Collateral Preparation Best Practices

This document is targeted at presales and marketing professionals responsible for preparation of collateral like Capability Documents, Case Studies, Capability Presentations, Offering Detail Notes, Offering Detail Presentations, White Papers, Proposals, Approach Papers, etc. Typically, collaterals are prepared in Microsoft Word 'DOC' or PowerPoint 'PPT' formats and circulated in Adobe Acrobat 'PDF' formats. While the thrust of this document is presales and marketing material, many of the best practices listed here are equally relevant for post-sales (i.e. delivery) documentation like scoping documents, product mapping reports, business mapping reports, traceability matrixes, user manuals, training materials, and so on.

- Always think about what experience your reader is likely to undergo while reading your collateral.

- Prepare and use a ***Styleguide*** so that there is consistency across the collateral in terms of font size, bullets, numbering, heading styles (e.g. Heading 1, Heading 2, …), and paragraph alignment (left justified or full justified).

- Many types of marketing collateral (e.g. capability documents) are prepared once and circulated to hundreds or even thousands of readers before they are taken up for revision. Therefore, errors and inconsistencies are multiplied hundred- or thousand-fold. That is why it is all the more important to follow best practices meticulously while preparing marketing collateral.

- Use only industry-standard jargon. Avoid using terms that are only understood within your company or your project.

- Remember that your company's field personnel (like Sales Managers & Relationship Managers) might want to edit your collateral before submitting them to the prospect / customer. This is especially true for collateral like approach papers and proposals. While editing text is not an issue in DOC and PPT formats, you need to watch out when it comes to graphical elements and make sure (as far as possible) that you embed only editable versions of the same. PDF format is not likely to be editable on most PCs at the field, so ensure that you convert DOC / PPT versions to PDF versions only after they are completely finalized and no further editing is required.

- When providing screenshots, beware of taskbars at the bottom. The reader is not interested in knowing what other applications were open on your PC when you took the screen-shot! Try using **Alt-PrtSc** to get a screenshot of only the active / foreground window. Better still, use freeware packages like *IrfanView*, which let you omit mouse pointers, crop sections and include only the active / foreground window in the screenshot.

- Avoid using 'he' as far as possible. Use 'she / he' in general. A new form being increasingly used is 's/he'. Alternatively, where appropriate, use the plural form 'they', which sidesteps the gender issue.

- Use 'person-month' or 'person-day' instead of 'man-month' or 'person-day'.

- Use acronyms only after you have given the expanded form earlier in the material. In long documents (typically > 10 pages), it helps to keep repeating the expanded form a few times later, or even add a glossary of such terms at the beginning or the end of the collateral.

- Ensure consistent usage of either the noun or the verb form in a given set of bulleted points.

For example, **avoid** saying
- Development of code
- Test software

Instead, say (noun form)
- Development of code
- Testing of software

Or (verb form),
- Develop code
- Test software

- Ensure that the spacing between the left parenthesis and the start of text inside it is the same as that between the end of text and the right parenthesis. Avoid uneven spacing like **'(Usability Practice)'** or **'(Usability Practice)'**. Instead, say **'(Usability Practice)'** or **'(Usability Practice)'**. After selecting one of these two styles, follow it consistently throughout the collateral. The same is applicable for words separated by '/'.

- Use header and footer to identify the document owner (e.g. the sketharaman.com logo at the top right of this document) and list the page number. Additionally, you can choose to list the document filename, author's name, and so on.

- Make sure that you have selected the appropriate *Paper Size* under Word's *Page Setup* menu. Often, this is left at the default setting of 'Letter', which is not the standard paper size used outside North America. Many countries use A4 paper as standard, so changing the document's paper size setting in Word to 'A4' could improve the formatting quality.

- To make table headers appear on all pages in which the table appears, and not just on the page where the table commences, select the table header and check *Heading Rows Repeat* under the *Table* menu in Microsoft Word.

- While using graphic elements, make sure that all shapes are sized consistently and aligned properly.

- Do not forget to run **Spell Check**! And, before doing this, ensure that the appropriate country-specific dictionary is activated.

- Assign a document number or even a bar code to every item of high-consumption collateral (e.g. Capability Documents). This small step enables not just better internal tracking of the collateral but also gives a higher-profile image to the collateral and the company behind it. For example,

12453156