Visualize What You Mean

Idea In Short

Consulting is storytelling, and the visual layout of a slide is part of the argument. Six recurring templates, showing process, stage and gate, relationships, sequencing, current-versus-future and simple buckets, cover most of what a client needs to see clearly.

Consulting Is Storytelling

Very few working days pass without touching a slide deck, whether building one or studying investor presentations and analyst reports for structural ideas. On one recent forty-page deck, the first several pages built the executive summary, establishing what needed to happen and why, while the remaining thirty pages carried the operational detail: how, when, how much and who.1 A handful of recurring visual templates carry most of that structure across engagements.

Showing a Process

A process slide, similar in spirit to a SIPOC diagram used in process-improvement work, sets the stage early in an engagement by laying out the key activities ahead.2 Used repeatedly through a project, it functions like a drum-beat, orienting the team and the client on where things stand and where they are headed, the same way a road sign orients a passenger. Effective versions use parallel wording, every bullet starting with the same part of speech, and terse, high-impact phrasing rather than full sentences.

Showing a Stage or Gate

Projecting distinct phases of work benefits from a simple, even slightly reductionist visual. More technical tools exist for this, but clients often find them harder to edit and overly detailed for their purposes. A stage-gate slide should avoid unnecessary complexity, limit the color palette to what actually carries meaning and use a large enough font that it stays

legible for readers who may not want to squint at a screen from across a conference room.

Drawing Out Relationships

Mapping responsibilities and reporting lines between roles requires some care, since genuine organizational design is its own specialized methodology. That said, a simple relationship diagram can still clarify a common failure point: confusion over decision rights and who actually has authority to decide what. Simplifying that confusion visually, even imperfectly, often does more good than a wordy explanation.

Sequencing Activities

Showing a sequence of numbered activities against a timeline works well for communicating specific milestones and dates. The risk is that this style of slide starts to resemble an appendix page, dense with facts but thin on message. A short summary box at the bottom of the slide, restating the key takeaway, keeps the sequencing detail from burying the point it is meant to support.

Comparing Current and Future States

A large share of consulting work is fundamentally about the gap between where a client is now and where they want to be. Maturity models are a particularly effective way to show that gap, though a simple side-by-side table comparing current and future states works nearly as well, since readers are generally good at recognizing patterns once they are laid out clearly.

Build a Personal Template Library

Consultants who produce strong decks consistently tend to keep a running personal library of scrubbed, anonymized templates pulled from past work rather than rebuilding every visual from scratch each time. Over years, that library becomes a genuine competitive advantage: a faster starting point for any new deck, a reference for how a similar problem was framed successfully before and a way to avoid reinventing a mediocre version of a slide that already exists in a better form somewhere in the archive.

Matching the Template to the Audience

None of these six templates is universally correct, and picking the wrong one for the audience undermines even well-designed content. A board presentation generally tolerates less density and more white space than an internal working session, since board members are reading quickly and need the headline fast, while a working team reviewing detailed analysis can absorb a denser table without losing the thread.3 Matching template to audience, rather than reusing whatever slide worked well in the last deck, is a small habit that consistently separates presentations that land from ones that merely get sat through.

Using Buckets

When no other visual format seems right, grouping ideas into simple buckets is often the most reliable fallback. A few prompts help identify the right buckets: what the idea would be if reduced to three things, how the problem naturally divides for a starting point, what falls inside versus outside the team's control and what belongs to the short term versus the long term. Most consulting pages combine text, data and graphics to support an argument, but tables, frameworks and simple visual templates consistently earn their place, while genuinely text-heavy, dense detail consistently belongs tucked away into the appendix rather than crowding the main narrative flow.

- 1Presentation
- 2SIPOC
- 3Data Visualization

Summary

Consulting is storytelling, and slides carry the argument. Process flows, stage-gates, relationship maps, sequencing charts, current-versus-future comparisons and simple buckets cover most of what clients need. Keep it legible, keep it simple, and never let rigor crowd out clarity.