



# 5 tips for writing about money (and 5 tips for better presentations)

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# 5 tips for writing about money

## 1 Begin with the end in mind

Before you start writing make sure you understand what you and the reader want from the document. If you want a decision then make it easy for the audience to know that is your purpose. If you are simply reporting something for information, make that clear too.

If you are not clear what the purpose of a report is then ask the recipient what they want, or ask your manager to advise you. Perhaps they don't know what the purpose is either.



## 2 Focus on the content (not the format) by writing in plain text

Spend time getting the beginning right. You might need to have several drafts of it.

If you're stuck, you could use this framework:

- What?
- So what?
- Now what?

Or you could use the snowflake technique, to expand a single sentence into a paragraph and then a page and two pages, until you're off and running.

Too much content is as bad, perhaps worse, than to little. Remember:

*Perfection is achieved, not when there is nothing more to add, but when there is nothing left to take away.* (Antoine de Saint-Exupery)

To focus on content first I suggest you write the first draft in plain text and only when you have the whole document do you transfer it into Word, Pages or whatever and format it.

There are lots of text editor apps you could use. Text Edit is built into Apple computers, and Notepad in Windows ones. There are many others to find, if you want. The one I use is Ulysses but it is Apple macOS and iOS only.

For people who want their plain text documents to look a bit easier to navigate you could write in [Markdown](#). This uses a simple syntax of symbols to indicate formatting within a plain text file but there are apps that can convert the markdown text into other formats including HTML, rich text format, PDF and Word.

## Embrace technology

Writing in small text files makes it very easy to get the benefits of cloud computing. Whether this is iCloud, Dropbox, Google Drive or similar you can access the same file with different apps from different devices and changes will be kept in sync. With some you can collaborate with others, too.

You should also explore the potential of dictation. It's built in to computers and phones now so why not use that to get your thoughts down quickly and tidy things up later.

There are also online services like [Grammarly](#) that you can use to your advantage. Grammarly works on any text so you can use the service to check the text of emails, blog posts, presentations, etc. And because you are pasting in plain text it won't be wrecking your formatting in the process.

## Declutter tables and charts

The aim of tables and charts is to convey a message to the reader. For that you want the message to be clear. This means:

- clear away gridlines
- be careful about the use of colour so that it enhances rather than obscures the message
- give the table a meaningful title
- consider ordering the data to make the message clearer
- consider rounding figures to 2 significant figures

## Follow a style guide

If your organisation has a style to ensure consistency across written documents then use it. If not find a style guide you like and stick to it. (For example you could use the [Guardian style guide](#).)

If you are interested in this stuff you could do worse than spend a few quid on *Elements of Style* by Strunk and White (Amazon). The aim of the guide is to introduce clarity into writing. Try to aim for the top left quadrant:

	AVERAGE SENTENCE IS EASY TO UNDERSTAND	AVERAGE SENTENCE IS HARD TO UNDERSTAND
SUBJECT MATTER IS COMPLEX	GREAT WRITING	TYPICAL WRITING
SUBJECT MATTER IS SIMPLE	HONEST WRITING	PROBABLY JUST BULLSHIT

# 5 tips for presentations

The following tips are a positive way of saying:



**Don't start the day before the presentations by filling out bullet points in a PowerPoint template and then, at the presentation, don't turn your back on the audience in order to use the bullet points as reminders of what to say.**

## 1 Write a script

Just as with writing documents, start by thinking about the audience and try to tell a story. As a rule of thumb a presentation is 120 words per minute so that tells you how long your script should be.

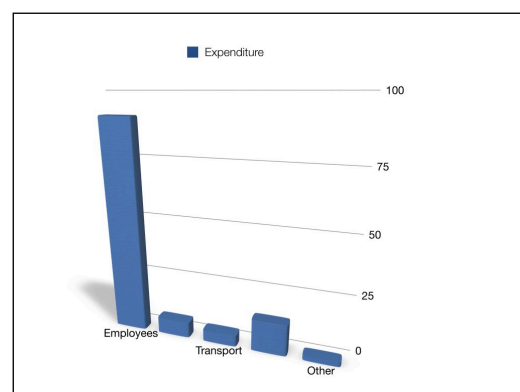
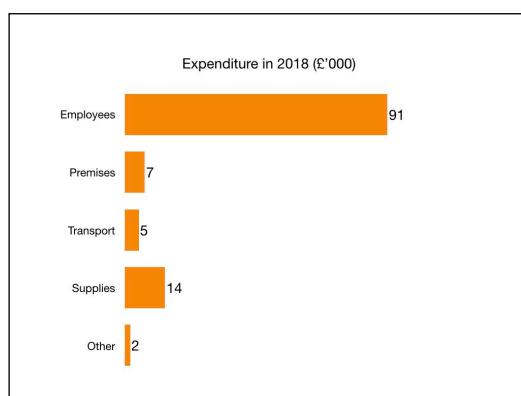
## 2 Use more images, less text

You are the presentation, not the slides. What's on the screen is supposed to support what you are saying, not compete with it. And using images are more memorable, and less of a cognitive load, on your audience.

If you're going to use images, get good quality ones, that are large enough to fill the slide (at least 1,000 pixels wide, but 1,600 for widescreen presentations).

You can pay for stock photos but there are lots of places where you can get free high-resolution images, including [Unsplash](https://unsplash.com/) and the [Noun Project](https://nounsproject.com/). Or you could create your images and videos using screenshots, screencasts, a camera, etc.

As with written documents, declutter tables and charts. Keep things simple: remove unnecessary lines and use colour sensibly. Pie charts are rarely the right choice. 3D effects are never the right choice.



If you have lots of data in a chart or table don't put it on the screen, put it in an handout instead. At that point in the presentation switch to talking about the handout so that the audience can follow what you are saying.

Avoid bullet points. If you do need to list things out, try this. Ones and noughts are free so you can have as many slides as you like in a presentation for no extra cost. Instead of bullet points on one slide, spread the words over several slides.

When presenting, you control what people see. Sometimes you want them to stop looking at the screen. The B key toggles the screen to black and the W key toggles it to white.

Lastly, if you have to use corporate templates, use them opening slide and perhaps the odd slide thereafter, but choose the blank page as the basis for most slides. You'll maintain the corporate look and feel from the fonts in the template, and using the brand colours for your tables and charts.

### 3 Remove barriers between you and the audience

Try not to stand behind a lectern or table so there is no physical barrier between you and the audience. It can help to have your laptop or other device set up where you can use it as a confidence monitor without interfering with the audience's view.

Use a remote control device so that you can change slides without returning to the device. (It looks awful, in my opinion, to have an assistant controlling the laptop and asking them to switch slide.)

### 4 Rehearse

If you want to give a good presentation you need to rehearse it. The first run-through can be reading from your script but the more you practice the better and smoother you will be.

And when you are rehearsing, think like an actor. When an actor receives a script they are not just thinking about the words but also the emotion or mood that they are to portray. Think about that when you are rehearsing. Do you want to communicate excitement to the audience, or fear, or joy or seriousness?

### 5 Create proper handouts

The easy thing to do is use the Print Handout feature in PowerPoint or Keynote, but don't do that. They're not proper documents. If all your slides were bullet points, they sort of make sense, but if you have lots of images they don't.

Instead, create a handout that is a summary of your presentation. The point is to have a document that works on its own, but which is particularly useful as an aide memoire to people who saw your presentation. For this reason it makes little sense sharing the handout at the beginning of the presentation.