Tippie College of Business

BAIS Capstone Final Report and Presentation Guidance

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Items for discussion

Written report best practices for:

- Executive summary

- Problem description

- Conclusion

Presentation best practices

- Audience expectations

- Storyline and team dynamics

- Slide design and data visualization

Report: Executive Summary

Outline everything the sponsor needs to know

Mindset: assume the reader won't read anything else – what do they need to know?

Elements to include:

Main goals of the project

Outline of the report's content

Major takeaways / findings / determinations

Report: Body Sections

Focus on what you learned, not what you did

Use positioning statements to begin paragraphs:

- <u>Description (ineffective)</u>: The data provide insight about the challenges of customer retention.

- <u>Positioning statement (effective)</u>: Customer retention can improve by [actions A, B, and C].

Strategy: Read only the 1st sentence of each paragraph and see what kind of message comes across

Report Conclusion

Clearly identify recommendations and action steps (if appropriate)

Other content to include

• other information/data that would have been useful

• unanswered questions

• next steps

• goodwill ending

Be sure to thank the sponsor for their time and attention

Use of clear language

Demonstrates respect for audience's time

Avoid 2nd person (you/your) but some 1st person plural (we/our) is fine in the intro and the conclusion

- You/your is confusing - sponsor may think it's addressing them

"This, these, that" usage requires clarifying nouns or phrases

- Ex: This leads to success for them
- Can be confusing, esp. in technical or client-centric documents

Use of clear language

Avoiding wordiness and unnecessary phrasing

→ Excess of 1-5 letter words in a row

→ Ex: One thing to consider would be to think about using the data to make changes to boost efficiency for processes the company uses (23 words)

→ Better: This data provides a potential roadmap for more efficient processes (10 words)

Read aloud and highlight sentences that take extra time to read through or that require multiple readings

Client expectations about quality

To meet professional-level communication standards:

SPELL CHECK

Read your work out loud to find places with errors, typos, or missing words

Check that paragraphs in conclusion begin with positioning statements and not description

Presentation PPT Slides

Presentation: Audience expectations

Sponsor is only mildly interested in models, code, what you did with the data, or how long you worked on the project

Emphasis on results, not process (no more than 30 seconds on data)
- Most of the focus on recommendations/findings

Mid-level technicality appropriate for most sponsors

Introduction

Not the same as an overview (only discusses content)

Follow the same pattern as the written report

Elements to include:

Main goals of the project

Outline of the report's content

Major takeaways / findings / determinations

Identify the takeaways up front to give the audience time to consider them

Presentation: Storyline as guide

For the body consider why information is presented in a certain order
→ E.g. presenting a project before discussing the cost

Contextual transitions help in demonstrating intentionality

→ <u>Ineffective</u>: "Now I'm gonna hand it off to Brett."

→ <u>Better</u>: "Now that Miranda has discussed the benefits of our proposal, I will talk about the commitment it will take from us to implement this plan"

Presentation: Slide design for retention

You are the presentation, the PPT is a visual resource

Short phrases (4-9 words) – otherwise 0-5% info retention

- Use "fade" or "appear" animation to keep audience's attention

No copying/pasting sentences from proposal/report draft

- May work for visuals

Slide as notecards for you and resource for audience

Presentation: Slide design for retention

DATA DICTIONARY

Features we used in our models

Offensive
- ❏ *FGPCT_O* (field goal %)
- ❏ *TURNPCT* (turnover %)
- ❏ *TORD* (steal rate)
- ❏ *ORB* (offensive rebound %)
- ❏ *FTR* (free throw %)
- ❏ *2P_O* (2 point shooting %)
- ❏ *3P_O* (3 point shooting %)
- ❏ *ADJOE* (adj. Offensive efficiency)
- ❏ *WAB* (wins above bubble)

Defensive
- ❏ *ADJDE* (adj. Defensive efficiency
- ❏ *DRB* (defensive rebound %)
- ❏ *FTRD* (defensive free throw %)
- ❏ *2P_D* (defensive 2 pt shooting %)
- ❏ *3P_D* (defensive 3 pt shooting %)
- ❏ *FGPCT_D* (defensive field goal %)

Teams/Identifiers
- ❏ *TEAM* (Name of school)
- ❏ *YEAR*
- ❏ *TEAMYEAR***

Rank/Standing
- ❏ *PowerRating* (overall team rating)
- ❏ *SEED* (tournament seeding)
- ❏ *Tournament?* (if team made tournament)
- ❏ *power_conf* (if team is in power conf.)
- ❏ *Elite8** (whether or not team made elite 8)
- ❏ *Games* (# games played)
- ❏ *Wins* (# of team wins)

*Target Variable
**Identifier

What is the takeaway from this slide?
How does audience consideration change this slide?

IOWA

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Slide Deck: Making effective visuals to maximize readability

Include a message title that establishes the visual's takeaway message

- Ineffective: Profits

- Effective: Net income down 13% in 2020 Q4

If impractical/too unorthodox, use short phrases in remaining space on slide to establish takeaways

- Avoid complete sentences unless very short
- If you must include a longer sentence, it <u>must be read aloud to audience</u>

Best Practices for Visuals

Don't assume a report visual will translate to a PPT
- Size, color, scale can look different
- Be prepared to make a simpler/more accessible version

For slides w/ visuals:
- Title should be the visual's takeaway message
- Use colored boxes/ovals to highlight key areas of the visual

If showing model, display it <u>briefly</u> and move on

IOWA

Notes on <u>presenting</u> visuals

Transition: "Now that we understand (principle), let's move on to (example)"

Message Title: "As you can see, over the last 10 years…"

Orient: "The blue bars on the chart represent…"

Discuss: Move into the visual's points of interest

IOWA

How can we improve on this? It depends on audience needs…

On-Time Arrivals by Airlines by Year

Step 1: Add a better message title or have takeaway somewhere nearby

2008 was worst year for on-time arrivals at Australian airports
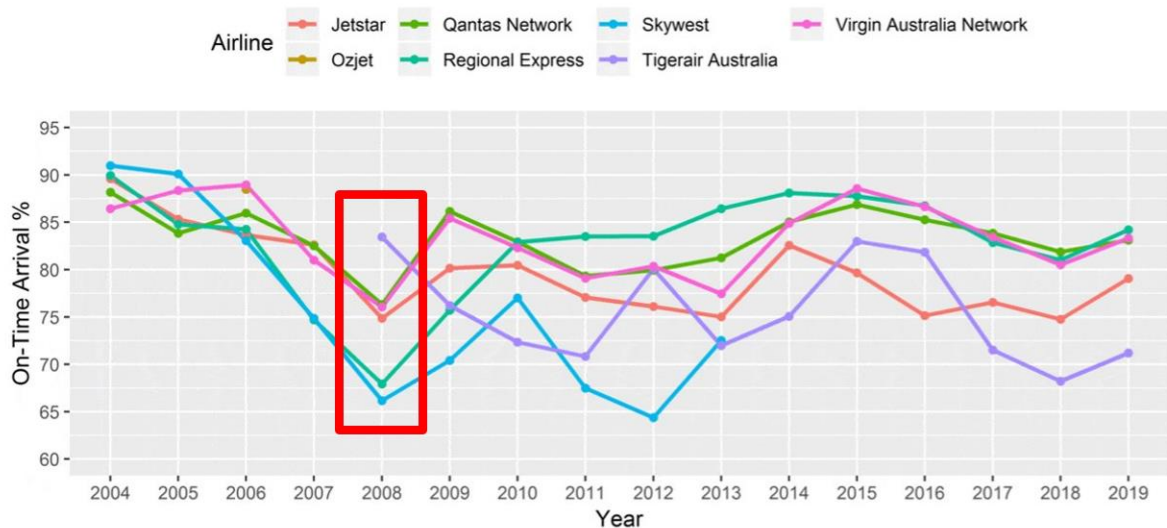
But what else?

Direct the eye by outlining

2008 was worst year for on-time arrivals at Australian airports

Better, but what can we still fix?

2008 was worst year for on-time arrivals at Australian airports
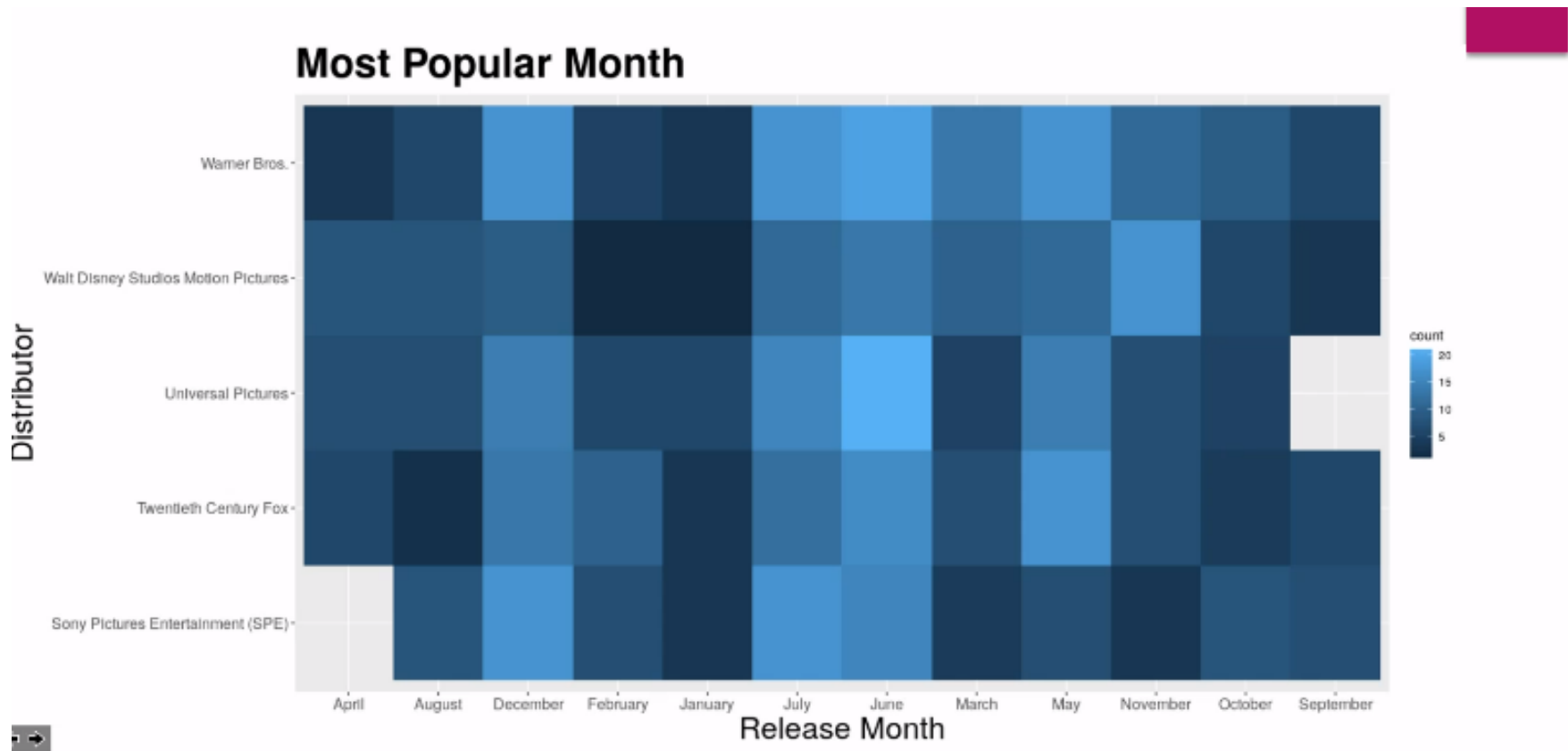
Get rid of "Year" label

Use only 1 shade of green

Get rid of the grid in the background
- Ideally, limit the # of years/data points
- Combine all airlines?
- Use color only in key areas, gray in the rest

IOWA

Consider how information is organized

Most Popular Month

Concluding thoughts

These practices will highlight the hard work you've done

When stuck, ask "what would the sponsor think?"

Specialized communication consultants will be available (information TBA)

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