Efficient Elements

Efficient Elements. Click. Done.

Efficient Elements for presentations

Little check list for PowerPoint Templates and EE Customization process

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Little checklist for PowerPoint Templates and EE Customization process

1 Well prepared: the Template

2 Assign font/s

3 Corporate design colors

4 Bullet definitions / Indent / Fontsizes

5 How to create new layouts

6 Placeholder versus text fields

7 Template check list

8 EE Customization check list „nice to have“

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Little checklist for PowerPoint Templates

Well prepared: the Template

Efficient Elements impresses not only with its large selection of efficiency tools, but also with the binding framework conditions that are checked by the Corporate Design Check.

Among other things, compliance with color specifications and element positioning within a defined drawing area are queried. The extensive range of elements in the slide library, which are created in the customer style, represents a considerable simplification in the creation of presentations. The basis of the text box variants is the text field stored in the template with bullet definitions, text indents, fonts and sizes.

The customization in your corporate design is based on the template provided by you. Below you will find a few suggestions on how to create a new template and what to consider when doing so. Often templates are already in use and cannot be customized without problems. In this case we are available for advice and support.

In the following the Microsoft terminology is used: the template is called master.

The settings described below are all made in the slide master view.

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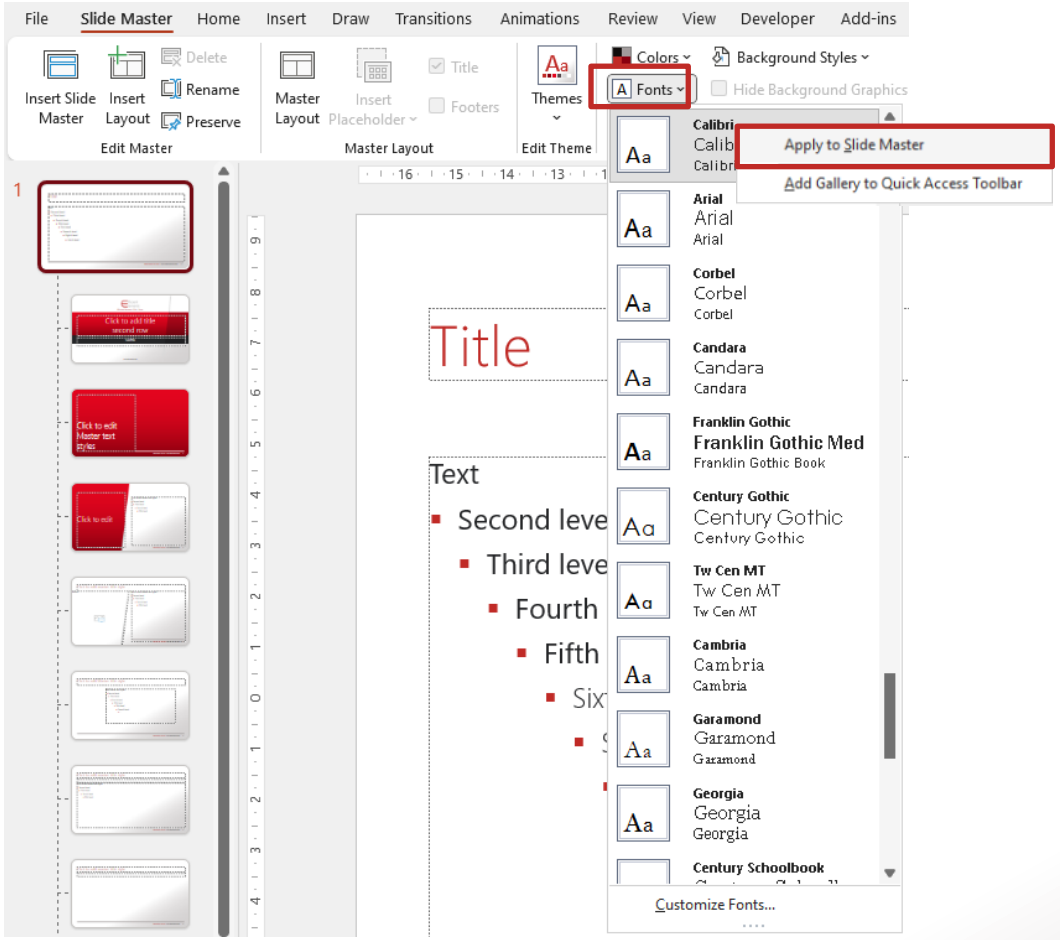
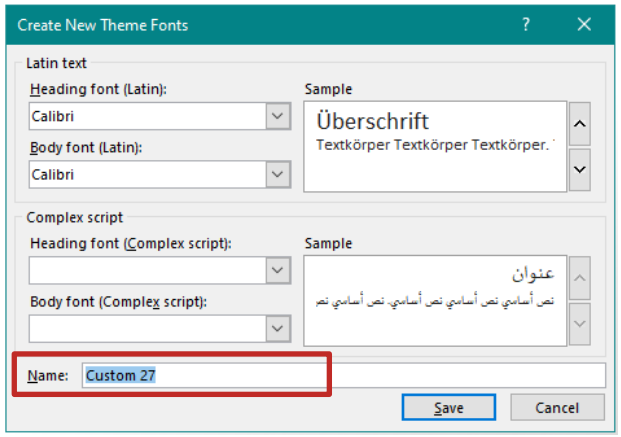
Assign font/s





In the master view, select the font(s) for the headings and body text, save the settings, and assign the font(s) to the slide master.

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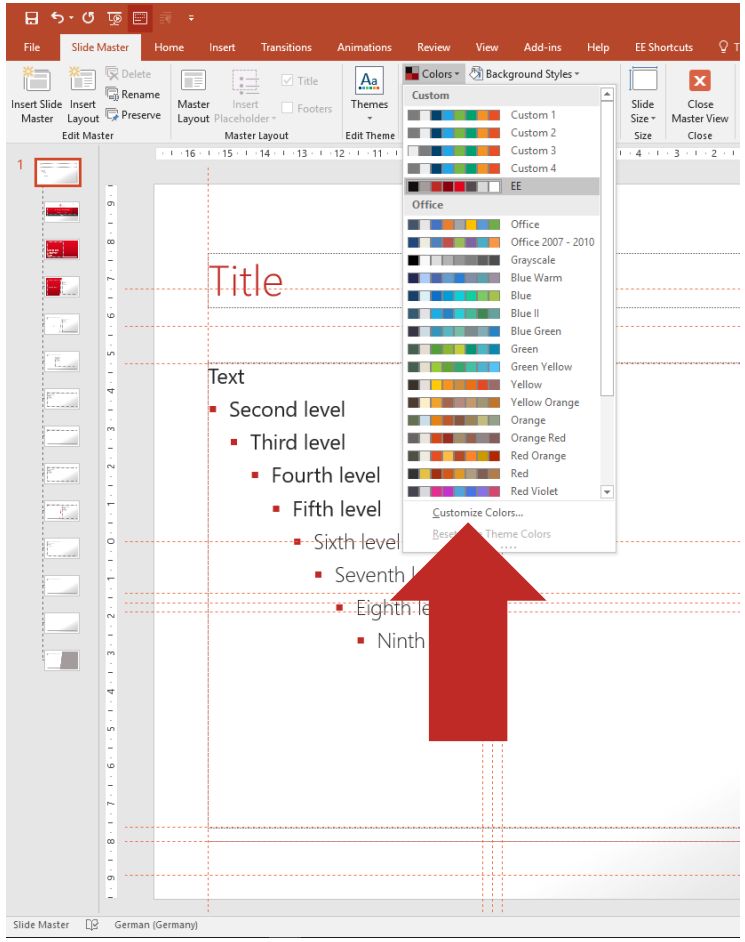
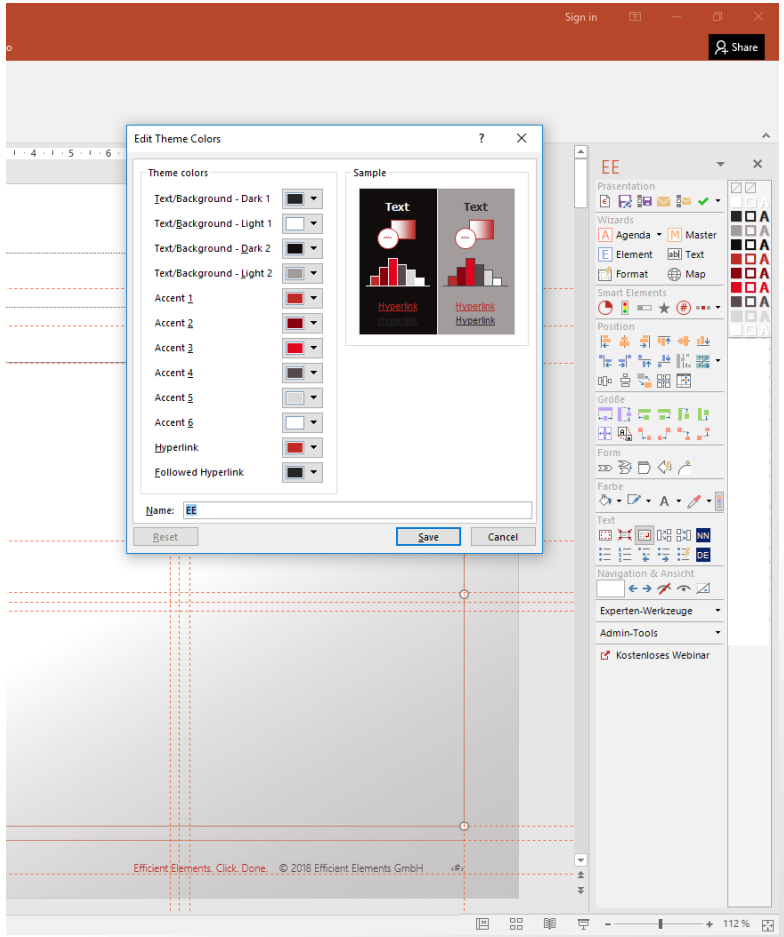
Little checklist for PowerPoint Templates

Corporate design colors





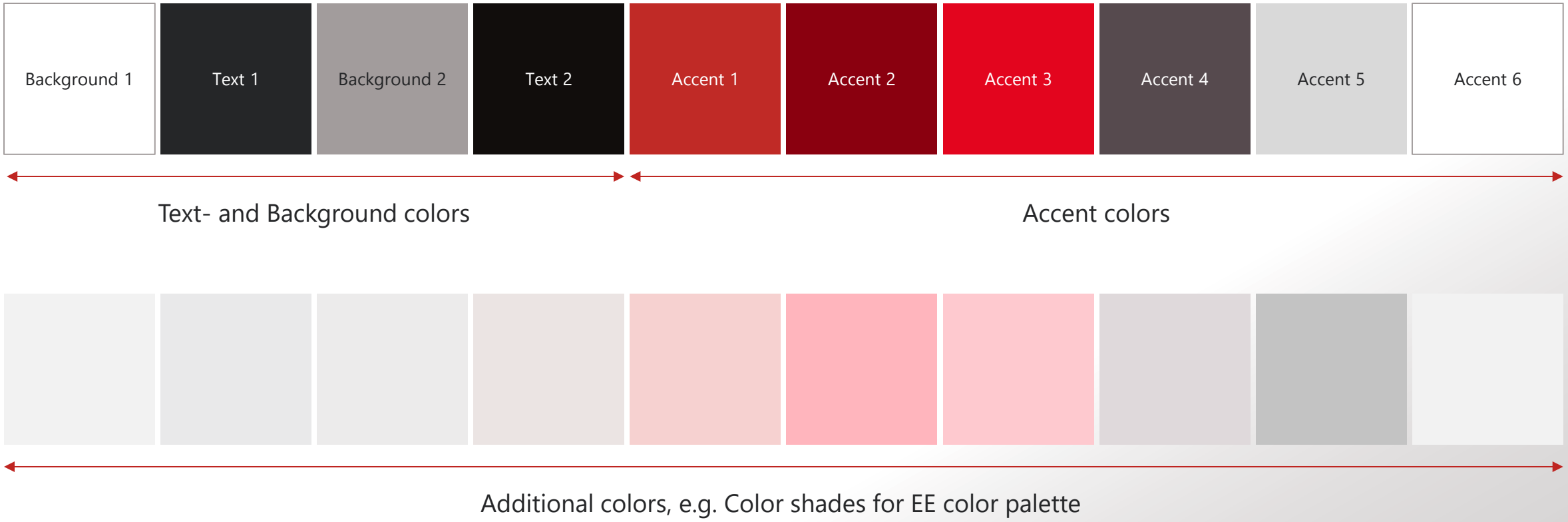
To avoid a mess of color tones, it makes sense to create your corporate design colors as PowerPoint design colors.
You can add more colors in the template by using so called *custom colors*.

Additional colors, such as color shades, can be stored in a color palette during the customization of Efficient Elements.

If you do not want to change or define theme colors in order you already have a template in use and don´t want to change it, we will store all colors as RGB colors in an EE color palette.

Little checklist for PowerPoint Templates

Corporate design colors



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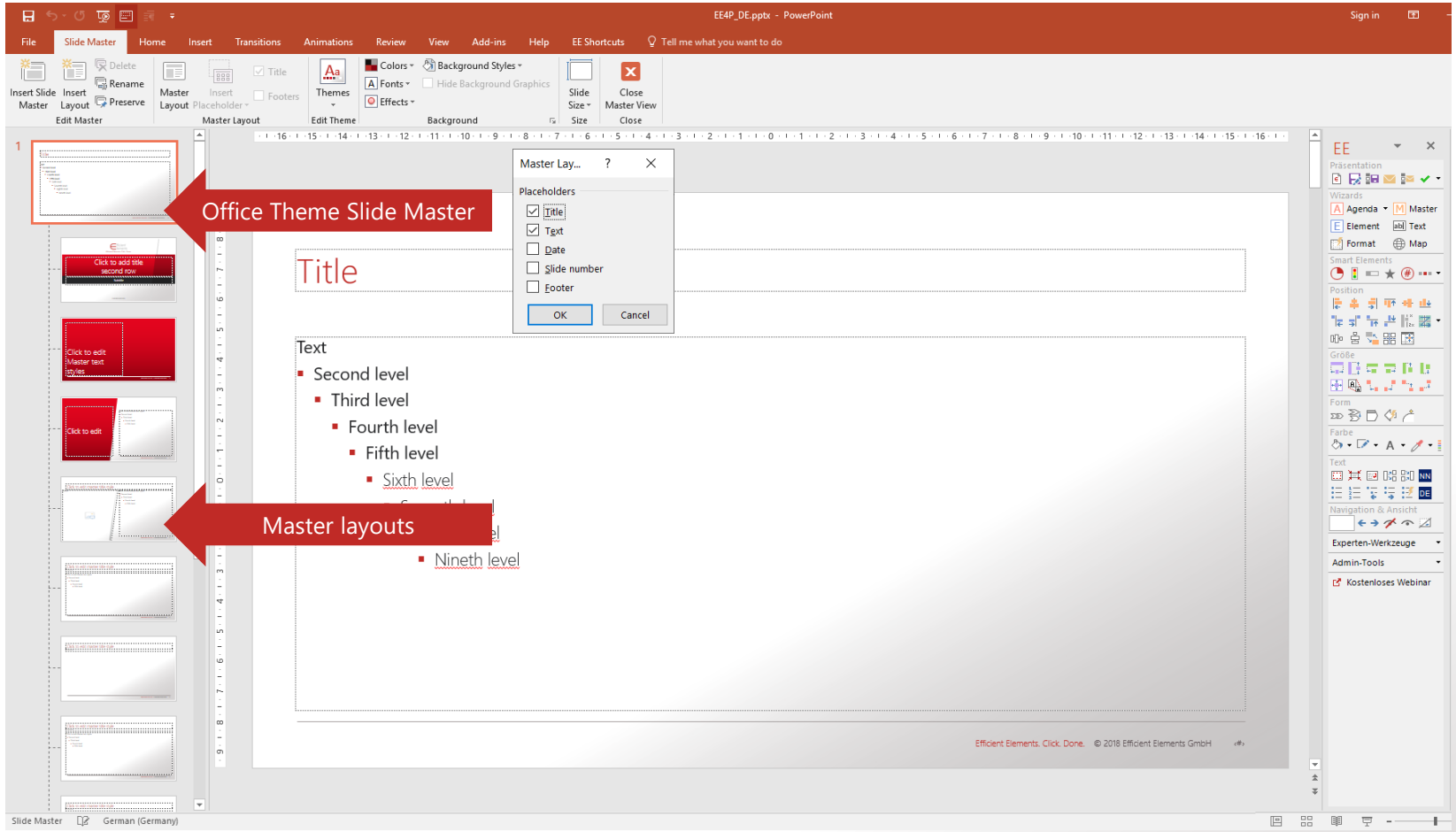
Little checklist for PowerPoint Templates

Bullet definitions / Indent / Fontsizes



Template settings were set up in "slide masters view".

In the Slide Master of your template title placeholders, texts and footers were defined.

The definition of text fields (bullet points, indents, font size, color and type) is the basis for all texts. It also defines the margins (margin top, left, right, bottom). A little time is well invested at this point.

In a new master, a selection of layouts is automatically inserted. You can edit these and / or add your own layouts.

Note: please use correct title placeholders and predefined text placeholders for layouts.

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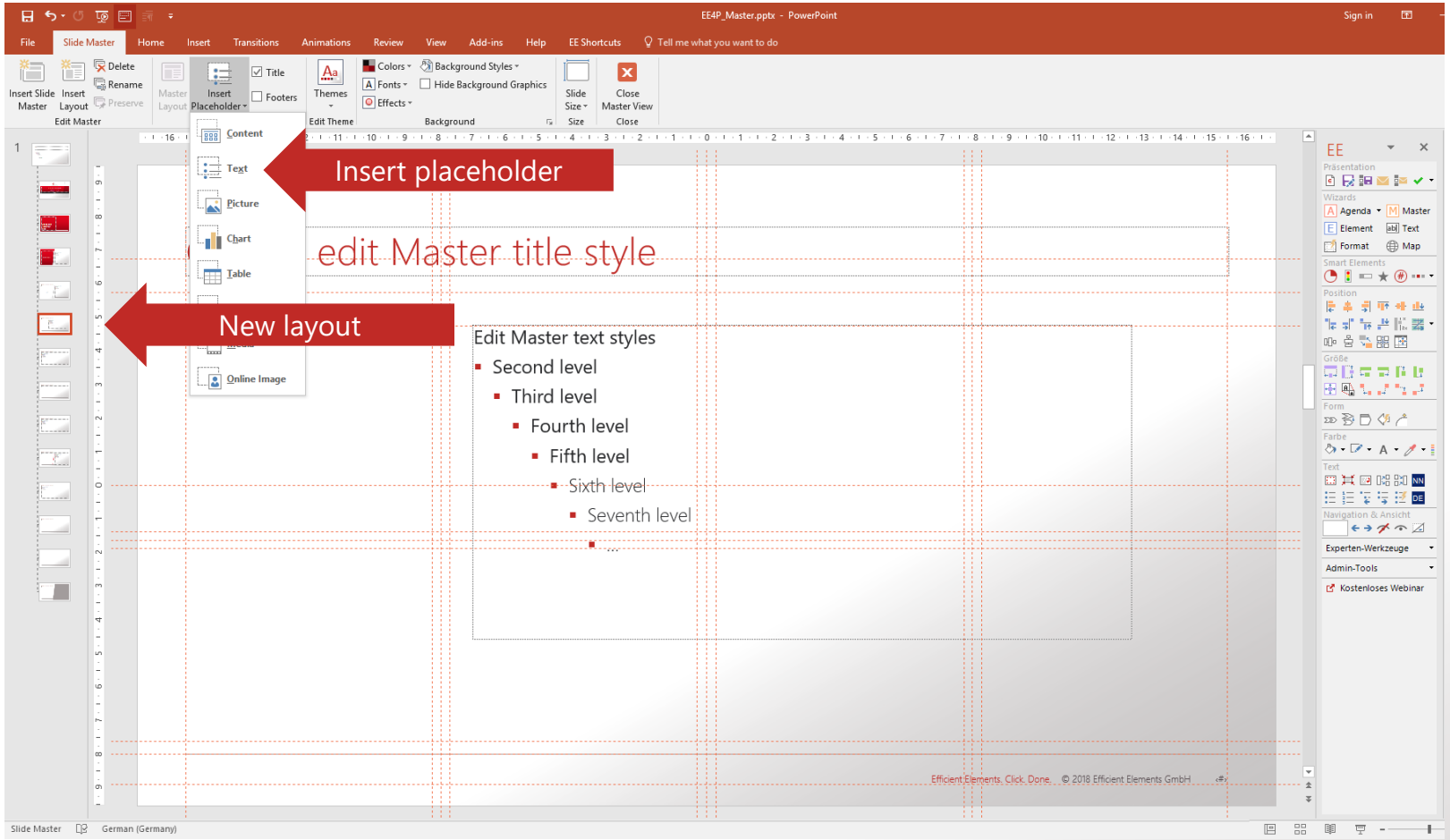
Little checklist for PowerPoint Templates

How to create new layouts



The text fields of layouts are inserted as placeholders and correspond to the formatting in the Slide Master.

If changes were made in the Slide Master, the text fields are automatically adjusted.

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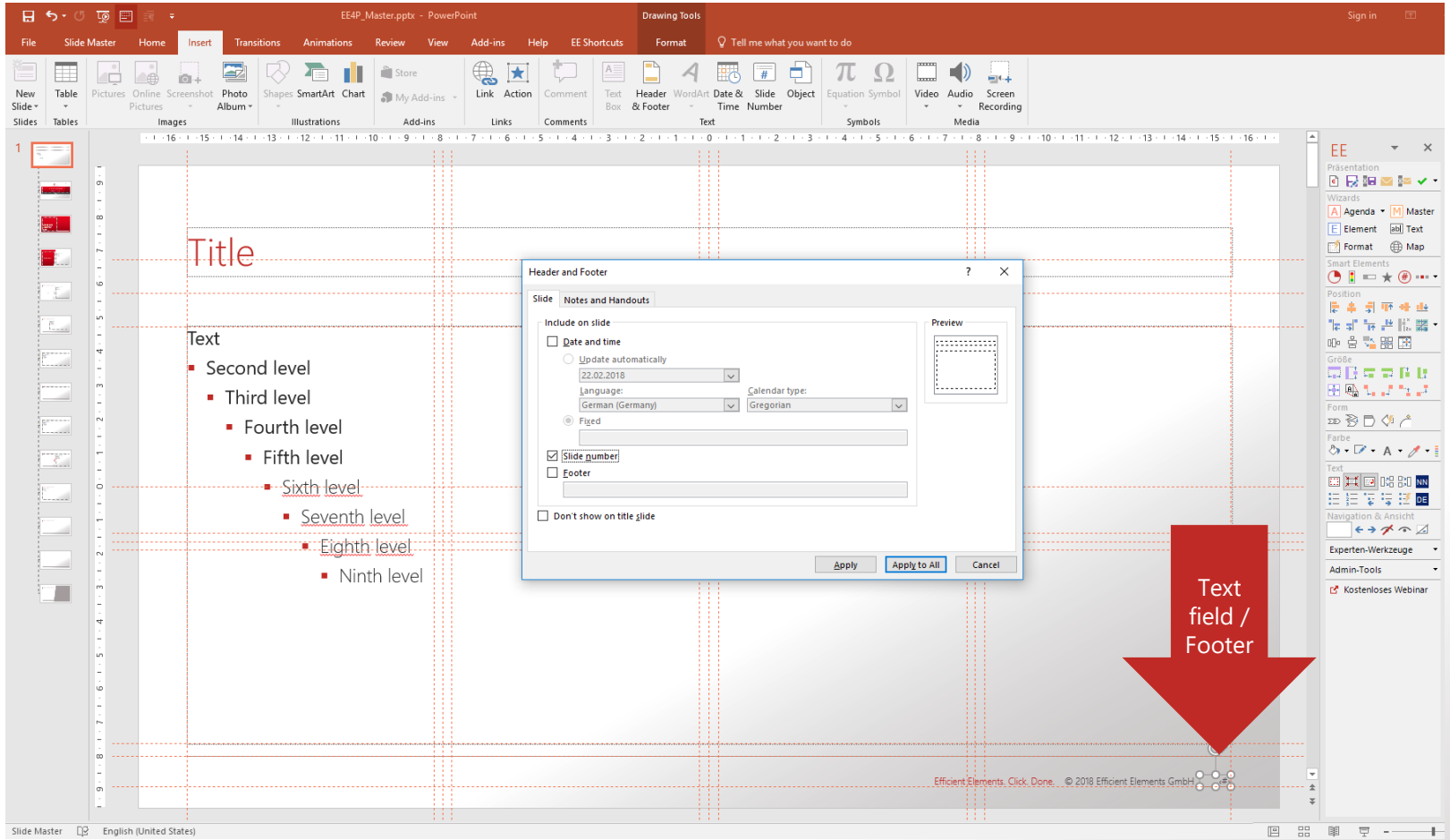
Little checklist for PowerPoint Templates

Placeholder versus text fields



Footers created as placeholders in the master are later displayed on the slides and can be accidentally moved or even deleted when designing a slide.

If text fields are used instead (provided with a corresponding content Slide number, Date, Footer) they will only be displayed, but are not editable on the slides, e.g. they cannot be moved either.

Benefit of the footer placeholder: the content can be changed individually on the slides. Colors are editable and elements were not overlapped by full size pictures.

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Little checklist for PowerPoint Templates

Template check list

- [ ] Correct defined placeholders?
  Check definitions in master
  Title, subtitle (just title layouts), text, footer elements
- [ ] Correct and wanted text properties like "Do not autofit"
- [ ] Default Shape/Line/Text
- [ ] Theme font (title and body)
- [ ] Theme colors
- [ ] Drawing area
- [ ] Guides and grid?
- [ ] Check adjustments of elements in layouts
- [ ] Standardized Bullet definitions
- [ ] Color definitions like corporate colors and used in layouts?
- [ ] Check template properties:
  Title / topic, company, author, last modified,…
- [ ] File size (otherwise maybe compress/optimize inserted pictures)
  Resolution: width 1920 px, 70% JPG exported by PowerPoint *save for web*
- [ ] Spell check

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Checklist „nice to have“ for EE Customization

Before customizing the Efficient Elements in your corporate design, in addition to the corporate template with the correct text field definitions and color specifications, we also need a style guide, with all informations like line weights, text sizes, bullet definitions, drawing area, etc. Do you have individual elements like for example stickers or Take away boxes, that we can add to the slide library for you? At which position should these stickers be placed and how do they look like (examples).

Will you have individual confidential stickers (strictly confidential, internal use only) or status notes (draft)... any icons, logos, customer logos, slide elements, images, etc.? We can add them to the slide library for you, too.

Based on your template and style guide, we will create sample slides in our standard Box, Line or Shadow styles with various agenda layouts. The more precise your specifications in the style guide are, the more exact our samples will be. You will review the sample slides, select a style which fits best to your corporate style and/or maybe adjust elements. This will be the basis for your edition.

Use the following checklist to make sure you have thought of everything.

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Little checklist for EE Customization process

Checklist „nice to have“ for EE Customization

- Final template
- Template adjustments by Efficient Elements possible (ask for offer)
- Overview of required colors (incl. color shades for e.g. charts)
- Style guide and samples of e.g. Boxes, agenda, stickers, diagrams, processes, tables
- Define language for spell check
- Master Wizard: confidential stickers and status hints
- Individual elements (sticker, call outs, …)
- Icons (most likely SVG, .EMF or PNG)
- Corporate logos (.PNG or .JPG)
- Client logos (.PNG or .JPG)
- Images and Pictures (optimized on 1920 px width, Photoshop: export for web, 70% JPG quality)
- Individual slide library
- You have 2 styles (4:3 und 16:9) and need an ImportWizard to convert presentations from one into the other?

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Thank you!

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