



Mu Sigma

Art of Deck Making

Do The Math

Chicago, IL
Bangalore, India
www.mu-sigma.com

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Proprietary Information

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Agenda

- ▶ Background and Need
- ▶ Purpose
- ▶ Ease of use
- ▶ Appeal

There are four key factors that determine the acceptance of a work product

Do I know what it is for?

(Purpose)

Is it easy to use?

(Ease of use)

YES THERE ARE!

Is it attractive/appealing?
Do I feel like using it?

(Appeal)

Will it last?

(Quality)





Okay... So what is my work product?

Anything that we send a client that they can see, feel, hear and use (and hopefully what they don't smell 😊)

- ▶ Presentations/Decks
- ▶ Proposals
- ▶ Excel tools/reports
- ▶ Process documentation
- ▶ Emails
- ▶ Phone calls
- ▶ ...

Interestingly, the usability/likeability/value of spreadsheets, documents and decks are dependent on similar factors

Dimensions	Key Question
Purpose	What decisions will the client make using my work product?
	How would I use this work product if I were the client?
Ease of use	Is the work product flexible to accommodate changing needs?
	Is it easy to read, understand and use?
Appeal	How does the work product look and feel?
	Does it look familiar – something I am comfortable with?
	Are there any distractions or inconsistencies?

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Creating good presentations can be thought of in three stages



Message design

- ▶ Presentation structure
- ▶ Pyramid principle, problem definition
- ▶ Persuasive arguments – qualitative and quantitative

Slide design

- ▶ Simplicity of message for each slide
- ▶ Clarity in identifying part of chart or table of most interest
- ▶ Mu-Sigma Way: talking headers, take-away boxes etc
- ▶ Aesthetics issues (use of graphics, sufficient white space, clean color schemes etc.)

Slide element design

- ▶ Object manipulation
- ▶ Shortcuts
- ▶ Efficiency tips

The first stage of a good deck is to be clear about what you want to say

▶ What does the audience want to accomplish out of the call?

- Project Approach
- Project Updates
- Findings
- Insights (What should I do?)

▶ What do you want to accomplish out of the deck?

- Obtain client buy-in
- Show capabilities
- Obtain approvals
- Demonstrate process
- Highlight risks

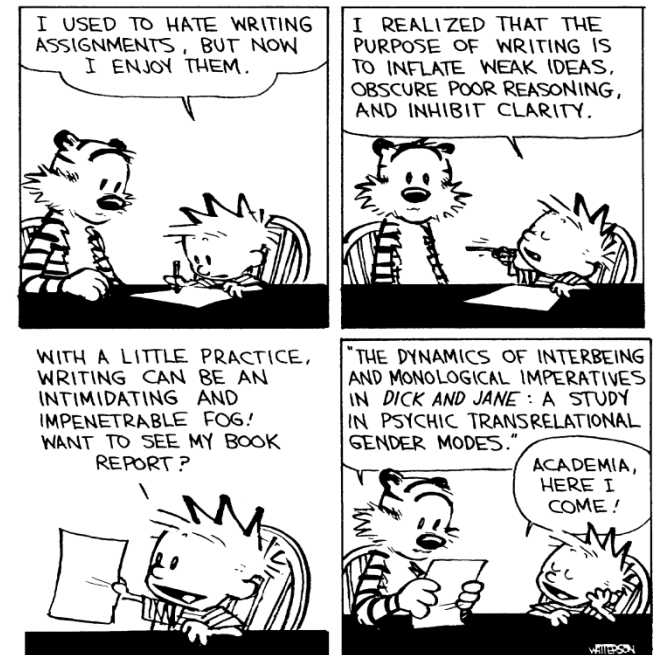
▶ Can the messages be broken/grouped into uniform sized elements?

- All slides should be of roughly equal weight
- Each slide should not be too long or too short



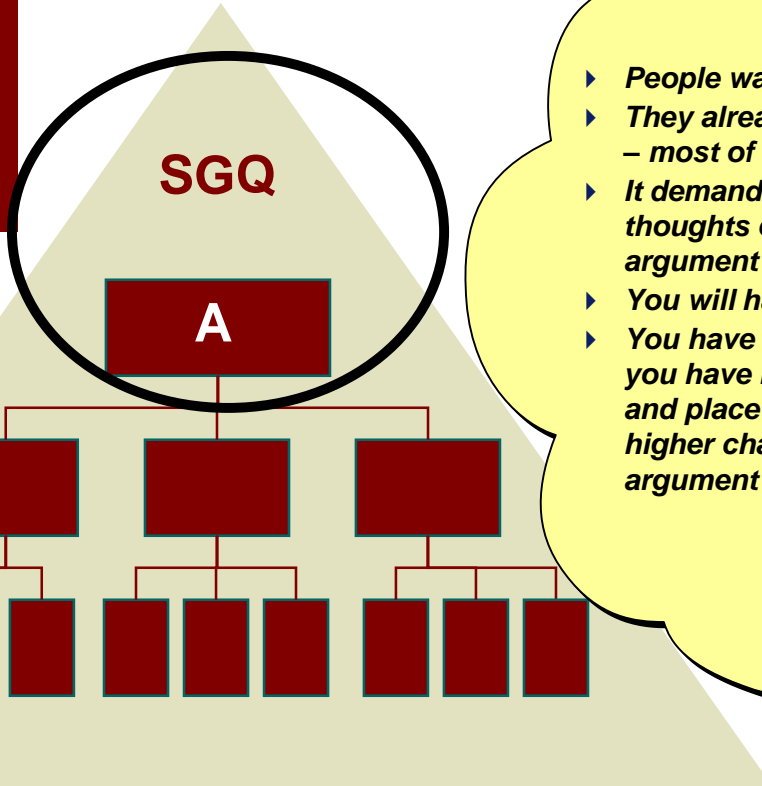
Nothing beats writing on a piece of paper

But not like this....



Tell it like a story – the deck needs to have a logical flow from slide to slide

Establish a Q/A dialogue that pulls reader thru the thinking



- ▶ *People want to be told things in a story format*
- ▶ *They already have other thoughts in their mind – most of which is more dear to them*
- ▶ *It demands real effort to push all those thoughts out and concentrate on your argument*
- ▶ *You will have to entice them to do that*
- ▶ *You have to actively engage their mind – once you have riveted their mind to specific time and place you can control it – then you have a higher chance of putting forward a convincing argument*


Establish a logical flow that answers the question either inductively or deductively

Each slide should have one key takeaway and its content should support this takeaway – no more no less

“The mind cannot hold more than about seven (+/- two) items in its short-term memory at any one time.”

George A. Miller,

The Psychology of Communication: Seven Essays

- 
- ▶ Reduce clutter and multiple messages
 - ▶ Organize slide content – Favour graphics over words
 - ▶ Ensure that the key takeaway is captured in the talking header and...
 - ▶ Make sure that the takeaway fits into the overall story you are building

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Your presentation should be self-contained and reusable

What Clients do	Therefore, what we should do
Clients tend to reuse slides from our decks i.e. copy our slides into their decks	Ensure we stay compliant to the Powerpoint template to enable ease of copying
Sometimes, clients would like to modify a graph/table, or simply want access to the data used to create the graph/table	Don't copy and paste tables and graphs from Excel. Create tables and charts in Powerpoint so that the data is readily available
Clients may want to modify graphics from our slides to reuse in their presentations	Use Powerpoint aids such as shapes, connectors, grouping objects, charts etc.

Setting the stage at the beginning of a presentation makes the rest of it easy to follow for the audience

- ▶ If there are decisions to be made during the presentation, it is sometimes useful to call them out at the beginning of the presentation

- ▶ Make your 1st or 2nd slide an outline of your presentation
 - Ex: previous slide

- ▶ Follow the order of your outline for the rest of the presentation

- ▶ Only place main points on the outline slide
 - Ex: Use the titles of each slide as main points

Now, how do I make the presentation easy to read or use?

- ▶ Is the deck too long?
 - Good decks can be fewer than 5 slides

- ▶ Does one slide logically flow to the next?
 - If you were the audience, does each slide answer the first logical question that follows from the previous slide?

- ▶ Is it readable?
 - Large text – you should never have to use fonts less than size 12 in a deck
 - Slides not busy – right content, margins etc.
 - Good choice of colors

- ▶ Does it print/PDF well? (Remember, many clients still print their presentations before reading)
 - Print a test copy (in black and white as well to ensure that color contrasts are still good)
 - Create a test PDF

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Things to worry about...

- ▶ Slide layout
- ▶ Text
- ▶ Font
- ▶ Tables
- ▶ Charts
- ▶ Shapes
- ▶ Colors
- ▶ Grammar

Respect margins... Half an inch from each edge of the page. All content should be within the box below



There are a few simple rules that, when followed, result in appealing slides

- ▶ When you design a slide, it should be such that the presenter doesn't spend more than 30-90 seconds discussing its contents
- ▶ Paragraphs are for Word documents. Keep your sentences and messages concise in Powerpoint – Use bullets
- ▶ Audiences like pictures. Avoid text-only slides (like this one 😊). If you are forced to use a text-only slide, don't make more than 5 points (respect the “rule of seven”)
- ▶ Don't use animation unless the slide is complex and the animation helps in the narration. Avoid too much animation – it gets boring

Text becomes easier to read when the author focuses on four factors that enhance readability

Attribute	Best Practice	Good	Bad
Bullets	<ul style="list-style-type: none"> ▶ Use bullets consistent with the Powerpoint template; For Mu Sigma use (“▶” and “–”) ▶ Indent bullets sufficiently so that the text is aligned on the same line on the left hand side 	<ul style="list-style-type: none"> ▶ This is an example of good indentation <ul style="list-style-type: none"> – The sub-bullets are sufficiently indented as well 	<ul style="list-style-type: none"> ▶ When you don’t indent properly, the second line seems to start some distance to the left of the first ❑ Nice indentation, but wrong bullet for this template
Line Spacing	<ul style="list-style-type: none"> ▶ Use single line spacing. Too little spacing or too much spacing renders text hard to read 	<ul style="list-style-type: none"> ▶ This is an example of good line spacing. Easy to read... 	<ul style="list-style-type: none"> ▶ And this is an example of really low line spacing ▶ This is bad because the line spacing is too high
Paragraph Spacing	<ul style="list-style-type: none"> ▶ Use paragraph spacing of 0.75 times your font size 	<ul style="list-style-type: none"> ▶ This is good ▶ Because the second bullet is sufficiently spaced from the first one 	<ul style="list-style-type: none"> ▶ And this is bad ▶ Because, the second bullet and first bullet are not spaced at all
Alignment	<ul style="list-style-type: none"> ▶ Text in sentences should always be left aligned. Do not use center alignments except in rare cases. Do not justify your text in Powerpoint 	<ul style="list-style-type: none"> ▶ You can’t go wrong with left-aligned text. It is easy to read especially when the eyes move around from one line to the next 	<p>Center-aligned text causes tremendous strain on the eyes for the eyes can’t anchor on a margin</p> <p>Use very long words in short sentences and the spaces become larger and hard to read</p>

Powerpoint gives you a lot of power in formatting text – that power can be misused

Good

- ▶ Use at least an 12-point font
- ▶ Use different size fonts for main points and secondary points
 - this font is 14-point, the main point font is 16-point, and the title font is 22-point
- ▶ Use a standard font like Arial or Calibri (the “Sans Serif” fonts)

Bad

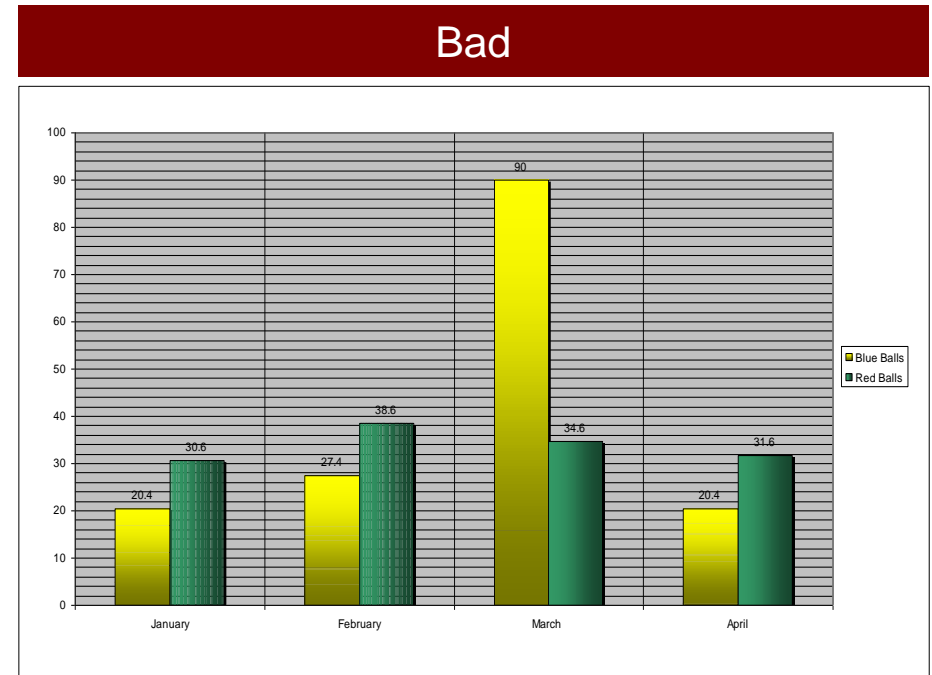
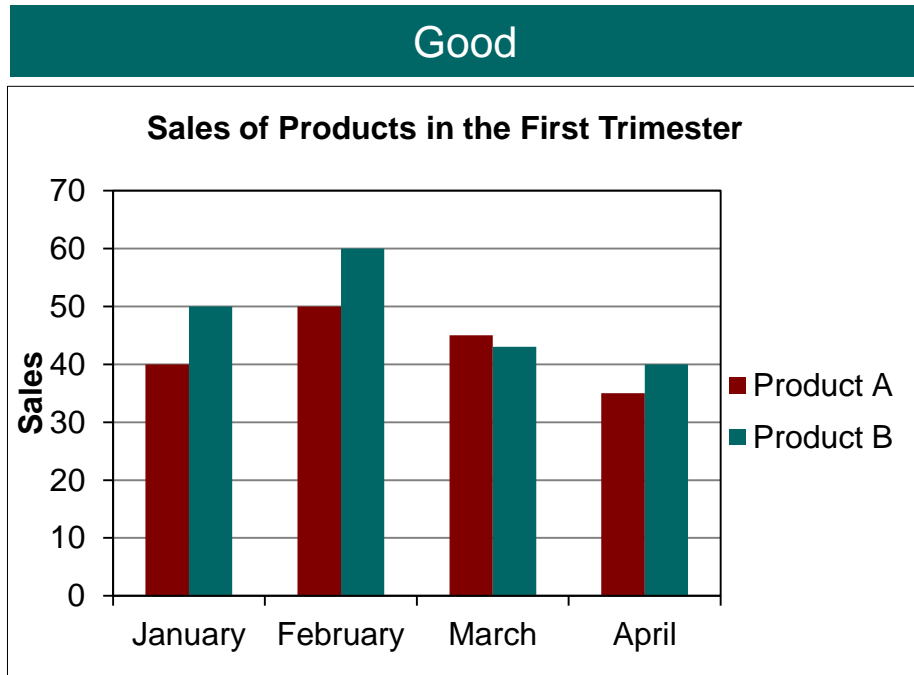
- ▶ If you use a small font, your audience won't be able to read what you have written
- ▶ CAPITALIZE ONLY WHEN NECESSARY. IT IS DIFFICULT TO READ
- ▶ **Same rule with bold, italics and underlined fonts**
- ▶ *Don't use a complicated font*

Mu Sigma table formats favor shades of colors to distinguish rows and columns over the traditional lines

Name	Math	Physics	Chemistry
Puneet	13	26	60
Rangan	84	61	28
Bharath	79	26	33
Srivatsan	63	58	35
Tri	14	93	27
Tanuj	3	14	58
Shrinivas	78	29	89
Vikas	98	50	42
Sriram	47	78	4

Name	Math	Physics	Chemistry
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Rangan	84	61	28
Bharath	79	26	33
Srivatsan	63	58	35
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Shrinivas	78	29	89
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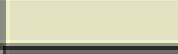

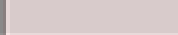
Charts...



- ▶ Minor gridlines are unnecessary
- ▶ Font is too small
- ▶ Colors are illogical
- ▶ Title is missing
- ▶ Shading is distracting

The standard Mu Sigma colors that should be used in client presentations

Colors allowed in Mu Sigma

Color	RGB Code	Hex Code	Sample
Maroon	128, 0, 0	#800000	
Teal	0, 102, 102	#006666	
Tan	226, 225, 192	#E2E1C0	
Ash	102, 102, 102	#666666	
LightAsh	216, 203, 203	#D8CBCB	

```
> rgb(128, 0, 0, maxColorValue=255) # The RGB function  
returns Hex code for a color combination
```

More tips on charts

- ▶ Avoid borders around graphs. In any case, if you want to include borders do it consistently throughout your presentation
- ▶ Avoid 3-D charts – they are difficult to read and interpret
- ▶ If you have a graph with more than three series, reconsider your slide design

Shapes allow users to create graphics or flow charts. However, “too much” and “disorder” can be bad

- ▶ Too many shapes
- ▶ Too many types of shapes
- ▶ Too many different sizes
- ▶ Shapes that are not aligned properly
- ▶ Shapes that are not spaced properly

Colors can help you effectively communicate your message... Or blind your audience. Use them wisely

Good

- ▶ Use a color of font that contrasts sharply with the background
 - Ex: blue font on white background
- ▶ Use color to reinforce the logic of your structure
 - Ex: light blue title and dark blue text
- ▶ Use color to emphasize a point
 - But only use this occasionally

Bad

- ▶ Using a font Color that does not contrast with the background Color is hard to read
- ▶ Using Color for decoration is distracting and annoying.
- ▶ Using a different Color for each point is unnecessary
- ▶ Using a different Color for secondary points is also unnecessary
- ▶ Trying to be creative can also be bad

Avoid bright colors and too many colors

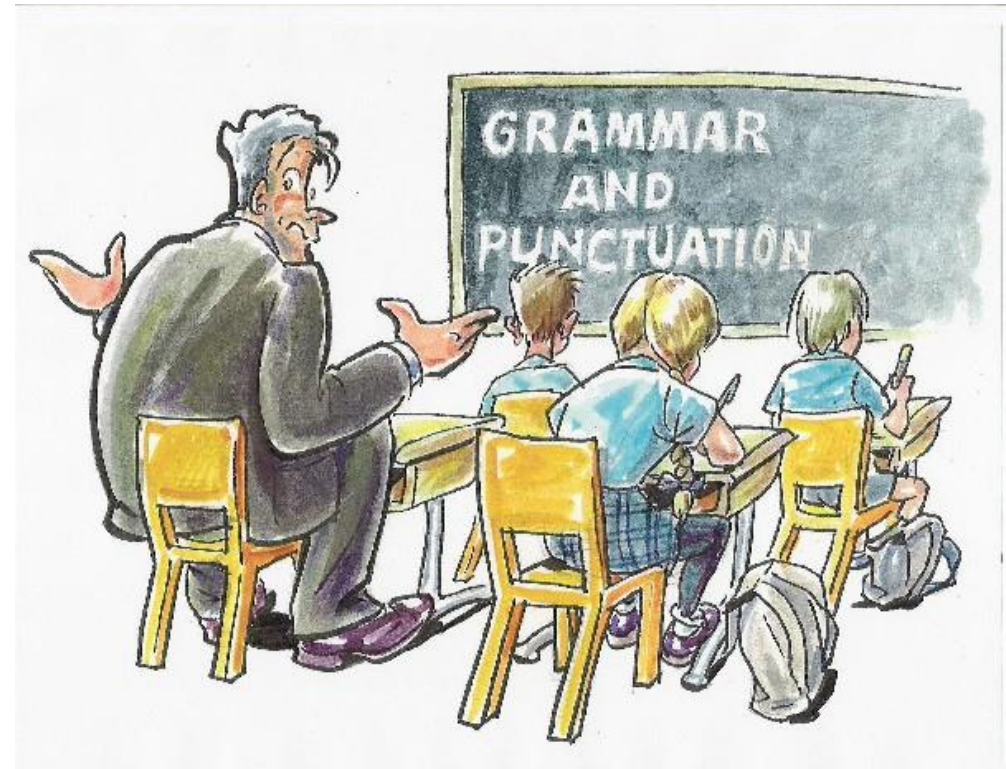
- ▶ Avoid backgrounds that are distracting or difficult to read from
- ▶ Always be consistent with the background that you use



Spelling and Grammar

- ▶ Proof your slides for:
 - spelling mistakes
 - the use of of repeated words
 - grammatical errors you might have make

- ▶ If English is not your first language, please have someone else check your presentation!





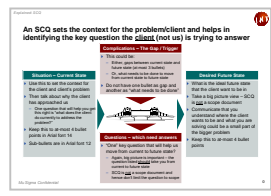
A typical client presentation comprises of five components

1



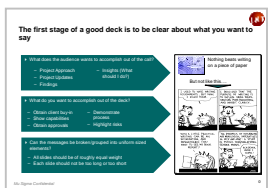
- ▶ Title slide
 - The client’s name, Mu Sigma name and logo
 - Project name and the presentation title
 - Date of the meeting

2



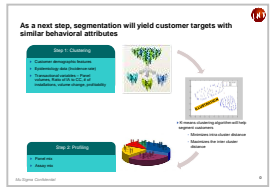
- ▶ Background and objectives
 - SGQ
 - Representation, Hypothesis Matrix

3



- ▶ Content
 - Convey key takeaways through executive summary

4



- ▶ Next steps
 - Suggest subsequent analytical steps to solve the business problem

5

Appendix



DISCUSSION DOCUMENT



Mu Sigma

United Health Group
Segment Ascription

- ▶ Problem with template, should not have a logo on cover slide here

Chicago, IL
Bangalore, India
December 2009
www.mu-sigma.com

- ▶ Wrong template used. This should be centered

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BMS wants to negotiate for a higher formulary status for their 2nd generation TKI drug - Sprycel among payers


Current State

- ▶ The HEOR team of BMS is responsible for communicating the value of its drugs by providing a comprehensive view of the evidence based on synthesis of real-world and clinical trials data.
- ▶ The sales of BMS's second generation TKI (Tyrosine-Kinase Inhibitor) drug – Sprycel, is not meeting set expectations.
- ▶ BMS wants to know on what grounds they can approach payers requesting for a higher formulary status for Sprycel.

Gap

- ▶ The team needs to assess the characteristics of the drug where it outperforms its competitor drugs.

▶ Headline should not go beyond 2 lines



Questions

- ▶ How can BMS in the formula

▶ Font size is too small to read
 ▶ The bullets are the wrong color – they should be blue like in this comment

Desired Future State

- ▶ **Outcome** : Sprycel, on achieving a higher formulary status, is now available to a larger number of CML patients.
- ▶ **Behavior** : BMS was able to devise an appropriate strategy to convince the payers why Sprycel should have a higher formulary status.
- ▶ **Insight** : The team has a clear understanding about the benefits andcomings of Sprycel as compared competitor drugs.