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LSA Global | White Paper

Best Practices for Using Presentation Software Effectively

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Introduction

We want you to be an increasingly successful presenter, and the effective use of visuals can play an important part. Slides, for example, can enhance a speaker's impact if they are thoughtfully created and skillfully used. Often, however, slides are included in ways that add little or actually detract from a presentation.

To help you get the greatest advantage from your slides, we have gathered the following guidelines from presenters and graphic designers who are known for the effective use of slides in presentations.

DEFINITIONS: Unless noted otherwise, the word "slides" is used in this discussion to include computer-generated projections, 35-mm slides, and overhead transparencies. Microsoft POWERPOINT®97 is the presentation software cited as an example, but the graphic guidelines that follow can be applied to any of the fine presentation software packages currently available. (When referenced below, POWERPOINT features are first-letter capitalized and italicized.)

When Slides Help

Slides can add significant improvements to the persuasiveness of a presentation.¹ In our experience, however, it is important that you use slides for the purposes they serve best:

- focusing your audience's attention
- stimulating interest
- reinforcing key ideas or data
- illustrating hard-to-understand points
- increasing audience retention of your content

When They Don't

Unfortunately, many speakers use slides in ways that reduce, rather than enhance, their presentation's impact on the audience. You've probably witnessed presentations in which—

- slides were used primarily to avoid audience interaction
- slides contained overwhelming amounts of detail
- slide content and/or sequencing made too many points or no point at all
- the speaker's reading of the slides was the presentation rather than an adjunct to it

Slides can be either an asset or a liability to a speaker's presentation. The guidelines that follow can help you put yours in the plus column.

Designing Your Slides

Remember the KISS rule: Keep It Short and Simple. Ideally, the content of each slide should be understandable by persons who have only a basic knowledge of your topic.

The content of your slides needs to be attractively and readably arrayed. Interestingly enough, this often requires common sense far more than it requires uncommon artistic flair.

Estimating How Many Slides You'll Need

A common pitfall is trying to squeeze too many slides into a presentation.

- You can calculate the approximate number of slides you should use for your presentation by allowing an average of two minutes of viewing time per slide. If your presentation includes complex diagrams or explanations, allow even more time per slide.
- This may mean using fewer slides in your presentation than you might at first assume you will need. Don't automatically assume that more is better.



Creating Your Titles

- For continuity, the title of each slide should convey the slide's main subject, idea, or action required, but it is best to limit titles to a two-line maximum. Subtitles occasionally may be appropriate as the second line to describe more precisely the content or central point of the slide.
- Put your titles to work. Whenever possible, the title of a slide should state the conclusion you want the audience to reach or the action you want people to take.
- For example, Our Computer Network Must Be Modernized is a better title than just Computer Network for communicating the message.
- CAPITALIZATION: The most common practice is to capitalize the first word and key words in titles, with articles and prepositions not capitalized. Decide what capitalization style looks best for your content and use that style consistently.

Getting to the Point(s)

- A sensible guideline for bullet-point content on slides is the “five-by-five rule.” Limit the content of each slide to a maximum of five bullet points (including any sub-points) and a maximum of five words per bullet.
- This rule enables your audience to glance quickly through a slide's content and still pay attention to what you are saying. It also helps you avoid reading your slides to the audience (another pitfall that makes for dull presentations).
- EXCEPTION: Sometimes, to achieve clarity, the temptation to break the five-by-five rule on a particular slide is just too great to resist. In those rare cases, allow up to six words on some line(s) and/or go to six lines on the slide if you must, but keep the total words on the slide limited to twenty-five or less.
- For clarity and appearance, don't put more than one level of sub-points under any bullet point, even though POWERPOINT allows for up to four sub-point levels.

Choosing the Right Words

The difference between the almost-right word & the right word is really a large matter—it's the difference between the lightning bug and the lightning.

—Mark Twain—

- You need to spend time carefully choosing your words for each slide. If lengthy explanations, long sentences, and/or detailed descriptions are necessary, it is best to keep those for your handouts.
- For bullet points, avoid using full sentences. Use phrases and key words that quickly communicate the essence of each point without a lot of reading.
- Keep the grammar and style of bullet points consistent, and use a parallel structure for each point on a slide. For example:
 - This PC is faster and cheaper than anything around
 - Includes a color monitor
 - Multimedia

is presented better as:

- Fastest PC at the price
 - Color monitor included
 - Multimedia capability built in
- CAPITALIZATION: Although some people like the look, capitalizing the first letter of every word in bullet points can cause some slides to look too “busy” and make them more difficult to read. A common practice for bullet points is to capitalize only the first letter of the first word and the first letter of proper nouns. Decide what capitalization style works best for your purposes and use that style consistently throughout your slides.



At the Margin

- Always leave a quarter-inch margin all the way around every slide. The resolution of a projector and the size of the projection screen often conspire to cut off the image or make the edges of the display fuzzy. Similarly, most vendors of 35-mm slides advise at least a ¼- to ½-inch margin on all slides so that none of your text or graphics risk being covered by the slide mounts.

Getting Fancy

- The practice of revealing a slide's bullet points one at a time on a computer-generated projection (called a slide "build") works well when not overdone. You can even "gray-out" points as you finish discussing them so the next point built on the slide will stand out more brightly. In POWERPOINT, this is done under Slide Show/Custom Animation.

But Not Too Fancy

- Don't give in to the temptation to "build" every slide. Audiences get weary of such repetition.
- Another trap to avoid is mixing different kinds of transition effects in the same presentation. That can be confusing and can draw attention away from your message.
- Pick one transition effect and use it throughout, unless you need a marked change to make a clearly noticeable style divider between different sections of your presentation.
- Sometimes presenters try to create a build effect on overhead transparencies. They do this by covering up bullet points on the projector with a piece of paper until they are ready to discuss the points. Then they lower the covering paper to "reveal" the point they want to present next. This practice should be used sparingly. It is annoying to many people and ties you to the projector.

Numbering Slides

- Put slide numbers on every slide. This can help viewers get back on track if they join the presentation after you have begun or if they are distracted and lose the thread of your presentation. Slide numbers can be added in POWERPOINT either through Insert/Slide Number or View/Header and Footer.
- In our research, we found that many presenters use slide numbers as an aid for themselves. For example, some presenters print out hard copies of their numbered slides with several slides on a page. Then they keep those pages handy during their presentations to use as a quick slide number reference in case they choose to show a hidden slide or want to skip ahead or back to a specific slide during their presentations. (See Appendix A: Some POWERPOINT Tips and Tricks, items 1b and 1c.)

The Last Slide

- It's not uncommon to accidentally hit a "next slide" key after the last content slide is shown in a presentation. When that happens, you will inadvertently end your presentation with an unwanted slide, a projection of your desktop, or a white projector glare showing on the screen. To avoid this, put a final "end" slide as the last slide in your presentation. Many presenters insert a blank or logo slide, or simply repeat their main title or introductory slide, as their last presentation slide just to be safe.

Don't Be Screened Out

- Turn off any screen saver you may have on your computer before you start to deliver a computer-projected presentation. Depending on the length of time you leave a slide projected, an active screen saver may black out your slide and replace it with some irrelevant moving graphic.



Using Colors

- If your organization has a preferred slide color scheme or style, use those choices. If you have freedom of choice for computer-projected or 35-mm slides, it generally is best to use dark colors for backgrounds and “drawn objects” (e.g., boxes, circles, lines, etc.) and light colors for text. For computer images projected to large audiences, for example, material that is white or yellow on dark blue would be easier to read than the reverse.
- For overhead transparencies, it is most common to use a clear background with dark text and images. (For the reasons, see Producing Paper Copies and Transparencies from Your Slides, below).
- It usually is best to limit the number of colors on a slide to between two and four to avoid a confusing rainbow effect.
- Decide on the colors you will use before you start creating your slides. This can save you considerable time in the long run.

Background Color

- For readability, there needs to be considerable contrast between a slide’s background and the text and objects written and drawn on it. For 35-mm slides and computer projections, a dark background generally is more readable and looks more professional than a white one.
- Think about U.S. interstate highway signs with their white letters on dark blue or green backgrounds. These are color combinations chosen for fast readability. The same principle holds true for slides.
- Dark blue and black are the most popular slide background colors, although black may appear too “heavy” for some material and situations. Your organization may prefer that you use a special color linked to a corporate theme or logo. If so, use that color.
- Whichever color you choose, the same background color generally should be used for continuity on all the slides in a presentation, unless you have a specific content or audience reason for a change.

Text Color

- White and yellow work best as text colors. White is often the default color, with yellow used to highlight text you want to emphasize. Use other colors for text with caution.
- Some colors and color combinations bleed into the background when projected and are very difficult for audiences to read. If in doubt, do a pilot test in a room similar in size and lighting to the location of your presentation.

Color Combinations for Images

- Save yourself time and trouble: When deciding on color combinations, use your software’s color selection feature when you create several objects (such as boxes and circles) that require using different colors on a single slide. This feature is called Color Scheme in POWERPOINT. Such software help is useful especially if your own eye for color coordination is questionable.
- Use colors for emphasis. To highlight an object or text, make it a brighter color or simply add a shadow to it.
- Apply colors to images consistently. For example, if the same object is represented on several slides, use the same color for that object on all of your slides. This practice makes it easier for the audience to follow your ideas from slide to slide.
- Remember that a portion of the male population has some degree of color blindness. Reds and greens will fade to grays for them. Use those colors only where gray would also be acceptable.



Color Placement

- When deciding where to place various colors for objects on a slide, you can use the so-called “earth-to-sky” theory,² remembering that the darker brown earth lies below the lighter blue sky. Following this visual principle, consider arranging colors for objects on a slide from darker to lighter as you move up the slide.
- Slides often seem more balanced when object colors progress from darker at the bottom of the slide to lighter at the top (or progress from darker on the left to lighter on the right). For example, putting darker colors in the top tiers of a multi-tiered pyramid could make that graphic seem top heavy and awkward.

Using Fonts

Choosing Fonts

- A slide series generally reads better when only one or two fonts are used throughout. Times New Roman is the default font in POWERPOINT, and this popular font conveys a somewhat conservative image. For a lighter but equally professional look, Arial is a popular font. For internal or less formal presentations, the font Comic MS Sans may be a good choice.
- CAUTION: If you use non-standard fonts, be aware that other individuals may not be able to use your slides exactly as you created them until those fonts are installed on their computers.
- Use bold, italics, and underlining—rather than a different font—to highlight appropriate text.
- Some people find sans serif fonts (fonts without strokes or “feet” at the ends of the letters) easier and faster to read when projected from a slide. Arial and Verdana are sans serif fonts. When projecting your presentation for a large audience, a sans serif font might improve readability, particularly for people in the back.
- The same font is commonly used for both a slide’s heading and its bullet points, although these fonts can be different if you prefer, as long as they work compatibly.
- Use POWERPOINT WordArt sparingly to highlight something or to make a point. It is distracting to have too many such “attention-getting” items on a single slide.

Sizing Fonts

- Do not expect your audience to be able to read a font smaller than 20 points. A popular guideline is 24 points minimum, unless the audience is a small one.
- If you must shrink the font size below 20 points to make all of your text fit, you probably have too much text on the slide. A 40-point font or larger is recommended for titles and a 32-point font or larger for bullet points.
- For a comparison, this discussion is written in 12-point Century Schoolbook font and
- this is 20-point, the minimum for slide text.

Changing Colors and Fonts “Globally”

- When creating slides in POWERPOINT, select the appropriate Slide Layout for each slide and place your headings and bullets in the default title and text boxes that POWERPOINT provides. Avoid unnecessary use of the Text Box on the Drawing toolbar.
- This practice will enable you to more easily change the colors or fonts “globally” for the entire presentation at one time if, for example, you plan to print out the presentation in black-and-white format (see Producing Paper Copies and Transparencies from Your Slides in the pages that follow).



Moving Beyond Text

- Drawings, animations, photos, video images, sound, and occasionally clip art can add life even to presentations on dry topics, but don't overdo it. Excessive use of any of these features can reverse the desired effect and distract the audience's attention away from what you are saying.
- CAUTION: Use any of the following devices only in ways that directly support your message. If they don't make your data, ideas, and/or conclusions easier to understand and believe, don't use them.

Drawings and Animation

- "A picture is worth a thousand words". . . sometimes!
- Pictures can break the monotony of slide after slide of bullet points. However, it is important to keep drawings and diagrams simple and to the point. Numerous boxes, lines, and arrows going every which way are bound to be confusing. Limit the use of boxes and circles, for example, to a maximum of eight on a slide.
- A "drawn object," such as a box or a circle, displays best in a single color. Such objects usually don't benefit from a different border color outlining them.
- The animation of drawings (obtained by building a slide in steps) is one of the simplest ways to keep an audience's attention. Once again, though, don't overdo it. While animation can help explain the flow of a complex process, too much animation keeps your audience waiting for the next visual trick, rather than paying attention to what you are saying.
- Always use animation appropriate to the object you're revealing. For example, use a left-to-right wipe for an arrow that is pointing in that direction; use a dissolve for a single object that you are revealing in successive stages. Limit animation sequences to two or three concurrent steps; otherwise, your audience is likely to get lost and confused.
- Rather than describing the animation verbally as it's playing, let the animation speak for itself, pausing until the animation is complete before you start speaking again. Of course, if it's a lengthy animation, speaking during its course will probably be necessary.
- If you choose to use animated slide transitions, make sure those transitions don't conflict with any animations on the slides themselves.

Clip Art

- Use clip art sparingly and preferably not at all. Some companies have even banned the use of clip art!
- While clip art is an easy way to add pictures to boring text, extensive use of it (especially cartoons that your audience may have seen many times before) can have a very negative impact.
- If you believe you must use clip art for some reason, avoid the standard clip art that comes with POWERPOINT and other presentation software programs. You can access many Web sites that offer less commonplace clip art, which can be purchased from the site or even downloaded free for use in your presentation.
- Make sure the clip art directly reinforces the content of your slide and is not just a picture for the sake of having a picture.

Photos

- Compared to clip art, good photos can be enormously more appealing and more easily targeted to specifically reinforce a point for the audience. You can supply the photos yourself or find them
- on CD-ROMs and over the Internet. Scanners and digital cameras allow you to easily put photos into slides created by most current presentation software programs. (See the first paragraph of Videos and Images, below, for photo placement and size guidelines.)



Video and Images

- It is a good idea to edit your graphic images, photos, or video clips to the size or resolution you desire before you insert them into your presentation. Ideally, an image, photo, or video clip should take approximately one-half to two-thirds of the slide area, leaving adequate space for a title and description. Images, photos, or videos that are too small are often impossible to see clearly.
- A TECHNICAL NOTE: If you want control over a video clip while you are showing it, the best method is to have POWERPOINT launch an on-screen version of a movie application (like mplayer). The application displays buttons that control operations such as starting, stopping, pausing, and rewinding. Use the Insert Movie command on the Insert menu. Position the image where you want it on the slide, leaving room for any appropriate title and descriptions.
- An alternative method is to use the Action Buttons found on the Slide Show menu. Position a movie button on the slide and link it to a movie and a movie-playing application. When you click on the button, the movie will play automatically. No on-screen controls will appear, and the movie will play to the end. (Notice that the Action Buttons can be used to link slides to other resources as well, including sound, the Internet, and other software applications.)

Sound

- The appropriate use of sound can help make a point (for example, hearing the sounds of different engines in a presentation about the history of motorcars). Incorporating a recorded conversation, interview, or message from another person also can be an effective way to communicate a point.
- The use of random sounds in a presentation (such as playing a tone when each bullet in a slide sequence is displayed) is more likely to be met with annoyance than with appreciation.
- If you plan to use sound, be sure the room is equipped for it. Speakers on a PC, for example, may be too small to be heard by the whole room. If the room has no sound system and your PC speakers are inadequate, attach amplified speakers to the PC. In rooms with simple speaker facilities, you can usually put a regular microphone in front of the PC speakers and amplify the sound in that manner. In more sophisticated settings, a direct plug-in may be available from the computer to an amplified sound system wired in the room. If you do not know how to set up or plug into the sound equipment yourself, be sure there is a technician available to assist you.
- In all cases when using sound, it is IMPERATIVE to perform a sound check for the presentation—in the room you will be using—before the audience arrives. Experienced presenters also take the precaution of communicating with slide text the point they want a content sound bite to make, just in case the sound system becomes inoperative for some reason.

Using Material Created in Other Applications

- Some of the content that you want to use in your presentation may exist in other formats, such as spreadsheets, text documents, Web pages, or charts. Embedding these files in your slides can save you the time and trouble of re-creating the material on a slide, but there are downsides to this.
- BE AWARE: Unless you will open the file in full-screen mode in the application in which the file was created, remember the following:
 - The standard 10- or 12-point font in a spreadsheet or document will not be readable on a slide.
 - A chart with too many data points may be too small to see.
 - The black text and white background typical of a spreadsheet or document may be hard to read in a large room.



- For these reasons, it often makes sense to re-create from scratch the content you want to use in slides, even when it already exists in another application format. For example, you may need to display only the relevant portion of a table, not the whole spreadsheet. You can always include the full spreadsheet (or other detailed document) in your handouts or link to it, if you must, with an Action button.

Producing Paper Copies and Transparencies from Your Slides

- It's common and advisable for speakers to have paper copies of their slides available as handouts and overhead transparencies available as projection backups, just in case something goes wrong with the electronic projection of their slides. Fortunately, these formats are relatively easy to create.

Printing Black-and-White Paper Copies of Slides

- Some color changes may be necessary to make your slides print well in black and white. If you are planning to print out your presentation in black and white, switch to POWERPOINT'S Black-and-White View mode before you print. Look to be sure the colors used for text and objects on your slides are clearly visible and acceptable in this mode. Be aware that POWERPOINT occasionally has trouble converting some darker background colors into white when printing slides in black and white.
- It also is possible to change how text and objects appear when printed in black and white. For example, you can choose grayscale or black with grayscale fill (if you have a printer that handles grays), reverse type, etc. In POWERPOINT, this is achieved while in View/Black and White mode—by selecting the text or object, clicking the right mouse button while the arrow is in the selected area, selecting Black and White from the list that appears, clicking on the desired setting from the next list, and deselecting the area.
- As you plan your slides, think about whether you will need to create black-and-white copies of your color presentation. If so, try to choose colors with high contrast so they also will print well in black and white.
- If you have a printer that handles grays, light colors will print as light shades of gray, and dark colors will print as dark shades of gray/black. For example, a blue box in your color presentation will print dark gray/black in black and white.
- Color choice is especially important in charts and graphs. If you have two colors with low contrast next to each other, they will be indistinguishable from each other when printed in black and white (e.g., shades of red and blue will print as nearly the same shade of gray/black on a black-and-white copy). (Also see Changing Colors and Fonts “Globally”, discussed earlier.)

Creating Black-and-White Transparencies

- If you are not sure that you will be able to project your presentation from your laptop, it pays to have a version printed on overheads available as a backup.
- Black-and-white transparencies are easy to create using the techniques described in the previous section. Color transparencies also are an option, although more costly, as explained in Creating Color Copies and Transparencies below.
- AN IMPORTANT PRECAUTION: Even if you think everything should go fine with the projection equipment, throw a crumb to Murphy's Law: Have transparencies available just in case.



Creating Color Copies and Transparencies

- If a color printer is available and you want to produce color transparencies and/or handouts, you may want to make a few “tweaks” to your slides before printing.
- Printing hard copies in exactly the same colors as your slides has some consistency advantages, but printing a color background on every page consumes large amounts of time and ink. When you want to avoid that cost, you can change the color background on the slide master to white. Then change the appropriate text and line color options to dark colors so they will be visible on the printed page. Apply the changes to the whole presentation before printing.
- After printing, return the slides to their original colors to get the best projection visibility during your presentation.

Use Your Slides - Don't Let Them Use You

There are some proven do's and don'ts that can make a big difference in the effectiveness of your whole presentation. Here are some of the most valuable:

- Look at your audience at least 95 percent of the time during your presentation, not at your slides or at your computer screen or keyboard. Don't speak unless you are looking at your audience.
- Keep the lights in the room as fully lit as possible. This is especially important after a meal when people's body chemistry makes them prone to snoozing.
- If you have a portable screen, move it to the side and angle it 45 degrees to the audience. That way, you - not the screen - will occupy center stage.
- Don't try to have the slides be your presentation by reading them to the audience.
- Use to your advantage the seven key presentation delivery skills: Posture, Movement, Gestures, Facial Expressions, Voice, Eye Contact, and Pausing.
- Interact with your audience frequently and appropriately.

In Summary

- Remember: The slides are not the messenger - you are. Your slides are just a communications aid.
- Slides do not automatically have a positive impact. They can make a presentation clearer and more appealing, or they can muddy it up and distract your listeners. The result you achieve depends on how effectively your slides are created and used.



Appendix A:

Some POWERPOINT® Tips and Tricks

In addition to the many POWERPOINT suggestions mentioned in the body of this discussion:

1. When giving a presentation:

- a. You can press the B key to blacken the screen during a presentation. Press B again to return to the slide you were showing. This feature can help bring the audience's attention back to you when a slide's job is done, its message is now a bit off the subject, but the next slide is not yet appropriate.
- b. If you want to skip ahead or go back to a slide in a presentation, you can key in the slide's number and press Enter to navigate directly to it.
- c. Hidden slides are useful for storing content that you don't plan to use in the main body of the presentation but might need based on circumstances. Hidden slides can be set up only in Slide Sorter view. With the hidden slide(s) created, press H during your presentation to go to the next sequential hidden slide if you choose to reveal it depending on time constraints, the nature of the audience, and/or the direction of the discussion or questions.

2. When creating a new presentation:

- a. Decide on the slide template you will use before doing any custom formatting or adding multimedia. The Presentation Designs and sample templates provided in POWERPOINT may help you formulate your ideas. (Several tabs of examples are displayed when you select File/New.) Many of the program's sample formats, however, do not conform to the proven visual guidelines preferred by many graphics experts and outlined in this document. Be careful what you choose to copy or use.
- b. Learn the Keyboard Shortcuts and Quick Procedures to the most commonly used POWERPOINT commands. They are usually highlighted in the better reference books. Use these "quick keys" to save time as you create your presentation. You will find that many of these quick keys are universal to various Microsoft applications (e.g., Copy = Ctrl + C).
- c. If you will be creating many drawn objects, copy and paste from those that already exist on your other slides whenever possible, instead of re-creating them from scratch each time. This process will not only save you time, it also will help ensure consistency across your presentation. Remember, however, that when you copy an object in POWERPOINT and paste it onto another slide, the object will be placed in exactly the same position it had on the original slide.
- d. To make sure your drawn objects line up, on the Drawing Toolbar enable Snap to Grid (Draw/Snap/To Grid). Use Shift "click and drag" to move objects in a straight line and Shift+Ctrl "click and drag" to copy them in a straight line. If you need to move an object only slightly between grid points, hold down the Alt key while you are dragging the object.
- e. When inserting graphics from other applications (e.g., PhotoShop, Illustrator, Freehand, CorelDraw), be sure you choose the correct file format so the graphic will display and print correctly in your presentation program. POWERPOINT accepts most vector-based and bitmap graphic formats. For bitmap images such as photos, save your graphics as Tagged Image Format (.tif) with LZW compression, JPEG (.jpg) with medium to high-quality resolution, or bitmap images (.bmp), although bitmaps can tend to have large file sizes. To decrease the size of your photo file, set the resolution at 100 to 150 dots per inch (dpi). This will produce a crisp image on screen and also on printed overhead transparencies or 35-mm slides. Any lower resolution will make the graphic appear blurry. Avoid inserting Encapsulated PostScript (.eps) graphics; they print well, but they often do not display well on screen. Also, before sending your graphics to a service bureau, be sure to set your graphics to RGB color if you want transparencies or CMYK color if you want printed paper copies.
- f. When resizing an image or bitmap embedded in your slides, press Ctrl while you are moving the mouse to ensure the image dimensions re-size proportionately. If an image is too small and is blurry when enlarged, try cropping the image before enlarging it.



Endnotes

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2. Tom Mucciolo and Rich Mucciolo, Purpose Movement Color: A Strategy for Effective Presentations (New York: MediaNet, Inc., 1994), 28-29.

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About LSA Global

Since 1995, LSA has helped organizations create and maintain distinct competitive advantages through human capital. We work with leading organizations to drive success through their people and the strategies, structures, systems, and processes that attract, inspire, develop, and retain top talent. Our solutions focus on the areas of:

- Sales Revenue Growth
- Leadership and Management Performance
- Project Management Performance
- Human Resource Performance
- Strategy Execution and Transformation
- Customer Service, Satisfaction, and Loyalty

We believe our clients' success in the marketplace is realized through increased revenue, decreased costs, and higher productivity. We are fiercely devoted to the success of our clients and proud that over 85% of our business comes from repeat business with satisfied clients and that we have a 97%+ customer satisfaction rating.

