

Guidebook for creating visual and consistent course reports in PowerPoint-format

Final version

Spring 2022

Prepared for _____

Aalto University



This short document contains common best practices and visual examples for creating high-quality slide-based reports

Foreword

Background and context

- ▶ MS PowerPoint and other similar tools are ideal for creating compelling, visual and easy-to-read reports, and are both globally and in Finland by far the most used tool to efficiently create visual documentation and reporting.
- ▶ Learning how to create coherent and high-quality PowerPoint presentations and reports already during university studies is a significant benefit – most students will need to use PowerPoint as one of their primary tools at work after their graduation.

Objectives and scope of the guidance document

EY-Parthenon is collaborating with Aalto University School of Business to create a short guidebook for students regarding PowerPoint-reporting. The objectives of this guidebook are as follows:

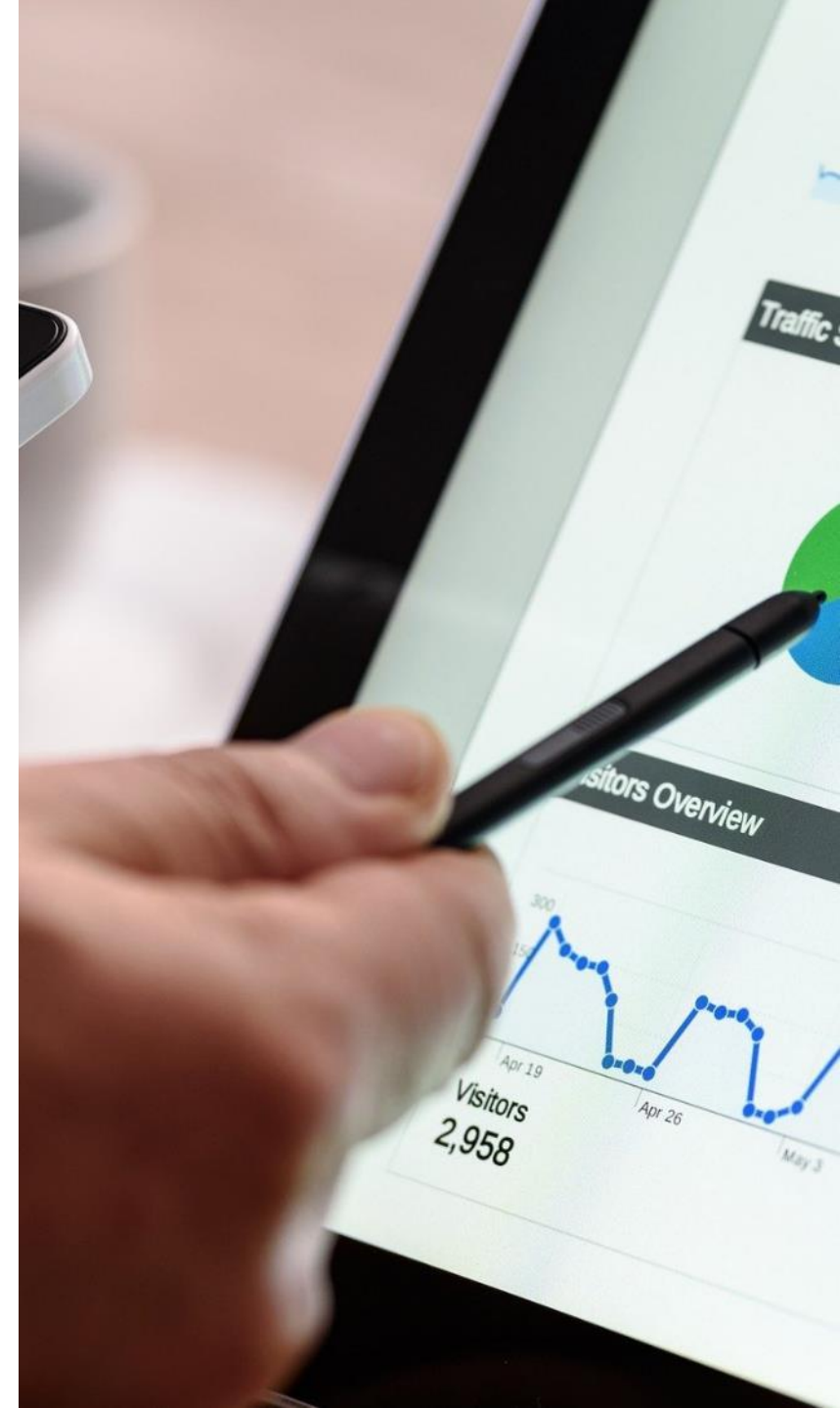
1. **Learn to structure PowerPoint final reports** into distinct sections to make reading the material and following the storyline easy
2. **Understand most common style guidelines** for PowerPoint presentations such as using colors and page layout
3. **Provide visual examples on report content & visualization** such as drawing charts & graphs and highlighting key information

It is important to note that this **guide was created using EY-Parthenon's proprietary PowerPoint-template**, and hence it is not directly applicable to be used as-is in university course final reporting or as a strict guideline. **The overall purpose is to illustrate examples and share best practices**

For further guidance and information about EY-Parthenon, including career opportunities, please feel free to contact antti.sinkkonen@parthenon.ey.com or recruitment.helsinki@parthenon.ey.com

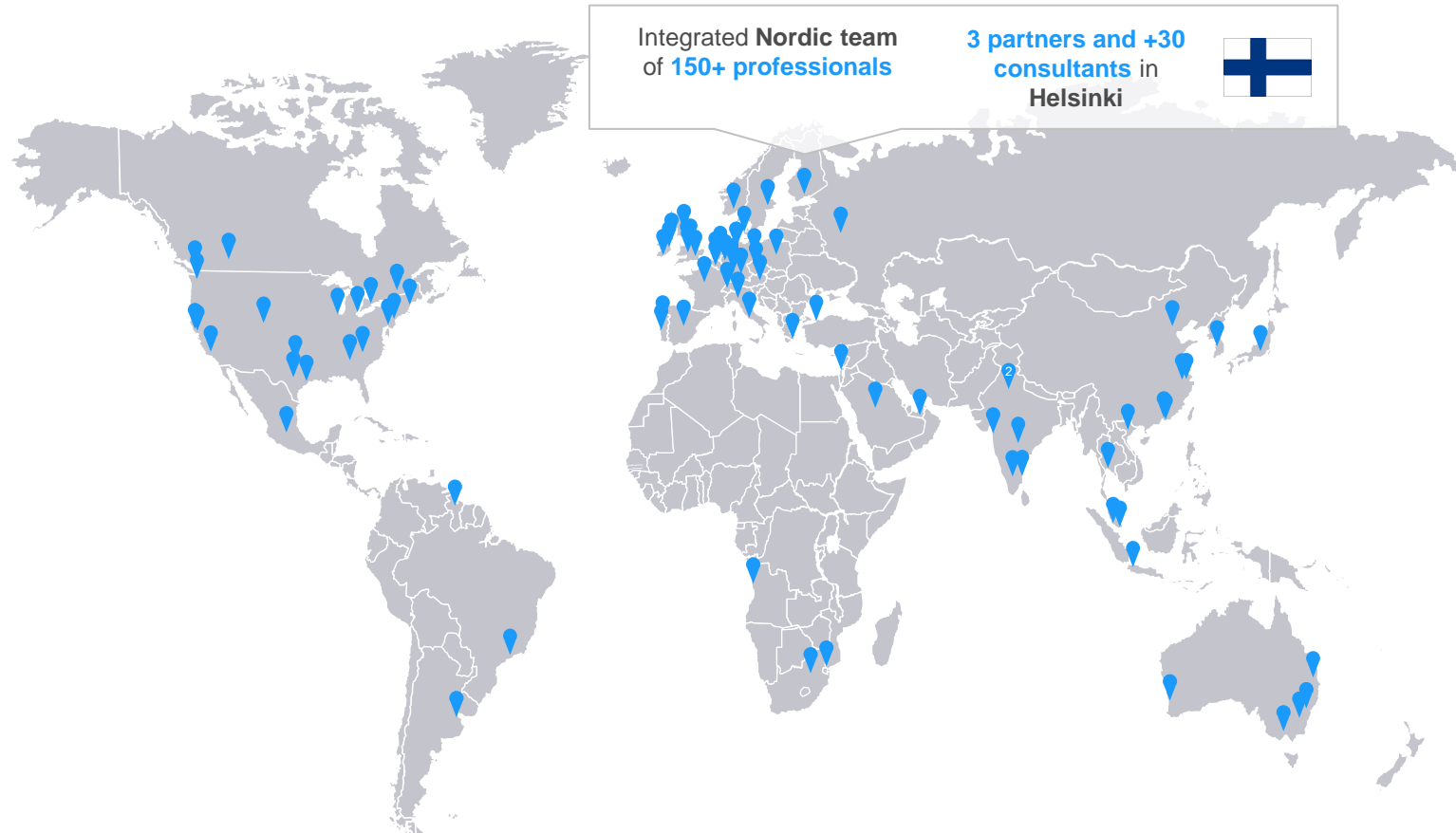
Content

- ▶ **EY-Parthenon in brief**
- ▶ Report structure
- ▶ Style guide



EY-Parthenon provides strategy consulting across the globe, and in Finland we have a team of +30 consultants

EY-Parthenon overview



EY-Parthenon in brief

- ▶ Parthenon was founded in 1991 and merged to EY in 2014
- ▶ Growth by acquisition of digital strategy consultancy company BOX Associates in 2017 and acquisition of OC&C teams in Germany, Netherlands and France in 2017-18
- ▶ Continuous recruitment of strategy professionals and acquisitions of other strategy boutiques globally
- ▶ Currently over 40 offices in 25+ countries worldwide
- ▶ Over 7,000 consultants worldwide

Growth & transaction focus

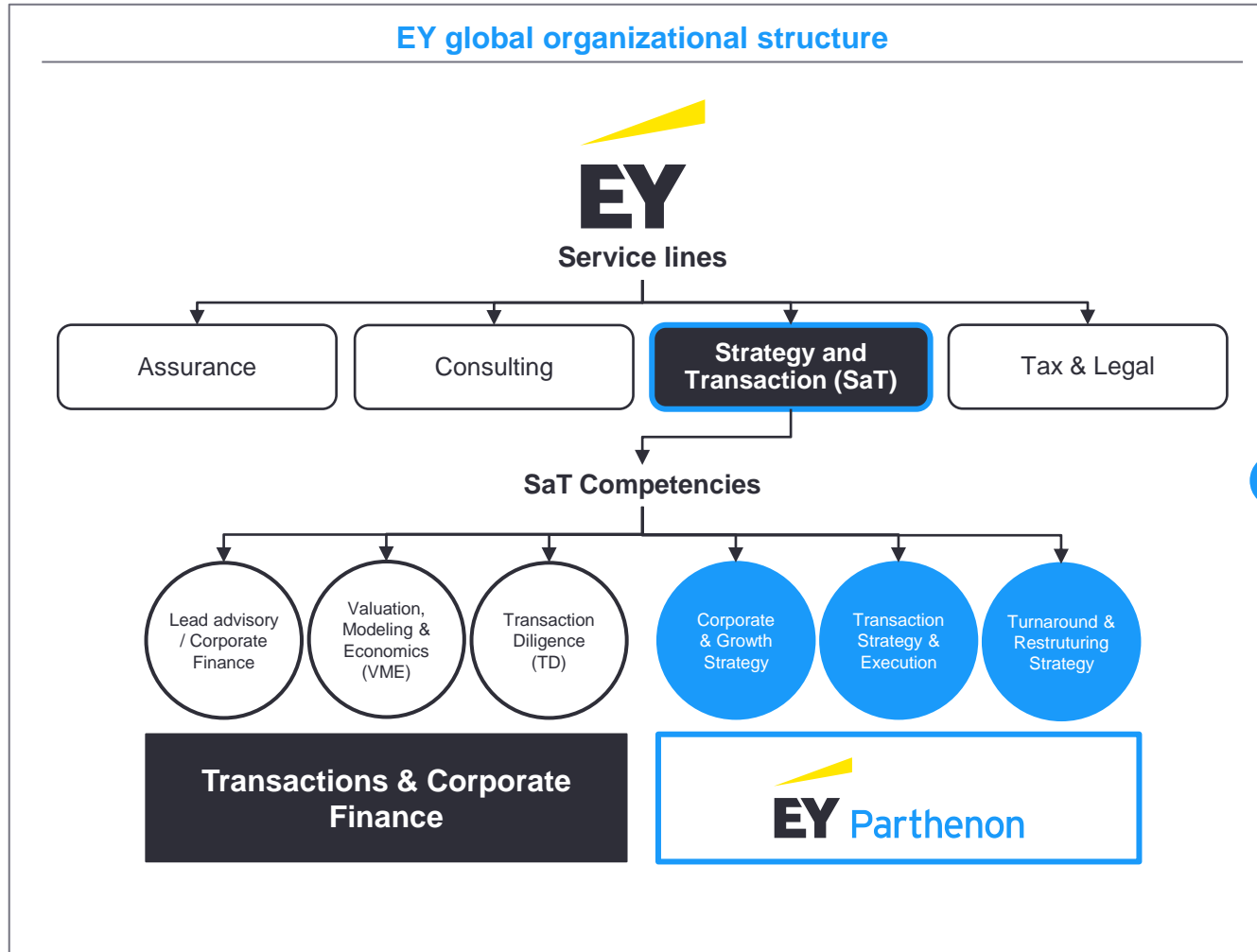
Integrated offering

Flexibility in approach

International network

EY-Parthenon is the strategy consulting arm within EY

EY-Parthenon within EY



Organizational breakdown explained

- ▶ EY has 4 service lines (SLs)
 - Assurance (Auditing)
 - Consulting (Transformations)
 - Strategy & Transactions (M&A)
 - Tax & Legal (Regulatory support)
- ▶ Every SL has multiple sub-service lines (SSLs) with specific competence areas
- ▶ Strategy and Transactions (SaT) provides support for corporate acquisitions and divestments as well as restructuring and advise on strategic capital management
- ▶ EY-Parthenon (EY-P) enables clients to unlock their full potential with strategy, transactions and restructuring, as well as by paving the way for major transformation programs, and driving measurable impact to the rest of EY

Our teams and our culture is all about being Smart, Nice, and Driven

Smart.



Extremely **bright, intellectually curious**, blending a command of analytics with an appetite for inventive thinking

Nice.



Friendly, arrogance-free style that relishes open collaboration and partnership

Driven.



Unrelenting energy focused on finding inspired solutions and delivering **proactive service**



Content

- ▶ EY-Parthenon in brief
- ▶ **Report structure**
- ▶ Style guide



Structure of a PowerPoint-format report follows the same structure as a typical Word-format report

Report structure

Typical report structure

- 1 Cover page
- 2 Table of Contents
- 3 Executive summary
- 4 Key content (analysis & findings)
 - 4.1 Section 1 (e.g. company information)
 - 4.2 Section 2 (e.g. market environment)
 - 4.3 Section N (e.g. competitor analysis)
- 5 Appendices
 - 5.1 Glossary
 - 5.2 Information sources
- 6 Closing page



The presented structure is illustrative and is dependent on the type of the project you are working on.

However, it is recommended to follow the basic structure of elements #1 to #6.

Modify the structure in section 4 and its sub-sections based on your project type, context and scope

The key content sections are dependent on the type of course project and scope of your work – remember to adjust them accordingly into distinct sections

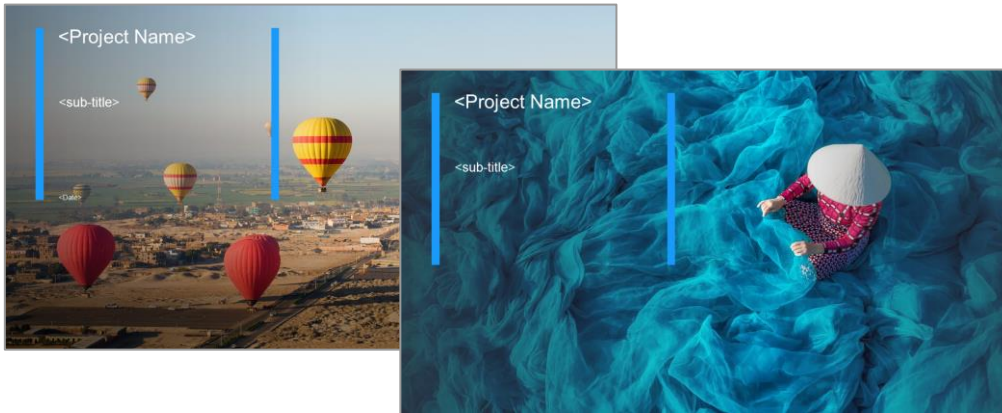
Content of the key report sections

Section	Description
1 Cover page	A visual cover page of the report which includes at least the title of the work, the name of the university course / project and date of the report
2 Table of Contents	General table of contents of the report, which indicates the structure of your report Note: In PowerPoint format, it is not necessary to add the page numbers to your table of contents similarly to Word
3 Executive summary	Section which summarizes the key insights / results of your work, and provides answers to e.g., key hypotheses or presented research questions (we recommend to google and learn to use the 'pyramid principle')
4 Key content	One or several sections (depending on the type and scope of the project) which include all written and visualized insights of the work in well structured order
5 Appendices	Section which includes other material relevant to the project that may be used as a background information
5.1 Glossary	A sub-section within Appendices which describes the key abbreviations and terms
5.2 Information sources	A sub-section which lists the key information sources used in the project
6 Closing page	Closing page can often include the contact details of the report creators (including your student IDs if required by professor)

Despite the report type, the report should include a simple cover page and clear table of contents to start off with

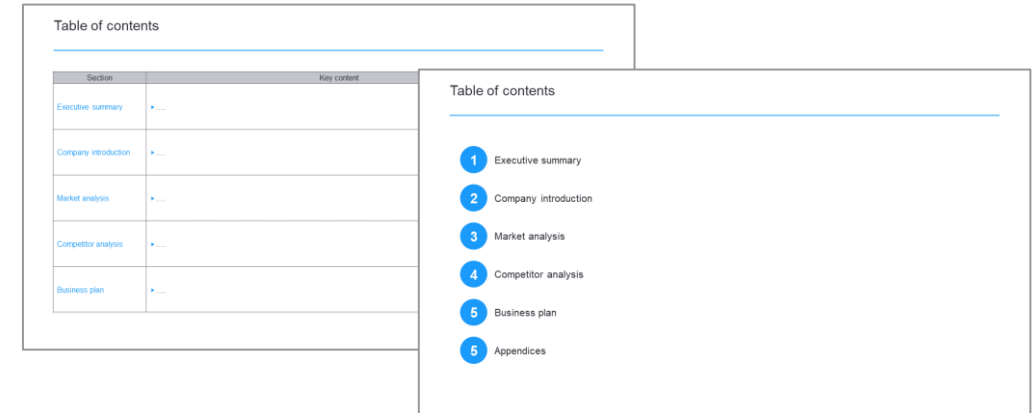
Examples of key report elements

1 Cover page



- ▶ Use cover pages with vivid pictures and colors – do not use a white background in cover pages
- ▶ You can find suitable cover photos from e.g.
 - [Pixabay](#)
 - [Unsplash](#)
 - [Pexels](#)
- ▶ Note: remember to check license and copyrights of the images!

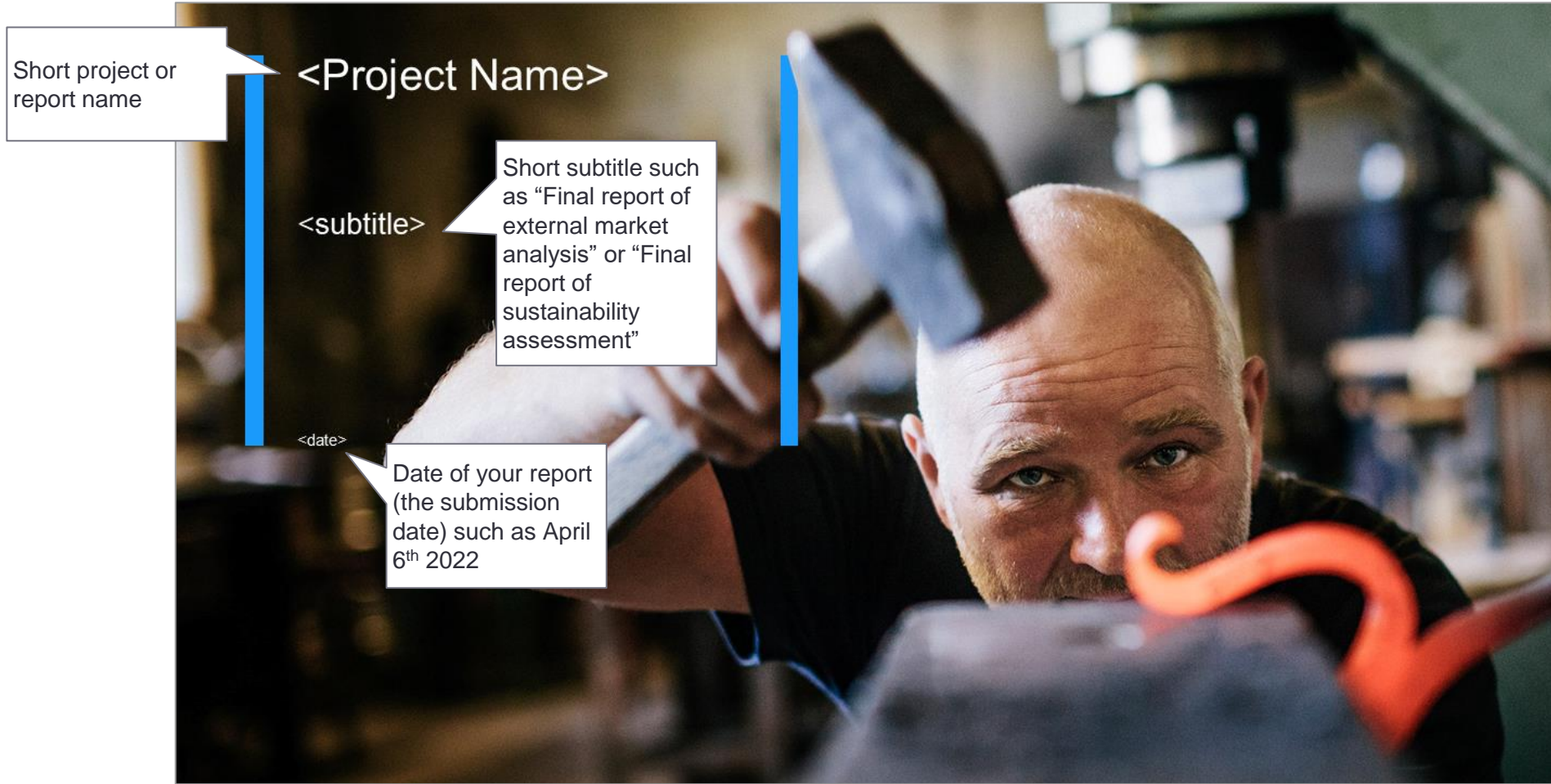
2 Table of contents



- ▶ Create a simple table of contents page to start off with
- ▶ Tip: you can use the table of contents page as a “section divider” to help the reader to stay on track while reading the report – see next pages for examples

Preferably use a colorful cover page which includes your project / report name, an informative subtitle and date of your report

1 Cover page

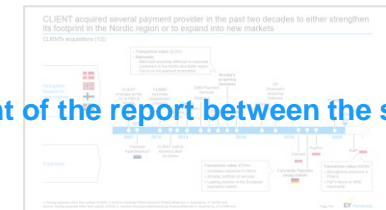
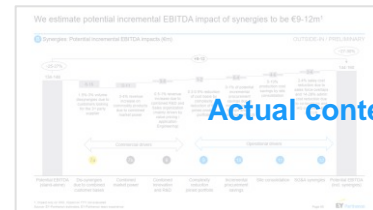


Use section divider pages to break down the report into distinct sections, and to make the report easier to read, navigate and digest

2 Table of contents (as section dividers)

Contents

- Executive summary
- Company overview**
- Market environment
- Business plan
- Appendices



Actual content of the report between the section dividers

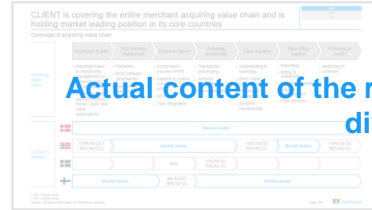


This is a **section divider** – it shows also the overall content of the report and highlights with color the next section.

Best practice is to create a simple table of contents template, which also works as a section divider, and copy the same slide across the report for consistent look

Contents

- Executive summary
- Company overview**
- Market environment
- Business plan
- Appendices



Actual content of the report between the section dividers

Contents

- Executive summary
- Company overview
- Market environment
- Business plan**
- Appendices



Actual content of the report between the section dividers

Executive summary is the most important section of the report – it summarizes in a concise format the most essential findings, recommendations and thinking of the work

3 Executive summary

Executive summary
<Template for 1-page executive summary>

Executive summary – overview of key findings

Key findings	
Text	► Text
Text	► Text
Text	► Text
Text	► Text

Executive summary
CLIENT is an established business with a well-rounded offering portfolio that has demonstrated steady growth trend while maintaining a decent profitability level

Summary of findings (1/4)

Business overview

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed egestas cursus accumsan. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia curae; Curabitur vestibulum laoreet varius. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc sed hendrerit velit, at suscipit eros. Aliquam arcu urna, pretium vestibulum congue vitae, hendrerit id est.
- Pellentesque ultrices faucibus interdum. Aliquam erat volutpat. Pellentesque velit sem, semper vel mauris vel, consectetur consequat nisi. Quisque lobortis quam quis leo mollis sollicitudin.
- Donec diam elit, maximus ac orci porta, molestie porta lorem. Duis dictum sit amet magna a venenatis. Nunc fermentum facilisis eros, vitae dignissim ex tincidunt non.
- Vestibulum congue a diam nec ornare. Phasellus euismod nulla ullamcorper eros laoreet viverra. Sed eget mauris turpis. Fusce auctor neque vel tortor elementum placerat. Cras mi magna, interdum quis turpis eget, placerat fermentum tellus.
- Aenean condimentum tincidunt urna, ut sodales justo iaculis vitae. Curabitur interdum imperdiet euismod. Cras fringilla et augue vitae fringilla.
- Nam ornare dignissim sodales. Aliquam iaculis efficitur aliquam. Curabitur nec vestibulum ex. Vestibulum rutrum porta ex id euismod. Donec erat mi, faucibus quis scelerisque a, varius a sapien. Nulla at lorem finibus, molestie justo vel, mollis erat. Duis convallis sapien tortor, in sagittis justo lobortis non. Curabitur et luctus purus. Ut sollicitudin tortor nulla, vel suscipit eros scelerisque nec. Vivamus finibus porttitor gravida.
- Proin commodo velit non posuere lobortis. Phasellus eu vestibulum mi, quis ullamcorper justo. Cras fermentum cursus purus nec rhoncus.

Executive summary
The domestic market is large, growing and fragmented – local and mid-market generalists form the key competition for CLIENT

Summary of findings (2/4)

Market overview

- Pellentesque ultrices faucibus interdum. Aliquam erat volutpat. Pellentesque velit sem, semper vel mauris vel, consectetur consequat nisi. Quisque lobortis quam quis leo mollis sollicitudin.
- Proin commodo velit non posuere lobortis. Phasellus eu vestibulum mi, quis ullamcorper justo. Cras fermentum cursus purus nec rhoncus.

Competitive positioning

- Pellentesque ultrices faucibus interdum. Aliquam erat volutpat. Pellentesque velit sem, semper vel mauris vel, consectetur consequat nisi. Quisque lobortis quam quis leo mollis sollicitudin.
- Proin commodo velit non posuere lobortis. Phasellus eu vestibulum mi, quis ullamcorper justo. Cras fermentum cursus purus nec rhoncus.
- Donec diam elit, maximus ac orci porta, molestie porta lorem. Duis dictum sit amet magna a venenatis. Nunc fermentum facilisis eros, vitae dignissim ex tincidunt non.
- Vestibulum congue a diam nec ornare. Phasellus euismod nulla ullamcorper eros laoreet viverra. Sed eget mauris turpis. Fusce auctor neque vel tortor elementum placerat. Cras mi magna, interdum quis turpis eget, placerat fermentum tellus.

- ▶ Executive summary can be presented in numerous different ways.
 - One alternative is to structure the executive summary based on the analyzed themes (scope items), such as “market”, “competitors”, “business strategy”, “action plan going forward” etc.
- ▶ It is important that it consists of short and concise phrases which include, using the pyramid principle, the most essential information of the analysis & findings of the course work

Glossary of key terms should be included at the very end of the report

5.1 Glossary



Report will most likely consist of several acronyms and abbreviations. It is a good working practice to list a glossary of key terms, and include it in the final report

Appendices

Glossary of terms

Acronyms and abbreviations

Term	Explanation	Term	Explanation
A	Actual	m	million
b	Billion	mgmt.	Management
B2B	Business to Business	NGO	Non-governmental organization
B2C	Business to Consumers	NOC	Network operations center
CAGR	Compound annual growth rate	NPS	Net promoter score
DC	Data center	n.a. or NA	not applicable
E.g.	Exempli gratia - for example	RFP	Request for proposal
EBITDA	Earnings before interest, taxes, depreciation and amortization	SaaS	Software as a Service
EUS	End-user services	SME	Small and medium-sized enterprises
F	Forecast	SOC	Security operations center
FY	Financial year	SW	Software
HW	Hardware	WAN	Wide area network
IAM	Identity and access management	WLAN	Wireless local area network
i.e.	Id est - that is	YTD	Year to date
k	thousand		
KPC	Key purchase criteria		
LAN	Local area network		
LTM	Last twelve months		



Finally, the report should contain a summary of the completed research activities (i.e. methodology) and data sources

5.2 Information sources

Appendices

Summary of research activities and data sources

Information sources

Primary research (N=X)	Secondary research
<p>Industry experts (N = X)</p> <ul style="list-style-type: none">▶<description of the interviewed expert>▶<description of the interviewed expert>▶<description of the interviewed expert>▶<description of the interviewed expert>	<ul style="list-style-type: none">▶ IDC▶ Alma Talent▶ Orbis BvD▶ Statistics Finland▶ Statista▶ Company websites▶ Company financial statements▶ Company presentations▶ Other company information including<ul style="list-style-type: none">▶ Customer data▶ Company budgets and forecasts▶ Personnel development▶ SLA performance metrics▶ Customer satisfaction data

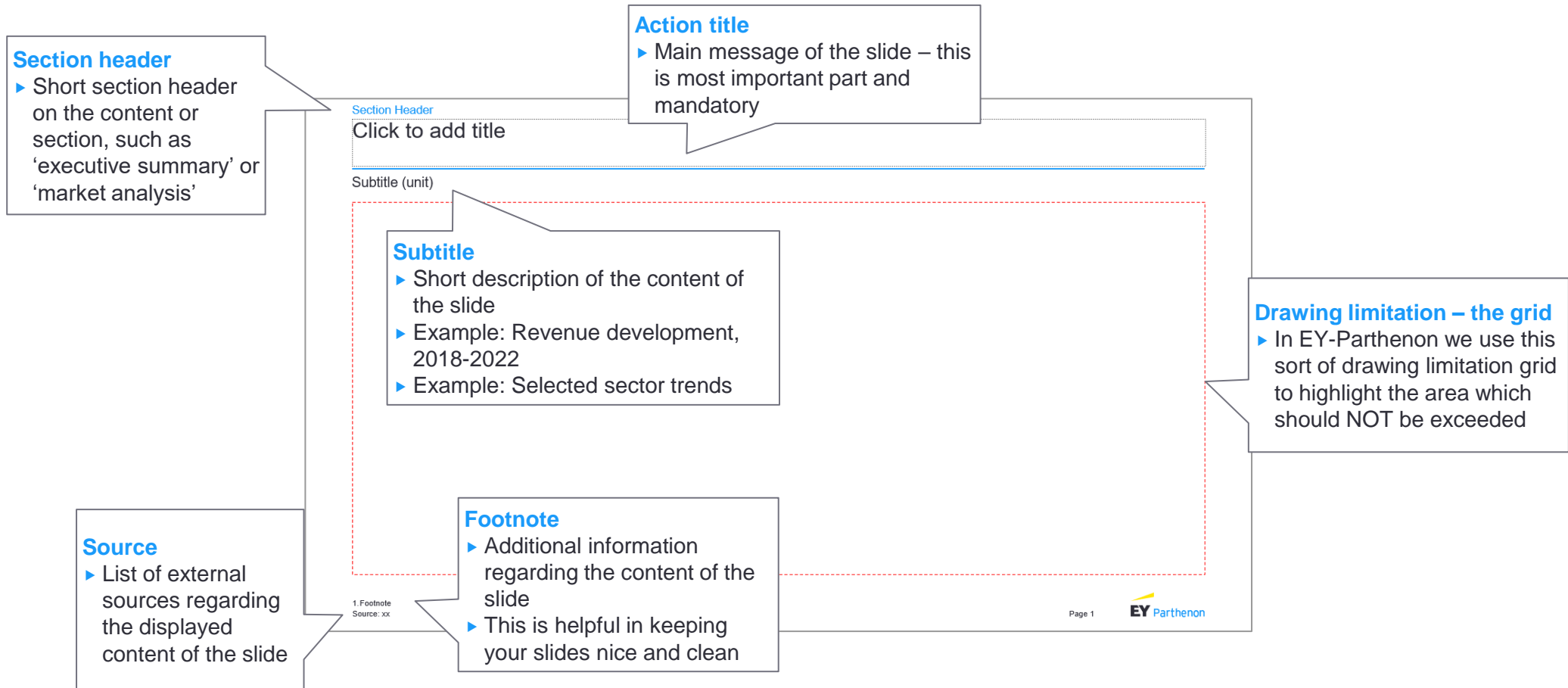
Content

- ▶ EY-Parthenon in brief
- ▶ Report structure
- ▶ **Style guide**



Regardless of the chosen page layout and template, every slide should have an action title and a subtitle

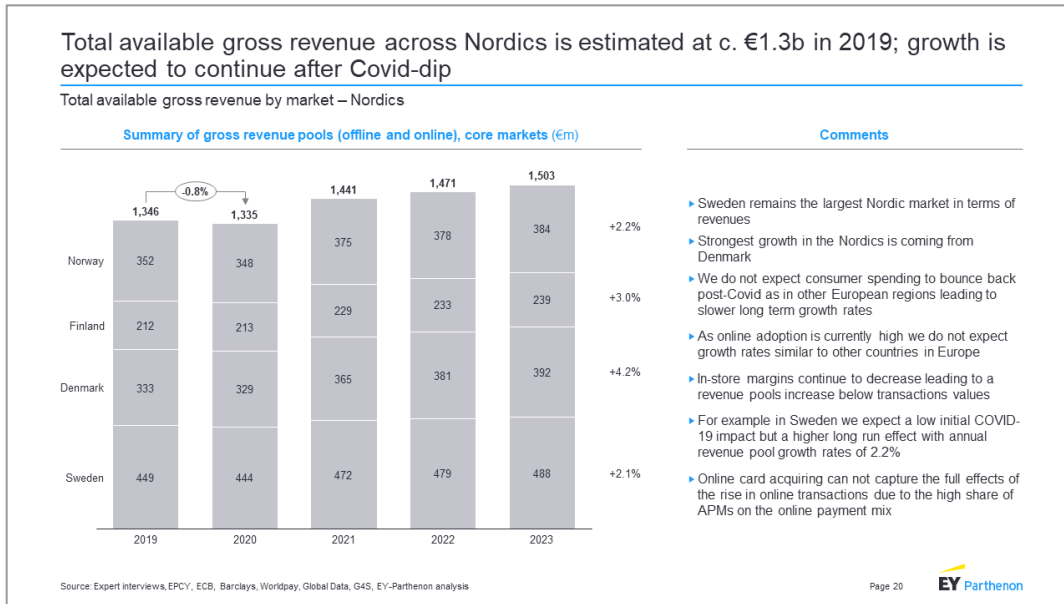
Slide structure



Action title tells the key message of the slide, and is the single most important element of each slide – pay attention to good action titles as it allows you to tell a story

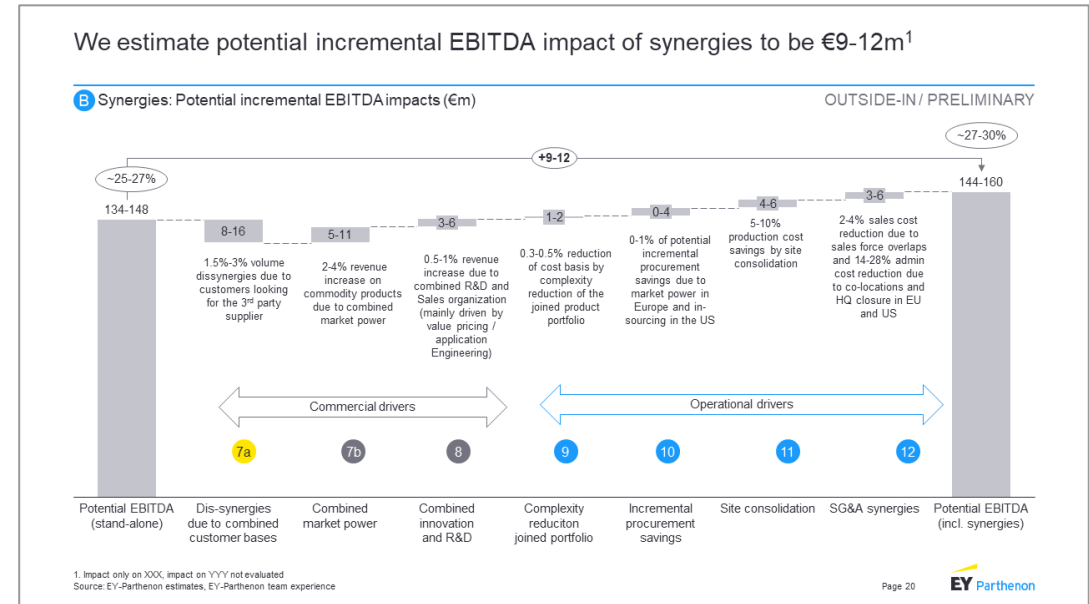
Action title examples

Example 1



- ▶ Main messages of the slide:
 - What is the size of the total available gross revenue in Nordics?
 - How is the market expected to develop in the coming years?

Example 2



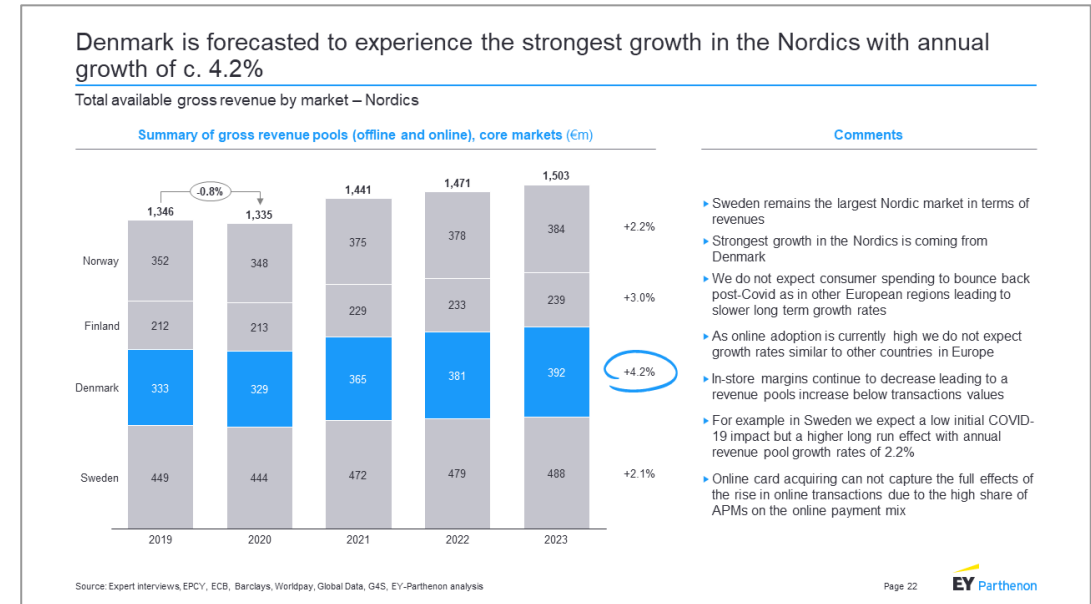
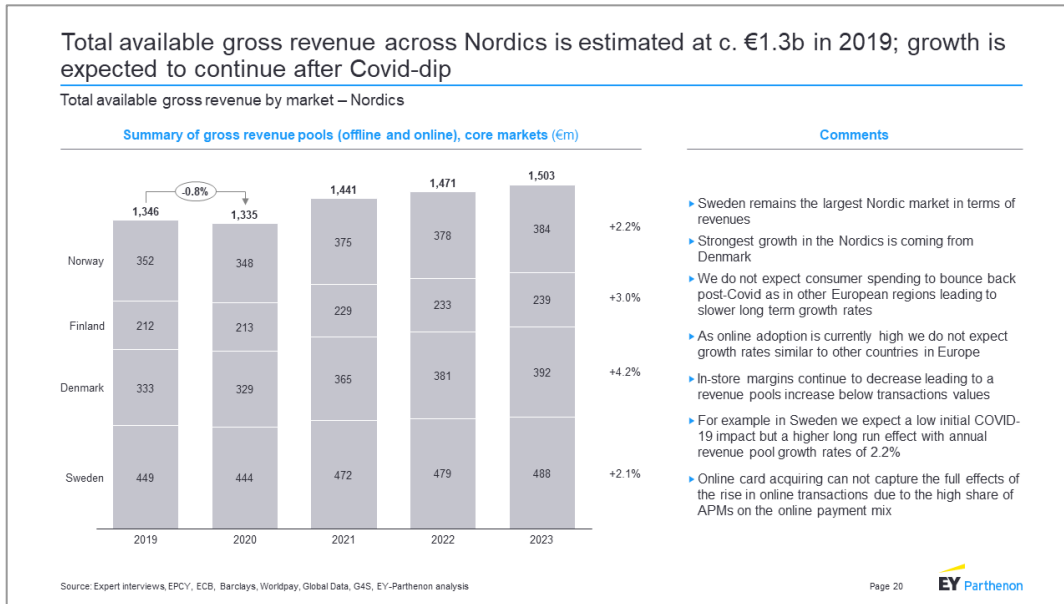
- ▶ Main messages of the slide:
 - What is the total estimated synergy potential?

Adjust to action title according to what's at focus

Action title examples (cont'd)

Alternative 1

Alternative 2



► Main messages of the slide:

- What is the size of the total available gross revenue in Nordics?
- How is the market expected to develop in the coming years?

► Main messages of the slide:

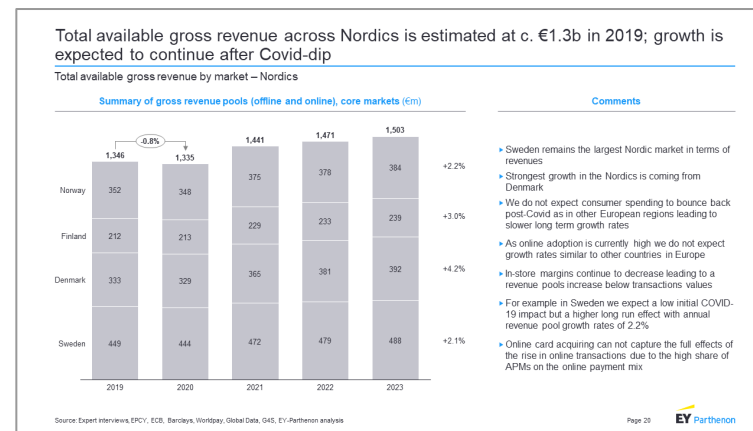
- Which country has the highest growth rate?

Preferably use a white background for easier reading, and use the same page layout and set of selected colors across the report for consistency

Usage of colors

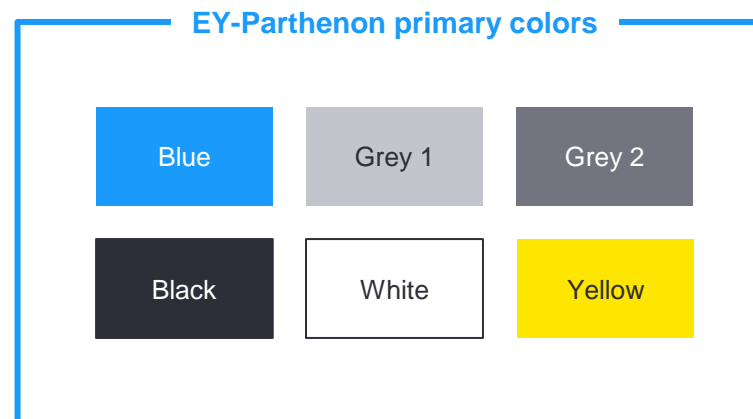
Use a white background

- ▶ Preferably use a white background in your slides across the report for consistency.
 - Studies also show that reading text and interpreting visualizations on white background is easier for majority of the readers!
- ▶ Avoid using black background
- ▶ Use the same layout and color background across the report



Use a set of primary colors

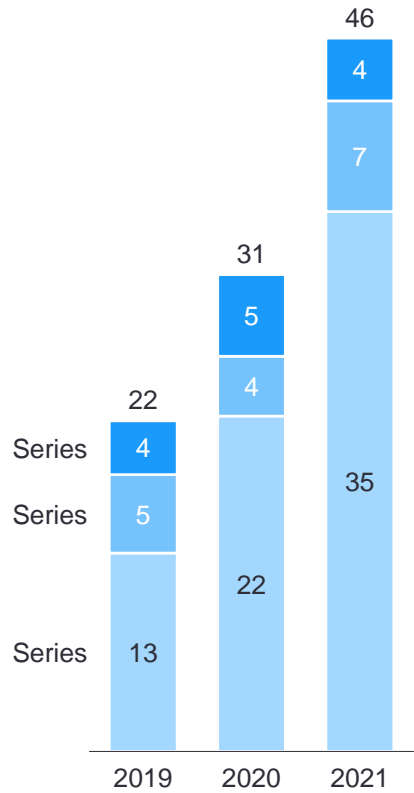
- ▶ Throughout the report, preferably use a consistent set of primary colors, i.e., do not use all the colors available in PowerPoint – it makes the report look inconsistent
- ▶ Note: Colors in this guidebook are EY-Parthenon’s proprietary brand colors. Use the colors which are available or embedded in your PowerPoint template layout



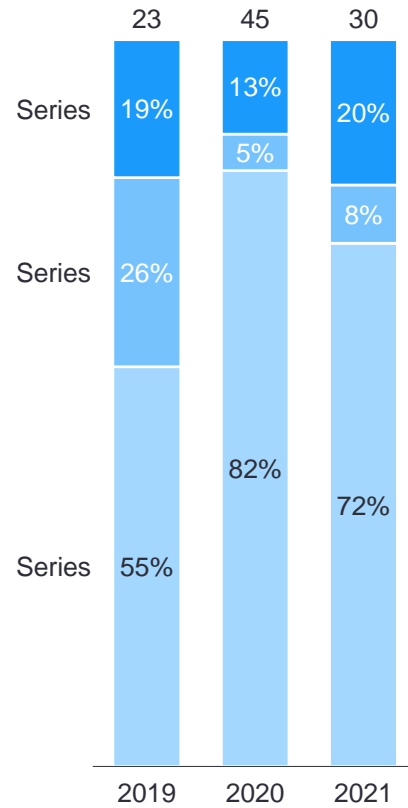
Pay attention to data visualization – try out different graphs and charts, and choose the most suitable for your needs

Simple data visualization alternatives

Stacked charts



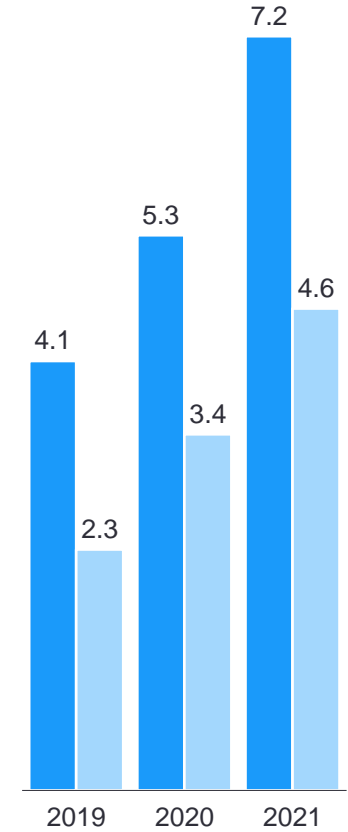
100% stacked charts



Line charts



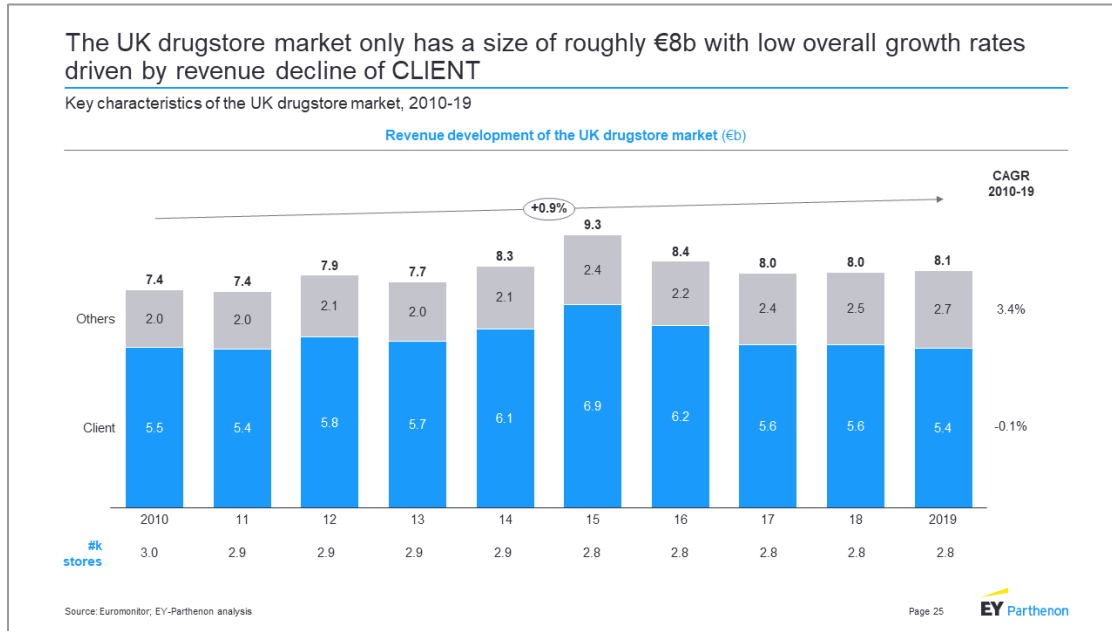
Clustered charts



Try highlighting the most important data points to strengthen your message

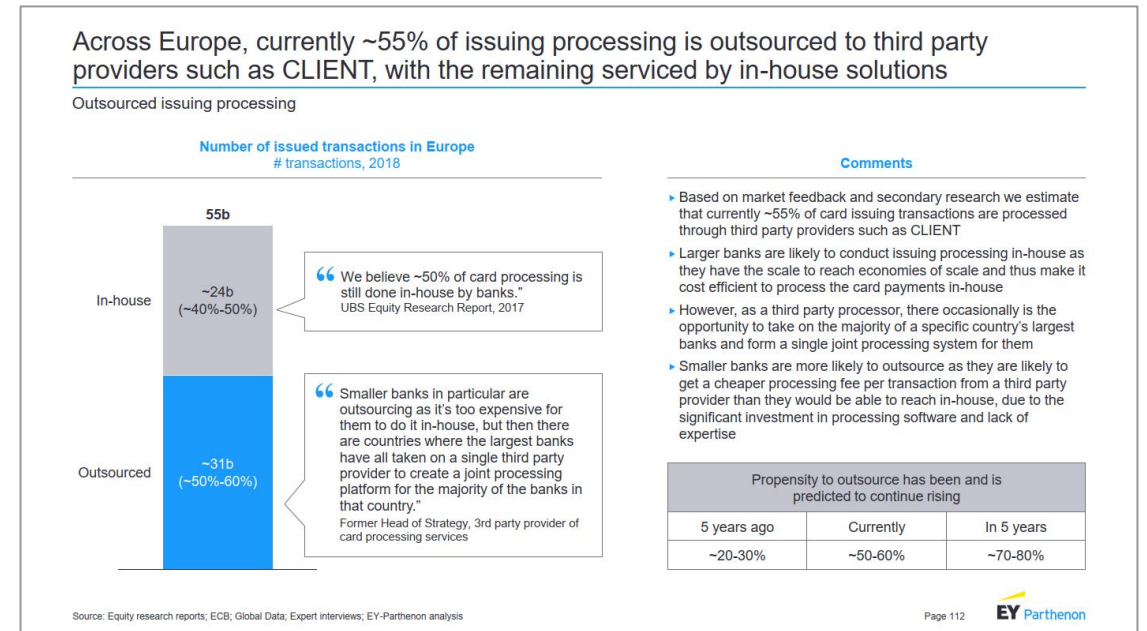
Data visualization examples

Example 1



- ▶ Stacked bar chart used to display the total revenue development of client and the other companies
- ▶ Client data highlighted with color

Example 2



- ▶ 100% stacked bar chart used to visualize the total number of issued transactions in Europe, and the split of outsourced vs. in-house transactions
- ▶ Outsourced transactions highlighted as the analysis has been focused on a client that provides outsourced services

Using icons, flags and logos makes the report more vivid instead of using only texts and shapes

Usage of icons, flags and logos

We work performance-driven, pragmatically and in close collaboration with the client team

EY-Parthenon's view on requirements for successful collaboration

Result orientation

- Maximum motivation of the entire team to lead the project to success
- Solid analytical basis for key decisions
- Creation of a structured and holistic perspective on key levers of Sales Excellence and how to realize them

Pragmatic approach

- Ensuring a rapid and pragmatic prioritization key levers, leveraging EY-Parthenon's frameworks
- As uncomplicated communication and decision-making as possible
- Manageability and replicability of the process for the organization

Close collaboration and intensive interexchange

- Close integration of team, management and other involved stakeholders
- Short communication paths through strong EY-Parthenon presence on site
- A targeted exchange and mediation of methodological competence for the 'training' of management team

Requirement for a rapid progress of the project is the availability of stakeholders and data

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CLIENT acquired several payment provider in the past two decades to either strengthen its footprint in the Nordic region or to expand into new markets

CLIENTs acquisitions (1/2)

Strengthen footprint in core markets

- 2007: Panade Kaardikeskus³
- 2008: CLIENT emerges as the JV of PBS & Noyfio
- 2010: CLIENT becomes independent company
- 2014: Payzone Nordic (57.7% Stake)
- 2014: Edigard Stake
- 2014: Paytrail
- 2014: DIBS Payment Services
- 2014: Signaturgruppen
- 2014: Storebox Aps
- 2016: Nordea's acquiring business
- 2016: OP Financial's acquiring business
- 2016: Edigard (42.3% Stake)
- 2018: Poplatek

Expansion

- 2018: Dotcard
- 2018: PayPro
- 2018: Concordis Payment Group GmbH
- 2020: Pepi

Transaction value: €230m

- Rationale:
 - Merchant acquiring offerings to corporate customers in the Nordic and Baltic region
 - Focus on full payment proposition

Transaction value: €700m

- Increases exposure in DACH
- Broader portfolio of services
- Leading position in the European payments market

Transaction value: €405m

- Strengthens presence in Poland
- PeP's focus on SME merchants

Source: Closing expected within third quarter of 2020; 2. Centrum Rozliczeń Elektronicznych Polskie ePłatności 3. Acquired by JV of PBS and

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► You can search for free icons from e.g.:

– <https://www.flaticon.com/>

– <https://thenounproject.com/>

Finally, here's a list of general do's and don'ts which may be helpful when creating reports

General do's and don'ts



Do's

- ▶ Always present key findings first – both in executive summary, and across the content sections. Put supporting analysis in the appendices section!
- ▶ Keep the report, visualization and text simple – sometimes the simpler, the better and easier the report is to read
- ▶ Put extra focus on storyboarding - create a concise storyline with good action titles
- ▶ Do not try to include everything on one page – only include 1-3 key message per page
- ▶ Pay attention to writing professional language
- ▶ Use graphs and other visualizations instead of tables when possible – this makes the report more illustrative and vivid!



Don'ts

- ▶ Avoid creating too 'busy' slides with no white space, filled with texts and shapes
- ▶ Avoid creating too long and complex sentences – the report is not an English writing language test
- ▶ Do not use spoken language – it is not professional
- ▶ Avoid writing down every obvious thing in the slide (e.g., 'what you can see from the graph') – rather focus on the 'so what?' by writing further key considerations, implications and commentary on the insights!

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