# Quick Reference Card (QRC)

## Best Practices for Slide Presentations

1. Before launching your slide application (e.g. PowerPoint, Keynote, etc.) to create your first slide, create an outline of the content based on the ADViCE™ framework found in these QRCs:

   o Utilize ADViCE™ Framework to Maximize Message Delivery Impact
   o Utilize ADViCE™ Template to Maximize Message Delivery Impact
   o 10 Questions to Ask Before Communicating a Stock Call

2. Start with your firm's template, if one exists. If not, create one that has the same header, footer, and font throughout, including it for all exhibits.

3. If the presentation will likely be made again (or slides will likely be reused) and it relies on market data, set it up to automatically link to a market data feed. This can be a big time saver, but requires the slides be manually reviewed before each presentation to ensure the data updated correctly and is consistent with the text.

4. Avoid having more than five lines of text per slide.

5. The font size should be easily readable for everyone in the room (or for viewing online) -- at least 14 point, and preferably larger, which shouldn't be a problem if you're following the rule directly above.

6. Let pictures tell as much of the story as possible. Do this by breaking up the text with *relevant* exhibits. Places to find good stock photos include iStockphoto.com and Shutterstock.com.

7. Avoid graphics that do not help convey or reinforce your message (e.g. clipart, irrelevant images).

8. Include video if it's critical for conveying your point, but understand that it adds technical complexity, which raises the odds of a technical glitch.

9. If others in your firm will likely find value in the slides, save the presentation on a company network.

10. When presenting, keep in mind the human mind can read much faster than the typical person can speak. By the time you get halfway through reading the slide aloud, everyone else is finished, allowing their minds time to wander. In order to avoid this problem:

    o **Don't read slides verbatim**. Instead, use the slides to accentuate or support the points where you provide greater elaboration or an anecdote.
    o Don't use your slides as a lazy man's speaker notes. PowerPoint and Keynote offer "presenter" note screens, where the author can read notes for each slide while presenting, but the audience cannot see them.

11. Search the web for the following resources:

    o Alexei Kapterev, "Death by PowerPoint"
    o Videos showing how to use PowerPoint presenter view and Keynote presenter display