



DOCUMENTING SUCCESS

The final word on
how to present
documents.

BY JANE SMITH

Presenting documents well is crucial if you want to get your message across in the right way, whether it's an internal report, business plan, pitch or presentation. But how do you choose the right product(s) to use and what innovative new products are there to help?

Firstly, it is important to understand the context within which the documents are to be presented. The size, complexity and importance of the documents will have a significant bearing on how you should present them. Will you be there in person to back them up and run through them or will they have to stand on their own and be read in isolation? Is the recipient expecting the document or is this a prospecting piece or mailing?

In presenting documentation it is best to break down the elements so that the appropriate tools, materials and products can be brought into play. >>

PASS IT ON

USE THE APPROPRIATE PACKAGE

In the past we have been used to dedicated support staff to take care of actually producing the documentation once the manager had generated the content. However, this administrative 'back-up' or centralised support is now a thing of the past and today most of us work very independently and find ourselves responsible for preparing our own.

Is it a business proposal, for example, with a covering letter or a CV? It could be a product specification or recommendation that will be accompanied with a quote. Whatever it is there will be a most appropriate way of setting the information out. Choose to use either Word or PowerPoint, bearing in mind your need to include graphs, tables and/or photographs. And don't be tempted to be a 'would be' designer and use every font and type size and colour available. The document needs to be kept clear and easily legible with emphasis only where it is needed.

A PAPER IMPRESSION

Again think about what you are printing and how. Is it a simple single colour document on your letterhead, a double-sided document because there are a lot of pages or you want to show economy? Are you using colour and/or photographs? Don't just think about paper as paper, think about the opaque qualities (show through), the finish – glossy, satin or matt, and the grammage (weight). You could decide to use a colour paper – depending upon the document concerned but be careful to ensure that the content is still legible. You may decide that using a 100% recycled paper will give the desired impression.

IT'S ALL IN THE BIND...

Next is the decision about how to finish off the document. Should it be placed in a simple folder or professionally bound using a comb, wire or thermal binding system?

The move away from centralised support has also led to smaller machines (including binding machines) being developed, intended for personal use. Small, personal machines are affordable and versatile ideal for use at the office or in the home office.

Many now combine the features and benefits of speed and flexibility with simplicity of use and stylish design. As well as some great affordable machines, the supplies that can be used on the systems have also been developing recently to provide greater choice. Choose from traditional leathergrain finishes to funky brightly coloured polypropylene. Wires and combs also come in a variety of colours and capacities.

There are some important considerations in choosing the best method of binding depending on what you are trying to achieve with the document. For example, if you are producing a working document that needs to be frequently amended then it is better to use say a comb, coil or strip binding method. For further information about the best binding method you can contact any of the big manufacturers such as GBC, Acco, Esselte or Fellowes.



Top 10 Tips for Presenting Documents

1. Choose the appropriate software package to produce the base document.
2. Take care to resist the temptation to confuse the presentation and layout by using too many different fonts, clip art or other gizmos.
3. Take into consideration size, use of colour, tables and photos in deciding what paper to print on.
4. Determine the best way to bind the document based upon the size of the document and whether it is formal or informal, for frequent use or a one off read.
5. If the document is to be posted the cost of postage needs to be considered which includes the weight of the paper document and the choice of binding or folder.
6. Use the appropriate type of envelope to ensure that the contents are delivered in good condition.
7. Make sure the envelope is professionally addressed and the recipient's details are accurate and correctly spelt.
8. If it's a prospecting piece it can appear more personal if stamps are used instead of a prepaid stamp or franking mark.
9. Consider laminating if you need to present a document that needs to be durable and longer lasting.
10. Check out your local suppliers' catalogues to find an appropriate, affordable solution that will get you noticed.

If you don't want to go to the expense of a machine, there are other forms of manual binding using strips called spine bars or slide binders.

If you don't feel it appropriate to go for a full binding solution then a ring binder or personalised presentation ring binder may be the answer. Again the choice is phenomenal from both a style and design point of view, as well as capacity. If you're looking for a straight-forward document wallet or folder, there are some very nicely designed polypropylene products available to set your document off beautifully.

FINAL DELIVERY

If you are sending documentation through the post don't make the mistake of taking all the care in the world over the document and the way it is presented and let the whole thing down with the use of envelope and addressing. If you are not using a window envelope then use a well-produced label and check the spelling and title of the person you are sending your document to. Make sure the envelope is robust enough to protect the contents en route.

A LASTING IMPRESSION

It could be that the type of information you want to present needs to be durable and longer lasting. Signs, notices, menus, telephone lists are just a few examples. This is when a laminator becomes a great 'document finishing' tool.

Ways to use a laminator are endless for projects at both home and at work. It's amazing but once you own a laminator you'll be surprised just how much you use it! ■