's **Themes** and preformatted slide layouts useful, as discussed in the following sections.

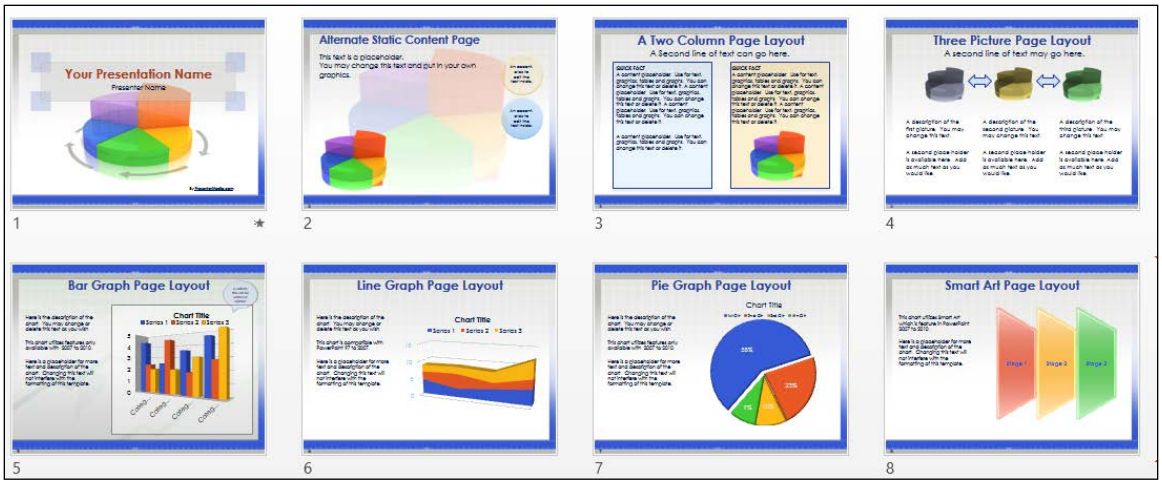

Figure 12 - Examples of Slides Created from a Template

Using Themes

In PowerPoint 2007 and later versions, **Themes** are used to control the overall appearance of a presentation. **Themes** include formatting characteristics such as color schemes, fonts, font sizes, and background styles. **Themes** replace design templates used in prior versions of PowerPoint. Any of the predefined **Themes** may be used with a presentation, or new **Themes** may be created and saved for reuse in future presentations.

To apply a **Theme**, simply select the desired **Theme** from the **Design** tab of the Ribbon as shown in **Figure 13**. Note that additional **Themes** may be downloaded from **Microsoft Office Online**.

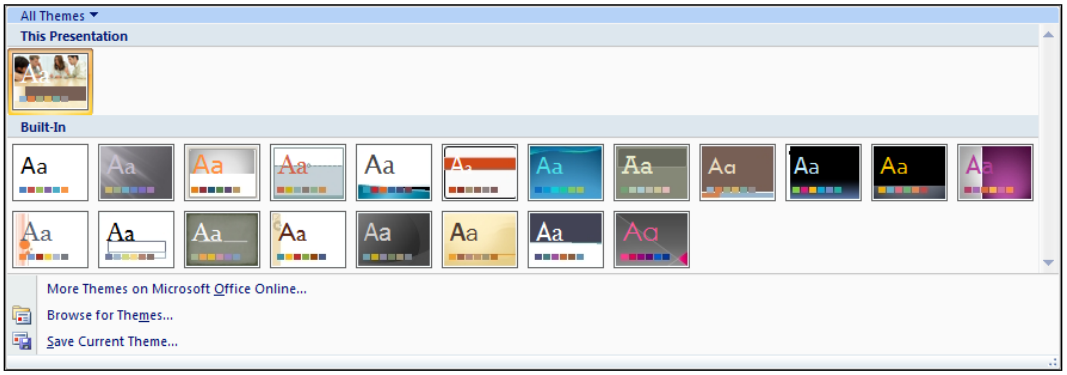

Figure 13 – Applying a Theme in PowerPoint

Custom **Themes** may be created and saved as shown in **Figure 14**. To save a custom Theme, make any desired changes to fonts, colors, backgrounds, etc. and then click **Save Current Theme** as shown in **Figure 14** and provide a name for the custom **Theme**.

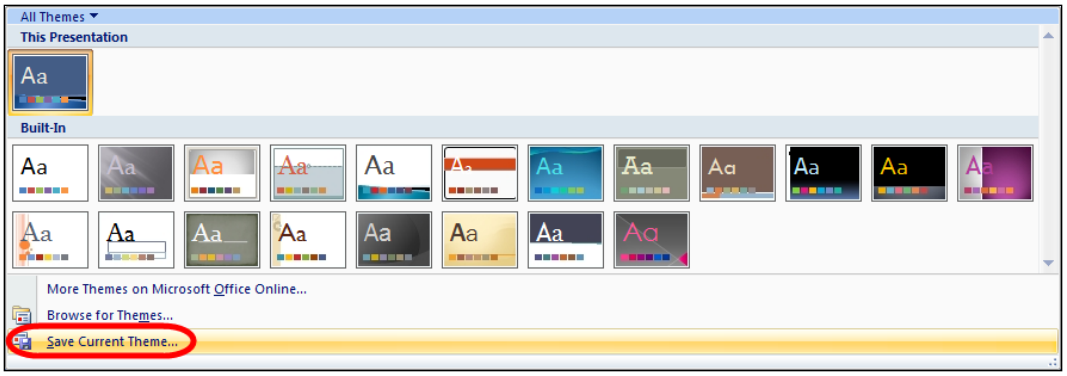

Figure 14 – Saving a Customized Theme

The use of **Themes** is not limited to PowerPoint; rather, **Themes** can be applied consistently throughout the Microsoft Office suites starting with the 2007 version. For instance, a particular **Theme** might be applied to a Word document, an Excel spreadsheet that accompanies the Word document, and a PowerPoint deck used in a presentation based on the information in the Word document and Excel spreadsheet.

The consistent use of **Themes** across the suite helps to ensure that each document has a similar look and feel and leads to a more professional appearance of all the documents.

> Many PowerPoint users remain confused about the difference between Themes and Templates. While not absolutely correct, a good way to think of these is that Themes control formatting only, while Templates affect both content and formatting. In other words, a Template includes the formatting applied by the Theme associated with the Template.

Theme Family

New in PowerPoint 2013 are theme families - variants that have complete control over all elements of the presentation's design – colors, fonts, effects, layouts, text properties, paragraph properties, design elements, and photos and textures. This feature is accessible from the **Design** tab of the **Ribbon** as shown in **Figure 15**.

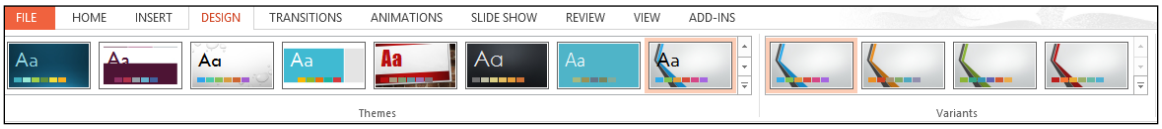

Figure 15 – Use Variants for a Unique Look

Organizing Slides

Once created, slides may be rearranged in any order necessary to achieve maximum impact in the presentation. Perhaps the easiest way to do this is to select the **Slide Sorter View** and then click-and-drag slides to the appropriate order in the presentation. To select **Slide Sorter View**, click **Slide Sorter** from the **View** tab; alternatively, in the lower, right-hand corner of the PowerPoint window, click the **Slide Sorter View** icon as highlighted in **Figure 16**.

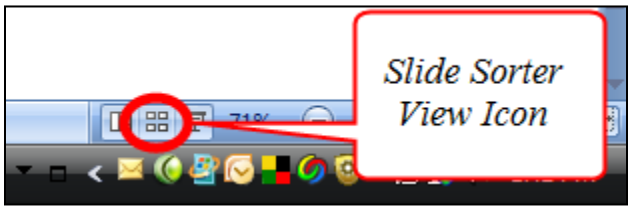

Figure 16 - Slide Sorter View Icon

Slide Transitions

Slide Transitions are the effects applied as one slide gives way to another. To apply a **Slide Transition**, select the **Transitions** tab of the **Ribbon** to choose the desired effect from the gallery pictured in **Figure 17**.

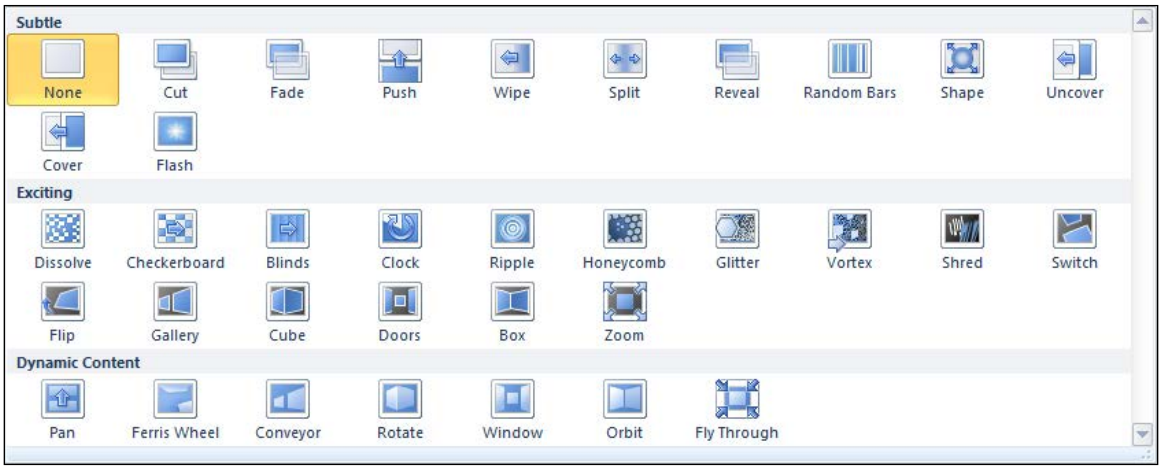

Figure 17 - Slide Transition Gallery

From the Slide Transition Gallery, select the effect you wish to apply to a particular slide. Note also that on the Transitions tab of the Ribbon, it is possible to apply a particular effect to all slides in the presentation by clicking the button labeled **Apply to All**.

In addition, note that it is possible to control the speed with which the transition effect is executed and any sound that is played when the transition effect occurs. These are controlled from the Transitions tab of the Ribbon as well. Additionally, the **Advance Slide** section of the Transitions tab of the Ribbon group

allows users to control whether the slide will be advanced when the mouse is clicked or if predetermined intervals of time will control the advancement of the slide.