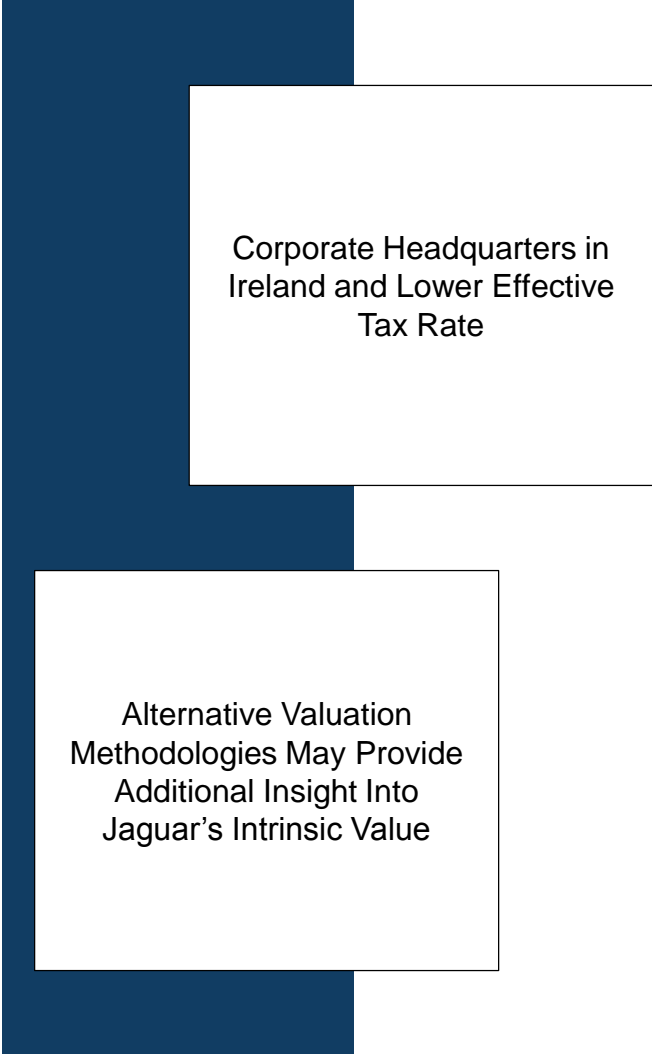


How You Use PowerPoint in Banking

- **This Tutorial:** A quick PowerPoint tip that takes <10 minutes to set up and will save you hours each week
- **PROBLEM:** Many PowerPoint shortcuts you use all the time in pitch books, case studies, stock pitch presentations, etc. are **difficult to access**
- **EXAMPLE:** A simple left or right alignment is *surprisingly* cumbersome

How You Use PowerPoint in Banking

- **Shortcut to Left-Align These Shapes:**



Corporate Headquarters in
Ireland and Lower Effective
Tax Rate

Alternative Valuation
Methodologies May Provide
Additional Insight Into
Jaguar's Intrinsic Value

1) Shift + Click to select both shapes

2) Alt, H, G, A, L to left align them

- Can you imagine doing that **thousands of times** in a single presentation?
Nooooo!!!!!!

How You Use PowerPoint in Banking

- **And** there are quite a few cumbersome, common shortcuts!
 - **Distribute:** Alt, H, G, A, H or V
 - **Bring to Front:** Alt, H, G, R
 - **Font Color:** Alt, H, FC
 - **Shape Fill:** Alt, H, SF
 - **Shape Outline:** Alt, H, SO
 - **Insert Shape:** Alt, N, SH
- In PPT, you use the **same shortcuts repeatedly**

Solution: The Quick Access Toolbar

- 1) Criteria:** VERY common shortcut, somewhat long/cumbersome, and no existing Ctrl + shortcut
- 2) Order:** Use the 1-4 positions for the *most* frequently used commands; 5-9 and 01-09 for less common ones
- 3) Import/Export:** You can import/export your customized QAT as well... but PPT versions must match!
 - If your firm doesn't allow this, take a few minutes to customize your QAT in your PowerPoint

Our View – the Most Common Shortcuts

- How Our **QAT** is Set Up:
 - Align Objects
 - <Separator>
 - Font Color
 - Shape Fill
 - Change Outline Color
 - More Options
 - Arrange
 - Font Size
 - <Separator>
 - Rectangle
 - Draw Horizontal Text Box
 - Shapes
 - Straight Connector
 - Merge Shapes

Customize Quick Access Toolbar: ⓘ

For all documents (default) ▼

Align Objects

<Separator>

Font Color

Shape Fill

Change Outline Color

More Options...

Arrange

Font Size

<Separator>

Rectangle

Draw Horizontal Text Box

Shapes

Straight Connector

Merge Shapes

Solution: The Quick Access Toolbar

- **How to Set This Up:** *Easiest* is to download the exported QAT we created (Click “Show More” and then scroll to the bottom under “Resources”)
- **Then:** Options (Alt, T, O), Quick Access Toolbar, and then Import/Export under Customizations
- **If That Doesn’t Work:** Set it up yourself! Go to Options, Quick Access Toolbar, display “All Commands,” and add them manually

The End Result: QAT Magic

- **Now:** Look at how much faster shortcuts are to enter:
 - **Align:** Alt, H, G, A, L/R/T/B → Alt, 1, L/R/T/B
 - **Distribute:** Alt, H, G, A, H/V → Alt, 1, H/V
 - **Bring to Front:** Alt, H, G, R → Alt, 6, R
 - **Font Color:** Alt, H, FC → Alt, 2
 - **Shape Fill:** Alt, H, SF → Alt, 3
 - **Shape Outline:** Alt, H, SO → Alt, 4
 - **Insert Shape:** Alt, N, SH → Alt, 09

The End Result: QAT Magic

- **Time Required:** This takes ~1 minute, or maybe up to 10 minutes, to set up, and will save you hours of time
- **Example:** Let's say you get a messy, misaligned, unformatted slide from a senior banker or an intern who doesn't know what he's doing...

Poorly Formatted Slide:

	Goldman Stanley	Legal	Management	Board
Phase I: Organization	<ul style="list-style-type: none"> ▪ Determine potential partners ▪ Finalize projections, CIM, and mgm't presentation 	<ul style="list-style-type: none"> ▪ Review draft DA ▪ Identify legal issues/concerns 	<ul style="list-style-type: none"> ▪ Determine potential partners ▪ Finalize projections, CIM, and mgm't presentation 	<ul style="list-style-type: none"> ▪ Determine process and objectives ▪ Approve Tier 1 and Tier 2 partners to approach
Phase II: Contact and Marketing	<ul style="list-style-type: none"> ▪ Contact partners and negotiate NDAs ▪ Schedule management meetings 	<ul style="list-style-type: none"> ▪ Assist in NDA negotiations ▪ Assist in compiling legal diligence items 	<ul style="list-style-type: none"> ▪ Prepare for management meetings ▪ Contact potential partners (if appropriate) 	<ul style="list-style-type: none"> ▪ Receive process updates ▪ Provide input/direction if required
Phase III: Business Due Diligence, Synergy Discussions, and Initial Bids	<ul style="list-style-type: none"> ▪ Conduct management meetings and solicit bids ▪ Discuss synergies and facilitate diligence 	<ul style="list-style-type: none"> ▪ Assist in reviewing initial bids and follow-up diligence lists for legal items 	<ul style="list-style-type: none"> ▪ Formulate synergies ▪ Attend management meetings ▪ Answer diligence requests 	<ul style="list-style-type: none"> ▪ Receive process updates ▪ Provide input/direction if required
Phase IV: Final Negotiations, Confirmatory Diligence, and Signings	<ul style="list-style-type: none"> ▪ Review bids from potential partners ▪ Negotiate terms of DA with top partners 	<ul style="list-style-type: none"> ▪ Review bids, negotiate terms of DA, and assist with confirmatory diligence 	<ul style="list-style-type: none"> ▪ Review bids and assist with diligence ▪ Discuss contracts 	<ul style="list-style-type: none"> ▪ Review bids and approve agreement, if appropriate

The End Result: QAT Magic

- **This Slide:** Takes 10 separate commands to fix
 - **2 Distribution Commands:** Alt, H, G, A, H/V
 - **QAT Version:** Alt, 1, H/V
 - **8 Alignment Commands:** Alt, H, G, A, L/R/T
 - **QAT Version:** Alt, 1, L/R/T
- **Built-in Shortcuts:** $10 * 5 = 50$ keystrokes required
- **QAT Shortcuts:** $10 * 3 = 30$ keystrokes required
- **And:** The QAT keystrokes are easier to reach!

Recap and Summary

- **Built-In PowerPoint Shortcuts:** Often cumbersome
- **Better Solution:** Create custom shortcuts for the most common commands and add them to the QAT
- **Method:** Download and import our file below, or create your own QAT shortcuts in the Options menu (Alt, T, O)
- **Result:** 30-40% time savings, adding up to hours or even *days* each week