A Trainer’s Guide to PowerPoint

BEST PRACTICES FOR MASTER PRESENTERS

Mike Parkinson
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Introduction

If I gave you a paintbrush and paint, could you paint a masterpiece?

Most likely you couldn’t, unless you were a trained artist.

Just like a paintbrush and paint, Microsoft PowerPoint is a tool. The tool doesn’t make the art; you do, through your skill and talent. Learning how to use PowerPoint is the secret to making effective presentations and learning materials.

PowerPoint epitomizes the term *ubiquitous*. The number of PowerPoint users is mind-blowing—even if the only available data are outdated. Robert Gaskins (n.d.), the founder of PowerPoint, wrote that in 2003, more than 500 million PowerPoint users worldwide were making more than 30 million presentations every day. These numbers are still widely circulated and have not been updated, but that equates to well over 10 billion presentations annually. On average, PowerPoint is used more than 350 times per second (PowerPointInfo 2017). Even if the actual numbers were half this estimate, PowerPoint eclipses the use of all other similar tools combined. Wherever you find a computer, you will likely find a PowerPoint user.

Having so many PowerPoint users at different skill levels creates a reoccurring challenge—lack of quality and effectiveness. Feedback for PowerPoint presentations range from “What was the point?” to “That changed my life.” Unfortunately, most fall closer to the former reaction.

What are the key traits of a powerful, effective PowerPoint presentation? I have identified six:

1. engaging throughout
2. professional
3. clearly connects the dots between the learner, the objectives, and the content
4. easy to understand
5. easy to remember
6. easy to apply.

How many presentations have you seen that achieve these benchmarks—100, 20, 10, none? Compare your number with the total number of presentations you have seen. I’m guessing the amount of successful educational presentations is relatively low.
The reason we don’t encounter better PowerPoint presentations is because most presenters don’t know how to create them. That is why I wrote this book and, I assume, why you are reading it. I want to share with you how to effectively use PowerPoint and reveal what the best-of-the-best PowerPoint designers and presenters do.

PowerPoint is an amazing tool. It offers a variety of features that align with the needs of presenters in every industry. The software is many things to many people; it isn’t always used for one purpose. Trainers and facilitators can use it to make presentations, graphics, storyboards, handouts, brochures, and more.

However, PowerPoint’s default settings and built-in functionality do not always encourage best practices; its features can lead users astray. For example, bullets are a key part of PowerPoint’s standard settings. In a presentation, bullets are better than paragraphs of text, but they are usually unnecessary. They often act more as speaker notes than training elements.

When most presenters start using PowerPoint, they focus on the default features and “gee-wiz” effects like WordArt (Figure I-1).

**Figure I-1. PowerPoint Default WordArt Features**

The result is an unprofessional presentation that looks like every other unsuccessful presentation. Explaining what functionality to use or avoid is not enough to become a PowerPoint expert. That’s like showing someone how to operate a camera and expecting an Ansel Adams photograph. It’s more than knowing what to do; it’s knowing why to do it.

Take something as simple as choosing the colors for your presentation. Knowing how to change your PowerPoint’s theme colors is much easier than knowing which colors to choose to get
optimal results. Do you choose colors you like? Do you select hues from an online color picker? Do you base your palette on your organization’s brand? Knowing why you choose which colors is much more important than knowing how to change them in PowerPoint.

This book focuses on developing professional, powerful PowerPoint presentations that improve understanding, recollection, and adoption. There is no magic button to make awesome slides. However, there are proven processes and tools that deliver successful PowerPoint content every time you use them. For example, PowerPoint is not a graphics package, but it can be used to build amazing graphics—if you know how.

The formal steps in this book are intended to give you a solid, repeatable approach to presentation design. There is no one-size-fits-all process for making successful PowerPoint presentations and educational materials. As you gain more experience, some steps will become intuitive, and you will not always need to doggedly follow the exact method. You will learn the best practices and tailor them to meet your specific needs.

To learn this process, we must first define and agree on key terminology. When I refer to the presenter, I mean the person or organization sharing the PowerPoint material. Author means the person (or people) in charge of developing the presentation (and learning materials). Audience and target audience denote the learners intended to receive your content. Conceptualize refers to the process of creating a design or design plan. It often involves visualizing and graphically representing your content.

The process shown in this book is founded on two principal needs. Selecting the right PowerPoint features to meet your learners’ goals is easy when you know what functions or approaches elicit what responses. The process shown in this book is founded on two principal needs.

**Two Principal Needs**

When cultivating and growing skills through training, there are two principal needs you must keep in mind:

1. Communicate the necessary information in a way that is easily understood and applied.
2. Engage the learner.

Aside from presentations used for pure statistical analysis of empirical data (in which case, use a better-suited tool), almost all PowerPoint presentations are meant to engage our audience and improve learning. How to engage the learner is based on a combination of understanding basic human behavior and knowing what motivates them.
A successful presentation answers your audience’s questions. It tells the learner who, what, where, when, why, and how. The content makes it easy for the learner to go from attending a PowerPoint-based seminar to achieving all learning objectives.

**How Learners Learn**

How we learn is the foundation on which you build content. Knowing how to improve understanding, recollection, and adoption is key. Don’t swim against the current; use your audience’s natural brain functions to your advantage.

To make successful presentations and learning materials, you need to recognize the two levels of audience communication—conscious (intellectual) and unconscious (emotional):

- **Conscious communication** is the intellectual, analytical, and surface processes involved in comprehending the information presented. It is the presentation’s (and the presenter’s) ability to communicate content in a way that is easy to intellectually digest. It is the information your audience knowingly processes. I call it surface communication. For example, think of the last time you attended a presentation. When you studied the slides, you made a conscious choice to engage with and interpret the content. It is what you chose to focus on—to read and hear. One of the conscious mind’s jobs is to keep our unconscious mind on the right path. Both your conscious and unconscious mind create checks and balances to make sure you stay on the right path.

- **Unconscious communication** is the emotional effect the presented materials have on your learners’ state of mind. It influences whether they are truly engaged and can easily recall the content shared. Everything we take in elicits an emotional response—whether we know it or not. Successful PowerPoint content harnesses this aspect of the human mind to influence and motivate audiences. For example, you could use pictures of tragic accidents to provoke your audience to change their driving behavior by emotionally connecting what they are learning to an undesirable outcome. Color choice alone is shown to sway your learners’ moods.

Research is proving that the vast majority of our choices and actions depend upon brain activity that is outside our conscious awareness (Ariely 2010; Bargh 2007). Based on my observations and reading, I (nonscientifically) estimate that 95 percent of learning and the application of what we learn is subconscious (Figure I-2). For example, do you need to concentrate to breathe, blink, walk, talk, write, type, or tie your shoes? Have you learned something simply by watching others? Have you thought, “I don’t like the look of that?” That’s because our unconscious mind is constantly learning, making quick decisions, and applying what we learn while our conscious mind goes on
to other tasks. In many situations, the unconscious mind can actually outperform the conscious mind (Dijksterhuis 2009). Even life-and-death activities are governed by our unconscious mind. For example, something as dangerous as driving is supposed to be a conscious, focused activity, but while you were driving, have you ever wondered, “Where am I? Did I miss my turn?” Most of what we do in life—even driving—is unconscious.

I regularly conduct an experiment in my workshops. I ask for a volunteer who drives. I hand the person a paper plate and say, “This your vehicle’s steering wheel. Can you show us how you change lanes from the center lane to the right lane? You’ve already turned on your blinker, and checked your mirrors and blind spots. We just don’t know what you do with the steering wheel.” To date, no one has correctly showed how to turn the wheel to change lanes. Volunteers forget that after turning the wheel right to move into the right lane, you then have to turn your wheel back to the left to straighten your car’s tires and continue moving forward. Of course, they know how to do it—unconsciously. They do it almost every day. The issue is that most of our actions are driven (no pun intended) by a powerful part of our brain.

**Figure I-2. The Relationship Between the Unconscious Mind and the Conscious Mind**

 consciousness and unconscious communications are interrelated; each affects the other. For example, do you make a habit of buying from people you don’t trust? Trust is an amalgamation of analytical and emotional observations and conclusions. The same is true with how participants see
and choose. All surface and subsurface inputs interact to form a cohesive picture of the content for your learners. Assuming no other input, what your audience sees and hears combine to create the lasting impression of the presenter and ultimately leads to a positive or negative end result.

In his 2006 book, *The Happiness Hypothesis*, psychologist Jonathan Haidt uses a fantastic metaphor to understand the relationship between the two parts of our brain. He wrote that the emotional, automatic side is an elephant, and the analytical, controlled side is its rider (Figure I-3). The rational rider’s job is to maintain control when the irrational elephant wants to leave the path.

Figure I-3. The Emotional and Analytical Sides of the Human Brain

When we process information, our unconscious mind is constantly working—largely without our awareness or supervision. The benefit is often that we learn important stuff faster, have fun, stay safe, and stay alive (that is, it regulates automatic body functions). It even helps us solve problems over time. How often has a solution popped into your mind while you were in the shower or falling asleep?
Unconscious thought is a part of all decision making and almost always trumps the conscious mind. Ignoring this impedes learning. For example, if you want your presentation to be seen as professional and compelling, then every aspect must be consistent with that desire. If your presentation is aesthetically unappealing and riddled with grammatical errors, your audience will question the quality of the content being shared. The incongruence of the conscious and unconscious communication confuses learners’ minds. Your audience begins to doubt that the presentation is worth their attention. The “elephant” will likely leave the path.

Your participants are bombarded with competing information. There is too much to consciously process, so your learners take shortcuts. Their brains quickly determine if it is worth their time and use brain tricks to acquire knowledge. We want to tap into that. For example, when I teach participants how to render PowerPoint infographics, I include step-by-step instructions. Learners quickly decide that they want to make professional graphics like the ones they see, and I show them (along with accompanying text) how to do it themselves. The images act as a brain cheat sheet—a quick reference guide. I’m tapping into how the brain learns best.

As trainers and facilitators, it is in our best interest to tap into unconscious learning and application to improve the outcome for our audience.

Because everything we absorb elicits an emotional response that affects our state of mind, your presentation will also communicate other, less identifiable, unconscious ideas, such as the credibility, competency, professionalism, reliability, creativity, and strength of the presenter. Your goal is to elicit emotions in your audience that support the author’s and presenter’s goals.

Knowing how to involve both the conscious and unconscious mind is a secret that great trainers and facilitators use. If you follow the methodology laid out in this book, you will too.

The Process
Using a process to make successful PowerPoint presentations gives repeatable, predictable results. It supports the two principal needs and relies on how participants really learn. The process I’m sharing is arranged into three phases: Discover, Design, and Deliver (Figure I-4). The methodology I share is applicable to all PowerPoint-based learning materials—not just presentations.
Introduction

Figure I-4. The Three Phases of the PowerPoint Process

About This Book
Discovery, phase 1, focuses on determining the problem, mission, learner, and subject matter—the four success factors to discovery, and the foundation of an effective presentation (chapter 1). Lacking this information results in a presentation that focuses on you (for example, what you want to say, your biases) and not what your learners need. The outcomes improve the more you know about the problem, mission, learner, and subject matter. Research into what matters most to your audience provides the insight needed to keep them engaged throughout your session and improve adoption rates.

Design, phase 2, is where your presentation is created. This step involves how to write a takeaway (chapter 2), how to storyboard (chapter 3), and the secret tips and tricks to rendering, or making, your slides (chapter 4). Your takeaway is the summary of your entire presentation. It must capture your learners’ attention. Storyboarding is your plan. It connects the dots between the takeaway and your narrative. When done right, a proper storyboard is fed by the information found during the discovery phase. All these steps are preparation for understanding the design principles you can then apply to your presentation (chapter 5).

Delivery, phase 3, focuses on your method and medium for sharing your presentation and supporting content. It may be a virtual session; a face-to-face classroom, where participants are learning from a lecture; or both. Best practices, tips, and tricks for each delivery method are included in chapters 6 and 7.
Being proficient with PowerPoint is only the first step to mastering presentation design and delivery (and any other purpose for which you may use it). The formal steps in this book are intended to give you a solid, repeatable approach to presentation design.

Use what works for your situation. Not every project can accommodate every step in this process. Be judicious when choosing what you need to create a successful presentation with your allocated resources and schedule. For example, you may have four hours to develop a presentation that explains a new technology. In this case, use the steps you have time for.

Finally, although all the steps are important, some matter more than others. The two most important steps in the process are to understand your learner and to develop a takeaway that motivates your audience. These are required to make a successful presentation.

Let’s get started. . . .
Imagine being tasked to make a presentation for a financial planner. The goal is to empower customers to make wise decisions for their short- and long-term financial security. Right now, with a little research, I suspect you could create a wonderful presentation that shared strategies, formulas, tools, and points of contact you received from your project adviser. You are wise enough to make sure the presentation is professional in every way and takes full advantage of all that PowerPoint has to offer. Assuming you have the information you need, within hours you might have an outline and slides started. If you did this, you would be guilty of what most PowerPoint users fail to do. You would likely make the sort of presentation that you dislike. Engagement and efficacy would suffer.

The main problem with this approach is that you are missing critical pieces of information that directly affect the likelihood your presentation will be successful. For example, what if you discover your audience is people who won the lottery or families with very little money to save and invest? What if you find out that for legal reasons, they cannot invest in traditional retirement saving vehicles? What if your audience is visually impaired? Might any of these significantly change your presentation? (I hope you emphatically answered, “Yes!”)

The Discover phase is focused on your audience and its needs—not yours. In this phase, you immerse yourself in the project and see the presentation from multiple perspectives. You become the learner. When done right, you end up with a profile that informs every decision you make during the Design and Deliver phases.

“When you want to start a PowerPoint presentation, the first thing is: Don’t open PowerPoint. You don’t want to get lost in the templates, colors, fonts, and design of the slide.”

—Doug Thomas, Microsoft, Creates Videos and Training at Support.Microsoft.com
Most PowerPoint presentations fail because the author does not take time to understand the audience. The author focuses on what they want to say and not what the participants need. Too many assumptions are made about the problem, learners, mission, content, and so on. The developer bases the presentation on their preferences, personality, and biases, and their presentation fails.

Before you develop your presentation, understand the problem you are solving and see it from your learners’ perspective. You need to appreciate the requirements and limitations. Your goal is to share solutions to reoccurring problems in a way that achieves their learning objectives.

What is your mission? It should encompass your goals, delivery methods, and resources. Knowing your mission informs what content you include in your presentation and how you communicate and share it. Achieving your audience’s learning objectives requires understanding, recollection, and adoption. How you do that in your PowerPoint presentation is dependent upon the learners and the subject matter.

Know your learners. What are their aspirations? What are their hopes, fears, and biases? Do they want to learn this material, or were they told they had to? Your learners’ state of mind directly
affects their ability to learn. The more you know about them, the greater your odds of engaging them—motivating them to want to learn. They have to decide to care about your content. It is up to you to reinforce or incite that desire.

Lastly, know your subject matter or have access to people who do. How can you teach what you don’t know? Your job is to learn and share what is critical to the learning objectives. You have the unenviable task of simplifying complex and sometimes boring content into a desirable, digestible format.

Your goal is to uncover as much intelligence as you can in the time you have, because there will be other things you do not know or cannot control. The more you know, the more you can account for. When it is time to share your PowerPoint presentation and materials, you want to mitigate the risks of anything that will impede learning.

You may also experience less controllable variables that affect whether you reach your learning objectives. I refer to these issues as outside influences; an example is a technical glitch, such as the loss of Internet or power. Do your best to accommodate these variables and roll with them.

Your presentation’s success is contingent upon the audience’s:

- perception (factual or not) of the presenter, material, and environment
- biases
- life experience
- open-mindedness
- intelligence
- subject matter proficiency
- comfort
- state of mind.

Consider the following two scenarios:

1. You create a professionally designed, factually accurate PowerPoint presentation. Unfortunately, the presenter is disheveled and dressed inappropriately, wearing a T-shirt, shorts, and sneakers. The presenter’s appearance distracts your audience from the material. Whether your presentation is perceived as credible and factual is now in question.

2. Because of past experience, your audience is biased against the presenter. They may have experienced poor customer service or once owned a defective product made by the presenter’s company. Adoption may not occur.

Many juried court systems try to lower the potential risk of outside influences. Lawyers, aware of the damage pre-existing prejudices may have, ask specific questions to eliminate jurors who may
result in a loss for their client. In some instances, jurors are sequestered to avoid the likelihood that
outside influences will affect their decisions.

Controllable elements (data accuracy, spelling, room temperature) as well as unexpected influ-
ences (unintended associations, technical glitches) can determine whether your presentation is given
the positive attention required to succeed. For this reason, uncover as many variables as possible
during the discovery process. Ensure that everything associated with your presentation is congruent
with your mission—your objectives.

After the Discover phase is the Design phase. Design requires planning. At the heart of planning
is a combination of research, resources, requirements, and analysis. If you lack certain fundamental
information (that is, the problem, mission, learner, and subject matter), your PowerPoint content
will be less than effective. For this reason, you want to gather as much relevant data as possible.

The entire Discover phase can be collaborative. For example, one author may have learner
insight, another may be a subject matter expert, and still others may hold the remaining pieces of
the puzzle. Together, the whole PowerPoint authoring team possesses the necessary knowledge to
produce a successful presentation. Your final output is limited only by your (or your group’s) imag-
ination and the audience’s understanding of the content being shared. Be creative and have fun.

In the Discover phase, you are a detective. Your job is to understand the scope of the project
from different perspectives, get into the minds of your learners, learn the subject matter, and use that
insight to make the best PowerPoint presentation possible with the time and resources you have.

In my experience, the Discover phase is often ignored. There are two reasons this occurs:

1. **Resources are scarce.** There is a lack of people, money, or time.

2. **There’s a lack of understanding.** To make a PowerPoint presentation, the typical first
   step is to make an outline or get started on the slides. Rarely is discovery the
   standard approach.
What Is the Problem?

All effective education is inherently solving a problem, and problem solving requires learning. Your presentation should give a solution to an existing problem, or else it has no purpose beyond entertainment or wasting time. The following are four examples of problems that educational PowerPoint presentations solve:

1. A college professor creates a PowerPoint presentation that educates students on Albert Einstein’s theory of special relativity. Through this presentation, the professor is solving the students’ need to learn this theory to pass the class and advance in the field of physics.

2. A company is implementing new tracking software. The problem is that the existing software does not catalog data and is difficult to search, which affects the organization’s ability to respond to client emergencies quickly. They create a training course to help their employees learn and adopt the new software, which is critical to resolving the issue.

3. A not-for-profit organization wants the results of a cancer study. Without an accurate understanding of the findings, additional lives may be lost. A researcher distills the quantitative information and presents it in an easy-to-follow format that allows the organization to quickly analyze the data and create a plan.

4. An organization needs to improve security protocols. The problem is that too many employees fail to observe standard operating procedures and expose the company to unnecessary security risks. They create a mandatory training workshop for their employees to reinforce security processes.
Your audience is sitting through your presentation to improve their condition—to learn something that will help them work through a challenge and achieve a specific goal (or set of goals).

You are not necessarily solving the problem for them, but sharing the solution. You want to impart the knowledge in a way that is succinct, engaging, and illuminating. The audience must want to apply what they learn, or else the problem will remain.

For inspiration, check out TED Talks (www.ted.com), in which experts across industries share solutions with the world. The most popular TED Talks help people solve a problem—either in their work or personal lives. Here are some of my favorites:

- Ken Robinson’s “Do Schools Kill Creativity?” discusses improving learning for children.
- Simon Sinek’s “How Great Leaders Inspire Action” tells you how to motivate others.
- Jill Bolte Taylor’s “My Stroke of Insight” helps learners understand what happens in our brain when you or someone you know has a stroke.

PowerPoint is absent in each of these presentations, yet they are extremely popular. Why? In part, they solve a problem. Education solves problems.

Successful PowerPoint training presentations solve the learner’s problem. However, you must first understand the problem before you can create a presentation that provides a solution.

Formalize the problem by completing a Solution Matrix (Table 1-1), which helps you explore the problem (“As Is” column), goals (“To Be” column), and barriers. (The “To Be” column is addressed in greater detail in the next section.)

<table>
<thead>
<tr>
<th>As Is</th>
<th>To Be</th>
<th>Barrier(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the problem now? How does it work now?</td>
<td>What is the ideal (and realistic) goal state?</td>
<td>What is stopping the change?</td>
</tr>
</tbody>
</table>

Start by listing the current situation in the “As Is” column. What are the problems the learner faces today? How does it work now? Perhaps the issue is they fail to follow a procedure, they lack knowledge needed to complete a task, or the current tool they use takes too long to process data. Figure out the problem and capture it.

Next, write down the “To Be” state. Be realistic and summarize at a high level; detail isn’t important now. At this point, you are focusing on the problem and the barriers.

Finally, list the barriers that prevent the goal from happening. If these obstacles were removed, the problem would be resolved. The “As Is” state would become the “To Be.” The barriers are the
foundation upon which you will build your solution during storyboarding. The presented solution should remove your learners’ barriers.

The Solution Matrix gets you closer to the situation. When properly filled out, it will give you a better appreciation of what learners experience. Your goal is to empathize as much as possible with learners. Seeing through your audience’s eyes will improve your PowerPoint content’s effectiveness.

Table 1-2 is an example of a Solution Matrix with the As Is and Barrier columns completed.

Table 1-2. Creating a Solution Matrix

<table>
<thead>
<tr>
<th>As Is</th>
<th>To Be</th>
<th>Barrier(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Files are shared openly over email and removable storage devices,</td>
<td>The secure network is seen as more time consuming.</td>
<td>• The secure network is seen as more time consuming.</td>
</tr>
<tr>
<td>which is a security risk.</td>
<td>• Using the secure network is not as intuitive.</td>
<td>• Using the secure network is not as intuitive.</td>
</tr>
<tr>
<td></td>
<td>• Using the secure network is not a habit.</td>
<td>• Using the secure network is not a habit.</td>
</tr>
</tbody>
</table>

In most instances, there is a prescribed solution. For example, you are tasked with creating a PowerPoint presentation that educates learners on a new tool meant to solve their existing problems. Part of the Discovery process has been completed for you. When this is the case, explore the problem even more. Improve your understanding and, at your discretion, validate that the proposed solution solves your audience’s problem. If it does, ensure this connection is clear to the learners. We will learn more about how to do this in the Design phase.

Be specific when uncovering the learners’ problem. A difficult-to-explain problem is almost impossible to resolve, whereas a well-defined problem has a well-defined solution. Verify that your audience knows the issue you are solving. Most times, your target audience is aware of the challenge you are working out, but it doesn’t hurt to remind them.

Once you discover the problem and barriers, define the goals, understand your audience, and learn the subject matter well enough to present the solution in a way that’s easy to remember and apply.

I used my Solution Matrix when I was helping a large hotel chain develop a presentation for hotel owners. After chatting with my point of contact (my subject matter expert), it was clear to both of us that the problem was lost revenue and low occupancy rates. We easily determined the goal state to be increased revenue and higher occupancy rates. The barriers took a little more investigation, but once we uncovered all of them, we were able to develop a powerful presentation that, if followed, would absolutely achieve their goals.
The presenter could clearly and simply articulate the problem, which resonated with participants, as well as the benefits of doing what he was sharing (the “To Be”). Next, he shared the three ways hotel operators could eliminate the barriers to achieve those goals. That’s the power of using this approach. Participants relate to your content, and it empowers them to achieve whatever you decide is the best outcome.

Here is a best-practice checklist for understanding the problem:

- Know the problem you’re solving.
- List barriers that prevent the problem from being solved.
What Is Your Mission?

Define your mission, which is the optimal outcomes using specific delivery methods and resources. Your mission clarifies the critical conditions and benchmarks that your presentation must achieve to succeed. It consists of four variables: goals, measures, requirements, and resources.

Goals

Your goals are your learning objectives. Andy Bounds, author of *The Jelly Effect* (2007), says it’s all about the “afters.” What do your learners get after the presentation, after they review your PowerPoint learning materials, after they applied what they learned? If your audience will receive no benefit and fail to resolve a problem, why should they care? If participants don’t care, why will they pay attention? Know their “afters.” They should be synonymous with your goals.

Choosing goals can be challenging. There are three groups that have their own goals, and they don’t always align:

1. your participants
2. your client (the person who engaged your services)
3. your organization.

Sometimes these groups complement one another, and other times they contradict. When possible, find a way to synthesize everyone’s goals. For your presentation to be effective, you must weigh each to determine how best to proceed. When in doubt, focus on your learners’ goals.

Consolidate and simplify when possible. Fewer goals result in a more effective PowerPoint presentation. Your job is to remove complexity and streamline every aspect of your training content, which includes all tasks during the Discover phase.
The goal state must be realistic and achievable. For example, if the problem is poor health due to an unhealthy lifestyle, the audience’s end goal is unlikely to be having the body of an Olympic athlete. If it is unrealistic, do not list it as a goal. Decide what the future state is and write it down.

Be specific. Make sure your goals are observable or measurable. You cannot improve the effectiveness of your PowerPoint materials if you have no way of assessing success.

Use action verbs like complete, identify, and deliver when setting your goals. Keep it simple, clear, and to the point. The more verbose or convoluted the goals, the less likely they will be achieved. Here are three examples of well-constructed learning goals:

1. Participants can increase revenue and occupancy rates by applying three solutions.
2. Attendees can resolve IT issues by identifying the source of an issue within 10 minutes.
3. Learners are able to complete a dietary analysis for a one-month nutritional plan.
4. By the end of this presentation, students can identify the artist, year, and art movement of all artwork shared.

Add the goals to your Solution Matrix. Each one should align with the problem and barriers. If all barriers were removed and the problem solved, what would the outcome be?

Table 1-3 is an example of a completed Solution Matrix. It shows how the problem, barriers, and goals are related.

<table>
<thead>
<tr>
<th>As Is</th>
<th>To Be</th>
<th>Barrier(s)</th>
</tr>
</thead>
</table>
| Files are shared openly over email and removable storage devices, which is a security risk. | Files are only shared using the secure network. | ∙ The secure network is seen as more time consuming.  
 ∙ Using the secure network is not as intuitive.  
 ∙ Using the secure network is not a habit. |

Measures
How do you know if you have reached your goals? You need to validate. A mature learning system includes benchmarks—a way to measure success. There are two paths from which to choose:

1. **Direct Measures:** Evaluate and validate through direct evidence of education. A few examples of direct measures include:
   » the work created during the class
   » the observable work products delivered after the class
   » testing scores.
2. **Indirect Measures**: Evaluate learner perceptions of the education to validate if your content met expectations. A few examples of indirect measures include surveys, interviews, and questionnaires.

Focus on the learning that occurs as a result of your program when you determine how to measure its success. The type of process or tool doesn’t matter as long as an assessment occurs. Determining success requires assessment.

Direct and indirect measures are often used together to give an overall review of the results. The more you track the results, the faster your PowerPoint skills improve because you are able to correlate key success factors with your approach.

Whatever you choose, make it an integral part of your learning event. Embrace validation and use it to grow. Measure and adjust accordingly for continual improvement.

**Requirements**

Following the project requirements paves the way to a successful training session. What is the delivery method? What is acceptable to share? What can’t you share?

Table 1-4 contains examples of requirements you should identify as early as possible. To improve the odds that I define all conditions and obligations, I split the information into two categories: technical and procedural.

**Table 1-4. Creating a List of Technical and Procedural Requirements**

<table>
<thead>
<tr>
<th>Technical</th>
<th>Procedural</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which version of PowerPoint can you use?</td>
<td>What is the duration or time limit?</td>
</tr>
<tr>
<td>Is it projected? If yes, what are the specifications of the projector/display device? What is the size of the projected surface and the room? How much seating is there?</td>
<td>Are there specified break times?</td>
</tr>
<tr>
<td>Can you use your laptop, or must you use another computer?</td>
<td>Is there a sign-in sheet?</td>
</tr>
<tr>
<td>Is it presented on a Mac or Windows operating system?</td>
<td>Will your PowerPoint content be printed, online with a trainer, online self-led, face-to-face with a trainer, or a hybrid?</td>
</tr>
</tbody>
</table>
### Technical

<table>
<thead>
<tr>
<th>Question</th>
<th>Procedural</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are animations acceptable?</td>
<td>Will you need exercises, worksheets/books, or breakout sessions?</td>
</tr>
<tr>
<td>Is video OK?</td>
<td>Do you need a timer?</td>
</tr>
<tr>
<td>Are you using specialty fonts for branding? (Can fonts be embedded?)</td>
<td>Must you follow a brand standard or use an existing PowerPoint template?</td>
</tr>
<tr>
<td>Are there software security tools?</td>
<td>Are you working with others?</td>
</tr>
<tr>
<td>Is there audio?</td>
<td>Are there security protocols?</td>
</tr>
<tr>
<td>Can you use a camera?</td>
<td>Is lunch provided?</td>
</tr>
<tr>
<td>What is the lighting in the room?</td>
<td>What learning materials are you expected to furnish?</td>
</tr>
</tbody>
</table>

When you get a requirement that limits your ability to deliver the best possible solution, ask your client or point of contact why. When you learn the answer, you may be able to reassure them that their needs will be met without this requirement.

For instance, I once developed a PowerPoint presentation that shared a new product with potential partners. My client wanted almost everything to be animated, so I asked why. He said he wanted the presentation to communicate that his solution was cutting edge. He believed animations would convey innovation. Once I understood his reason for the request, I was able to work with him to deliver a PowerPoint presentation that met his goals and effectively educated his future partners without unnecessary animation.

Another example: When I created PowerPoint templates for BMW Financial Services, they wanted all their graphics created in PowerPoint and not in other software like Adobe Illustrator. When I asked why, they replied that they wanted to easily modify graphics as needed without having to call me (or an in-house designer) to make changes. I realized that as long as the graphics were editable in PowerPoint, I could include elements that did not originate from within the tool. I delivered a better product faster by using a combination of PowerPoint’s native elements and items brought in from other sources that were completely editable in PowerPoint.

Seek first to understand a requirement before debating or dismissing it. Uncover the reason for the demand if you think it will hinder the likelihood of success. When a client insists on an unexpected requirement, consider responding with, “That sounds great. We can absolutely do it. Out of curiosity, why do you say that?” Once you know why, you might know a better way to do it and find a better solution for the client—a win-win for you both!

“Filling out an intake form is the best way to discover what a client presentation needs to be. A good intake form asks for info like the speaker’s objective, room setting, audience size, print requirements . . . many points of data.”

—Tony Ramos, The Presentationist
When I am my own client and I make my own requirements, I sometimes ask myself the same question, “Why?” Why do I feel compelled to do this? If my answer does not help achieve the defined goals, I remove the requirement.

**Resources**

What roles, processes, tools, and knowledge do you have and need? To develop your PowerPoint presentation, you want to take stock of what you possess and what you must acquire.

What roles need to be filled and who can fill them? Usually, subject matter experts are paramount. Depending on the project’s scope, you may need designers, writers, and editors. Often, you are all of the above—in which case, discipline yourself to follow a proven process for defining resources to ensure you have what is needed.

Processes ensure repeatable success of your training. Do you have existing processes in place to speed development? Do you need a version control procedure for your slides? List the processes you need now and in the future. Perhaps you will need a way to share large files or keep PowerPoint slides from being edited by contributors. Recognize it now before it slows your progress later. If a new procedure is needed, identify it and develop it for your next project.

Tools speed development, so decide what tools are needed. For example, do you need the ability to poll your audience? Do you have access to a tool that can be embedded into PowerPoint? Catalog what tools you will use with PowerPoint to execute your project.

There are often gaps in the knowledge you have and the knowledge needed to complete a project. What specific information is required? Once you identify the information or expertise needed, it makes it easier to track down an expert or identify a website, book, or resource that helps you bridge that gap.

Tip: When hiring others, be sure they are professionally trained and experienced in the software and type of work required to complete the task. Review their resumes, portfolios, and past performances.

To track the information, consider a matrix approach to quickly assess what you have and what you need (Figure 1-1).
Knowing your goals, requirements, and resources early in the process eliminates hiccups, headaches, and wasted time. Waiting until the need arises slows the process and could derail the project. Use this best-practice checklist to remind you of your key mission factors:

- List the goals.
- Include a way to measure success directly and indirectly.
- Define requirements (technical and procedural).
- Define resources you have and need for roles, processes, tools, and knowledge.
Who Is Your Learner?

Most PowerPoint presentations fail because the author concentrates on the subject matter and what they want to say instead of the learners. Your audience is focused on what they want from you. What do they get as a result of your presentation? If they cannot see themselves reflected in your content, their attention wanes and adoption rates fall.

Most presentations emphasize the subject matter and not the learners because it’s easy to explain the topic and difficult to connect it to your audience’s goals. Your content must relate to your learners’ hopes. To do so requires a level of intimacy that many presenters fail to appreciate.

Know your learners. Who are they—academics who love learning? Employees forced to take your safety training? What language do they speak? What are their buzzwords? What are their hot buttons? What motivates them? What do they like or dislike—colors, imagery, detailed explanations?

If you don’t know much about your audience, find out! Ask them questions. Research their organization. Visit their website. Talk with those who know them better than you, such as current or former employees or their clients. The more you know, the more powerful your presentation. Your goal is to feel what your audience feels. Empathize with your audience so your content captivates their attention and they can easily comprehend it. Every student will be different; it’s your job to find the common denominators. Look for things that help or hinder training. There are three key areas for learner understanding: proficiency, concerns, and preferred learning approach.

Tip: It is subconsciously comforting to hear and see familiar things. When applicable, use words, images, and sounds that your audience knows to build trust.

Proficiency

Have you heard someone use an acronym you did not know? Were you ever lost while learning something...
new? Have you attended a PowerPoint presentation that was not advanced enough for you? How did it make you feel? Frustration sets in when we struggle with confusing information or become disinterested due to irrelevant content. It results in a host of negative feelings.

If your audience finds your PowerPoint content to be beyond or behind their skill level, they will tune out. Determining your audience’s proficiency helps you choose a communication style and an approach to explain your content. How well do your learners know the subject matter? At what level are they? Are they new to the material, skilled at it, or subject matter experts? For example, if your participants are beginners and the topic is complex, use a metaphor to help them relate to and understand your topic. If your audience is advanced, avoid reiterating what they already know. Use the appropriate technical terms, acronyms, and imagery they’re familiar with. Explanations should build off their existing expertise.

Proficiency can be determined through formal assessments (tests), performance reviews, and conversations with your target audience or those close to them, such as management or co-workers.

**Concerns**
What are the key concerns that will affect your audience’s ability to learn the material? Specifically, what are their likes, dislikes, and biases—as it relates to your PowerPoint material. Knowing your learners’ preferences helps you connect your content with those things that are favored. Understanding audience dislikes and biases uncovers obstacles that block an open mind and hinder learning. I define a bias as a pre-existing prejudice for or against some aspect of what you are teaching. It could be a company, tool, process, person, color, word, solution, sound, and so on.

I was once hired to conduct a PowerPoint workshop in Minneapolis. I used a bridge metaphor in one of my explanations and it was met with pushback. Unknown to me, in 2007, the I-35W Mississippi River eight-lane bridge collapsed, killing 13 people and injuring 145 more. Obviously, had I known about the tragedy, I would have used a different metaphor. My ignorance brought negative emotions into a discussion instead of positive, open thoughts. Do your homework. Uncover as many biases as possible. By understanding your audience’s likes, dislikes, and biases, you are more likely to keep them focused on the topic and not distracted by unwanted tangents.

**Preferred Learning Approach**
Does your audience prefer individual or group exercises? If so, what type? Do they like to discuss topics or would they rather watch a video clip? Because learner preferences vary, I use a variety
of approaches in my presentations that are relevant to the content and objectives. Interactivity is almost always a great option. Here are six ways to learn more about your target audience:

1. **Ask and listen.** Have a conversation with your participants. Ask questions and take notes. To dig deeper into their psyche, I will ask this question after a learner has shared a response with the class: “That’s a great point. Why do you say that?” Encourage your learner to share more. Guide them. Get insight into their proficiency, concerns, and preferred learning approach. By asking, not only do you get accurate insight, but you also make your participants believe they matter. Your audience has input into what they will learn, which makes them more invested.

2. **Observe.** Watch how your learners do their jobs and socialize. What is easy and what is challenging? What makes them smile and what frustrates them? Their body language gives vital intelligence to their true feelings.

3. **Review their records.** Examine test scores, reviews, accolades, and issues. Look for patterns and make logical inferences. For example, a group of participants may receive awards for always shipping products early. This indicates they are process and task driven. If you give them a task, they will concentrate on accomplishing that activity.

4. **Distribute surveys and questionnaires.** Ask your learners specific questions that help you determine their proficiency, concerns, and preferred learning approach. For example, ask them to rate a set of predefined goals from one to three, with one being critical and three being least important to achieve.

5. **Create extracurricular activities.** Set up “getting to know you” events. Icebreakers, games, and sports work well, as long as there is a definitive purpose for each activity that maps back to a benefit to your learners.

6. **Use LEM.** When I struggle to understand my learners, I use the Learner Empathy Map (LEM) exercise (Figure 1-2). You can construct your LEM on a whiteboard or piece of paper, or with mind-mapping software. Write likes, dislikes, and biases in the center. Next, radiating out from the middle, list those elements that align with each central category. Continue to branch out as you further define and explain each element. Use this insight to craft the right content, messages, and story.

   Once, when developing a proposal for a government contractor, my team could not agree on our target audience’s likes, dislikes, and biases, so we made an LEM (Figure 1-3). First, to improve empathy, we chose a set of representative learners we personally knew. If you do not know your learners, give them names.
Make your learners as real as possible—fictitious or not. On a piece of paper, we listed the three central categories—likes, dislikes, and biases. What we listed was based on personal interactions, online research, and educated guesses. Once complete, I used that information to pick a path forward. I made a PowerPoint infographic that was easy to use, included examples, was relevant to their current project, and ensured consistency among writers and reviewers. It was a great success.

In chapter 2, you will learn about the Learner Motivation Map (LMM) and how to formally define learner motivations. The LEM emphasizes the audience partialities and potential landmines to avoid, whereas the LMM focuses on learner motivations. Neither is necessary to complete if you have an intimate understanding of your learners. The LEM and LMM help you better understand your target audience, enabling you to tailor your PowerPoint content to them, which significantly increases the likelihood of success.
Here is a best-practice checklist for understanding your learners:

- **Focus on your learners (not yourself).**
- **Uncover your learners’**:
  - proficiency with the subject matter
  - concerns (likes, dislikes, and biases)
  - preferred learning style.
- **Use the six investigative strategies as needed.**
- **Use your findings to pick a path forward and inform future decisions.**
What Is Your Subject Matter?

Know your subject matter. You must know the topic to teach it. It is your job to align the subject matter with the problem, mission, and learner in a clear, compelling way. The more you know, the more likely your audience will understand.

Here are five efficient ways to learn more about your subject matter. Use one or more to quickly study the topic at hand (WikiHow 2016):

1. Ask a subject matter expert.
2. Research.
3. Observe.
4. Gain hands-on experience.
5. Attend classes.

Subject Matter Expert

Learn from the wisdom of others. Ask specific questions to get specific answers. And take notes: In my experience, people ask good questions, but fail to take good notes. I once supported a project in which a SME shared her engineering expertise. The authors listened closely with their arms crossed. One day later, the authors were asking the SME questions that had been answered the day before. Write it down so you can remember what was shared. It shows that you value the SME’s time and expertise.

Research

Go to your favorite search engine and enter the topic. If one search fails to deliver the desired results, change your search terms. Look for visuals and infographics that explain your topic; don’t limit
Tip: If you don’t know something, don’t lie. Always tell the truth. Our learners’ brains are incredible lie detectors. For example, a neuroscientist had participants play card games with decks of rigged cards set to produce unfair results. Skin-conductance tests revealed that the participants became nervous when reaching for the rigged cards long before the suspicion that they were using rigged cards reached their conscious minds (Renvoisé and Morin 2005).

Watch and learn. Take notes. When needed and possible, ask clarifying questions. Imagine you have to do what they did. Could you? If you think you could, you are on the right track.

To make an interactive surgical game, I was once tasked with creating a tutorial for open heart surgery for a medical IT company. After I watched videos and read as much as I could, my boss, a doctor himself, made special arrangements for me to sit in on the actual surgery. Nervous and steps away from the patient, I watched as the cardiac surgeon performed the entire procedure—from incision to sutures. I took notes and pictures, and made sure to stay out of the way. Power cords, machines, and medical personnel were everywhere, so capturing the information I needed wasn’t easy—but it was incredibly valuable. I left the surgery with a deeper understanding of what happens during this operation, and my firsthand experience resulted in a better presentation. To this day, there is a tiny part of me that thinks, “If I absolutely had to, I could do that!” And at the same time, I know I could never do it. That is the power of intent observation.

Hands-On Experience
Do it! Although a do-it-yourself approach is not the most efficient means to learn, trial and error is an effective teacher. Get your hands dirty and embrace failing forward. Each time you are unsuccessful, you discover a way that doesn’t work and get one step closer to uncovering what does.

Due to accessibility, expertise needed, and other factors, hands-on experience isn’t usually a viable option. When it is, use your judgment to decide if it is the best use of your time.

Of course, most times you cannot get so hands-on. For example, using the previous observation example, I am certain that if I learned and performed open heart surgery, the training materials would be better than they were. I knew that would never (ever, ever) happen, so I observed instead.
Classes
Enroll in a workshop, search YouTube for educational videos, or attend an online course. The following is a list of some of the highest-rated online resources:

- CreativeLive (www.creativelive.com)
- Coursera (www.coursera.org)
- Coursmos (www.coursmos.com)
- Curious (http://curious.com)
- edX (www.edx.org)
- Highbrow (www.gohighbrow.com)
- Lynda.com (www.lynda.com)
- Skillshare (www.skillshare.com)
- Udemy (www.udemy.com).

For instance, I learned how to render professional isometric graphics for use in PowerPoint from one of the best designers in the world through an online class. His expertise was downloaded and assimilated for a fraction of the cost and time it would have taken me to learn through trial and error.

Here is a best-practice checklist for understanding the subject matter:

- **Know your subject matter.**
- **Pick one or more ways to do so:**
  - Ask a subject matter expert.
  - Research.
  - Observe.
  - Get hands-on experience.
  - Take a class.

Summary
That completes the Discover phase. Knowing the problem and mission, and understanding the learner and subject matter, are critical when developing a powerful PowerPoint presentation. However, most of my projects are quick-turn, and I don’t have the time to do every step I shared. Be flexible and realistic. Pick and choose what you need most.

On my projects, I always know all four Discover factors (problem, mission, learner, and subject matter) but, sometimes, it is only a high-level view of each. Gather as much information as you can with the time you have, because the more you know, the better your presentation.
Discover

1. Problem
2. Mission
3. Subject Matter
4. Learner

Design

2. Takeaway
3. Storyboard
4. Render

Deliver

3. Face-to-Face
4. Virtual
5. Hybrid

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