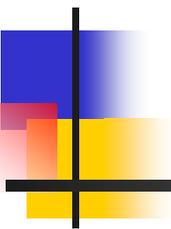
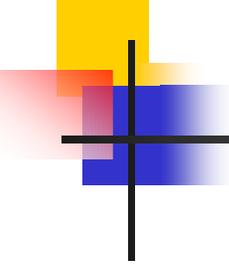


Rules and Guidelines for Creating Presentations and Memos

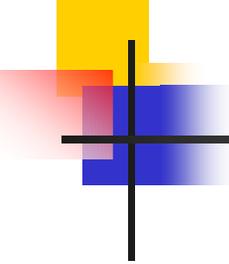


Ellis Freedman
December 30, 2003



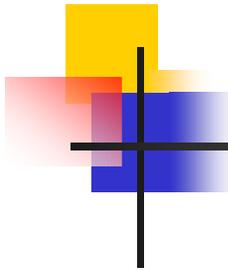
Rule #1: That's Entertainment

- Tell a story, and tell it in order
- Before you start writing, make a list of items that you want to mention and every point that you want to make
 - Not in any particular order
 - Each item can be a word, a phrase, a sentence or a paragraph ... it doesn't matter
- Now reorganize the list in a logical, storytelling order
 - Go back through the list, and for each item say to yourself, "Will the reader understand this if I haven't told him about something else on the list first?"



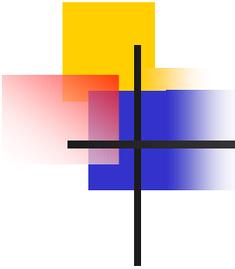
Rule #2: The Order of the Day

- Tell 'em what you're gonna tell 'em
- Tell 'em
- Tell 'em what you told 'em
- Your presentation or memo should have three major sections with each section telling the same story at different levels of detail
 - In music this is called the Development, Exposition, and Recapitulation



Rule #3: The Content

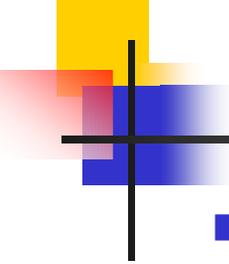
- Each section should include, in order,
 - An introduction
 - A definition of the problem
 - The approach to the problem that was, is, or will be used
 - The results of the approach used
 - Any conclusions or recommendations



The Introduction

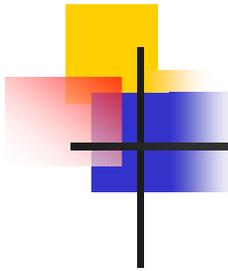
- **Make it short**
- **Hit the highlights of what's coming**
 - This can also be considered an **Executive Summary**
 - An Executive Summary should contain all of the highlights of your memo or presentation because most people won't read beyond it.
- **Use the rules of thumb from journalism and include who, what, when, where, why and how.**
- **Example:**

Come and listen to my story 'bout a man named Jed
A poor mountaineer, barely kept his family fed
And then one day, he was shootin' at some food
And up through the ground come a bubblin' crude ...
Oil that is. Black gold. Texas Tea.



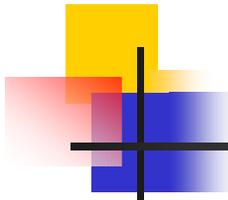
The Problem Definition

- Provide the background and/or history
 - What's the problem?
 - Why is it a problem? Why hasn't it been solved?
 - When did it start? When must it be solved?
 - Who's looked at the problem?
 - How has the problem previously been approached?
- **Example:** Once upon a time (**When**) NASA launched a satellite called Landsat. The scientists (**Who**) at NASA (**Where**) wanted to use it determine the color of plants on the ground so that they'd know how healthy they were (**What**). But they had a big problem. The atmosphere kept getting in their way and changing the color of what Landsat saw (**Why**). They tried everything that they could think of to fix it, like subtracting the lowest value from the picture (**How**) but nothing worked.



The Approach

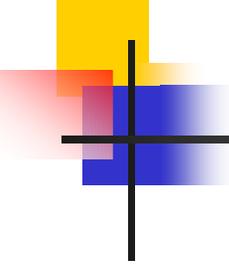
- What assumptions did you make?
- What did you do, and why?
- What order did you do it in?
- What didn't you do, and why?
- What preparations were necessary?



The Results

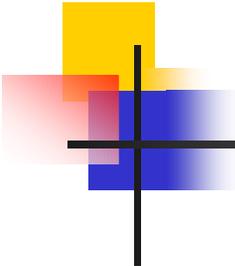
- Tell them everything, good and bad
 - You learn more from mistakes than successes.
 - If you didn't think that you would succeed, you wouldn't have done it in the first place, would you?
- Summarize the important results at the end.
 - Don't draw conclusions yet. Leave that for ...

Conclusions and Recommendations



- What was learned from the results?
- What would you have done if you had the chance to do it over again?
- What would you do the next time?
- Should anyone else do something about it?
- Be honest. If the results are inconclusive, say so.

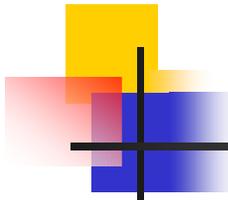
Rule #4: It's the Message, Stupid!



- Worry about the fundamentals and making your point, not about how you sound
- Write at, or below, the level of your reader or audience.
- If you bore your audience, you've lost them.
- For briefings, shoot for the 6th grade level, and for memos, the 8th grade.

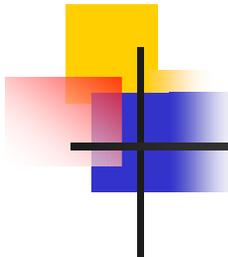
"No one ever went broke underestimating the intelligence of the American people."

Phineas T. Barnum



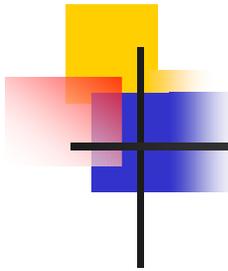
Corollary to Rule #4

- Don't go out of your way to use big words.
 - Who do you think that you're impressing?
 - It makes your document harder to read and increases the "Fog Factor."
 - Fog Factor is an unintelligibility scale that goes up with average word size and sentence length
- Which do you think is easier to follow and conveys more information?
 - A paper in the IEEE Transactions?
 - A science program on PBS?
- Which is more boring?



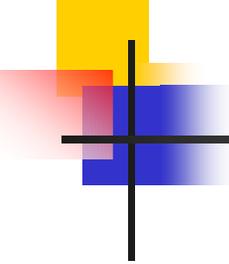
Rule #5: A Picture is Worth a Thousand Words

- Don't use a thousand words instead of a picture.
- Try to avoid using color whenever possible in pictures or graphs
 - You never know how many times it will be photocopied or printed on a black and white printer.
 - Exceptions:
 - Extremely professional reports
 - Sales brochures
 - Briefings that contain photographs or images that will only be displayed with a high quality color projector



Rule #6: Equations

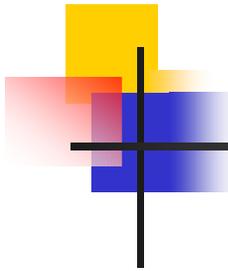
- Memos
 - Provide all relevant equations
 - Always identify each symbol and variable completely when it is first used
 - Never assume that the reader already knows that symbol
 - Always indicate the units or dimensions
 - Any derivations should be kept to a minimum, or placed in an appendix
- Presentations
 - Minimize the number and complexity of equations
 - Use them for illustrative purposes only
 - NO derivations



Rule #7: Suffer the Details

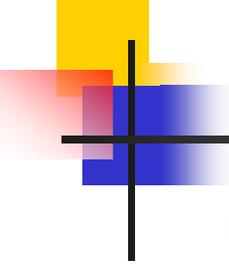
- Always provide,
 - A title
 - The publication date
 - Revision or update information
 - The names, affiliations, locations, and contact information for all authors
 - The delivery, contract, customer, or destination information
 - Proper classification, declassification, proprietary handling, and related information

Rule #8: A Little Style Goes a Long Way



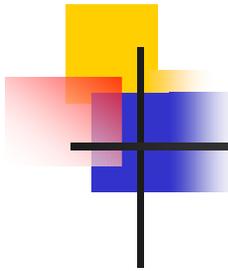
- Avoid speaking in the first person.
 - Example: “A Kalman Filter was used to ...” not “I used a Kalman Filter to ...”
- Keep your tenses straight
- Use an active and not a passive voice.
- Don't be afraid to sound a little casual. It can make you appear confident, but,
- Don't use jokes or puns unless you're absolutely sure that everyone will appreciate it.

A coward dies a thousand deaths, a poor comic wishes that it would end that quickly.



Rule #9: In the Light of Day

- Don't try to review your paper on the fly.
 - Walk away from it after every major section or when the first draft is done.
 - Read it a couple of days later and see if it makes sense. Then make changes.
- Have others review your paper.
 - Don't get annoyed when they make a lot of changes, because they will.
 - People are like dogs. They are territorial and they will want to make your paper smell a little bit like themselves. The only difference is that people use ink.
 - Be objective. Some of their suggestions may actually make sense.



Summary

- Follow the formats from Rules #2 and #3
- Use the other rules to govern your content
- Things to think about
 - Did this presentation bore you?
 - Was it dull? Did it hold your interest?
 - Did it get the point across?
 - Did it follow all of the rules? If not, why not?
 - Is it OK to break the rules sometimes? If so, why?