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Forging a presenter-designer partnership that succeeds

I'm a golf hack, so I was glued to my television during the British Open tournament this July. It was fun watching the pros, even when they were slicing a drive into the visitors gallery. But what really caught my attention this time was the relationship between the caddies and the pro golfers. A caddy is not just a lackey who carries the clubs from hole to hole — far from it. Especially on the green, there's a real partnership there. The caddy offers expert advice on which club to use, how to play a difficult shot out of the rough, or where a green might break.

In the tournament, one player had a commanding lead going into the last hole; a mediocre performance was all he needed to win. But instead of playing it safe, the pro grabbed his driver — a poor club selection — and proceeded to the tee. You think the caddy's role is insignificant? His failure to

collaborate at that critical moment cost the pro the honor of winning the prestigious British Open (and the caddy a huge payday).

This isn't so different from the relationship between presenters and their colleagues in the graphics department. Traditionally, we think of presentation design as supporting the presenter in a passive kind of way: The designers take what they're given, clean it up a bit, maybe throw in a little clip art, and they're done. But if this is how you view the process, you (and your company) are in danger of losing the tournament. The stakes for presenting are too high these days; they dictate a new role for presenter and designer.

How do designers see their role?

I frequently hear graphics departments complain that the corporate presenters they support dump on them with little notice and give them outrageously little time to develop a project. Having worked in a corporate environment myself, I know this doesn't need to be the norm. Many graphics departments put themselves into a react-and-respond mode, seeing themselves only as computer jockeys.

If that's how it is in your company, do what you can to expand the designers' vision of their responsibility in the presentation process. Consider extending their roles (with training) to be not only presentation designers, but content consultants as well. This gives your message an essential sanity check. We have PR specialists, media specialists and Web specialists — why not help the designers develop a core competence in the areas of message design and multi-media integration for presentations? As their skills develop, with your

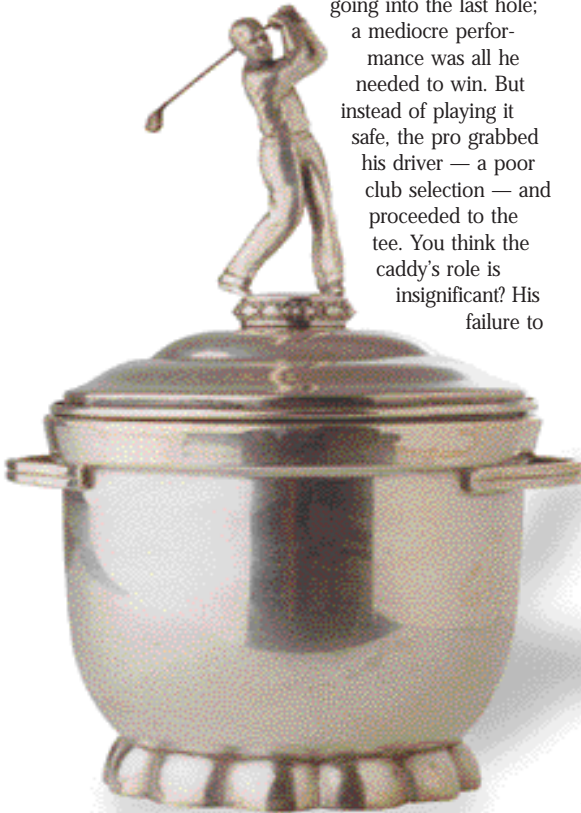
encouragement, their value will increase dramatically.

Create a worksheet for presentation design

The communication process for presentations is frequently informal and rarely documented. For this reason, encourage the design department to create a design worksheet for use with every presentation project. Be sure it includes the target audience, a description of the presentation's content, a schedule or timetable, the supporting technology the presentation will be used with, and the distribution medium (at kiosk at a trade show? via a Web site?).

Target audience. Seldom do presentations fall into the one-size-fits-all category — they're usually tailored to fit a specific audience. This can have far-reaching implications. For example, a senior staff briefing had better be short, packed with summary information, and prefaced with a section that specifies what listeners should do with the data. (Decision-makers instinctively want to evaluate and take action; if the talk is purely informational, tell them so up front.)

The target audience's industry will influence the design, maybe even down to the color selection. For a conservative industry such as a bank or a brokerage, traditional blues might work best, along with a focus on charts as a communication tool. A high-technology audience, on the other hand, expects more creative graphic treatments that effectively leverage the medium. Nonprofit organizations will recoil from anything that smacks of "flash," while a large-venue audience requires a readable typeface and font size — one that works for a crowd of 2,500 people, like the sans-serif Arial.





Questions for the designer to ask:

- Describe the target audience for this project. What is its professional or educational background — corporate executives? trade show attendees? conservative? high-tech?
- What is the audience's expectation for your presentation?
- What's the presentation room environment?

Content. Knowing the content up front is essential. Sometimes a presenter asks a designer to base a presentation on one they've seen somewhere else. Unless the designer asks enough questions to decode that experience, the final presentation will miss the mark. The mix of text to charts, graphics and photos is important — but a design *consultant* is expected to bring his or her expertise to the equation, offering creative options for the client that reframe the content in graphical terms. If designers simply take text information and clean up the typos, they're missing one of the greatest areas of assistance they can provide: Helping presenters use well-thought-out images to describe text information.

Questions for the designer to ask:

- Does the basic content include text, graphics, charts, sound files, digital video, animation?
- Does it require interactivity, or a simple linear approach?
- What are the presentation's three mission-critical messages?
- What is the anticipated length of the presentation?
- How does the presenter like to stage information — by mouse clicks, or automatic reveals?

Schedule. Production deadlines are a common source of conflict between presenter and designer, so this might be a difficult area to change. Becoming more proactive and less reactive is a critical first step in gaining control. Try setting up a once-a-month meeting between presenter and designer to discuss projects coming up in the next month. A nice side benefit is that presenters will begin to see the graphics department as a part-

ner in the process, not simply a necessary evil to deal with in getting presentations done.

Questions for the designer to ask:

- When will the presentation be delivered before an audience?
- When will its initial content be available for the designer to review?
- When will the presenter deliver the first draft?
- Whose approval is required and at what stages of the process?
- Can the designer see the presenter in action from time to time?

Supporting technology. Designers should look hard at the computer or projector the final presentation will depend on. It's easy to create a presentation that goes beyond the capacity of the computer it's supposed to be played on, and to create graphics that exceed the resolution of an electronic projector. Many a good presentation has looked pretty pathetic when played back on an old laptop computer.

Questions for the designer to ask:

- What's the presentation computer's type and speed?
- What's the resolution of the electronic projector?
- Does the presentation require sound?
- Can video be better accommodated through direct playback from VCR to projector, instead of digitizing the video for computer playback?

Distribution requirements. Often designers find out too late the presentation's ultimate objective. Perhaps the presenter wants the show put up on the Web for viewing after it's been delivered — in which case the designer had better be prepared to dumb down the animation and transitions to accommodate Web delivery. Just want to download it? The designer should decide what the threshold of pain is in download file size, and look at compression utilities to get the presentation to that point. Even a simple-sounding CD-ROM is not something to throw in at the last minute. I once had a client tell me (after the fact) that he wanted

to distribute his presentation at a trade show — a presentation that was too big to fit on a disc, and that used a different version of PowerPoint than most of his audience would have access to.

Questions for the designer to ask:

- Where will the presentation be viewed?
- Will it be distributed, and to whom?
- In what form will it be distributed — a Web site? a CD-ROM?
- If it's going out electronically, what can be assumed about the audience's supporting computer and software?

Why should the presenter listen to the designer?

Just as a pro golfer ignores the caddy's advice at his or her peril, it would be crazy for presenters not to listen to their presentation consultants. Consultants are not paid to let clients suffer the consequences of their poor choices. A designer should challenge a presenter's excessive use of text and recommend particular kinds of graphics, and also look for opportunities to use the media in some creative new way. The designer should find the courage to tell the presenter (and provide professional alternatives) when an important presentation is marred by gratuitous clip art or innocuous sound effects.

The way I see it, presenters and designers have two choices: Continue to feel victimized by an ineffectual presentation-design process, or forge a partnership that adds more value to the designer's contribution. Being a presentation lackey is not much fun. Being a presentation *partner* is infinitely more enjoyable. Being an effective *team* is even better. ■

