Chapter 1: Moving Beyond Bullet Points: A Three-Step Approach

In this chapter, you will:

1. Analyze a typical presentation scenario.
2. Consider some of the problems that bullet points present.
3. Learn the importance of a story.
5. Review a three-step approach to moving beyond bullet points.

Giving a presentation can be a challenge for anyone. But it’s even more challenging when you have to give a presentation to the board of directors of your organization next week and they’ve specifically asked you not to use “boring” bullet points for your slides. What do you do?

The thought of public speaking strikes fear in the hearts of most people. Not only do you have to prepare to speak in front of a group of people you don’t know, you also have very little time to figure out what to say and how to say it effectively. Where do you begin?
This book can help. It introduces the Beyond Bullet Points approach, which will help you to produce any presentation using Microsoft Office PowerPoint without relying on bullet points. You will be guided, step by step, through the makeover of a single presentation so that you can see the approach in action. Based on a blend of classical ideas and modern technology, this three-step approach helps you focus your ideas, clarify them, and bring them to life for your audience. You can easily apply the techniques in this book to any presentation—whether you’re an entrepreneur, a salesperson, an educator, a professional speaker, a student, an engineer, or a scientist—because they’re for anyone who uses PowerPoint to communicate.

The benefits of this approach go much deeper than the aesthetics of your slides. You’ll not only produce more engaging visuals, but at each step along the way, you’ll also grow more confident as a speaker, more sure of your message, and more connected with your audience. There’s plenty to say about the ideas underlying this new approach, but you have a presentation to give next week to the board of directors, so let’s jump right into the specific scenario.

Introducing the Scenario

This book will guide you through the process of redesigning an existing PowerPoint presentation using the tools and techniques of the Beyond Bullet Points approach. As you see the approach unfold, you can use this fictional scenario to help you learn the approach and apply it to your own presentations.

Here’s the scenario you face—it’s your first day at your new job as the director of marketing for Contoso Pharmaceuticals in Los Angeles. You’ve wanted to work at Contoso for a long time, so you’re thrilled to be here. When you get to your desk and turn on your laptop computer, there’s an e-mail waiting for you from your boss, Michelle Alexander, the vice president of marketing.
The IQ Pill is Contoso Pharmaceutical’s new breakthrough drug that instantly doubles the intelligence of anyone who takes it. It’s a miracle of science that has been under development for years and is finally ready to be released.

The successful launch of the IQ Pill is crucial to your company’s financial performance next quarter, so the board has dedicated an hour of its meeting next week to review and discuss the marketing plan you will present. But there’s a glitch. When you check your voice mail there’s a message from Contoso’s CEO, Chris Gray:

“Welcome aboard! I was sorry to hear about Michelle’s situation, and I hope everything is all right. Michelle told me she forwarded to you the materials for the PowerPoint presentation you’re going to give to the board next week. I reviewed the presentation with her yesterday, and I approved the marketing plan—I think she did a great job. But we have a little problem. The board members have been giving me a hard time about our PowerPoint presentations, and I agree that the presentations can be unfocused, wordy, and dull. They’ve told me that they don’t want
to see any ‘boring’ bullet points at next week’s meeting. They still want presenters to use PowerPoint, but they want the visuals to be focused, clear, and engaging. Take a look at our current PowerPoint file, and let’s set up a meeting for Wednesday so that you can show me what you can do to improve it. See you then.”

So, it’s your first day on the job and you’ve already been given these challenges:

1. Give a presentation to the board next week using PowerPoint.
2. Use no bullet points.
3. Be focused, clear, and engaging.

You expected to hit the ground running in your new job at Contoso, but you weren’t quite expecting your first day to be anything like this.

A good way to start your new project is to step back for a moment and analyze the situation. Why would an audience ask presenters to move beyond bullet points in the first place? What were the Contoso board members really saying when they told the CEO that the current approach is producing “unfocused, wordy and dull” presentations? To find the answers to your questions, you go to the source: the current PowerPoint file that’s waiting in your e-mail inbox. You locate and open the Contoso marketing plan PowerPoint presentation so you can analyze its contents next.

Analyzing the Problem

Analyzing a PowerPoint file outside of its presentation context can be difficult because you’re missing some important pieces of information. You don’t know exactly what the presenter intends to achieve with the presentation. You also don’t know how the presenter actually works with the PowerPoint slides during the live presentation or how the audience responds. But even without this context, you can still ask three basic questions about every PowerPoint presentation to analyze its effectiveness.
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Three Analysis Questions

1. **In Slide Sorter view**  Can I see the focus of the presentation by reading only the slide titles?

2. **In Notes Page view**  Does this presentation balance my spoken words and projected visuals?

3. **In Normal view**  Will the slides look interesting to my audience?

Let’s see how you’d answer each of these questions when you look at the Contoso PowerPoint presentation.

**Can I See the Focus of the Presentation by Reading Only the Slide Titles?**

The first question to ask about any set of PowerPoint slides is whether they help the viewer quickly understand the main idea of the entire presentation. At this initial stage of your analysis, reviewing the specifics of individual slides is not as important as seeing how the slides work together as a whole. To take a look at the big picture of any presentation, click **View, Slide Sorter** to display thumbnail-size versions of all of your slides in a single view, as shown in Figure 1-1.

![Slide Sorter view of the Contoso PowerPoint presentation](image)
As you review your slides in this view, ask yourself, “Can I see the focus of this presentation by reading only the slide titles?” When you review any presentation in Slide Sorter view, you should be able to determine the main idea of the presentation at a glance. If you can’t confidently grasp the focus of your presentation in Slide Sorter view, your audience will not confidently grasp the focus of your ideas either. In the example shown in Figure 1-1, the main idea is as hard to find as a needle in a bullet point haystack.

The titles of these example slides don't help you see what is most important because they are category headings—like those you see in almost all PowerPoint presentations. These generic headings designate a general category of information for a slide but offer little about the specific information the slide contains. A category heading like “Growing demand” is actually an information placeholder that asks the implied question “What information belongs to this category?” You naturally answer that question by listing the category items with bullet points.

A category heading can help you quickly brainstorm a list of information, but as you can see here, it does nothing to help you quickly understand what is the most important information on a single slide or across the slides in a presentation. When you read the three headings in this example (“Growing demand,” “Market research,” “Forecast”), they really don’t say anything specific. To find out what the headings mean, you need to invest extra time you don’t have to connect all the dots of the bullet points below the headings.

Category headings put an extra burden on you and your audience as you both struggle to see the focus of your ideas through the slides in your presentation. As your audience views these headings and their corresponding stacks of bulleted lists, slide after slide, it’s no wonder that they find the presentation unfocused, hard to understand, and overwhelmed with unnecessary details.

**REMEMBER** Using generic category headings as the titles of your slides makes it difficult for both you and your audience to see the focus of your presentation.
Does This Presentation Balance My Spoken Words and Projected Visuals?

The next question to ask of any presentation is how well it balances your spoken words and projected visuals. You can analyze a presentation using these criteria by looking at the PowerPoint file from a little-used perspective called Notes Page view. To review your file from this angle, select any slide and click **View, Notes Page** to see a view similar to Figure 1-2.

![Growing demand](image)

**Figure 1-2  The Notes Page view of a selected slide from the Contoso presentation.**

In Notes Page view, the top half of the screen displays the slide that appears on the screen during a presentation. The text box below, which does not appear on screen during a presentation, can be used to write down the words you will speak while you show this slide. In this example, as in most PowerPoint presentations, all the information has been squeezed into the slide area above, while the notes area below was ignored. The result is that the relationship between your spoken words and projected visuals is not addressed.

Because half of the available real estate for information is not used, the slide area becomes the single place that holds both spoken words and projected images. This creates a scarcity of resources in the slide area, which predictably produces overloaded slides. Words will usually take priority over visuals, so you will tend to
see slides filled with text—which is what the Contoso board noticed. Visuals added to these already crowded slides will usually shrink to the size of postage stamps so that they can squeeze between the boxes of text. These dynamics produce slides that are overly complex and difficult to understand. The result is usually information overload for your audience.

Always remember that no PowerPoint slide exists in a vacuum. You are standing there speaking to your audience while you project the slide. That means that you must effectively plan how your spoken words and projected images relate to each other. If you don’t balance what you say with what you show, you are certain to create an imbalance in understanding for your audience.

**Does This Look Interesting to My Audience?**

The last question to ask about your presentation is what impact your slides will have on your audience. Audience response can be difficult to predict, of course, because your audience is not present during your analysis. But you can get a rough idea of how things will look to them if you click View, Normal to display your slides in Normal view. This time, when you look at a slide, imagine that your audience is in the room viewing it, as in this example:
This technique will give you a sense of what your viewers will experience when they see this slide. Unfortunately, the view in this example doesn’t look engaging. What your audience experiences is exactly what you experience when bullet points appear on a screen. What was once interesting suddenly becomes dull. The atmosphere becomes formal and stiff, and relaxed discussion stops. It’s almost as if bullet points take aim at whatever is interesting and lively in a room and silently kill it.

In your analysis, you’ve already noted some of the roots for these common audience symptoms, including a lack of focus and overloaded slides. Another obstacle is the monotonous background of the slides. As in most PowerPoint presentations, these example Contoso slides were created using a design template with a single, predesigned background. Using a single background gives slides a uniform look, but it also prevents you from using a wide range of design techniques to visually highlight the most important information on single slides or across slides. It can also make your slides appear repetitive or tedious, which might cause boredom and inhibit understanding.

These problems can create confusion and frustration for an audience when a presenter simply reads bullet points from slides to an audience. The most common audience response to this situation is, “If you’re going to just read me the slides, why do I need to be there? Just e-mail them to me!”

Showing and reading bullet points to an audience undermines the purpose of presentations. People attend presentations to learn about a topic as it is explained by another person. When you read bullet points, the slide is doing the talking, not you. This becomes a counterproductive exercise that can waste both your time and your audience’s. Being chained to the sequence of bullet points in your slides can also severely constrain your ability to demonstrate confidence in your topic, express your personality, and make a real connection with your audience.

But it doesn’t have to be this way. The Contoso board has given you an opportunity to use your analysis to transform your PowerPoint presentation beyond bullet points. When you close your PowerPoint file, you think for a moment about what
you have to do. You’re confident that you have good information in your current presentation, so your main challenge is to present that information in a new way that makes it easier to understand. You have a great deal at stake here because you want to make a good first impression in your new job and you want to help Contoso meet its financial goals next quarter with the successful marketing launch of the IQ Pill.

But what strategy will help you to move the Contoso PowerPoint presentation beyond bullet points and make it focused, clear, and engaging? To find out you need to step back from PowerPoint for a moment to see the bigger presentation context.

**Selecting a Strategy**

One of the reasons the Contoso board of directors, like most audiences, wants to move beyond bullet points is because they live in a media-saturated culture like the rest of us. Almost every waking moment of our lives, we are all exposed to visuals and sounds streaming across the screens of televisions, theaters, computers, and advertising displays. But that all comes to an abrupt halt when we look at the walls in our meeting rooms and see them filled with bullet points.

We all expect an increasing standard of production quality for every type of communication, including PowerPoint presentations. Boards of directors and audiences everywhere want much more than just a “visual aid” tacked onto a classical verbal presentation. They want a sophisticated communication experience in which spoken words and visuals blend together into a seamless integrated media experience that helps everyone to understand ideas and make decisions more effectively.

To transform your PowerPoint presentations into the type of experience that audiences expect, you’ll need to adapt some ideas from the world’s leading experts in bullet-free communication. And to find them, you need look no farther than north of your downtown Los Angeles office building to see their symbolic home—Hollywood.
Introducing the Hollywood Approach

Hollywood films and PowerPoint presentations actually have much in common. Both use spoken words and projected visuals to communicate information, and both aspire to engage people and keep them interested throughout an entire experience. But the difference is that Hollywood somehow manages to do its job successfully without bullet points. Its secret? Hollywood films *tell stories*. PowerPoint presentations usually do not.

Hollywood has always known that a story is a powerful, effective, and efficient communication technique. No one needs special training or technology to understand a story, because it’s the way humans have been communicating with one another throughout history. The structures of stories follow natural patterns that underlie the way we think and understand. Stories frame the context for communication and focus attention by making information specific and relevant to an audience. When you apply what Hollywood knows about stories to your PowerPoint presentations, you will quickly and dramatically transform your communications well beyond bullet points.
Interpreting Classical Ideas with Modern Technology

Of course, Hollywood didn’t invent the idea of a story. It simply used the new technology of film to adapt the classical elements of storytelling recorded by the Greek philosopher Aristotle 2,400 years ago. It wouldn’t be unusual today to walk into a Hollywood film school and hear filmmakers debating the fine points of Aristotle’s classical ideas about plot, character, and three-act structure.

Just as film was a new technology that Hollywood filmmakers used to adapt Aristotle’s ideas, PowerPoint is a powerful new technology that presenters can use to interpret these classical concepts. As the number of presentations dramatically increases, it is clear that all of us who use PowerPoint to communicate need to remember what Hollywood has never forgotten: it’s all about the story. When you adapt this timeless idea to your PowerPoint presentations, you will ground your communications in a powerful technique that has worked effectively throughout human history.

Aligning Your Strategy with the Research

Before you say “Hello to Hollywood,” it’s important to recognize that Hollywood techniques have limitations in the context of PowerPoint presentations. Most of us go to a Hollywood movie for entertainment, but you’re not giving a presentation at next week’s board meeting to entertain. You’ll be trying to persuade your audience to do or think something new, which will take more than razzle-dazzle. Although you do want to use sophisticated media techniques to communicate, you don’t want your presentation to offer only sizzle and no substance.

Your PowerPoint approach should be informed by the latest research on how to use words and images to help people understand information. At the end of your presentation, you want your audience to comprehend and act on your ideas and not just remember your fancy slides or your fine performance. Fortunately, there is a body of research-based design principles that can provide you with the guidance you need as you adapt the fundamentals of the Hollywood process to PowerPoint. Many of these principles are already embedded into the process described in this book, and you can explore them in more detail in Appendix A.
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Understanding the Three-Step Approach

What works for Hollywood will also work for you as you transform the Contoso presentation or any PowerPoint presentation beyond bullet points. With this book, you will adapt the process Hollywood has tested and refined through countless successful bullet-free films. This time-tested process consists of three basic steps, depicted in Figure 1-3.

To create a PowerPoint presentation without bullet points

1. Write a script to focus your ideas.
2. Storyboard your script to clarify your ideas.
3. Produce your script to engage your audience.

Figure 1-3  The Three-Step Beyond Bullet Points approach: script, storyboard, and production.
Writing a Script to Focus Your Ideas

The single most important thing you can do to dramatically improve your presentations is to have a story to tell before you work on your PowerPoint file. To learn how to do this effectively, you can follow Hollywood’s lead.

In Hollywood, stories take a specific shape in the form of a document called a script. A script is much shorter and less detailed than a novel because it assumes that the visuals of a film will play a major role in telling the story. Instead of relying on long narrative descriptions, a script focuses on action and dialog. The best scripts distill stories to their bare essence and strip away anything that does not contribute to a story’s singular focus.

![Figure 1-4](image)

*Figure 1-4 The concept of a Hollywood script is the inspiration for the Beyond Bullet Points Story Template.*

When a writer finishes a script, the document then becomes a powerful organizing tool that literally puts everyone on the same page. The script is the starting point for getting funding, attracting actors, and planning visuals, and it serves as a way for everyone to be clear on what everyone else is saying and doing. If you were a filmmaker and you started filming before you had a script, you would waste time and resources while you changed the plot, characters, and setting as you figured out the story along the way.
You’ll take Hollywood’s cue and kick off an efficient and effective process for your Contoso presentation by writing a PowerPoint script first, as shown in Figure 1-4. This step of writing a story first focuses your ideas and helps you figure out what you want to say and how you want to say it. Although writing a script adds a new step to your usual PowerPoint process, doing so will save you time and effort later.

To write a script, you need to momentarily set aside PowerPoint design issues like fonts, colors, backgrounds, and slide transitions. Although it might sound counterintuitive, when you write a script first, you actually expand your visual possibilities, because writing defines your purpose before you start designing. The more time you spend writing, the better your visuals will become. A script unlocks the undiscovered power of PowerPoint as a visual storytelling tool in ways that might surprise and delight you and your audiences.

When you begin writing your PowerPoint script in Chapter 2, you won’t have to start with an empty page, because you’ll use the Beyond Bullet Points Story Template in Microsoft Word to guide you every step of the way. The story template makes your job of writing a PowerPoint story as easy as filling in the blanks, because it includes all of the essential elements of a classical story. Just as Aristotle’s ideas about story structure have shaped an endless variety of Hollywood stories, your story template includes a classical story structure that serves as the springboard for an endless variety of story possibilities for bullet-free PowerPoint presentations.

In addition to helping you tell a story, the story template helps you to figure out what you want to say and the order in which to say it. The challenge of any presentation is not to show all the information you have but instead to select the right information to present. The story template guides you through the important process of selecting only the ideas your audience needs to know and breaking them into digestible chunks that are easier for your audience to understand. All of your hard work pays off when you transform your story template into a PowerPoint storyboard.
Storyboarding Your Script to Clarify Your Ideas

With a completed script in hand, a Hollywood filmmaker usually turns to a storyboard artist to sketch selected scenes from the story to show how things will look on screen. Storyboards help teams collaborate effectively—the sketches help everyone see how the story will look so that they can plan various aspects of production such as staging, camera positioning, and lighting.

You’ll tap into many of these powerful benefits by adapting Hollywood’s storyboarding concept to your PowerPoint presentation, as shown in Figure 1-5. You won’t need to sketch anything, but will instead adapt the basic idea of treating your slides as a sequence of illustrated frames on a storyboard. When you finish focusing your ideas with the story template, you will have a solid story that sets the foundation for your spoken words and visuals. In Chapter 4, you will transform your story template into a PowerPoint storyboard as you prepare and plan your visuals in Slide Sorter view.

Figure 1-5  The concept of a Hollywood storyboard is the inspiration for the Beyond Bullet Points storyboarding approach.
In Chapter 5, you will add visuals and words to specific slides using a simple and elegant style that makes your job of turning your words into visuals much easier and faster. Don’t worry if you don’t have a professional designer working with you, because all the design techniques in this book are accessible to everyone.

Your storyboard will solve many of the problems with the example Contoso slides or any PowerPoint presentation because you start designing with a strong and coherent foundation in the form of a strong story. From the start, you will be able to work with your story in Slide Sorter view to review your story structure and sequence, check your pacing and flow, and use visuals to tie together the various parts of your story. This planning ensures that you continually build on and improve your strong story foundation with a single unified set of visuals and words. Developing your storyboard also increases your confidence in your topic and cultivates new and creative communication skills.

**Producing Your Script to Engage Your Audience**

Usually, you experience the final results of a Hollywood script on a movie screen when you buy a ticket for a new release, find a seat, and sit back and relax as the lights go down and you watch the show. But next week you are giving a live presentation to a live audience, so you’ll stretch the Hollywood model into the domain of live performance, as illustrated in Figure 1-6.
Using the approach described in this book, you’ll be well-equipped to produce a media experience that will get you the results you want anytime you give a presentation. Focusing your ideas using a story template and clarifying them using a storyboard blends your message with your media, and dramatically expands your ability to enhance your presentation with sophisticated media tools and techniques. And every step of the way, you refine your ideas and continually rehearse the way you’ll present them.

Your new storyboard improves the way visuals promote meaningful communication for both you and your audience. When you project your PowerPoint slides on a large screen, they work as visual triggers that increase your confidence as a speaker. You’re no longer tied to the uncomfortable task of reading text off the screen and unintentionally ignoring your audience. Instead your slides briefly signal what you’ll cover and remind you about the point you want to make. While the slide is displayed, you are free to look at your audience instead of at the slide.

Because your slides are simple, they minimize the work your audience must do to figure out what you’re saying. By decreasing the attention your audience would pay to complicated slides, you’ll increase the attention they pay to you and your ideas. The result is an engaging multimedia experience that balances visual and verbal elements and contributes to meaningful understanding.

And even if you had a fear of public speaking in the past, you’ll breathe much easier with your new PowerPoint approach. These powerful tools increase your confidence and improve the quality of everything you communicate with your spoken words and projected images. Because you’re more relaxed as a speaker, you’ll become more confident in improvising during your live presentation.

The three-step Beyond Bullet Points approach opens dramatic new possibilities for treating your PowerPoint screen as a canvas to promote dialog and collaboration. You’ll use a classical story structure and innovative techniques to engage your audience, but there are many more things you can do to help them feel more involved. You’ll explore these techniques in Chapter 7.
Getting Started

Now that you’ve analyzed your presentation problem, selected a strategy, and reviewed the three-step Beyond Bullet Points approach, it’s time to transform your Contoso presentation.

To get started on your Contoso presentation, you need a basic project plan, so you use Microsoft Outlook to send a meeting request for review sessions with your CEO, Chris Gray. Here are the milestones for this project:

**Project plan for the Contoso presentation**

1. Wednesday: Meet with CEO to review script.
2. Friday: Meet with CEO to review storyboard.
3. Monday: Meet with CEO to rehearse production.
4. Wednesday: Deliver presentation at board meeting.

Now that you’ve defined your project milestones, you’re ready to move beyond bullet points into a new world of focus, clarity, and engagement.