How to Use Excel More Effectively in PowerPoint Slides (Nov 10) By Dave Paradi

Excel is commonly used to perform calculations or financial analysis. I use it frequently for these purposes, as I am sure you do. While Excel is a great tool for performing numeric analysis, it is not intended to be a presentation tool. If you show a large spreadsheet on the screen, people get overwhelmed quickly and tune out.

I am going to share my best practices for using the information from an Excel analysis in a presentation. In the first part, we'll talk about using a table of numbers from the spreadsheet on a slide. In the second part, I'll cover ways to use the data in ways other than the "copy and paste" approach.

Part 1: Copy and Paste a Summary Table

If you shouldn't just copy and paste the entire spreadsheet on a slide, what should you do instead? Create a *summary table*.

Any analysis we do should result in us answering a question that prompted the analysis. How are this year's results compared to last year? How are results compared to our forecast? What do projections show for the next three quarters? What factors contributed to the rise or fall in results? There are many more questions that we could be wondering about that give rise to numerical analysis in Excel.

Your audience does not want, or need, to see all of the analysis. They only need to see the results that answer the question. So in Excel, create a summary of the results from your analysis. It could be on a portion of the existing worksheet or on a new worksheet. This summary table is what you will use on your slide. It should be a few rows by a few columns at most. This makes it easy to understand and big enough when displayed on the screen.

When you copy this small number of cells to your slide, I suggest you use one of four options. There are more that PowerPoint allows, but I think these are the four that are most useful for you to consider. I've listed the options below along with an idea of what the result will be in your slide. Three of the four are accessed by using the **Paste Special** command, which opens up a dialog box that gives you more options than the default Paste command.

Option 1: Simple Paste using Ctrl+V: This inserts your Excel cells as a PowerPoint table.

PowerPoint tables can only be animated as "all on" or "all off", so you can't build the rows or columns individually unless you use the exit animation reveal technique. This option does not link to the source Excel file, so any changes in the Excel file will not be reflected in your presentation automatically.

Option 2: Paste Special; Excel Worksheet Object

This embeds the current version of the Excel worksheet into your PowerPoint slide and displays the last editing view of the worksheet. The advantage to this method is that it allows you to access the entire sheet on your slide.

The disadvantage is that the last view is shown, so someone can accidentally open the object and what shows up on your slide will be what they last looked at, perhaps not what you wanted the audience to see. This method also uses the limited table animation and does not link to the source Excel file.

Option 3: Paste Special; Unformatted text.

This creates a PowerPoint text box of the entries in the cells, using tabs to create the columns in the text box. Because it is a text box, you have more control over formatting the text and you can animate it like any other text box, including by row. There is no link to the source data.

Option 4: Paste Link; Excel Worksheet Object.

This embeds a link to the Excel file on your slide and displays the last view in Excel. When you edit this object on your slide, it actually opens Excel to do the editing. For animation, it treats it as a single object, so you only have the "all on" or "all off" options. This link does update your slide as data in the Excel sheet changes (you will be asked to update the data when you open the PowerPoint file). This option is great if you have a regularly updated spreadsheet and only want to create one presentation that will always have the latest data.

None of these options is the best in all situations. Consider the purpose and future use of the summary table of numbers, then select which option will work best.

Next we'll talk about alternatives to using a table of Excel data in your presentation.

Part 2: Creating Visuals instead of Tables of Data

While showing a table of numbers is one option for presenting data calculated in Excel, it is not the only option, nor is it the best option in many cases. Here I want to explain other best practices you can use to present numerical information from Excel.

If you are showing a trend in some data or comparing a few figures, use a graph in PowerPoint instead of a table of numbers. If you show a table of numbers and expect your audience to do the math to figure out the difference in magnitude between the numbers, they won't. Audiences won't do the math. Instead, use a graph to illustrate the differences in the numbers.

Don't feel that you have to re-type the data and risk making a mistake. Just copy and paste the data from Excel to the PowerPoint graph data table. If you want to see how this is done, watch the video on creating graphs in PowerPoint at <u>www.PPtHowToVideos.com</u>. To determine which type of graph might work best for your message, use the decision tree in this article as a guideline.

I rarely suggest showing a full table of numbers, but if you must show a table of numbers, you need to make sure it is not overwhelming for your audience. There are two techniques you can use to make a table easier to understand.

First, if the table is small, use a callout to focus attention on the one or two numbers that are the most important. Put a circle around the number and add some text beside it to explain why this number is significant.

If the table is large, and you need to explain each area separately, use the break-down and zoom-in technique. Start by showing the entire table for context, but explain that there are different regions of the table that you will explain in detail and show the regions by semi-transparent overlays on the large table. This gives the audience an overall context for the organization of the data and how the different regions relate to each other.

Then, you can show a zoomed-in portion of the table to explain each region individually, using the callout technique to focus attention on the one or two numbers in that region that are most important.

The final best practice I want to cover is one that allows you to get audience input into the calculations. This makes it very personal to their circumstance and raises the level of engagement of the audience. This technique can work well when you have a situation where you have calculated a general example in Excel and show the results to illustrate a broad concept.

The idea is communicated, but the applicability to an individual situation might not be clear. In this case, hyperlink to a pre-created Excel spreadsheet that allows you to ask the audience for their exact inputs. Let the spreadsheet do the calculations using their inputs, giving results that are tailored to their exact

situation. Now you have involved the audience and demonstrated your point using inputs that exactly match their situation, engaging them in the message you are delivering.

You also now have an example you can e-mail participants right after the presentation that demonstrates their exact scenario, reinforcing the message you delivered in the presentation.

Just because you use Excel to calculate data for use in a presentation doesn't mean you have to copy and paste a large table of data on to a slide. Use the techniques above to present a more visual message that communicates more effectively with your audience.

About the Author:

Dave Paradi is the author of "102 Tips to Communicate More Effectively Using PowerPoint" and "The Visual Slide Revolution".

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