

SOME NOTES ABOUT NOTES:

A PRIMER ON USING NOTES DURING PRESENTATIONS

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Most presenters are glad that they no longer have to deliver a presentation with nothing more than a few 3x5 index cards to keep them on track. But the dizzying array of presentation software and display options available can cause them to almost wish for the simplicity of that comparatively manageable little stack of paper.

Different presenters have different styles. Most want to keep their notes handy but also have the freedom to roam the stage. There are many different ways to accomplish this, but despite the options afforded by modern AV technology, each solution comes with inherent limitations. Event managers should make it part of their preparation to understand these limitations and devise ways to accommodate them.

Many presenters, however, fare better if they are able to keep constant tabs on which slide is coming next and how much time they have remaining. Some speakers make it a priority to carefully craft their message and get certain wording “just right.” In this case, a more sophisticated – though not necessarily expensive – technological setup is required. Usually such a setup will involve the use of a downstage monitor, sometimes called a **confidence monitor**. These monitors are large video screens placed on the floor in a position which is easily visible to the presenter (but not distracting to the audience). This is not to be confused with a **teleprompter**, which is a means of displaying a speech, word for word, as it is written. As we will learn in an upcoming piece, teleprompters are a very different beast, and worthy of their own discussion.

Strictly speaking, a confidence monitor is used to display the main slide deck, or whatever is being shown on the main screens. It’s called a confidence monitor because it’s just a friendly reminder to the speaker of what’s on the screen. This is particularly helpful in large meetings, where the outboard screens are in line with the back of the stage, or perhaps directly behind the speaker (as is the case of

a classic Steve Jobs keynote). By using the monitor, the speaker does not have to turn around to make sure that his or her slides have advanced – it gives them confidence that the slides are advancing properly.

These monitors, however, can also be used to display the presenter’s notes. There are a couple of different ways to get notes to appear on the downstage monitor, depending upon the presentation software used. Microsoft PowerPoint and Apple Keynote are the most commonly used programs.

HOT TIP: Don’t assume that just because you have a downstage monitor, notes can be automatically be displayed on it. Although that is very easy to do, it does require some additional equipment. So if this is an option you’d like to offer your speakers, be sure to let your AV or production team know in advance.

“**Presenter View**” in PowerPoint will enable the notes to be displayed on-screen; in **Keynote** the feature is called “Presenter Display.” One advantage of using this feature in either program is that users can type their notes directly into the “Notes” field, allowing them to keep their entire presentation all in one place, which was one of the main goals of PowerPoint when it was first created. Unfortunately, even though Presenter View has been around in PowerPoint for some time, it was clearly designed for the boardroom, not the ballroom. It can only be viewed by the presenter at a very short distance, such as a laptop on a conference room table. Microsoft had the right idea, in that the presenter mode enables the speaker to not only see their notes, but also what slide they’re on, what slide is next, and even the amount of time that has elapsed. All the while, the **main slide deck** is being presented on a second, external monitor or projector. This might be great for a boardroom presentation, or even a small breakout room, where no technical support is given and the laptop is connected directly to the projector.

The disadvantages of Presenter View show themselves more readily in the context of a ballroom

speech, especially when **multiple speakers** are involved. The customization of Presenter View is extremely limited, at least in PowerPoint 2010 and earlier, which as of this writing are still dominant in the industry over the recently released PowerPoint 2013. Users can make each section larger or smaller by dragging handles, giving more screen real-estate to notes if that's what they deem most important. One can also adjust the size of the notes, but in so doing, will adjust the size of all notes on all slides in the deck, regardless of how they are formatted in the Notes section. Furthermore, **all formatting** other than the use of dashes and blank lines is stripped out in Presenter View, so one should not waste time using bold or italic text.

Perhaps the most crippling problem with Presenter View is that despite whatever customizations a user makes, upon exiting the slideshow (to make one of the inevitable last minute changes to the deck), all of these customizations – the pane size, the notes font size, and so on – **reset to their stock parameters**. The customizations need to be applied every time the presentation is run.

All in all, though, Presenter View is a working solution to our notes problem. Based on the above, event hosts just have to keep a few things in mind:

- Multiple presenters using the same slide deck, will have to agree on a font size for the notes so they can all see from the downstage monitor.
- Presenters with too much text in their notes field may find that their text is cut off on the monitor.
- The PowerPoint operator needs to be able to see the Presenter View so the feed to the downstage monitor needs to be split and sent to a separate preview monitor for them.
- Remember, all formatting is removed from the Notes when shown on Presenter View except for basic text, spaces, and returns.
- Increasing the Notes pane of the Presenters View necessarily means reducing the other panes, such as the images of the Next and Current slides, so presenters may no longer be able to clearly read or see them from the downstage monitor.

Apple's Keynote presentation software does not suffer from most of these issues. Formatting is allowed in the notes section, and that formatting is displayed correctly in Presenter Display. Speakers can therefore have different font sizes on a **slide-by-slide basis**, but should still bear in mind the distance they will be from the downstage monitor.

Customization of Presenter Display is done through the program's Preferences dialog, so any changes will "stick" on the display computer until changed, no matter how many times the program is opened or closed. Finally, the setup of Presenter Display can be easily viewed and set up without the use of an external monitor.

An alternative solution to using the built-in notes capabilities is to **create a second "notes-only" deck**. By doing this, one is creating, in essence, an independent presenter's display. This allows one to custom build notes and make them look exactly as desired, including any relevant diagrams, custom fonts, or formatting. This can be of enormous help to presenters, because it allows them to know exactly how the notes are going to look in advance, and they can practice their presentation accordingly. Bear in mind that there will need to be a separate display computer running that deck, so again you should let your AV or production team know that you intend to use this method so they can plan accordingly and have the right number of machines for you.

The biggest disadvantage to using a notes-only deck is making it match the display deck **"click for click"** in order to stay in sync. It is not enough for it to have the same number of slides – every "click" of the mouse or remote control needs to be accounted for. If the speaker has his or her bullet points in the main display deck coming in "on click" instead of automatically or all at once, then each one of those **advances needs to be mirrored** in some way in the notes-only deck. Otherwise, the notes-only deck will advance faster than the display deck. Likewise, if the presenter wishes to have several pages of notes pertaining to one single display slide, those "clicks" in the notes-only deck need to be accounted for in the

display deck.

The easiest way to solve both those issues is simply to **duplicate slides**. If a user wishes to have several notes slides regarding a single display slide, he or she will need to duplicate the display slide for every notes slide. That way, when advancing the notes slide, no change is perceived by the audience on the display slide. This solution also works when using PowerPoint's Presenter View and not all of the notes are visible. The fix is to simply duplicate the slide and split the notes between the two.

I have seen the notes-only deck used with great success, giving the speaker a near-teleprompter experience while still preserving his or her ability to go off-topic and **speak extemporaneously**. It can also, however, go horribly wrong. Last minute changes to either the notes-only deck or the display deck, unless carefully made to both decks, can cause the decks to get out of sync and really throw off the presenter.

In the end, whichever method you choose depends entirely on the needs of your speakers. If the formatting of the notes is extremely important, or your speaker needs to **easily reference charts or graphs** in the presentation without turning to look at the "big screens," then the notes-only road might be the way to go.

In our productions, metroConnections tends to favor the Presenter View method, mainly because it removes a point of failure from the equation – namely the second notes-only machine. It also removes the complexity of having to keep the decks in sync.

Both are perfectly legitimate ways to display notes in the downstage monitor, but you should be aware of the pros and cons of each method and **plan accordingly**. If you go the Presenter View route and have multiple keynote speakers, you should plan on extra time in rehearsals to sort out the display so everyone can view their notes comfortably. If you go the Notes Only route, you should probably have

somebody assigned the duty of tracking changes and making sure that all the clicks line up.

About

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After graduating from Macalester College in St. Paul, Minn. in 1995 with a degree in Technical Theatre, Brandt found himself working for a theatrical equipment rental company. It was there that he made initial contacts that would draw him away from the theater and into hotel ballrooms around the world. Just under a year later, he was hired by metroConnections to help build their event decor fabrication shop and to manage their growing event rental inventory. He also quickly branched into a technology role, building the company's first website as well as designing interactive game shows for teambuilding events within the next couple years. His role has continued to evolve over the years and now he's "the man on the headset" for most of metroConnections' large scale meetings and events, helping to produce hundreds of meetings and technical productions.