

BUSINESS PRESENTATIONS 2017 – PRACTICE, EFFICIENCY AND SUCCESS

RESULTS OF THE INTERNATIONAL SURVEY

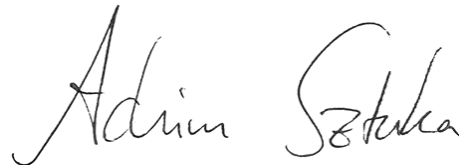


Strategy Compass, February 2018

Dear reader

Presenting with PowerPoint is a hotly debated subject. Spanning enthusiasm for its possibilities to total rejection and the often quoted “Death by PowerPoint”. Our overriding impression, made over many years, is that companies are letting a huge potential go to waste. This applies not only to market and brand success, but also to internal efficiency. This survey is an attempt to turn our gut feeling into facts, carry out an international assessment and at the same time find out where this journey is headed.

Slightly under half of the study participants come from the United States, and a similar number from Germany. Among them are a high proportion of managers, predominantly from large and mid-sized companies. Most of them rate their presentation abilities as above average. You’re therefore about to read the assessments and opinions of people with a high level of expertise and decision-making authority, which is significant for the interpretation of the results. Enjoy reading and pondering the results!



Achim Sztuka
CEO Strategy Compass



What you can expect

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In brief

PowerPoint still the standard.

In the mid-term, PowerPoint will remain the program of choice for approx. 75% of respondents. If anything, with an upward tendency.

All show and no go.

Significantly more effort is put into external presentations than internal ones. This raises the question of whether there is enough awareness of the potential for more efficient meetings, for attainment of company targets and for internal brand communication.

Lack of cost awareness.

Although respondents spend 30% of their working hours creating presentations on average, there is a lack of awareness of the associated costs in many companies.

Lack of support.

Despite widespread digitalization strategies, the technical possibilities for conveniently creating and providing presentations are not being sufficiently exploited. More than half of the companies surveyed do not offer adequate training for the success factors "Quality of Content", "Slide Quality" and "Presenting Skills".

Who's responsible?

Realizing the major opportunities offered by presentations requires a coherent approach involving Marketing/Communication, IT, HR and other departments, as required. However, the results show that only a few companies have taken this step so far, or have assigned any organizational responsibility to the matter.

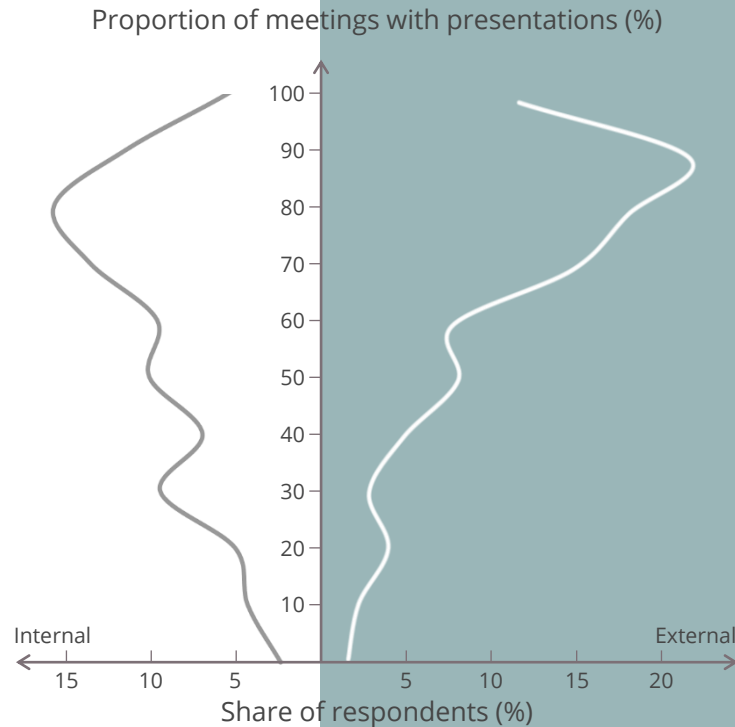
THE USE OF PRESENTATIONS



43% use presentations in at least **80%** of all meetings, **76%** in at least every other. Continuing upward trend.

INTERNAL MEETINGS

- 35% of respondents use presentations in at least 80% of internal meetings
- 70% in at least every other meeting
- In nearly half the cases, this represents an increase in use compared with 3 years ago
- 30% of respondents expect a further increase



EXTERNAL MEETINGS

- 51% of respondents use presentations in at least 80% of external meetings
- 83% in at least every other meeting
- More than 40% of respondents reported an increase in use over the past 3 years, but expect no further changes over the next 2 years.

INTERNAL



Trend over the past 3 years



Prognosis for the next 2 years



EXTERNAL



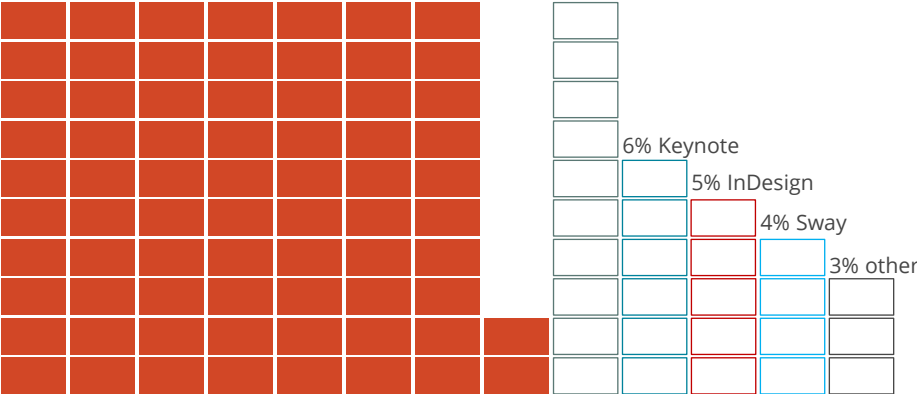
PowerPoint is and remains the dominant presentation software in companies. But presenting has become more diverse.

Programs used for creating presentations

- PowerPoint clearly dominates – used by 72% of respondents
- Similar use of programs internally and externally
- Use also similar when comparing presentation creation with actual presenting
- PowerPoint predominantly used on desktops/notebooks, but already significant use of tablet and browser versions, above all in the USA

72%

PowerPoint



Trends*

“How will you be working in 2 years’ time?”



- “We will work more visually, with less text.”
- “Reduced to the essentials.”
- “Hopefully no longer with PowerPoint!”
- “More videos.”
- “Modular, with elements from a global repository.”
- “More in combination with analog and other digital media.”

* Qualitative trends: a representative analysis is not possible. Some similar comments have been consolidated.

Findings on the use of presentations

PowerPoint here to stay.



Despite all the debates and reports on banning PowerPoint: PowerPoint is and remains the standard presentation program in companies for now. Whether you like it or not, the intensity of its use is likely to rise.

Slide bombardment becoming rarer.



More and more companies and speakers are realizing that a good presentation does not mean reading aloud from overcrowded slides. Increasing interest in the intelligent use and design of presentations is evident.

Digitalization?



PowerPoint is of course a digital medium. But there is little evidence that the possibilities of digitalization – e.g. flexible linking with all kinds of data, device-independent use, technological integration in overall communication – are really being exploited, either today or in the near future.

External beats internal.



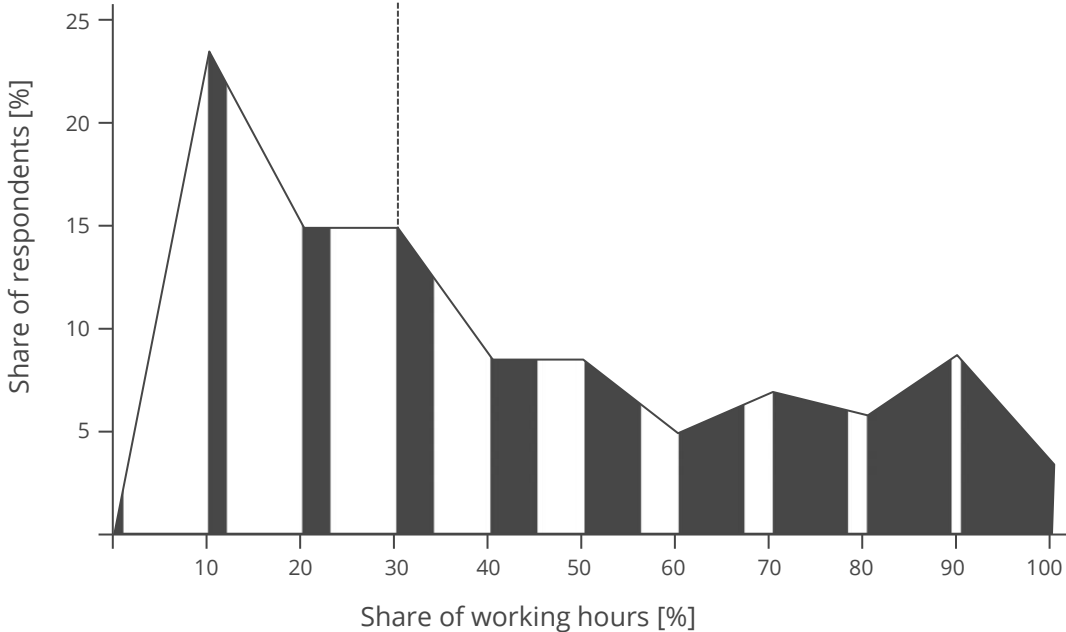
It appears that external meetings are significantly better prepared than internal ones, at least in terms of presentations. This raises the question of whether there is sufficient awareness of meeting efficiency, target groups and goal attainment, not to mention of brand impact within companies/groups.

THE EFFICIENCY OF PRESENTATION CREATION

Respondents invest 30% of their working hours in creating presentations. Many companies ignore the cost aspects.

Presentation creation as % of working hours

Median: 30%



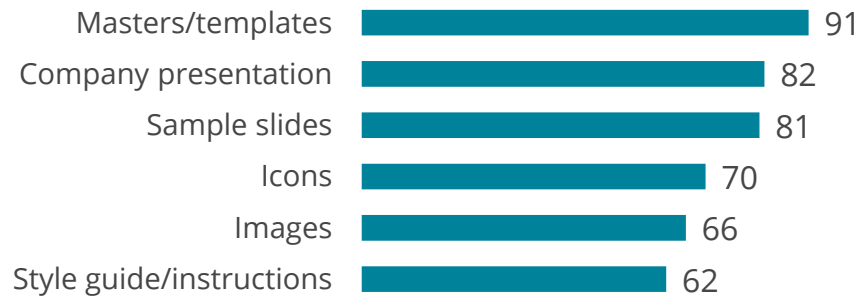
Cost awareness

- **44%** of respondents know, or have a rough idea of, the costs of presentations (personnel costs, agency costs, license fees).
- **56%** have “no idea”.
- General awareness of the costs associated with presentations exists
 - fully in 33% of companies,
 - partly in 30% of companies, and
 - not at all in 37% of companies.

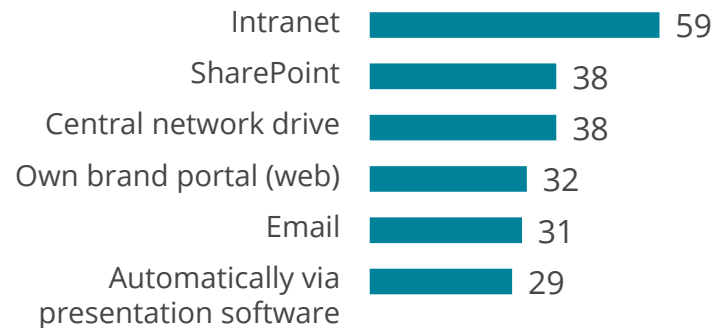
Basic materials are usually provided. Further support is much less widespread at present.

Basic materials

Companies providing [%]:



Provision via [%]:



Further support

Additional software for presentation creation is provided:

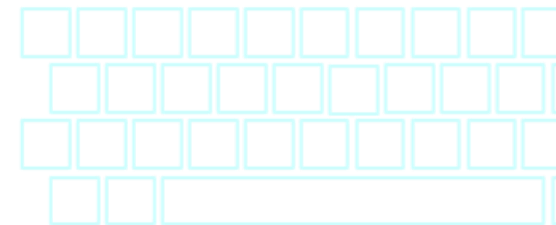
26% – for all employees
15% – for some departments/employees
59% – not at all

Software tools used (only those mentioned more than once are shown):

QuickSlide (22)
think-cell (6)
Efficient Elements (2)

The following service providers are tasked with creating presentations:

56% – in-house graphic design department
34% – external presentation agency
34% – shared service center
30% – communications/advertising agency
17% – freelancers



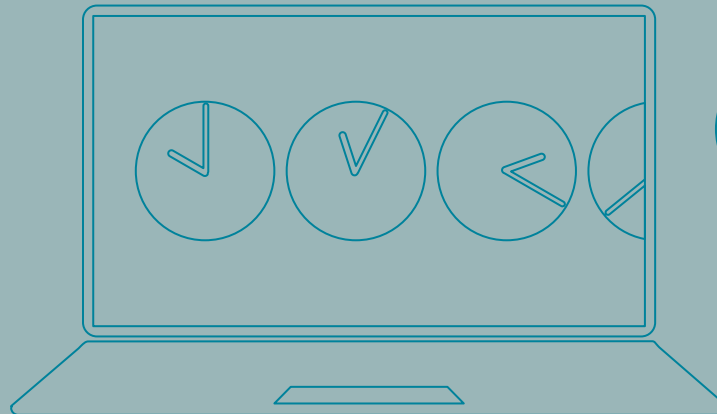
Findings on the efficiency of presentation creation

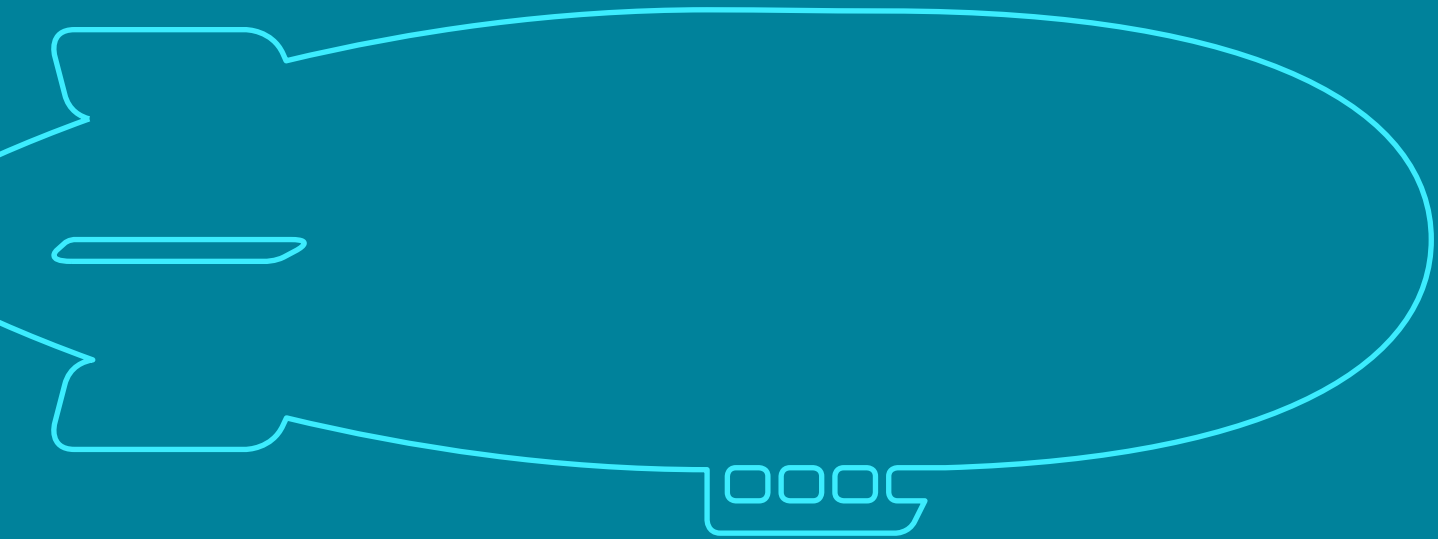
Cost factors overlooked.

Presentations appear to be so important that respondents spend 30% (median) of their working hours creating them. But awareness of the various costs associated with presentations is completely lacking in many companies.

Little technical support.

Basic materials are generally provided in inconvenient ways. For example, more than 30% of the companies send these materials by email. The huge potential of software tools, e.g. that extend the functionality of PowerPoint, is still underexploited.





THE SUCCESS OF PRESENTATIONS

Presentations often fall short of their potential.

“I have the feeling that even though the content of the presentation is important/useful for the audience, the presentation won't be a success.”

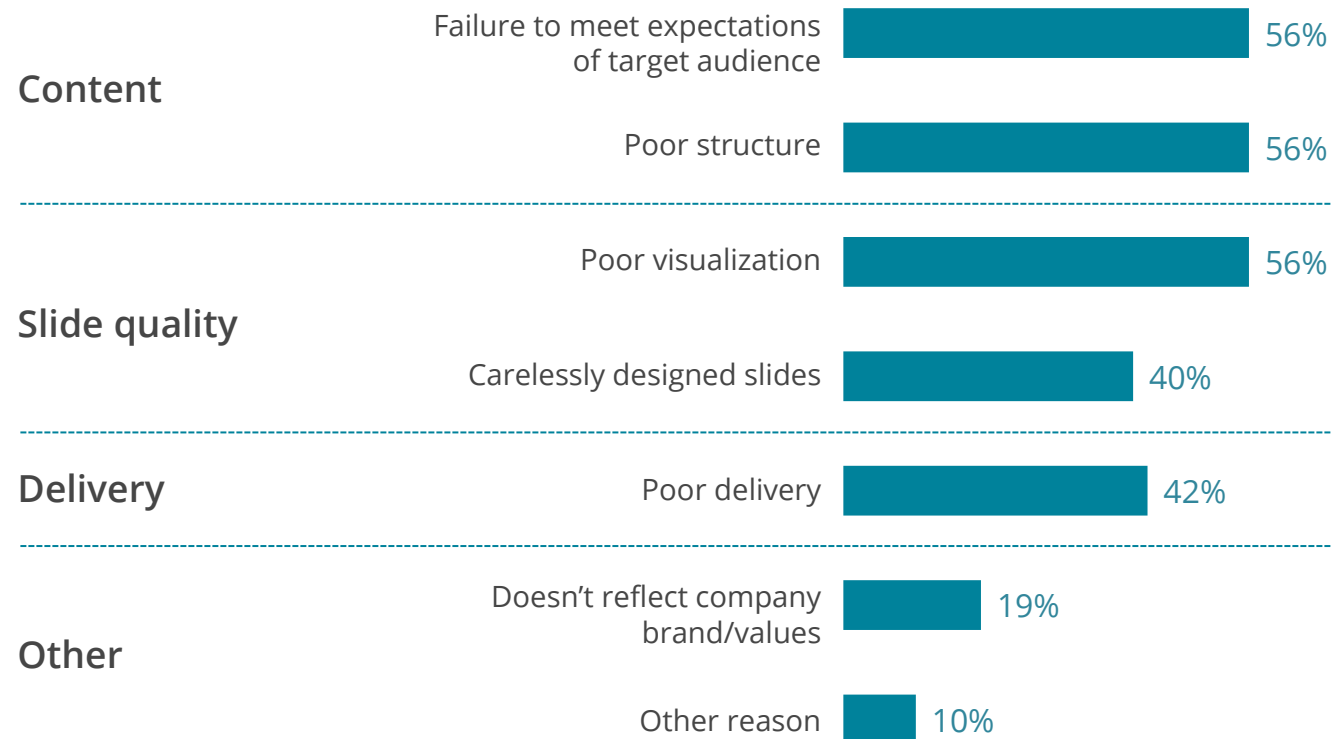


„Often“

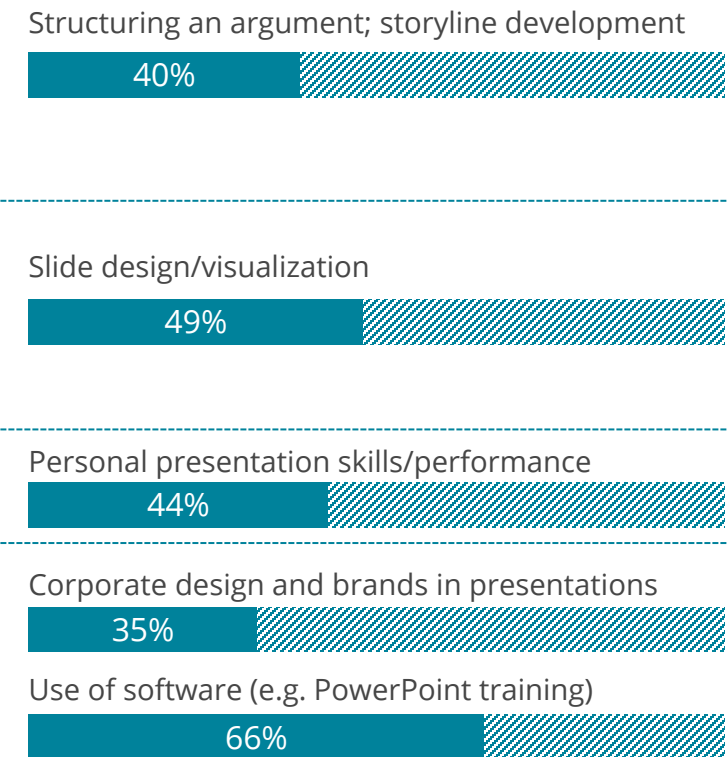
is the most frequent answer given by respondents

The majority of companies do not provide adequate training for the most important areas of improvement.

“What do you think causes most presentations to fail?”



Training currently offered*:



* Share of respondent companies with training

Findings on the success of presentations

Inappropriate training.



Content, slide quality and presenting skills were identified as being critical factors for the success or failure of presentations. This finding, however, does not correlate with the areas generally focused on by HR Development. Although 66% of the companies surveyed offer software training (e.g. PowerPoint), over half provided no training at all in those areas most relevant to the success of presentations.

Lack of responsibility.



Regarding their sources of support for external/internal presentations or for securing quality standards, most respondents give “my own responsibility” or “respective Head of Department” as their answer. The next most frequent answer is “Marketing/Communications”. And that’s more or less that.

The responsibility for concerted improvement within the company is clearly seen to lie with Marketing/Communications. According to the answers, however, this responsibility has yet to be adopted.

Lack of awareness.



It is evident that the success of presentations lies in the intelligent combination of technology, skills, processes and responsibility. However, the survey reveals little awareness of this, with the result that the need for action often goes unrecognized. The opportunities and potential for success inherent in this method of communication are not yet being sufficiently exploited.

Comprehensive strategy?



The combination of factors mentioned ultimately necessitates an interdepartmental strategy, encompassing Marketing/Communications, IT, HR and other departments. However, the current location of responsibilities indicates that, in many companies, a concerted approach is not yet being taken.

Food for thought

The results of the survey are well worth mulling over.
Here are some questions that you and your company might consider.

AWARENESS

- * How much awareness is there in our company regarding the handling of presentations?
- * Are we aware of the time we invest in presentations?
- * Are we transparent about the total costs associated with presentations?

SUCCESS

- * What successes do we hope to achieve using presentations?
 - * External e.g. regarding brand identity, sales targets, convincing particular target groups
 - * Internal, e.g. regarding management decisions, project management, communications
- * How successful are we really, right now?
- * How can we support management and employees in attaining these targets – with processes, organization, materials, training, tools?

RESPONSIBILITY

- * Where should we locate overall responsibility for this area?
- * How successfully can Marketing/Communications take on the role as a driving force for change – expectations vs own understanding of roles?
- * How do we incorporate PowerPoint (and other Office programs) into our digitalization efforts?

About the survey

HOW THE STUDY WAS CARRIED OUT

Survey period:	July through November 2017
Survey method:	Online questionnaire with 39 Items
Sample size:	531 participants

The survey will be continued at two-year intervals.

COMPOSITION OF SAMPLE

Geographic focus:	44% Germany, 43% USA, 13% other countries
Company size:	
100.000+ employees:	15%
10.000 – 99.999 employees:	14%
1.000 – 9.999 employees:	34%
100 – 999 employees:	23%
<100 employees:	14%
Industries:	broad distribution, no sector represented by more than 16% of participants
Company divisions:	broad distribution, no division represented by more than 16% of participants
Proportion from management:	49% of participants ¹⁾

1) 14% of participants gave their status as being “employed”, without mentioning any management responsibility. These were not counted as management.



Strategy Compass is a software company and design agency in one. We specialize on software solutions that extend the possibilities of Microsoft Office programs for companies, as well as on associated services from conception, graphic design and content creation through to presentation training and coaching.

Since 2009, our experts in Düsseldorf have been following an integrated approach to making marketing, sales and internal communication more successful. Right there where it takes place: in presentations and documents prepared with Microsoft Office. Enabling companies to unlock the full potential of their brand and employees.