

fusion HILL

Bringing Insights to Life

A FOUR-PART CONTENT SERIES



PART ONE: ORGANIZING INSIGHTS

KNOW YOUR STAKEHOLDER AUDIENCE

And get inside their head. Understand their needs, motivations and perspectives. Then shape your insights around what matters most to them.

When your insights feel like their insights, you've achieved resonance that sparks engagement.

- Listen intently to uncover your various stakeholder groups' core motivations and take note.
- Tailor presentations and insights to reflect their language and priorities back to them.



WHO ARE THEY?



WHAT DO THEY CARE ABOUT?



WHAT DO THEY NEED TO KNOW?

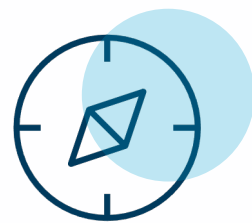
THE EXECUTIVE SUMMARY REIGNS SUPREME

The executive summary is the make-it-or-break-it opening of your presentation. For many audience members, it will be the only section they read closely. Take time to ensure it sparkles.



SHOW THE VALUE

Prioritize the most important takeaways and your unique perspective on them. Don't just summarize – add your point of view.



LEAN ON NEXT STEPS

Emphasize clear next steps the audience should take. Use concise yet actionable language that encourages engagement.



CONSIDER DESIGN

Organize visually with bold headlines, bullet points and ample white space. Guide their eyes to what matters most.

CRAFT A SKIMMABLE DECK

Craft a PowerPoint deck your audience can skim with lightning speed. Short bulleted lists, crisp phrasing and visual hooks allow insights to shine through the clutter. With each slide, let your audience dip their toes into the content. From there, they can decide if a deeper read is needed.

- Keep your titles short and sweet – think of them as chapter titles.
- Sometimes a deck with more slides is easier to read. Try keeping each slide to one point for a quick read.
- Prioritize your insights and do not be afraid to move in-depth information to an appendix.



WANT ADDITIONAL INSIGHT TRAINING?

Request our training:

**Building Insights: Turning Data
into Actionable Outcomes**

Ask your primary Fusion Hill
contact for more info!

USE DESIGN TO MAKE YOUR INSIGHTS MORE POWERFUL

Transform bland words into memorable messages. Strategic use of color, diagrams, icons and visuals can infuse your insights with energy and originality. Let design do half of the storytelling heavy lifting.

- Spotlight key data and quotes with bold fonts, color blocks and text boxes to make them pop.
- Replace text-heavy slides with simple yet impactful charts, graphs and imagery that convey insights rapidly.

HELPFUL DIGITAL TOOLS AND FEATURES VARY BY SEGMENT

In order to address key challenges, many **rely on many of the following digital tools and features**. Most **learn about new tools and features through trial and error** as they learn to navigate new websites and apps, though some are more proactive than others and may spend time researching new tools and watching tutorials.

COMMON DIGITAL TOOLS & FEATURES

| VISION | COGNITIVE | MOTOR |
|--|---|--|
| <ul style="list-style-type: none"> Night mode Brightness and contrast settings Increased text size Zoom capabilities Voice-to-text and dictation Reader view | <ul style="list-style-type: none"> Easy-to-follow tutorials Zoom capabilities Reader view Reminders | <ul style="list-style-type: none"> Advanced technology, including QuadStick and Tobii Eye Tracker 4C Voice control Voice-to-text and dictation Digital drawing pads and styluses |

UNAWARE OF VARIETY OF TOOLS OFFERED

Several are unaware of certain settings, features, and tools that are available. While some resources exist that could potentially help, they are not always advertised or easy to find.

*Note: Some participants have contradictory preferences (e.g., use of images vs. use of words) depending on what digital tools work best for them

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CONSIDER TWEAKS AND FEATURES THAT WOULD SET YOUR BANK APART

Among the array of suggested features, **consider leveraging those most relevant to finances/banking** to make your bank stand out among competitors.

| | CLEAN AND ORGANIZED LAYOUT | QUICK ACCESS TO ADJUSTMENT OPTIONS | COMPATIBILITY WITH CURRENT TOOLS AND DEVICES | OTHER SUGGESTIONS |
|------------------|--|--|--|---|
| VISION | <ul style="list-style-type: none"> Large, Bold, Standard Fonts High Contrast Words and Icons/Imagery | <ul style="list-style-type: none"> Zoom and Magnifier Options Voice Control Navigation Audio/Video Fine Print | <ul style="list-style-type: none"> Compatible with Device Settings and Other Software Quality Enlarged Visuals Virtual Assistant Capabilities | <ul style="list-style-type: none"> Mobile Deposit Scan |
| COGNITIVE | <ul style="list-style-type: none"> Broad to Narrow Navigation Layouts with White Space Few Major Layout Changes | <ul style="list-style-type: none"> Biometrics Across Devices Zoom and Magnifier Options Setting Reminders | <ul style="list-style-type: none"> Compatibility with Software such as Magnifiers | <ul style="list-style-type: none"> Automatic Save/Return |
| MOTOR | <ul style="list-style-type: none"> Fewest Possible Clicks Large Click Ranges | <ul style="list-style-type: none"> Voice Control Navigation Audio Customer Service | <ul style="list-style-type: none"> Compatible with Device Settings and Other Tools Virtual Assistant Capabilities | |








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BE CRYSTAL CLEAR ABOUT NEXT STEPS

Don't leave them hanging.

Compelling insights inspire action when you provide clear next steps. Leave your audience empowered to make an impact by spelling out specific recommendations and timelines in your presentation.

EMPOWER THEM TO DRIVE IMPACT BY PROVIDING:

-  Precise recommended actions to take post-presentation
-  Measurable objectives and methods to track progress
-  Timelines for key milestones and deliverables
-  Success metrics to evaluate effectiveness
-  Resources required from stakeholders
-  Potential implementation challenges to address
-  Opportunities to collaborate and share progress

YOUR INSIGHT ORGANIZATION CHECKLIST



Is the message catered to the **particular stakeholder audience**?



Do you have an **executive summary** that covers the main themes and takeaways?



Is it easy to **skim** the presentation?



Is your **design consistent** and used to make your points stronger?



Do you provide a **clear roadmap** for what needs to happen next?

PART TWO: INTEGRATING DESIGN INTO YOUR WORKFLOW

INTENTIONAL DESIGN MATTERS

Design should not be an afterthought, but rather a strategic consideration from the very start of any project.

Taking the time to think intentionally about design outputs from the outset of a project sets the stage for truly engaging and effective materials down the road.

DESIGN-FOCUSED QUESTIONS TO CONSIDER BEFORE A PROJECT EVEN BEGINS:



What are my timing and budget constraints for the output?



How can I infuse an emotional connection to output?



What assets do I already have to work with?



Will the final format enhance the presentation of the findings?



Who is the final audience?



How many people will need/want to review it and provide input?

THINK BEYOND DIGITAL DESIGN

Digital deliverables like slides are convenient, but **physical design pieces can prove more memorable, tangible and interactive for conveying insights.**

Physical deliverables stay in front of the reader longer and offer a sensory experience

Consider physical tactics to bring your findings to life:

- Mailers
- Flyers
- Brochures / Trifolds
- Posters
- Table tents
- Books
- Desk drops
- Card decks / Board games
- Window clings
- Promotional items
- Interactive installations



Interested in learning about physical takeaways?
Reach out to your Fusion Hill contact for more info.

TAKE ADVANTAGE OF FREE ONLINE TOOLS

When it comes to important or high visibility deliverables, we always recommend utilizing professional designers. The below tools however, can be helpful for initial ideating and drafting.

BRAINSTORM | WIREFRAME TOOLS

Miro, InVision Freehand, Google Jamboard

TEMPLATES

Canva, Google Slides

STOCK IMAGERY & ICONS

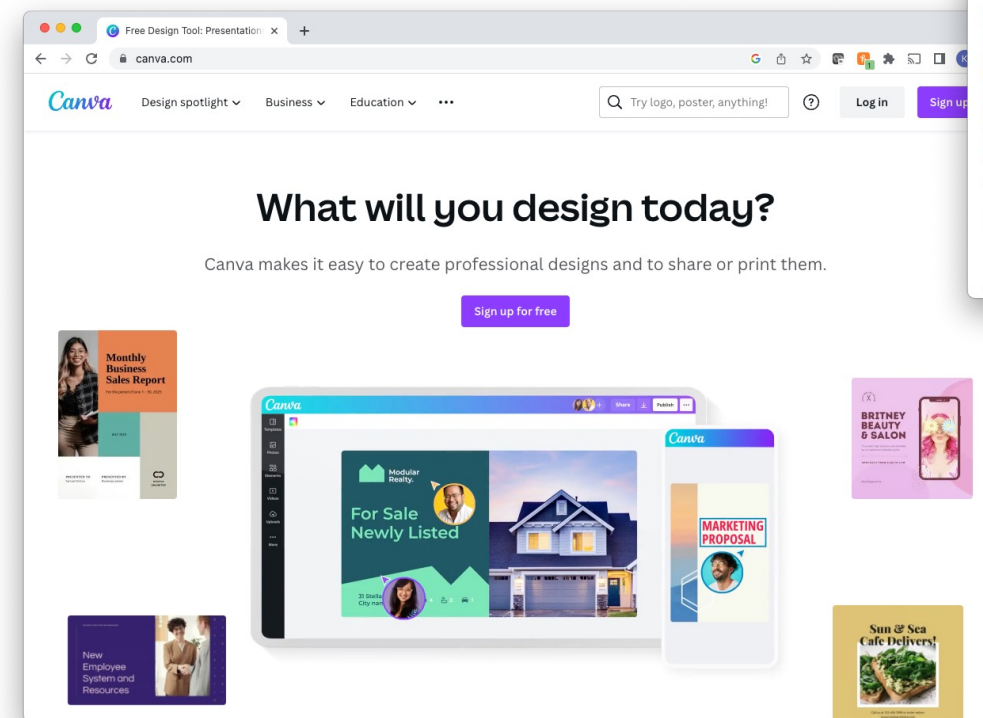
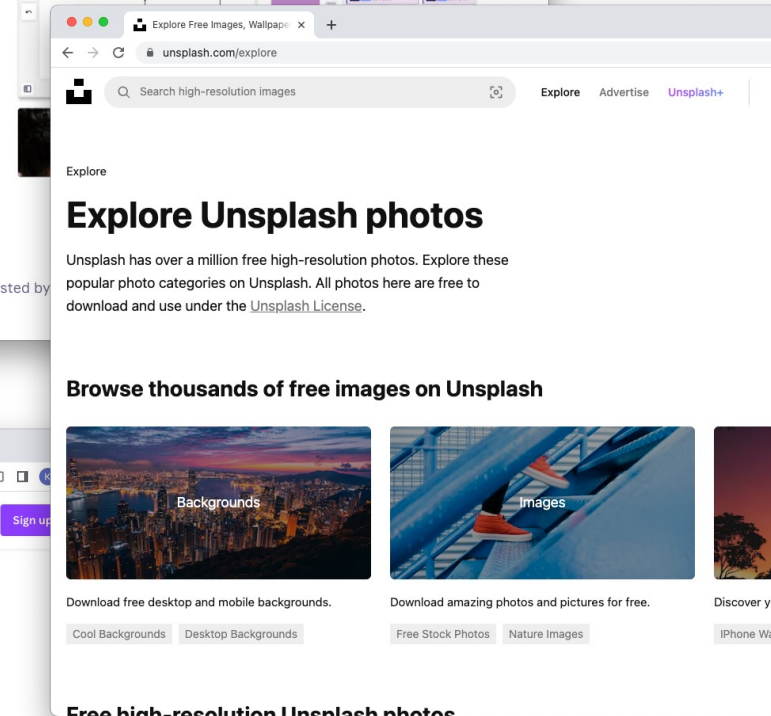
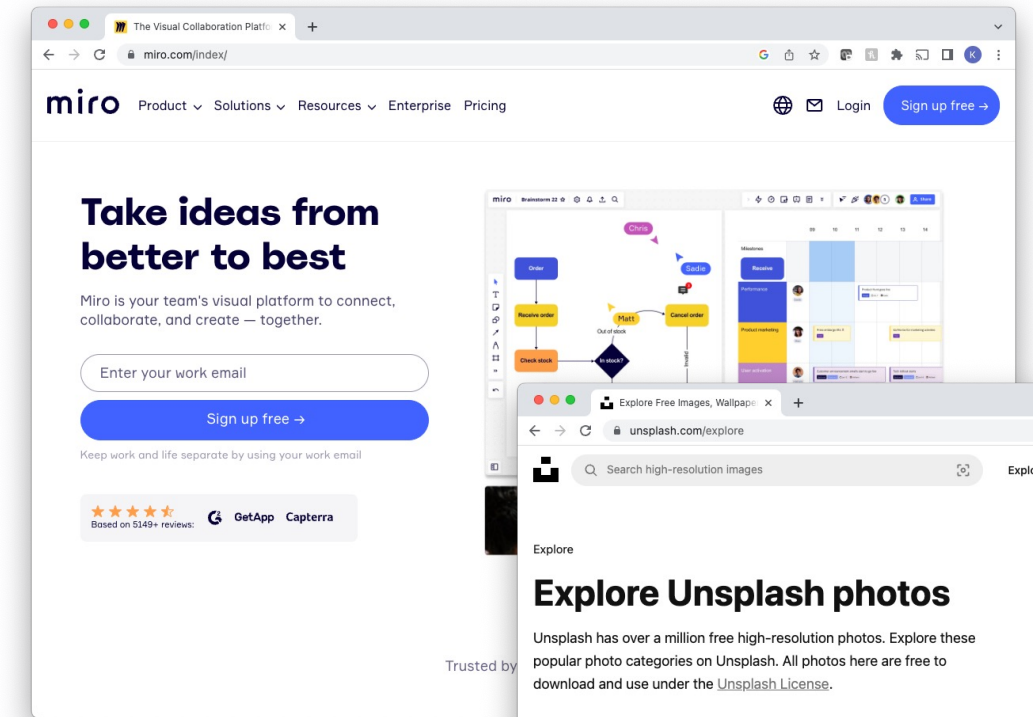
Unsplash, Vecteezy

DRAG & DROP WEB

Google Sites, Webflow

LEARNING

LinkedIn Learning, YouTube, Microsoft Support



EMBRACE AI AS A RESEARCH & DELIVERABLES PARTNER

The rise of advanced AI tools opens exciting **new possibilities to augment human thinking throughout the research process**. Platforms like ChatGPT, Claude and Bard can help take your deliverables to the next level when prompted thoughtfully.

Consider leveraging AI for:

1

CONTENT SYNTHESIS & REVIEW

While the human element of writing is essential, AI may help streamline tasks such as reviewing research documents and other starter materials to synthesize key points. This may be especially helpful for long-format work such as thought leadership articles. Of course, best practice with AI is to always double-check that the information you do use can be properly sourced, when relevant.

2

BRAINSTORMING

Feeling stuck brainstorming methodologies or slide layouts? AI may help add to your team's work and spark further human creativity.

3

FEEDBACK

Get an outside perspective by having AI review and provide constructive suggestions on draft presentations and more.

CONSIDER UNCONVENTIONAL DESIGN PROCESSES

A design sprint can be invaluable for projects involving **multiple stakeholder groups, complicated outputs and more**. Thanks to quick prototyping and validation, design sprints allow teams to rapidly test concepts and iterate before committing to full development. This “fail fast” mentality yields higher quality outputs, ensures alignment and boosts efficiency.

Fusion Hill recently conducted a design sprint to build a new architecture, wireframe and prototype for our very own website.

- Utilizing the design sprint process allowed us to condense this initiative down to one week.
- Including members from different teams ensured the outputs were informed by a variety of viewpoints and ways of thinking.



FINALLY, WORK TOGETHER

Use your team as a resource and share your wins.

Create an organized, shareable library of great design examples, templates and assets to reference for inspiration. A cloud-based data asset management (DAM) system enables teams to easily search previous assets.

- Share at team meetings, monthly email roundups or other touchpoints to keep it updated and growing.
- Tag assets by project, content type, design style, etc.
- Be sure to include the costs of each design and timeline considerations.

The image displays two screenshots of a design tool interface. The top screenshot shows a 'TIMELINE' menu with categories for 2-3, 3-4, 4-5, 5-6, and 7+ production days. The 'ACCORDION FOLD' product is highlighted, showing its cost as '\$' and production time as '2-3 DAYS'. The bottom screenshot shows the 'DECK OF CARDS' product, with a cost of '\$\$\$' and production time of '3-4 DAYS'. Both screenshots include a 'best for' section and 'other examples' images. A vertical 'fusion HILL' logo is visible on the right side of each screenshot. At the bottom of the interface, there is a key for pricing and a note that timelines do not include 3-6 days for design.

AND SET AN ANNUAL DESIGN REGROUP – IT’S WORTH IT!

It’s easy to get caught up in day-to-day work and lose sight of the bigger picture. That’s why dedicated time for high-level design thinking and process analysis is so valuable for teams. During this regroup, your team can:



UPDATE YOUR DESIGN LIBRARY

Remove outdated materials and introduce new, easily accessible layouts and visuals based on recent learnings.



REFLECT ON YOUR OVERALL DESIGN APPROACH

Analyze your current design processes to identify strengths and improvement areas, as well as alignment with team needs.



IDENTIFY AREAS TO PUSH YOUR DESIGN FORWARD

Leverage your team’s skills to creatively brainstorm ways to elevate designs to the next level.

PART THREE: DESIGN PRINCIPLES FOR NON-DESIGNERS

DESIGN ISN'T JUST FOR DESIGNERS

We can all incorporate better design into our work. When taken together, **the below principles help create a visual hierarchy of ideas**, so readers instinctively know what to read first and which ideas are most important.

CONTRAST

Using differences to create visual interest and highlight important elements

SCALE & PROXIMITY

Communicating relationships with relative size and distance between elements

BALANCE

Symmetry across a center line or intentional asymmetry, such as dividing a slide into thirds

WHITE SPACE

Strategic use of empty space to guide the eye and enhance readability

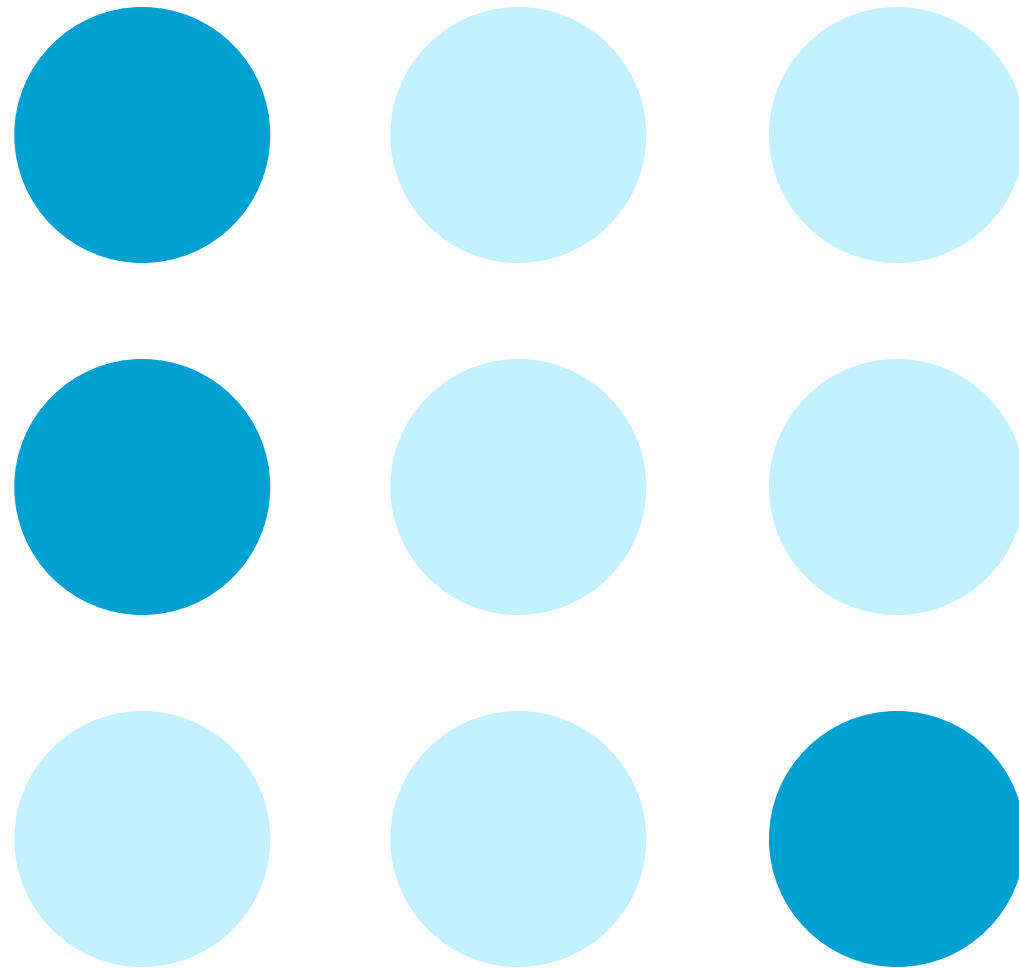
REPETITION & PATTERN

Repeating elements to create consistency and rhythm

VARIETY

Adding visual interest by incorporating different shapes, sizes, colors or styles

USE CONTRAST TO MAKE THINGS STAND OUT



Contrast is the use of different elements to create visual interest and emphasis.

Contrast is achieved through the use of different colors, shapes, sizes, textures or weights.

USE WHITE SPACE TO MAKE THINGS EASIER TO READ

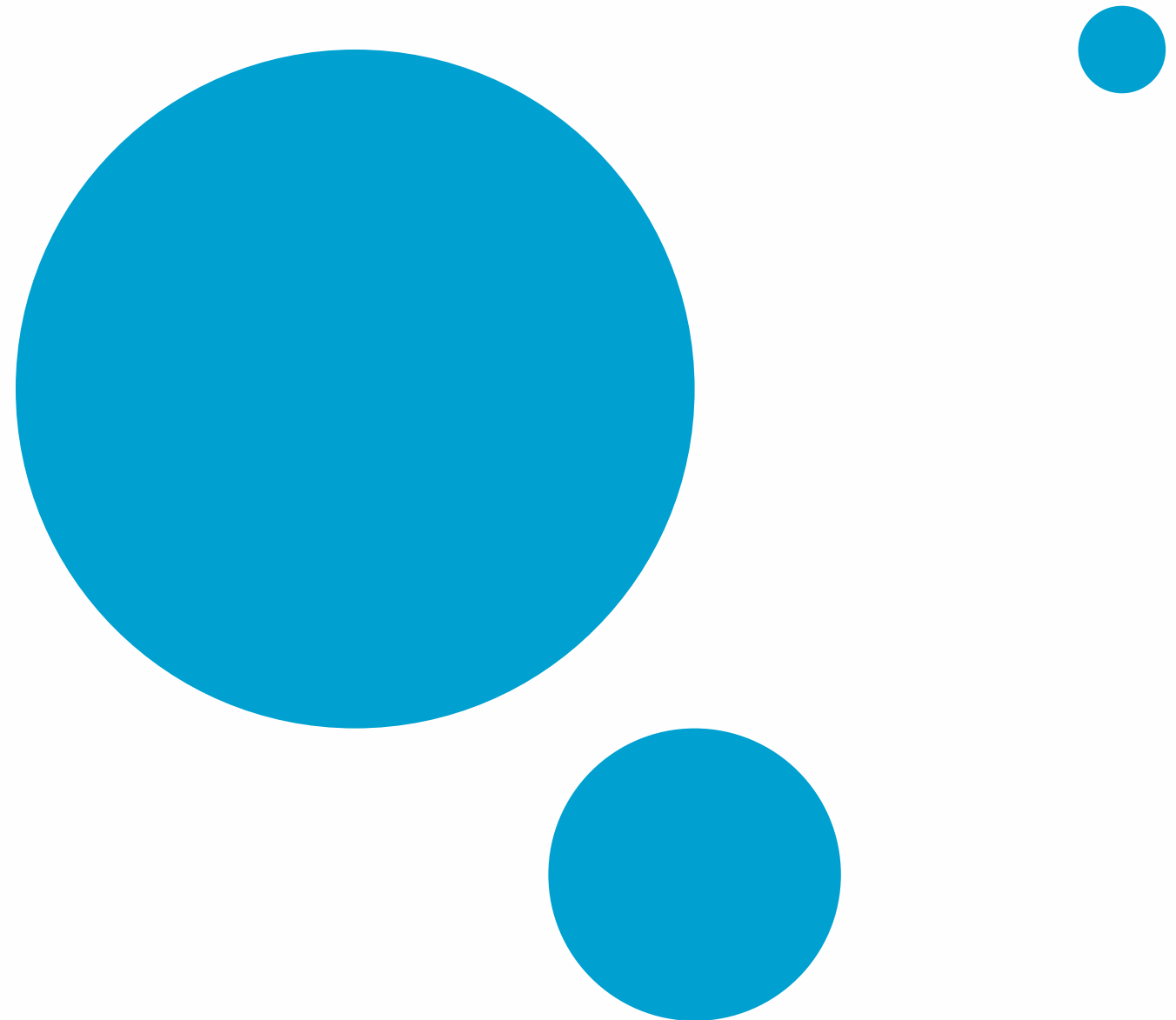
White space is the area of your design that is not occupied by any elements.

Reduce text and unnecessary visual elements, especially around the most important insights.

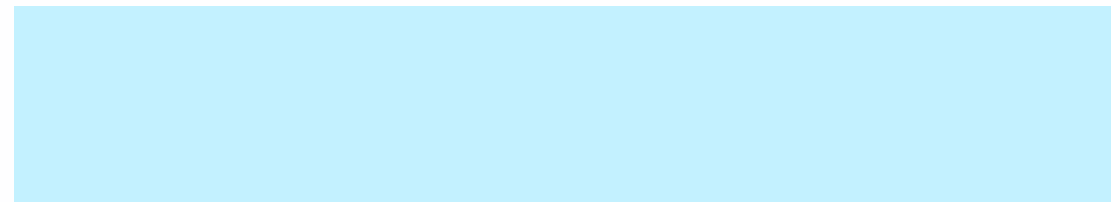
CONSIDER SCALE AND PROXIMITY TO SHOW IMPORTANCE

Scale refers to the size of the elements in your design, while **proximity** refers to the distance between them.

- Make important information larger and keep related information close together.
- Scale and proximity help create a sense of hierarchy in your design and guide the reader's eye.



BE CONSISTENT WITH VISUAL ELEMENTS



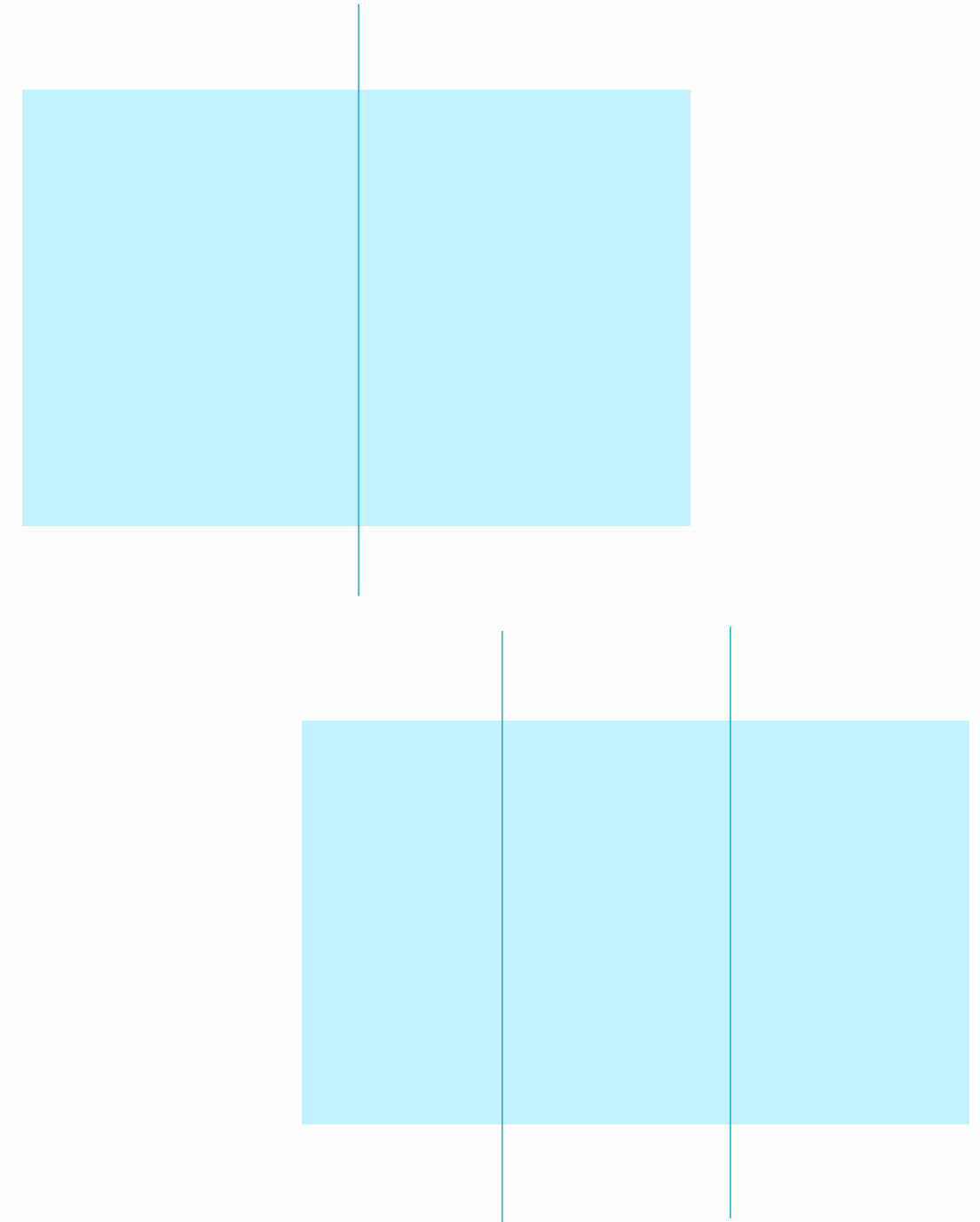
Repetition refers to the use of the same elements throughout your design, and **pattern** refers to the use of a repeated arrangement of those elements.

Use a cohesive template with repetition and pattern to create a sense of rhythm and unity in your design.

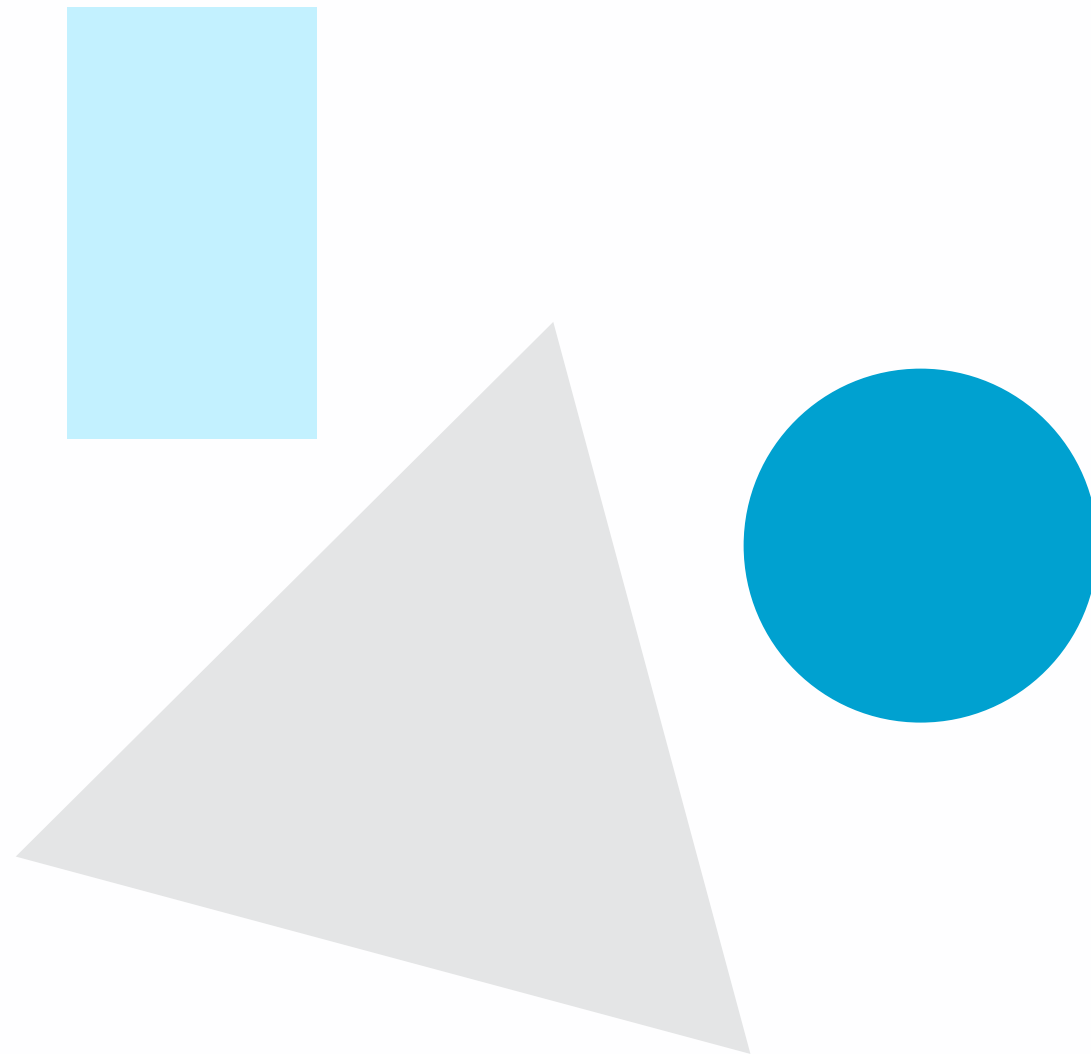
UTILIZE BALANCE FOR VISUAL APPEAL

Balance is a design principle that refers to the distribution of visual weight in your design.

- Symmetrical balance is achieved by arranging elements in equal amounts on either side of a central axis.
- Asymmetrical balance is achieved by arranging elements in different amounts, but in a way that still feels balanced.
- A balanced design will feel stable and pleasing to the eye.



USE VARIETY TO KEEP AUDIENCES ENGAGED



Variety is a design principle that refers to the use of different elements in your design.

- Variety is achieved by deviating from the normal layout, such as changing the fonts, font sizes, or colors, or by incorporating additional visual elements.
- When used in moderation, variety can help keep your design interesting and prevent it from becoming monotonous.

PART FOUR: MASTERING POWERPOINT TIPS & TRICKS



Let's face it, PowerPoint is a necessary evil. But under the hood are many overlooked features that can boost your productivity and polish your design.

YOUR GUIDE TO POWERPOINT

This guide will provide PowerPoint tips and tricks in the following areas:

- 1 TEXT FORMATTING
- 2 GUIDES
- 3 COLOR
- 4 FORMAT PANE

USE SHORTCUTS TO ENSURE CONSISTENCY

Get in the habit of using keyboard shortcuts for copying and pasting text — this allows you to maintain formatting like font family, size, color, etc.

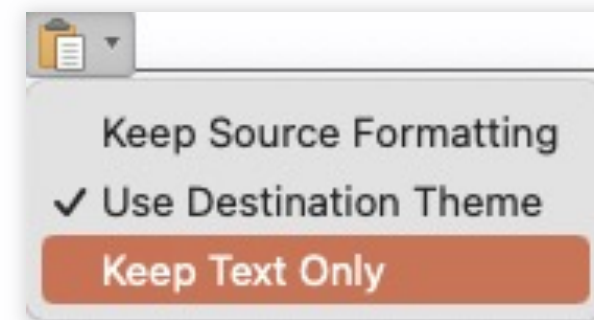


To format copy and paste:

CMD + SHIFT + C or **CMD + SHIFT + V**

To copy *any* styling — text, image, line weight, etc. — select or highlight the object/text with the style you want to copy (**CMD + SHIFT + C**), select or highlight the new object/text, then paste (**CMD + SHIFT + V**).

When copying and pasting text between slides, your best friend is “**Keep Text Only.**” Scroll down and click that option to keep your stylings



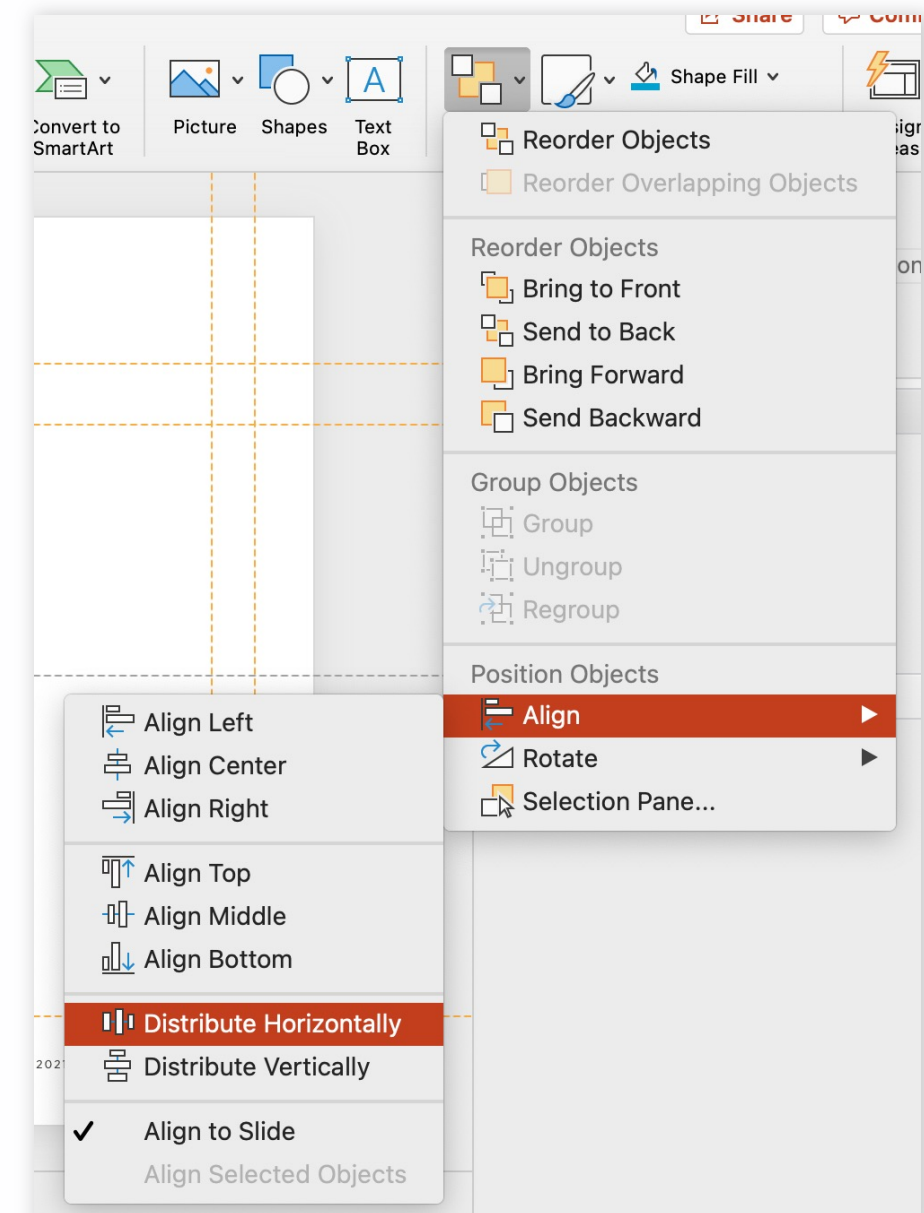
ALWAYS CHECK YOUR SPACING, SIZING & ALIGNMENT

Careful spacing makes slides look clean and cohesive.

- Make sure the line spacing, margin padding, bullet indent, and spacing before and after paragraphs is consistent throughout the entire deck before you start writing.

And proper sizing and alignment are crucial for polish.

- Make sure columns are the same width and/or height, and always distribute columns horizontally/rows vertically.
- To distribute elements with multiple text boxes/items, like a body and header, group the items together and then use the distribution alignment tool.

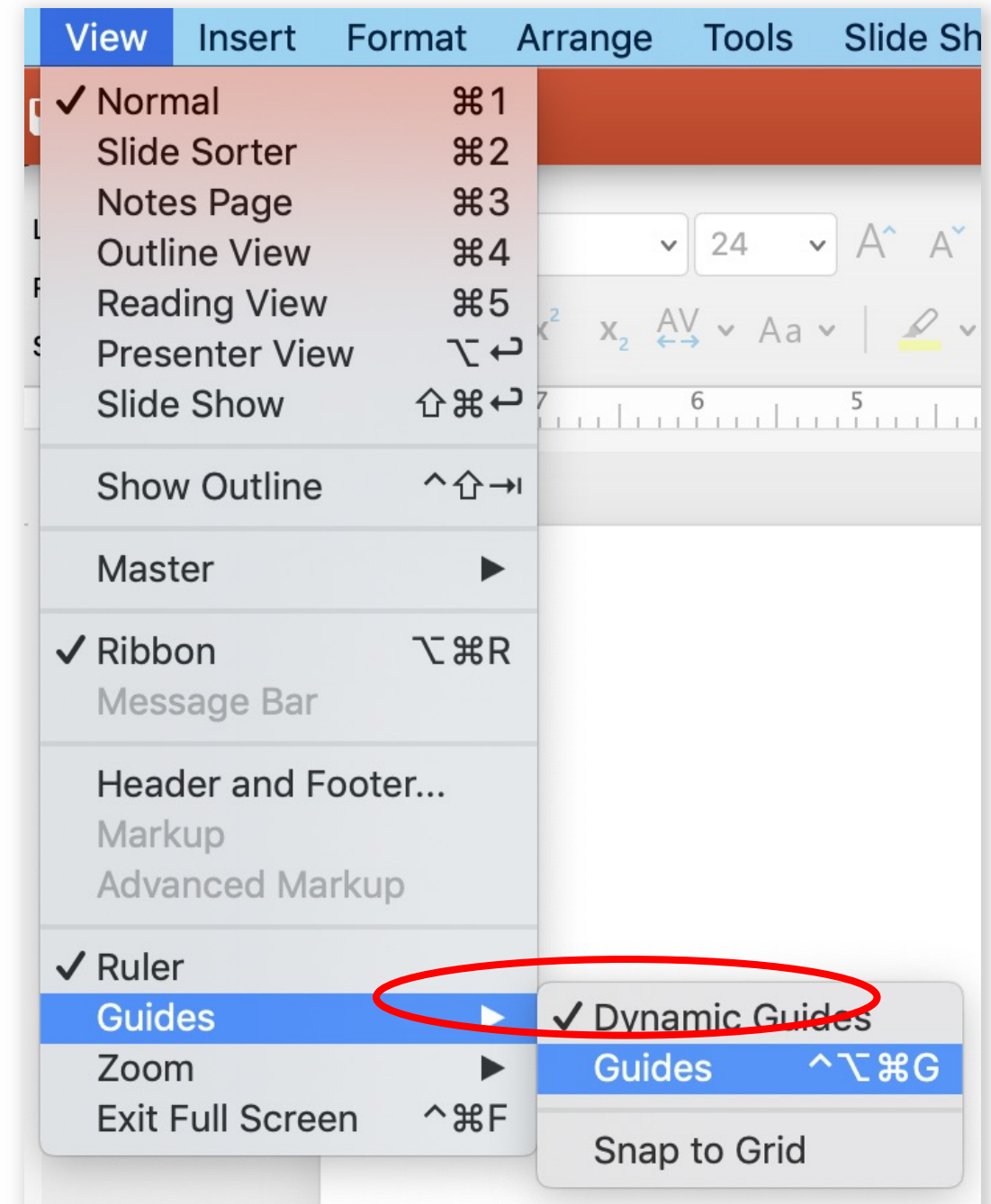


HARNESS THE POWER OF GUIDES FOR INTUITIVE DESIGN

Turn on guides to view where halves, thirds and other eye-pleasing subdivisions are on the page.

- Dynamic Guides is almost always helpful, but especially while writing initial copy for quick placement with less visual clutter.
- Guides can be a helpful tool when placing text, images and quotes on a slide.

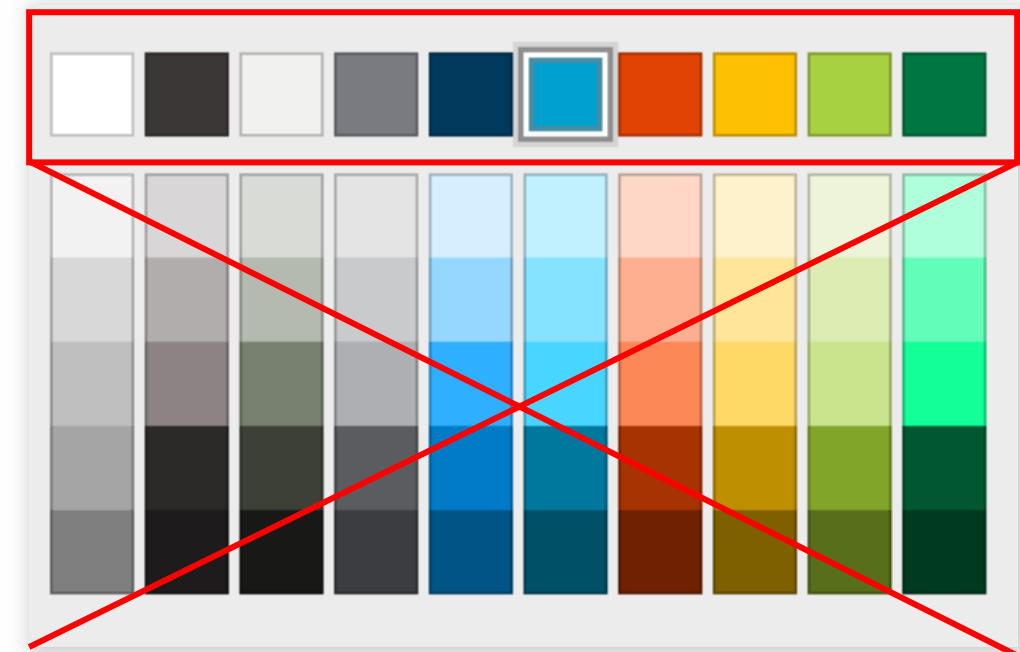
Use **CTRL + OPT + CMD + G** to toggle Guides on and off



USE COLOR THOUGHTFULLY TO MAKE KEY POINTS POP

Colors can be useful to differentiate ideas or themes throughout a report. However, be careful not to use too many.

- Use the set colors at the top primarily, as the tints and shades below can lead to muddled design. If you desire lighter colors, **use the main hues at 25%, 50% and 75% transparency** for a similar but cleaner effect.



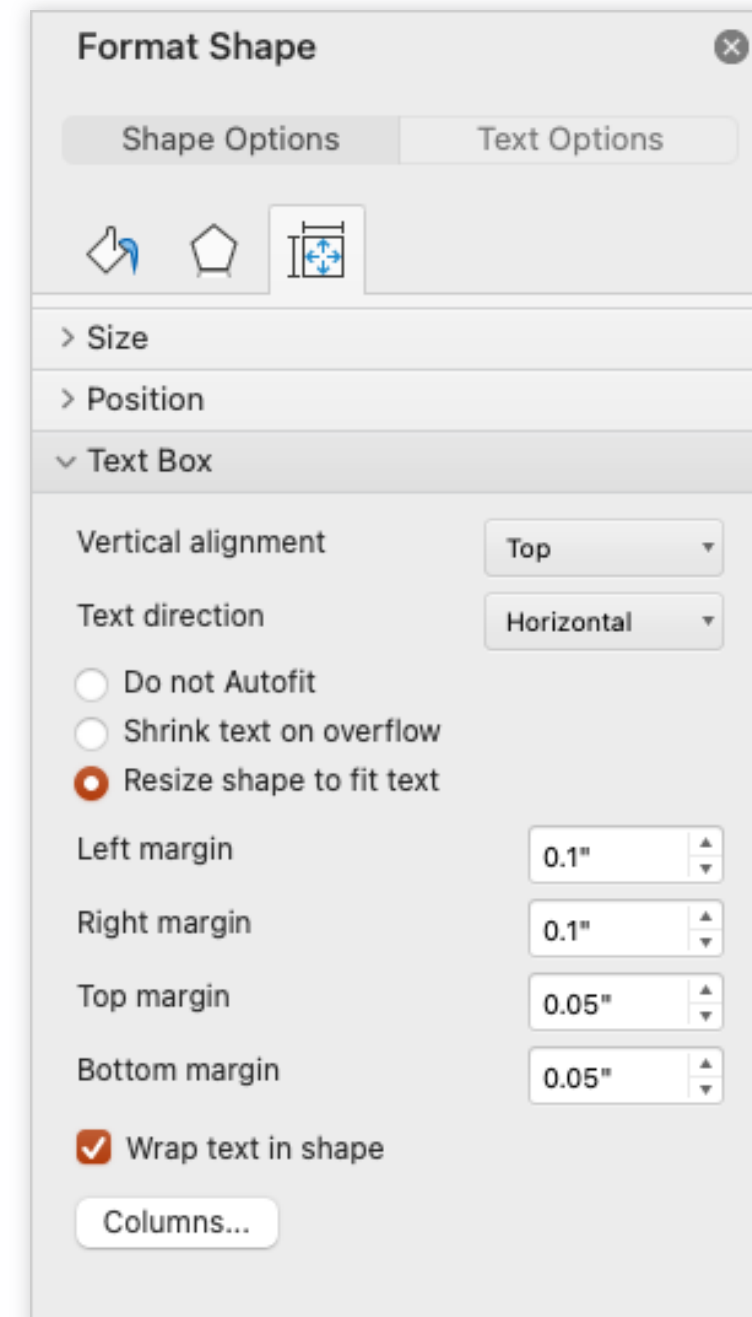
To input the correct hues to the shades in an incomplete template, go to the “Design” tab, select the drop-down from the large box on the left (often blank), select “Colors” and use the eyedropper to input a hue into the color theme. Ideally, this should be done just once at the initial template setup.

SOLVE COMMON PROBLEMS IN THE FORMAT PANE

Use the format pane liberally — it contains the answers to so many common problems, including:

- Too much or too little “margin padding,” or empty space around the edges of text boxes
- Whether or not the text box forms to the text, or the text changes size automatically within a box
- Detailed settings for shadows, color gradients, fill colors and outline options

Right-click on a shape, image or text box and select “Format Shape ...” from the drop-down menu.



ESSENTIAL SHORTCUTS – MAC

POWERPOINT

- ⌘ + D to duplicate a slide or item
- ⌘ + Option + Shift + V to paste without formatting
- ⌘ + Shift + F or B to send forward or backward one layer; add Option to send to front or to back
- ⌘ + - for en dash, ⌘ + Shift + - for em dash
- ⌘ + K to link to a slide or insert a hyperlink
- ⌘ + R to right justify, ⌘ + L to left, ⌘ + E to center
- ⌘ + Shift + G to group items, ⌘ + Option + Shift + G to ungroup
- ⌘ + OPT + M to view paragraph settings (indentation, spacing, before/after text)
- ⌘ + Shift + > or < to increase or decrease font size
- Shift + Return to add a line without the formatting of the previous line
- Tab to increase or decrease indent
- Use arrows to nudge objects; nudge will increase or decrease based on how far it's zoomed in
- Hold Shift when changing the size of an object to preserve dimensions
- Selection tool will select any object fully within the highlighted area

[Link to more shortcuts](#)

GOOGLE SLIDES

- ⌘ + D to duplicate a slide or item
- ⌘ + Shift + V to paste without formatting (keep text only)
- ⌘ + Shift + up/down arrow to send forward or backward one layer; remove shift to send to front or to back
- ⌘ + - for en dash, ⌘ + Shift + - for em dash
- ⌘ + K to link to a slide or insert a hyperlink
- ⌘ + Shift + R to right justify, ⌘ + Shift + L to left, ⌘ + Shift + E to center
- ⌘ + OPT + G to group items; CMD + OPT + Shift + G to ungroup
- ⌘ + OPT + M to insert comment
- ⌘ + Shift + > or < to increase or decrease font size
- ⌘ + Shift +] or [to increase or decrease indent
- Use arrows for large nudge, Shift + arrow for small nudge
- Hold Shift when changing the size of an object to preserve dimensions
- Selection tool will select any object partially or fully within the highlighted area

[Link to more shortcuts](#)

ESSENTIAL SHORTCUTS – PC

POWERPOINT

- CTRL + D to duplicate an item, CTRL + Shift + D for a slide
- CTRL + Z / CTRL + Y to undo / redo an action
- CTRL + Shift + C to format copy / paste
- CTRL + Alt + V to paste special, then select paste without formatting
- CTRL + Shift +] or [to send forward or backward one layer
- CTRL + K to link to a slide or insert a hyperlink
- CTRL + R to right justify, CTRL + L to left, CTRL + E to center, CTRL + J to justify
- CTRL + G to group items, CTRL + Shift + G to ungroup
- Shift + Return to add a line without the formatting of the previous line
- Tab to increase or decrease indent
- Use arrows to nudge objects; nudge will increase or decrease based on how it's far zoomed in
- Hold Shift when changing the size of an object to preserve dimensions
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[Link to more shortcuts](#)

GOOGLE SLIDES

- CTRL + D to duplicate a slide or item
- CTRL + Z / CTRL + Y or CTRL + Shift + Z to undo / redo an action
- CTRL + Alt + C / V to Format copy / paste
- CTRL + Shift + up/down arrow to send forward or backward one layer; remove shift to send to front or to back
- CTRL + Alt + + / - to zoom in / out
- CTRL + K to link to a slide or insert a hyperlink
- CTRL + Shift + R to right justify, CTRL + L to left, CTRL + E to center, CTRL + J to justify
- CTRL + ALT + G to group items; CMD + ALT + Shift + G to ungroup
- CTRL + ALT + M to insert comment
- CTRL + Shift + > or < to increase or decrease font size
- CTRL + Shift +] or [to increase or decrease indent
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- Hold Shift when changing the size of an object to preserve dimensions
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[Link to more shortcuts](#)

BONUS TIPS & TRICKS

FORMATTING

- Write directly into shapes instead of adding a separate text box over shapes.
- Disable autofit on any text box or shape.
- Pay attention to line thickness of boxes & shape for consistency across the deck.
- Remember to align elements with auto-distribute.
- Always delete empty shapes or anything in margins.
- Never modify the placement of the main text box or title box, unless you are making it narrower by pulling in the left edge so you can add content on the right.
- Make sure bullets are all the same color in bulleted lists, and the bullet indentation is the same across slides.
- Make sure text line spacing is consistent across the deck (e.g., Single, 1.2 or .9 spaced).

COPY

- Consistently capitalize headings.
- Boldface applies to the key idea or phrase, not the punctuation that follows it.
- Avoid orphans wherever possible (i.e., when a single word is left on a line by itself).
- Avoid contractions for more professional reports.

WANT TO LEARN MORE? GET IN TOUCH:

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