



PITCHBOOK DEVELOPMENT TUTORIAL OUTLINE (Draft)

Chapter 1 | Design Essentials

Chapter 2 | Presentation Design

Chapter 3 | Slide Layout

Chapter 4 | Finishing Touches

Chapter 5 | Drafting Process

Chapter 6 | Proofreading

Chapter 7 | PowerPoint Commands

This tutorial summarizes the 100+ most important skills required to design effective pitchbooks in PowerPoint

Chapter 1 | Design Essentials

Ideas on essential design elements.

- Headings
- Tables
- Categorization
- Flowcharts
- Graphs
- Graphics
- Styling
- Coloring
- Bullets
- Harvey Balls
- Short Form Text
- Decimals
- Slide Titles

Chapter 2 | Presentation Design

Guidelines for putting together a presentation.

- Table of Content
- Executive Summary
- Overview Diagram
- Header Sentences
- One Concept Per Slide
- Use of Visuals
- Use of Footnotes
- Use of Appendices

Chapter 3 | Slide Layout

Suggestions for basic layouts.

- Filling Blank Space
- Categories
- Comparison Tables
- Text Tables
- Styled Tables
- Two Columns
- Two Charts | One Column
- Four Quadrants
- One Row | Two Charts
- Two Columns | One Chart
- One Chart | One Row
- Three Rows
- Model Outputs & Commentary
- Charts | Sidebar

Chapter 4 | Finishing Touches

Finishing touches to enhance deliverables given extra time.

- Styling Headings
- Adding Diagrams
- Adding Charts
- Consistent Alignment
- Consistent Cell Margins

Chapter 5 | Drafting Process

Practical pointers for collaborating on a presentation with a team.

- Circulating an Outline
- Constant Follow Up
- Using Templates
- Creating Strawman with Annotations
- PowerPoint Comments and Notes
- Prioritizing Content before Design
- Prioritizing Instructions Given
- Maintaining Project Slide Library
- Sending Cut Slides
- Keeping Potentially Useful Slides
- Printing One Sided for Discussion
- Printing Double Sided for Final
- Making and Turning Handwritten Comments
- Making and Turning Electronic Comments
- Drafting Emails for Quick Yes/No Responses
- Labeling Presentations as Drafts
- Proofreading

Chapter 6 | Proofreading

Items to check for that are commonly overlooked.

- Check for one item at a time
- Check each word, sentence and slide
- Check numbers are consistent on each slide
- Check calculations tie
- Check page numbers on table of contents
- Check page numbers on each slide
- Check footer on each slide
- Check title formatting
- Check spacing, punctuation, font size / types and alignment
- Check decimals, unit and category labels
- Check chart labels
- Check slide & object alignment

Chapter 7 | PowerPoint Commands (Draft)

Step-by-step instructions for basic and more advanced PowerPoint commands.

- Setup - Autosave
- Setup - Increase Number of Undos
- Setup - Quick Access Toolbar
- Setup - Personal Save Reminder
- Setup - Default Theme with 4:3 Aspect Ratio
- Adding / Changing Slide Master
- Applying Slide Master to Slides
- Pasting Slides to Adopt Slide Master
- Inserting Charts from Excel
- Inserting Charts in PowerPoint
- Pasting Model Outputs
- Copying Values into PPT Table (Format Painter)
- Copying Values into PPT Table (Unformatted Text)
- Pictures | Cropping-Sizing-Adjustments-Transparencies
- Selecting Objects | Grouping-Alignment-Ordering
- Fill and border colors
- Border styles
- Format Painter
- Text Spacing (Paragraph Spacing)
- Text Spacing (Blank Line)
- Customizing Bullets
- Paste as Unformatted Text
- Horizontal Text Alignment
- Vertical Text Alignment
- Cell Margins
- Merging Cells
- Vertical Text Direction
- Eye Dropper
- Dragging in Straight Line
- Duplicating in Straight Line
- Maintain Aspect Ratio when Resizing
- Zoom In & Out for Precision
- Arrow Keys to Nudge Objects
- Repeat Items on Slides in Same Position
- Insert Page Numbers
- Harvey Balls
- Delete Image Metadata
- Shortcuts

Frequently Used Commands

Nudge Objects	↑↓→←
Nudge Objects (Precise)	CTRL + ↑↓→←
Edit Text in Object	F2
Exit Text Field in Object	ESC
Paste Special	CTRL ALT + V
Repeat Last Command	F4
Format Painter	ALT + FP
Group	CTRL + G
Ungroup	CTRL SHIFT + G
Move Objects in Line	SHIFT + Drag
Duplicate Objects in Line	CTRL SHIFT + Drag
Increase / Decrease Font Size	CTRL+] / [
New Slide	CTRL + M
Duplicate Current Slide	CTRL + D
Line or Paragraph Spacing	ALT + HKL
Insert Rows Below / Above	ALT + JL + E / V

Frequently Used Controls

Next Slide / Previous Slide	PgUp / PgDn or Scroll Wheel
Zoom In and Out	CTRL + Scroll
Select Next Item	TAB
Select Previous Item	SHIFT TAB
Show Guides	ALT + F9 or ALT + WS
Scroll Slides in Preview Pane	Scroll + Hover over Pane
Slideshow from Beginning / Current Slide	F5 / SHIFT + F5

Basic Microsoft Commands

Save	CTRL + S
Copy	CTRL + C
Paste	CTRL + P

Other Useful Commands & Controls

Cropping	ALT + JPVC
Send to Back	ALT + HGK
Bring to Front	ALT + HGR
Resize Object	SHIFT + ↑↓→←
Resize Object (Precise)	SHIFT CTRL + ↑↓→←
Border	ALT + JTB
Show Rulers	ALT + WR
Insert Table	ALT + NTI
Insert Text Box	ALT + NX + Drag
Font Size	ALT + HFS
Font Color	ALT + HFC
Font Type	ALT + HFF
Fill	ALT + HSF