

Effective and Memorable Reports

Developing a shared identity for documents & communications

Background

A leading UK high street bank wanted all their documents and communications to have a shared identity that was high quality, memorable and effective.

They realised that all their documents and communications, to each other and to their customers, did not reach the required standards at all times.

People used a variety of styles and standards because there were no rules or guidelines. Some people lacked the writing skills that would help them to write clearly and concisely.

Requirement

The high street bank asked Pacific Blue to provide them with a set of standards, styles and skills that reflected their needs and was inline with their brand. They asked us to include MS Word and MS PowerPoint templates, guidelines for emails and writing skills training.

Our solution

Pacific Blue delivered a programme that enabled the bank's staff to communicate effectively in reports, presentations and emails. The programme included:

Analysis

- Workshops where we gathered people's feelings about what they needed and how their shared identity might be enhanced.

Definition

- Document definition where we identified the types of reports and communications that people regularly wrote. We found eight types of basic reports which the bank set as 'standard'
- Template design and development where we designed a set of MS Word templates for the standard reports that incorporated the bank's brand.

Implementation

- A wizard incorporating the templates allowing users to select the most appropriate type of document and then download the required sections that should be covered.
- An MS PowerPoint template that enabled users to create communications that were engaging and followed a consistent look and feel.
- Online help so that users could open the templates and use them properly.

Implementation Training

- Workshops to introduce the templates and provide coaching on writing clear English.
- A special workshop to teach how to use the concepts of storyboarding in PowerPoint presentations.