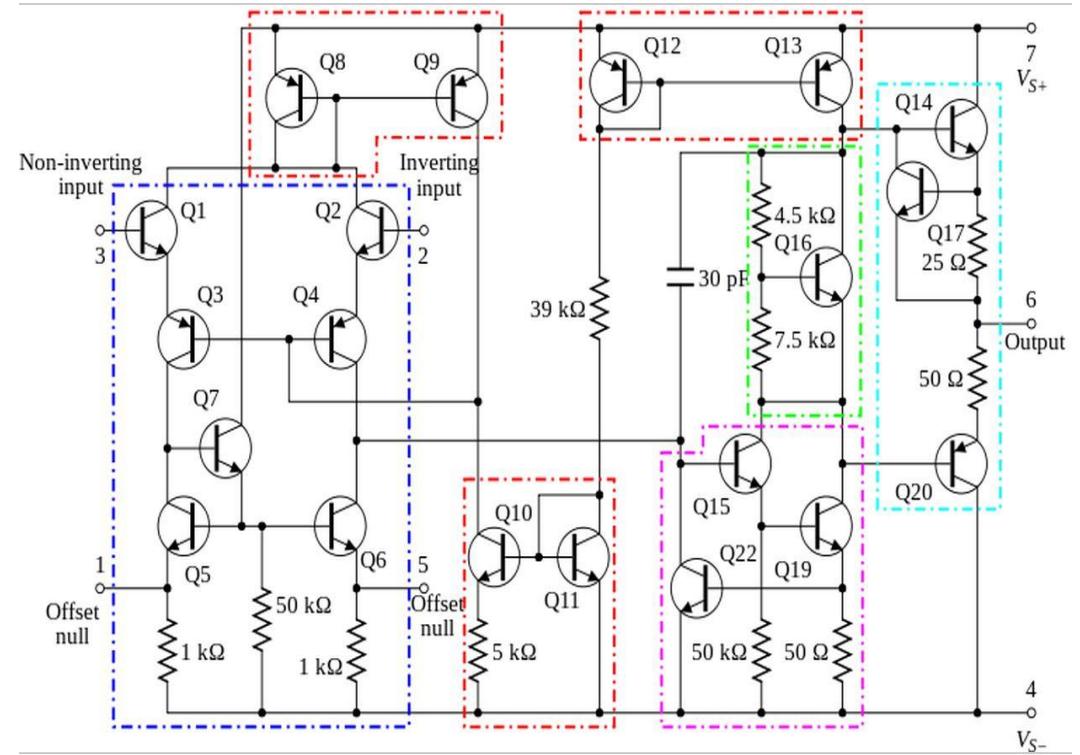




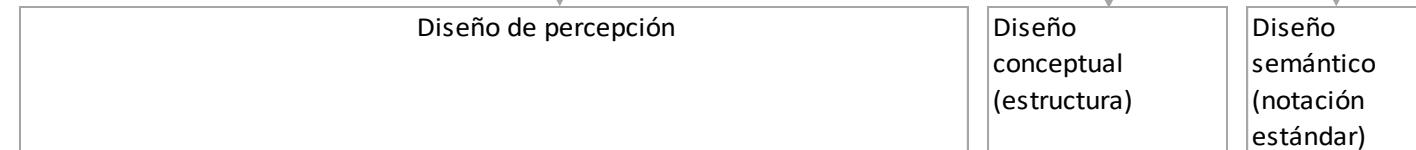
# IBCS® WITH SUCCESS

How communication standards help  
understand reports and presentations

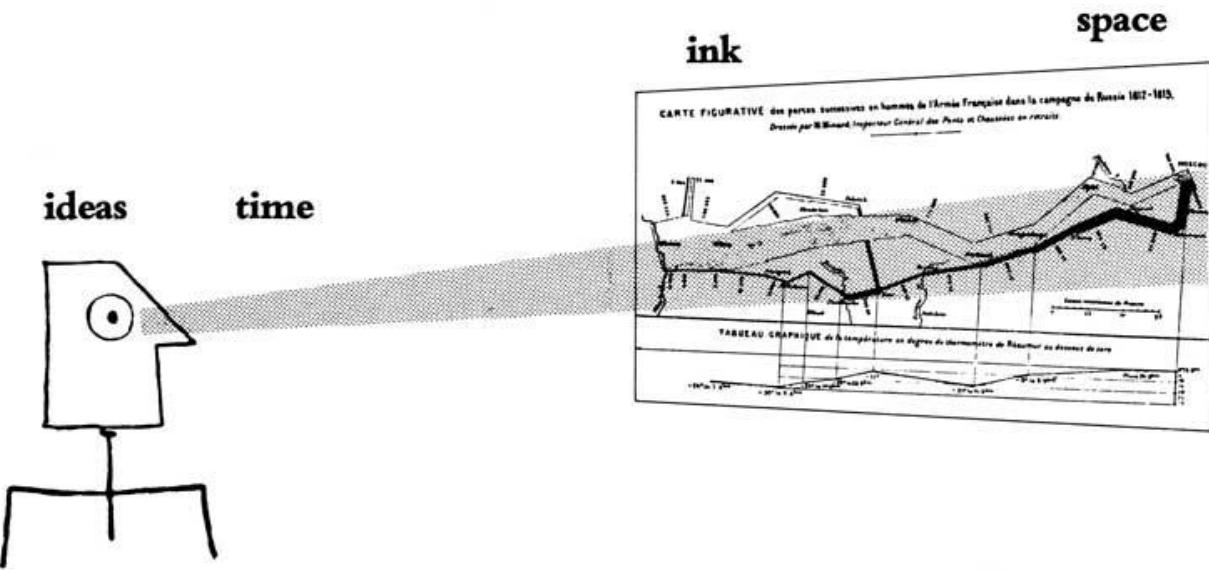
# 1/ Why now?



1779	1786	1913	1983	2004	1978	1985	2010
Johan H. Lambert (Alemania)	Playfair, W. (Gran Bretaña)	Brinson (EE.UU)	Tufte (EE.UU)	Few (EE.UU)	Minto (EE.UU)	Zelazny (EE.UU)	Hichert (Alemania)

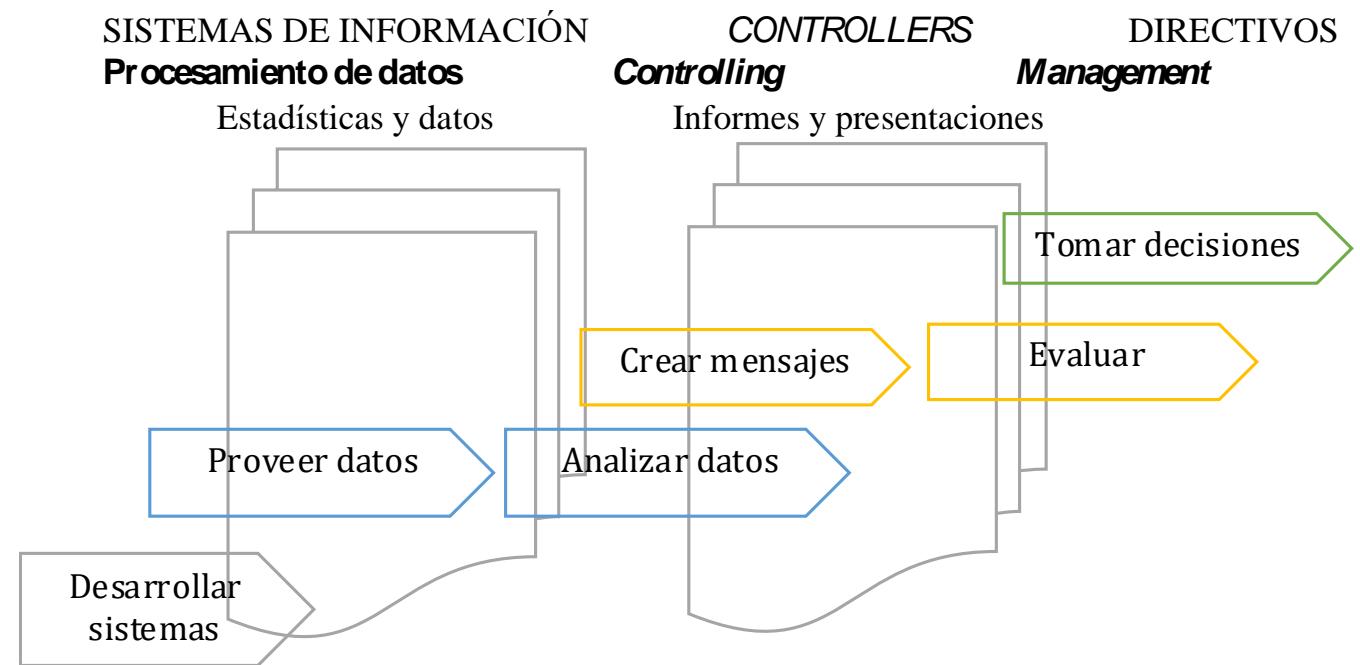


**SAY** (Decir)  
**UNIFY** (Unificar)  
**CONDENSE** (Condensar)  
**CHECK** (Comprobar)  
**EXPRESS** (Expresar)  
**SIMPLIFY** (Simplificar)  
**STRUCTURE** (Estructurar)



Edward Tufte : The Visual Display of Quantitative Information

## 2/ Benefits



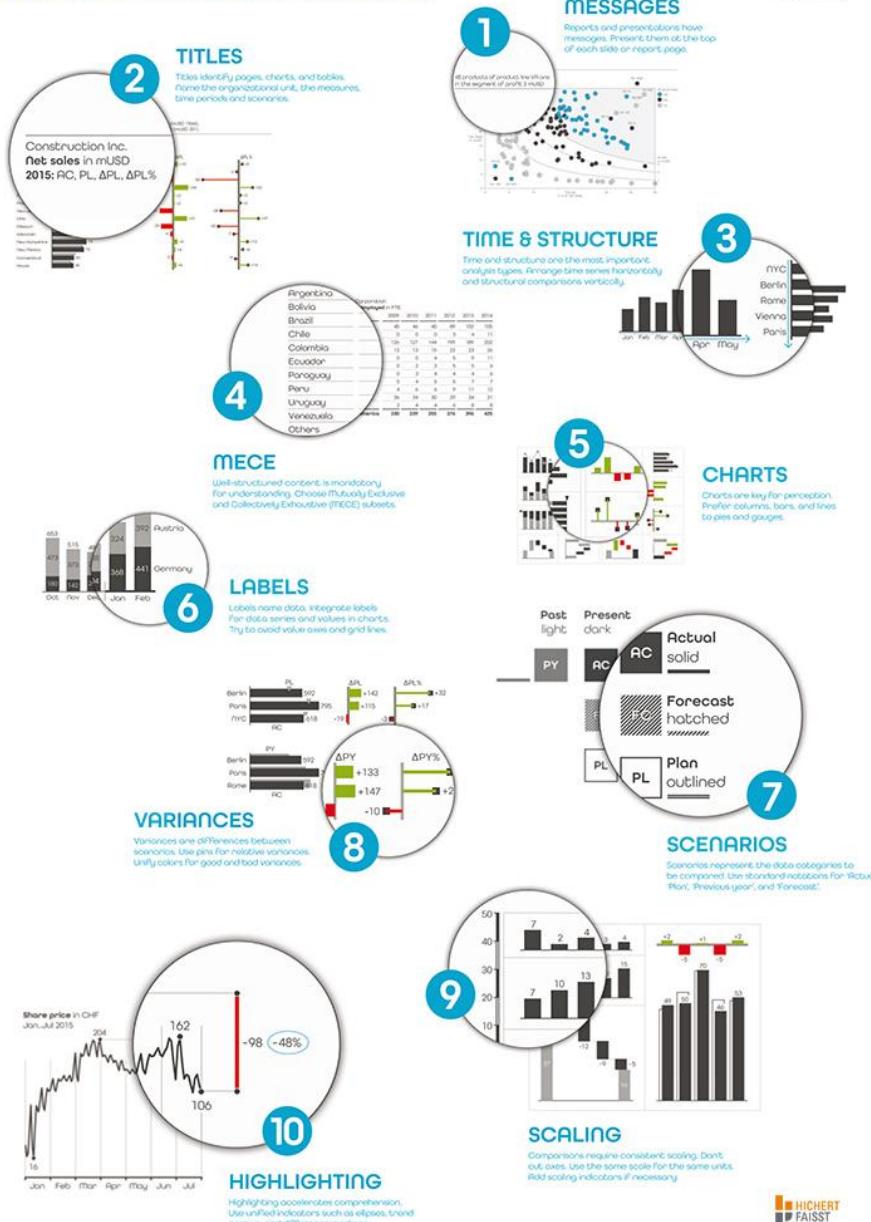
	<b>Sistemas de Información (SI)</b>	<b>Controlling</b>	<b>Management</b>
	Desarrollar <b>sistemas</b> y suministrar <b>datos</b>	Analizar <b>datos</b> y crear <b>mensajes</b>	Evaluar los <b>mensajes</b> y tomar <b>decisiones</b>
Mejora de la Calidad	1	2	3
Reducción del tiempo de reacción	4	5	6
Reducción de costes	7	8	9

## 3/ Principles

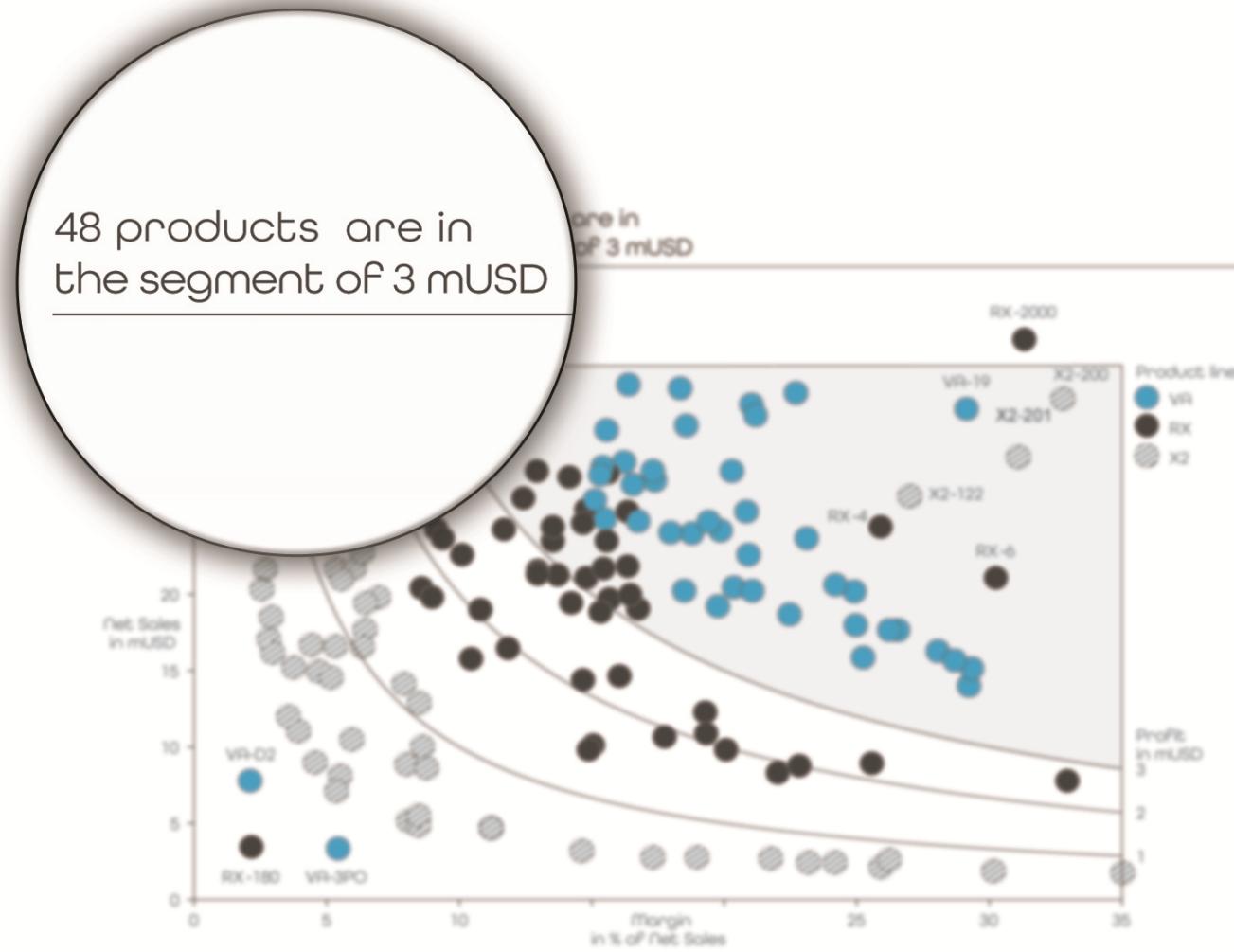
# IBCS TOP TEN

Standards For Business Communication

**ibcs**<sup>®</sup>  
INTERNATIONAL  
BUSINESS  
COMMUNICATION  
STANDARDS  
IBCS-A.org



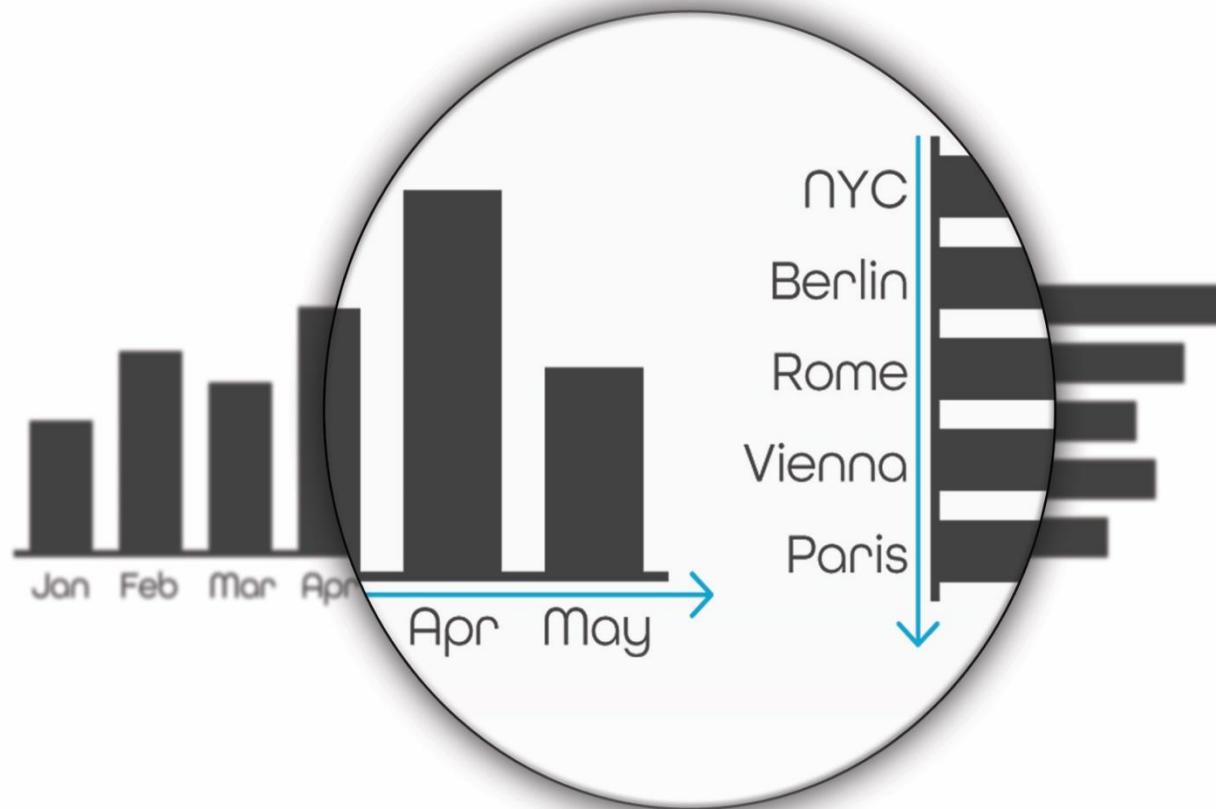
# 1.- Mensajes: debe figurar un mensaje en cada página del informe o de la presentación.



2.- Títulos: en cada página debe figurar un título con un formato homogéneo o consistente.



**3.- Tiempo y estructura: deben estar organizados en el eje horizontal y en el vertical, respectivamente.**



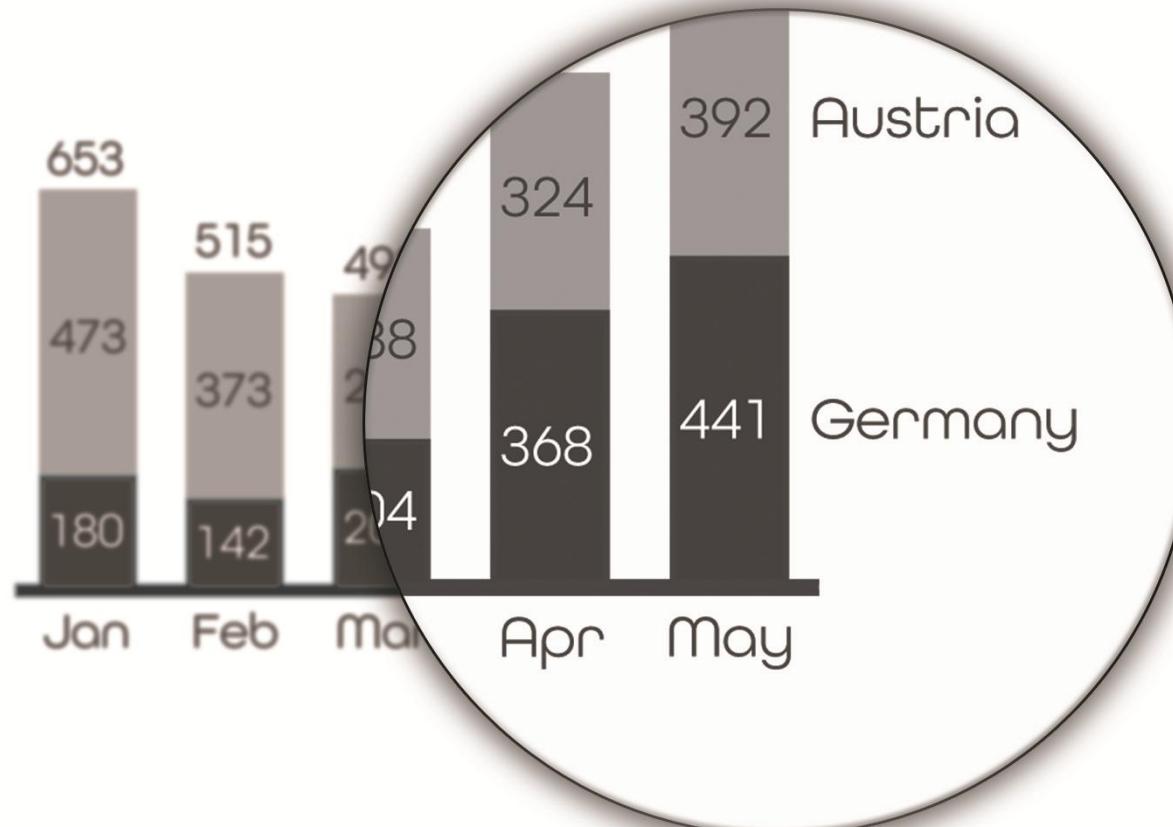
#### 4.- Regla MECE.

Country	Corporation employed in FTE					
	2009	2010	2011	2012	2013	2014
Argentina	45	46	40	89	102	105
Bolivia	0	0	0	3	4	11
Brazil	126	127	144	199	189	202
Chile	12	13	15	22	23	26
Colombia	0	0	4	5	9	11
Ecuador	0	2	3	5	5	6
Paraguay	0	3	4	4	4	6
Peru	5	4	5	5	7	7
Uruguay	4	6	6	9	11	12
Venezuela	36	34	30	29	34	31
Others	2	4	4	6	8	8
America	230	239	255	376	396	425

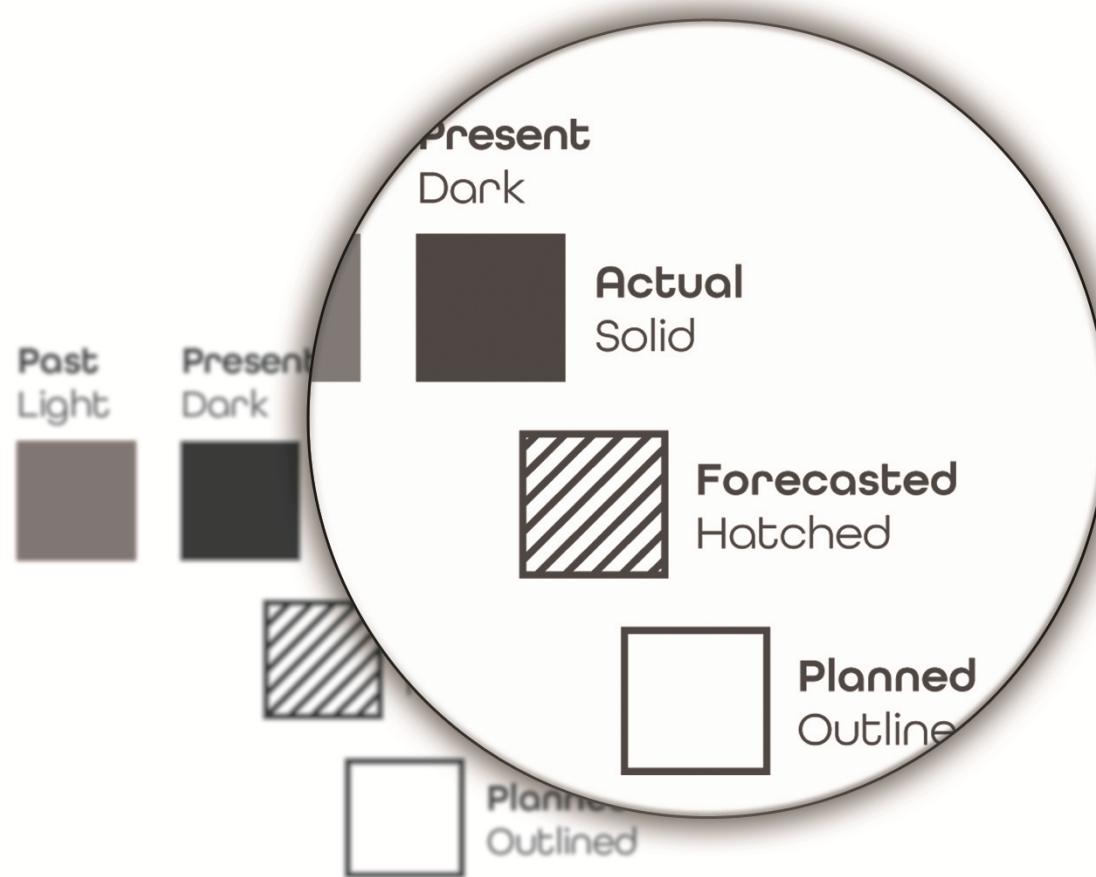
## 5.- Gráficos.



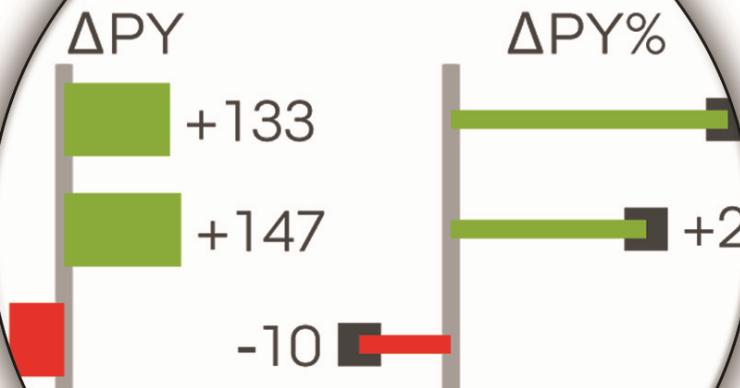
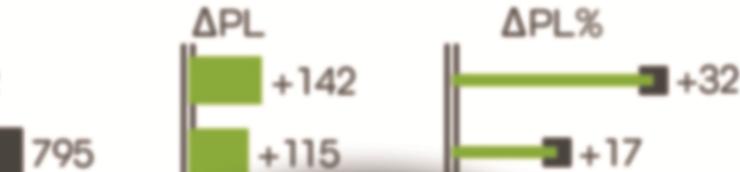
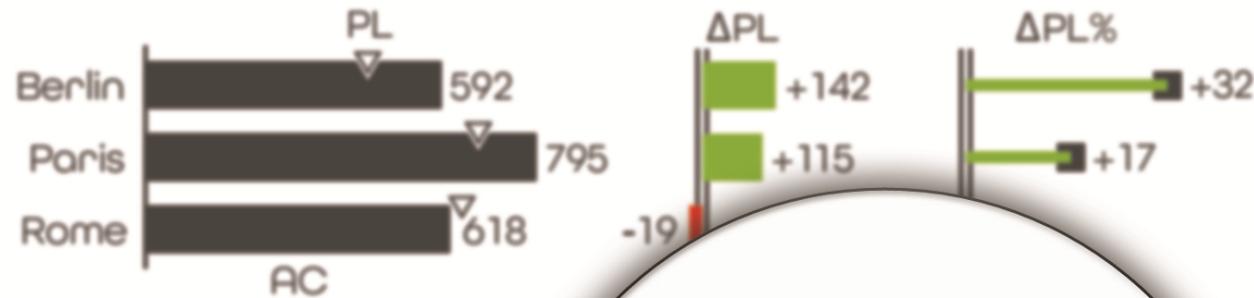
6.- Etiquetas: las etiquetas deben ir integradas en los gráficos, no separadas.



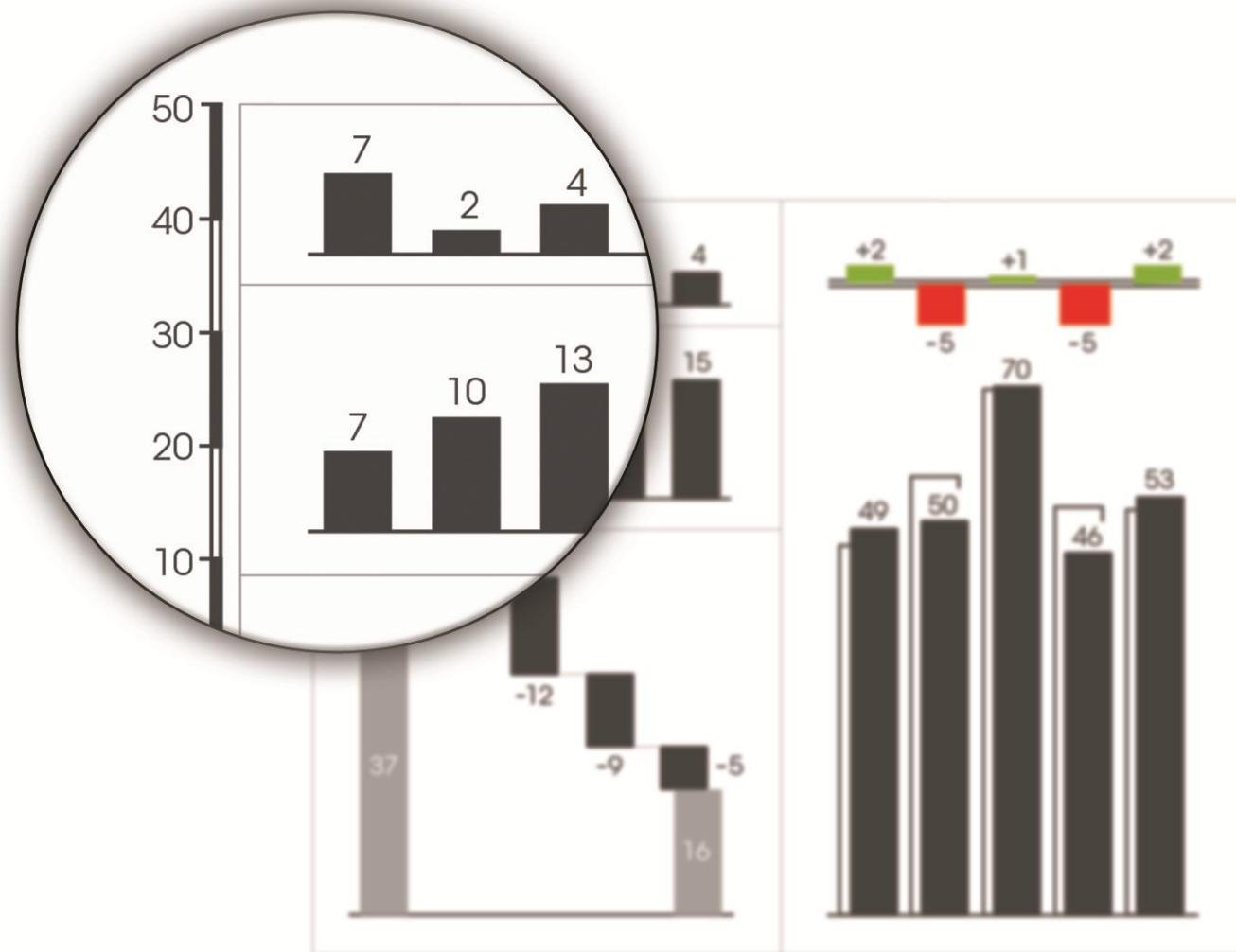
7.- Escenarios: hay que usar color oscuro sólido para los datos del ejercicio actual, el gris para el ejercicio previo, el remarcado para el presupuesto o el plan y las rayas diagonales (*hatched*) para las estimaciones.



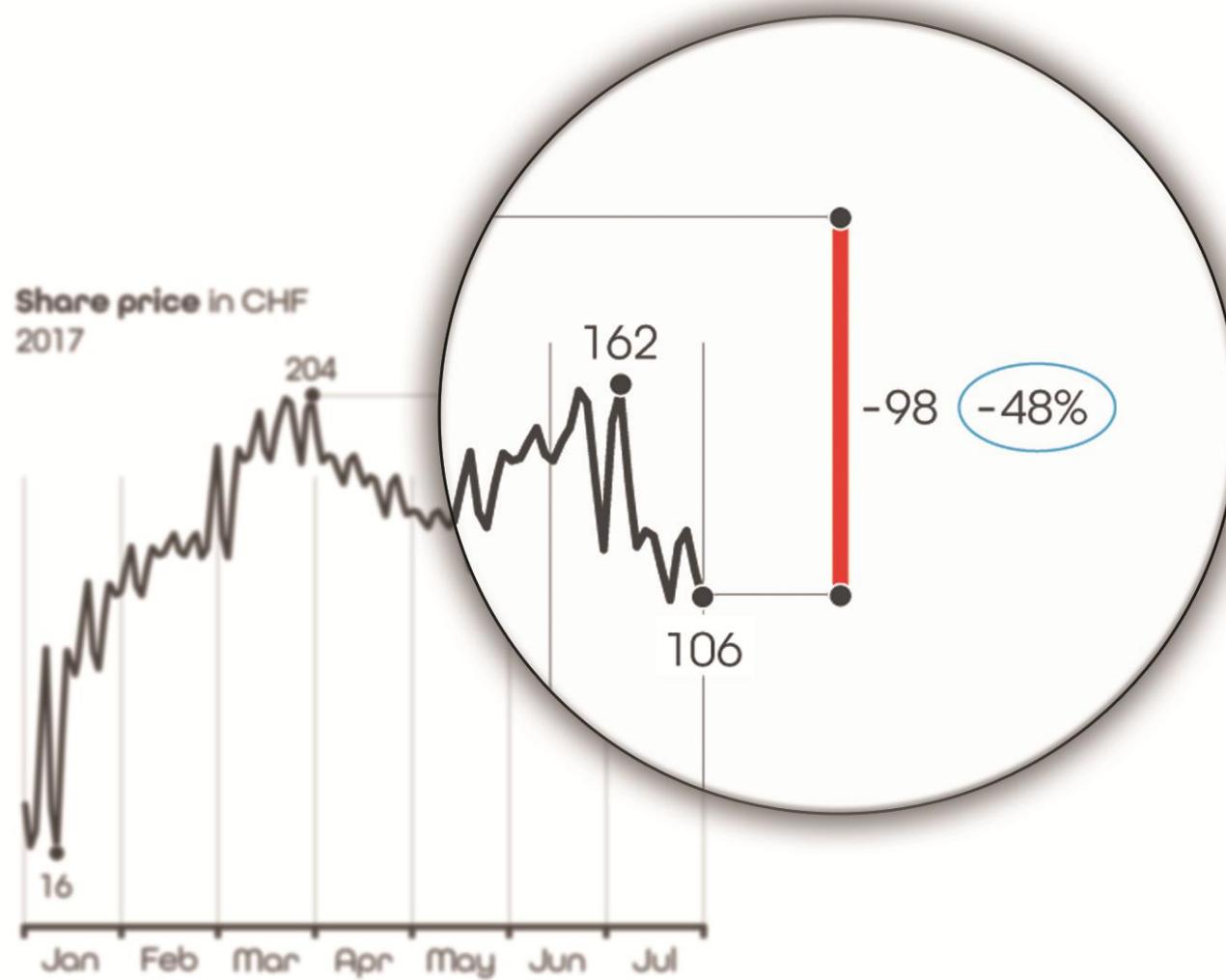
8.- Variaciones: las variaciones positivas (para un objetivo determinado) deben ir en verde y las negativas en rojo.



## 9.- Escala: las escalas deben ser correctas y homogéneas.



## 10.- Remarcar.

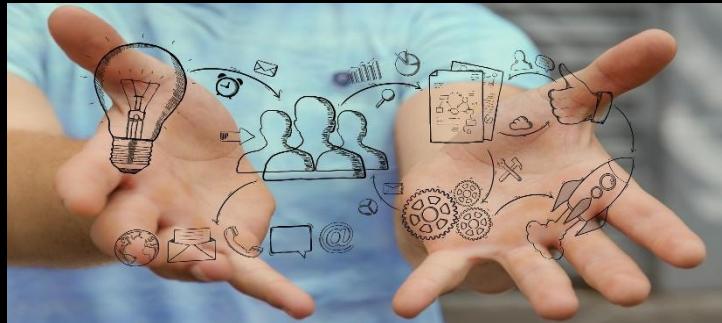


## **4.- How to? Method: SUCCESS**

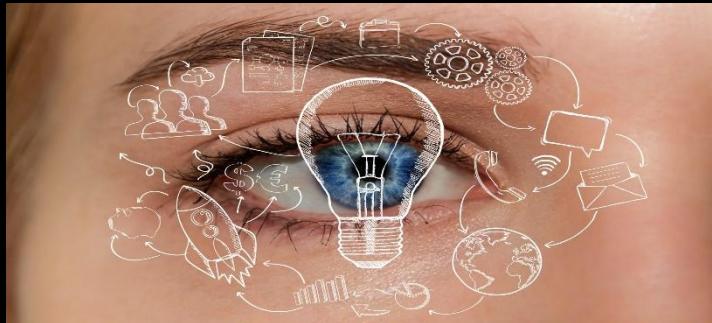
**ibcs®** INTERNATIONAL  
BUSINESS  
COMMUNICATION  
**STANDARDS**



## Conceptual rules



## Perceptual rules



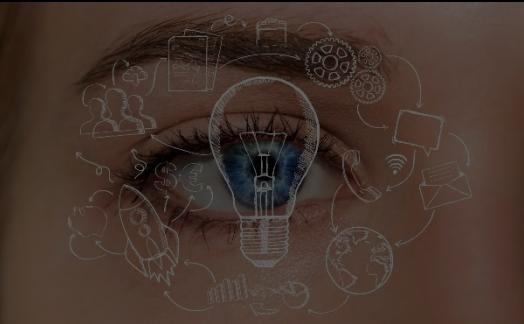
## Semantic rules



Conceptual  
rules



Perceptual  
rules



Semantic  
rules



**SAY**

**STRUCTURE**

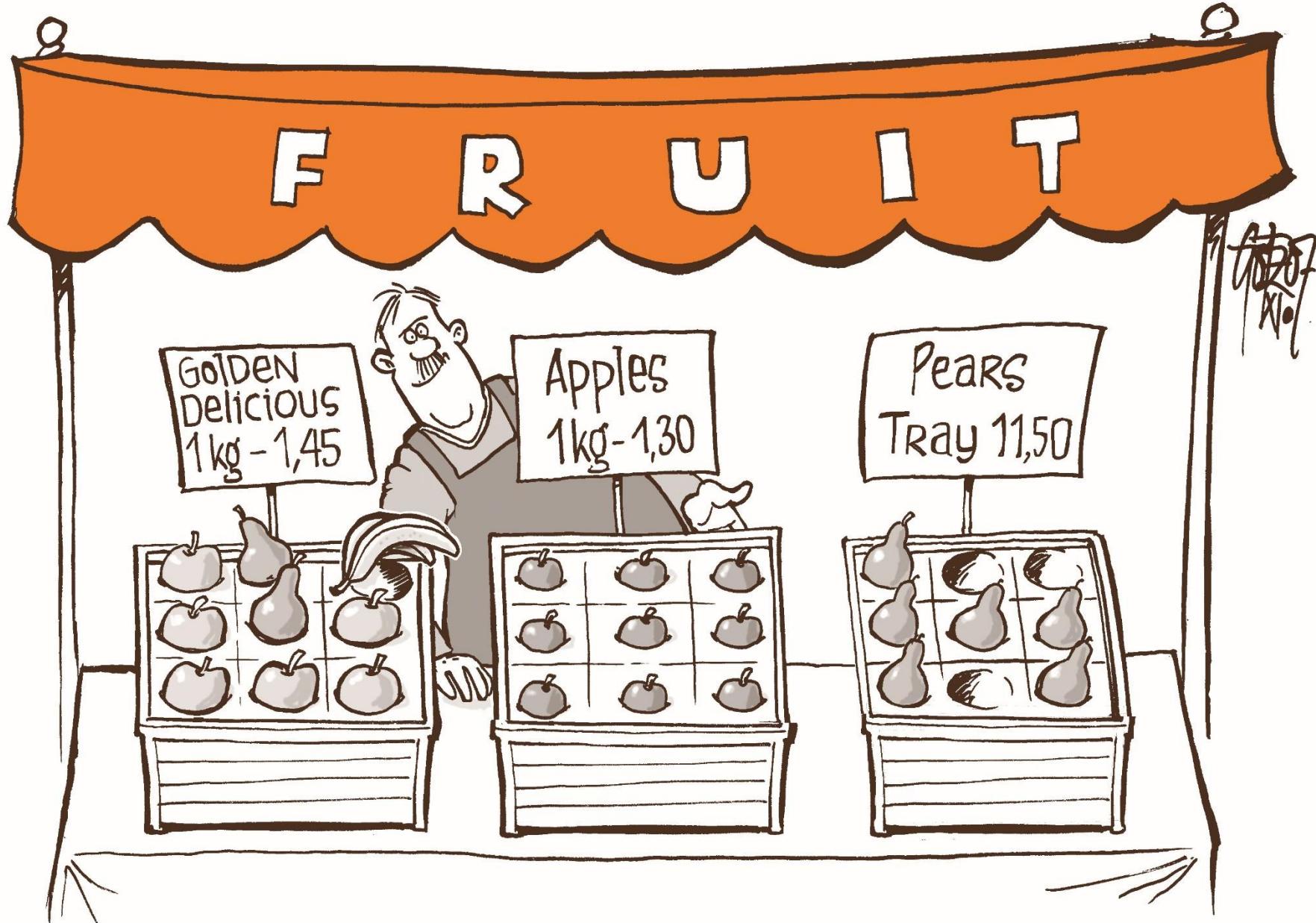
**CONDENSE**  
**CHECK**  
**EXPRESS**  
**SIMPLIFY**

**UNIFY**

**SAY** Convey a message

**SAY** Convey a message

**STRUCTURE** Organize content



NOT UNIFORM - NOT MUTUALLY EXCLUSIVE - NOT EXHAUSTIVE

# Conceptual rules



SAY

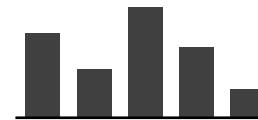
EXPRESS Choose proper visualization

STRUCTURE

## Time series

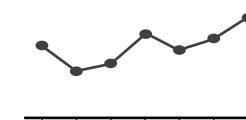
### Columns

Few data points



### Lines and areas

Many data points



## Structures

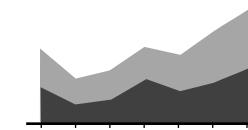
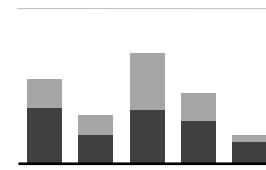
### Bars

Structural comparisons



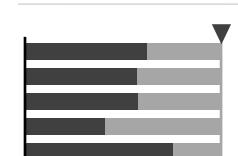
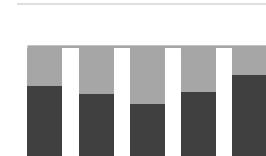
### Single

One-dimensional analyses



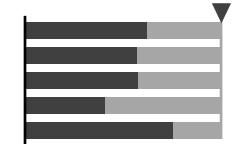
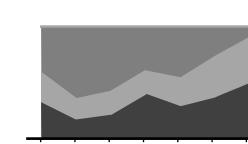
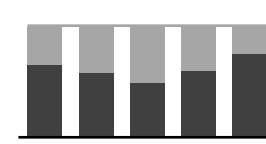
### Stacked

Accumulated items



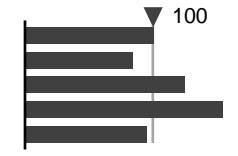
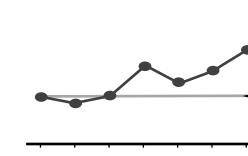
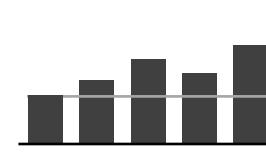
### Normalized

Part to whole analyses



### Indexed

Comparing growth rates



### Waterfall

Contributions to growth (columns) or calculations (bars)



## Time series

### Columns (cont.)



### Lines and areas (cont.)



## Structures

### Bars (cont.)

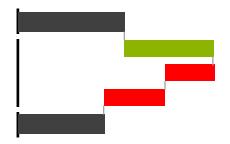
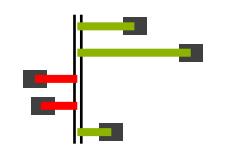
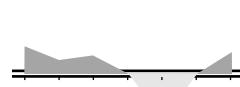


**Grouped**  
Comparisons

**Red and green**  
Absolute variances

**Red and green pins**  
Relative variances

**Red and green waterfall**  
Contributions  
to variance



# Conceptual rules



**SAY**

**STRUCTURE**

**EXPRESS** Choose proper visualization

**SIMPLIFY** Avoid clutter



Henkel

A Brand like a friend

## Development of Net Working Capital

NWC/sales ratio in %

Henkel\_German\_Steinebach\_few columns

19.6

17.4

14.1

13.3

11.5

11.4

2003

2004

2005

2006

2007

2008

→ NWC stabilized on low PY level

1

2

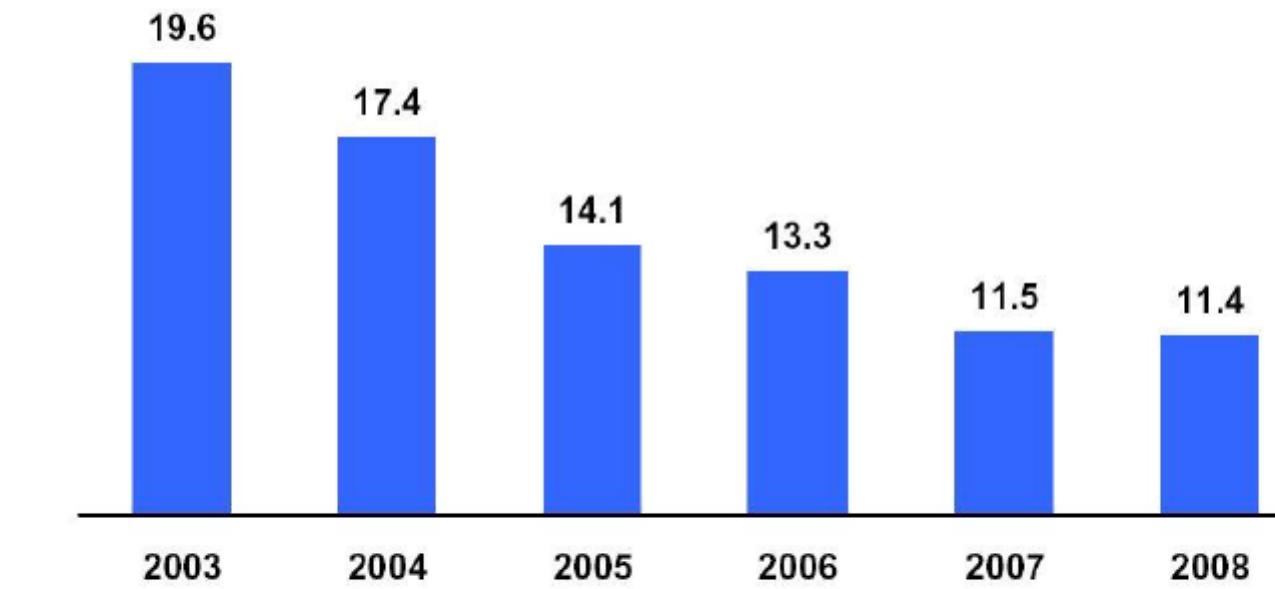
3

4

FY 2008 Key Financials

36

### NWC/sales ratio in %



1

2

3

4

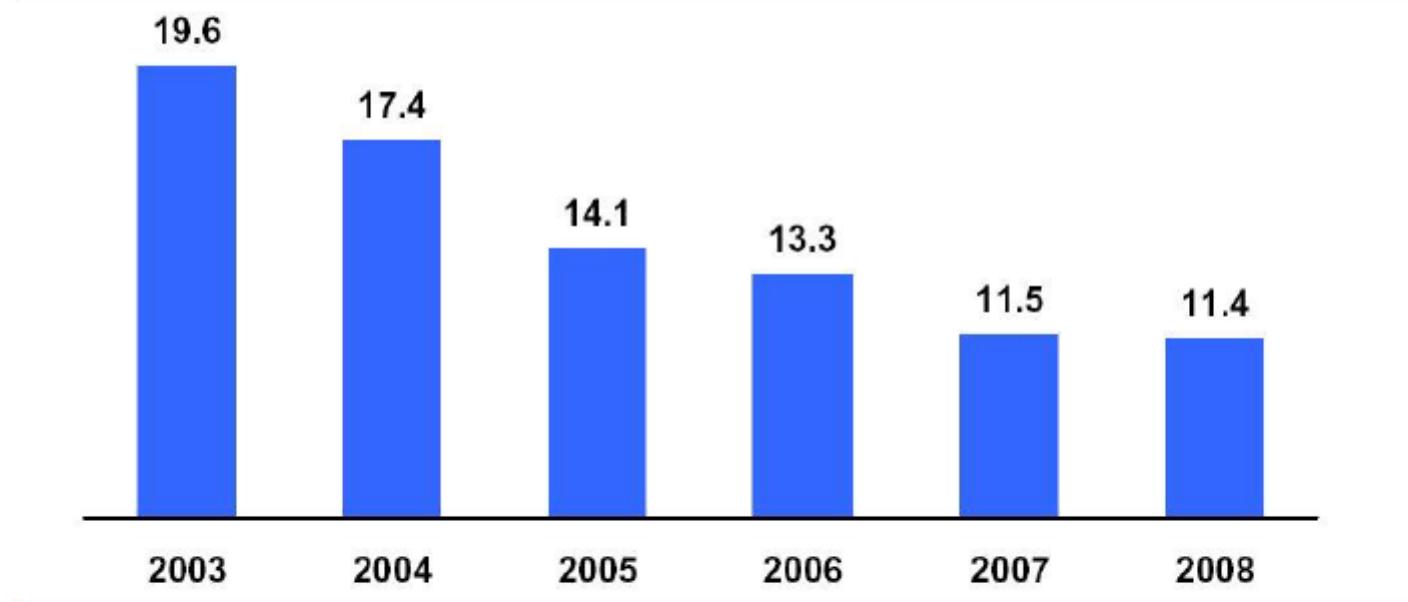
FY 2008 Key Financials

36

## We reduced the Net Working Capital per Sales



NWC/sales ratio in %



1

2

3

4

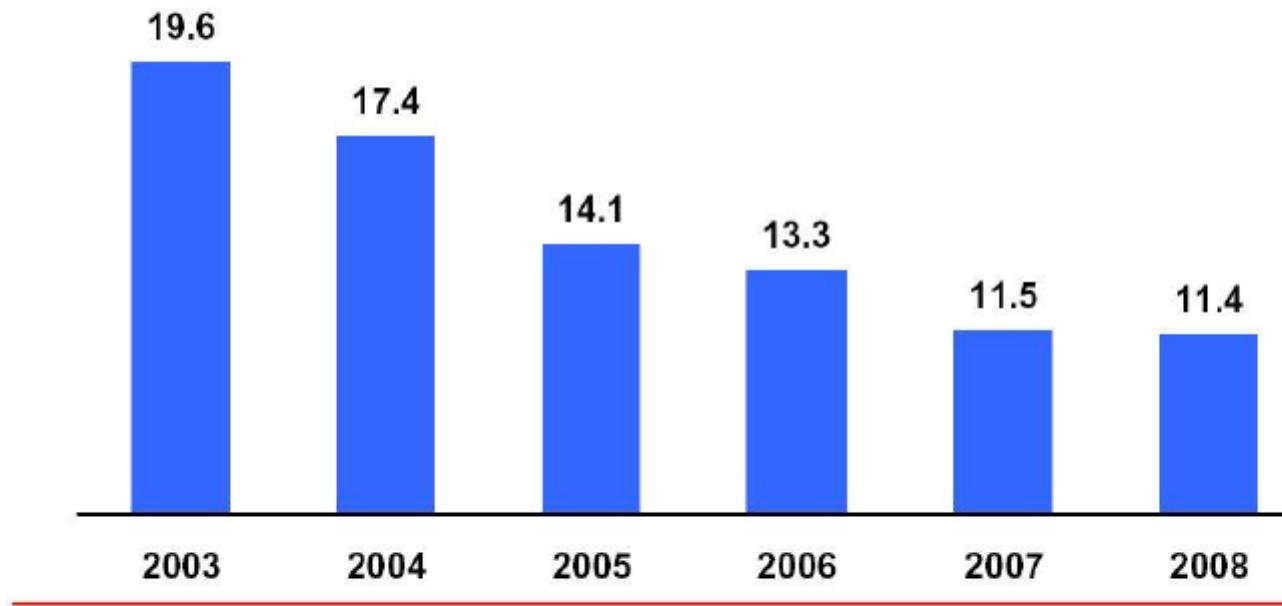
FY 2008 Key Financials

36

## We reduced the Net Working Capital per Sales



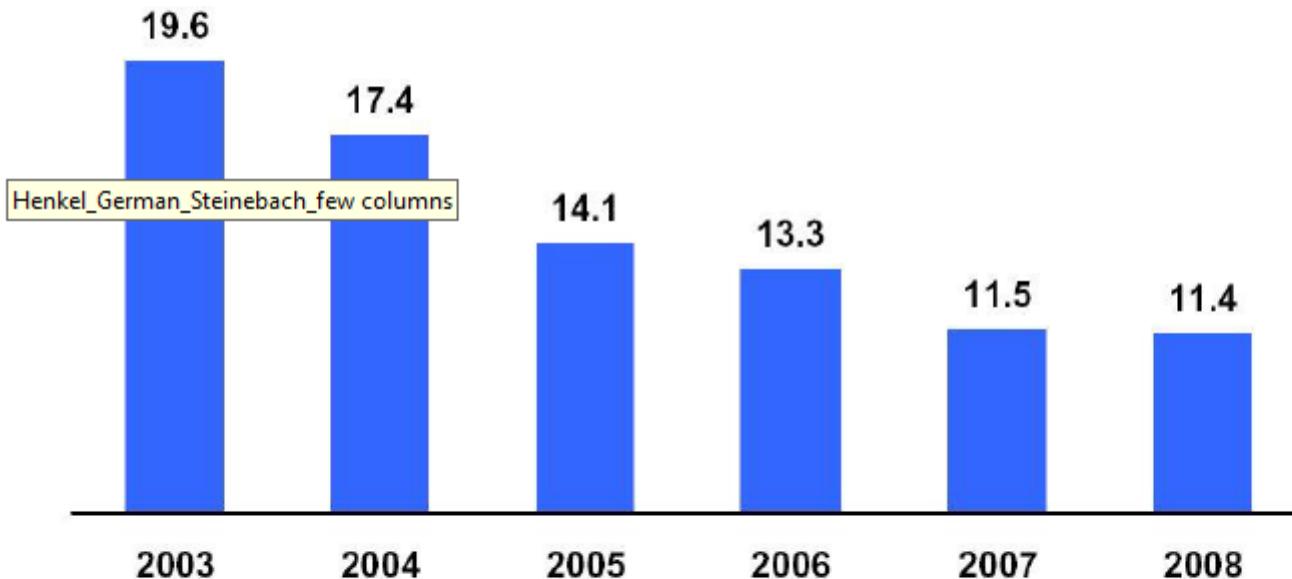
Net Working Capital per Sales in %  
2003..2008



## We reduced the Net Working Capital per Sales

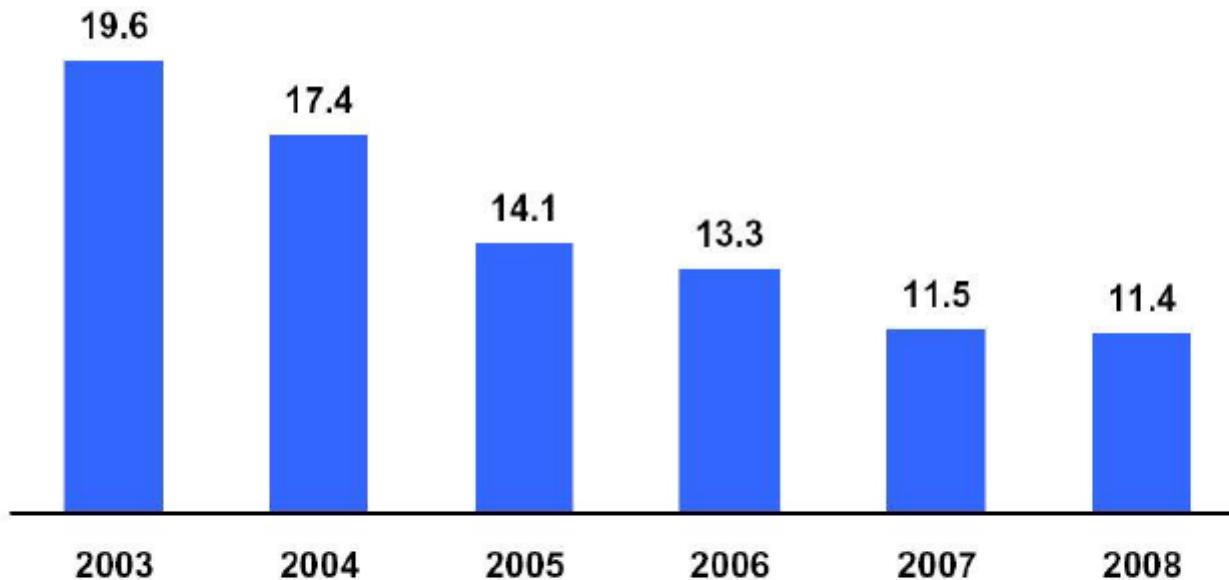


Net Working Capital per Sales in %  
2003..2008



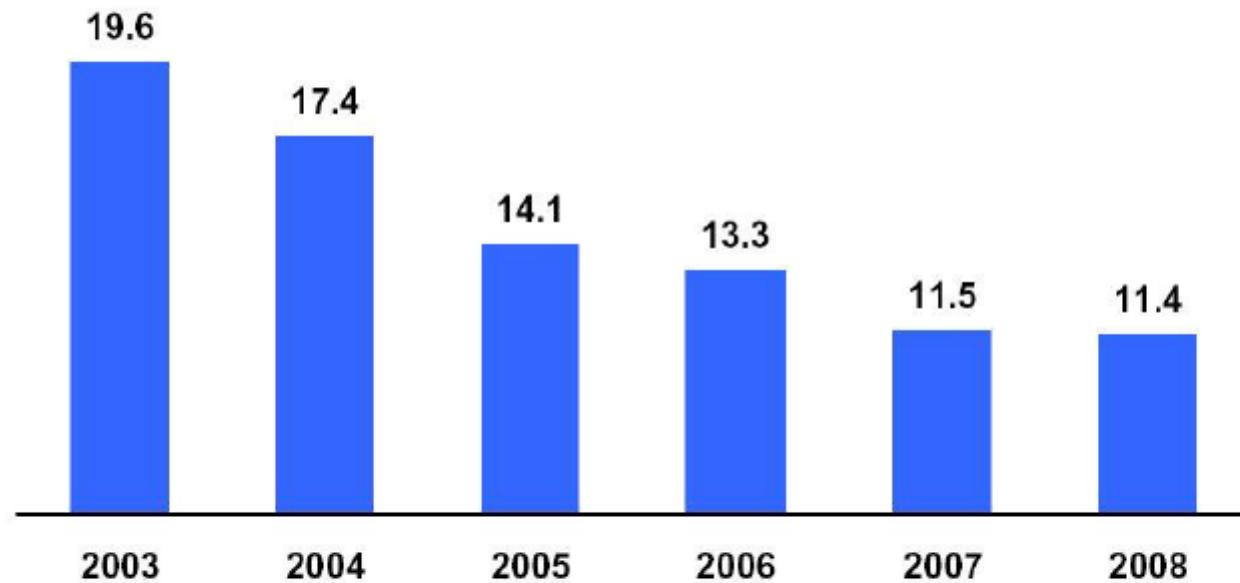
## We reduced the Net Working Capital per Sales

Net Working Capital per Sales in %  
2003..2008



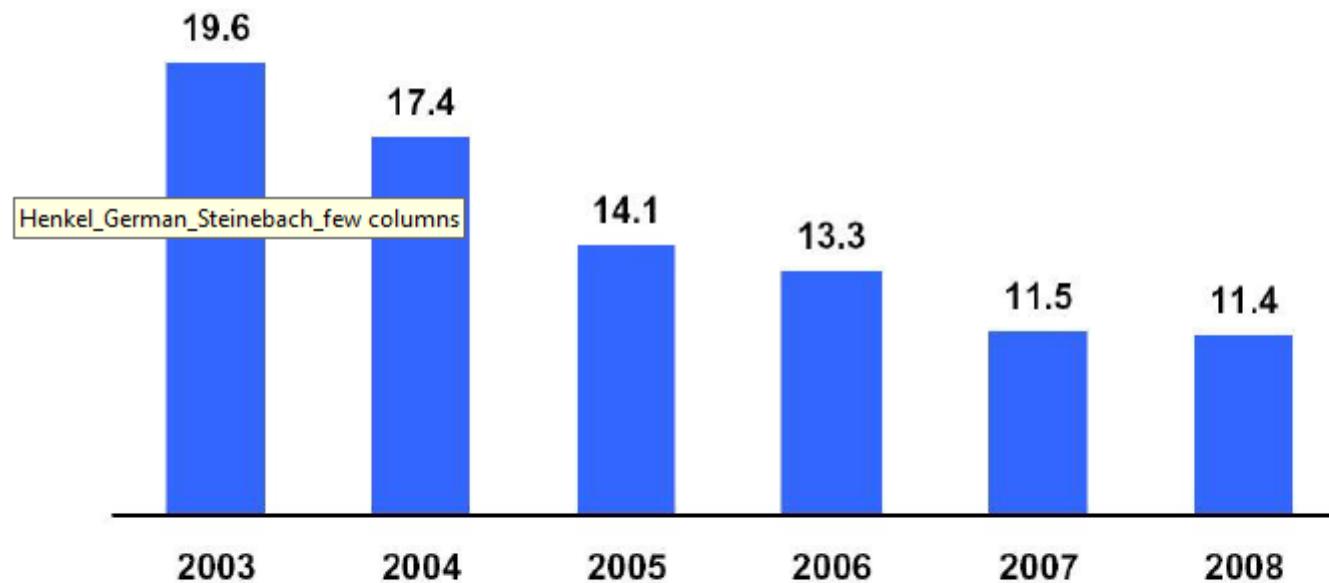
## We reduced the Net Working Capital per Sales

Net Working Capital per Sales in %  
2003..2008



## We reduced the Net Working Capital per Sales

Henkel AG  
Net Working Capital per Sales in %  
2003..2008

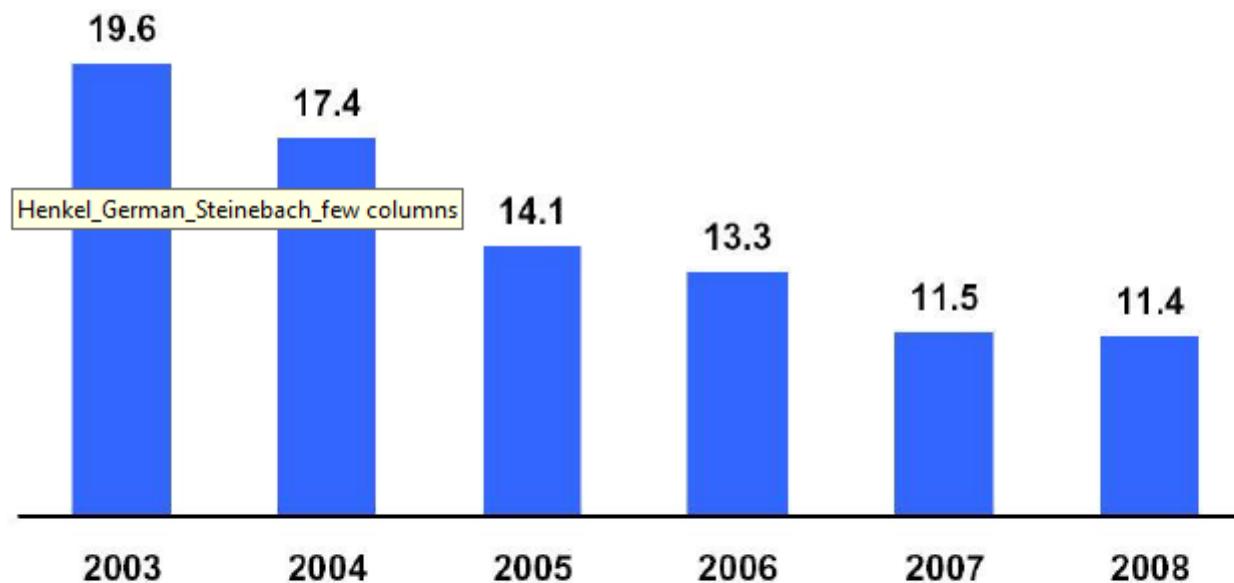


## We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

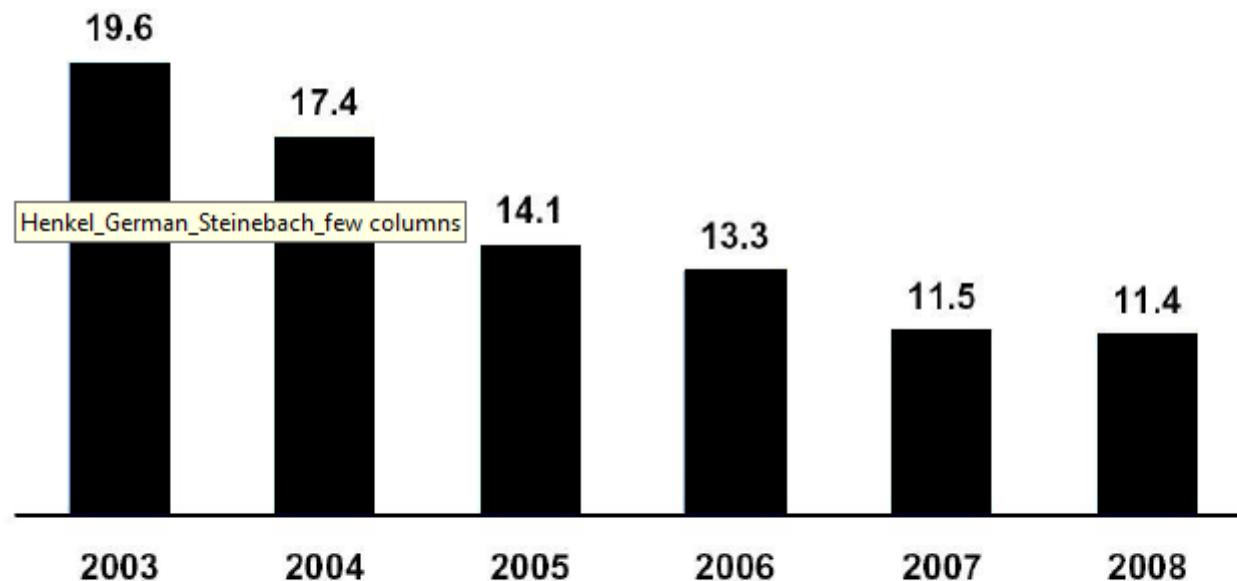
2003..2008



## We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %  
2003..2008



# Conceptual rules



**SAY**

**C**ONDENSE Increase information density

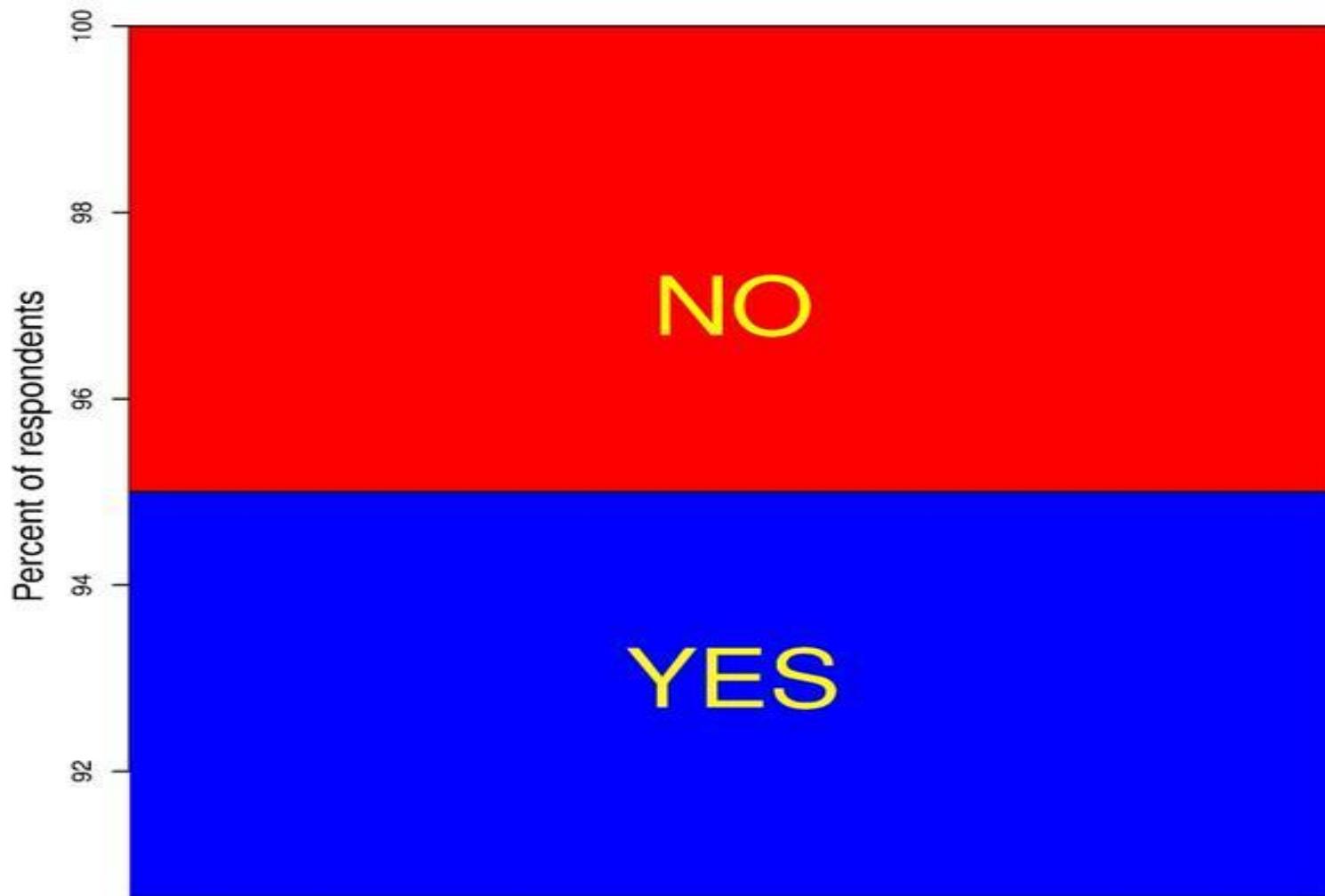
**C**HECK Ensure visual integrity

**E**XPRESS Choose proper visualization

**S**IMPLIFY Avoid clutter

**S**TRUCTURE

## Is truncating the Y-axis dishonest?

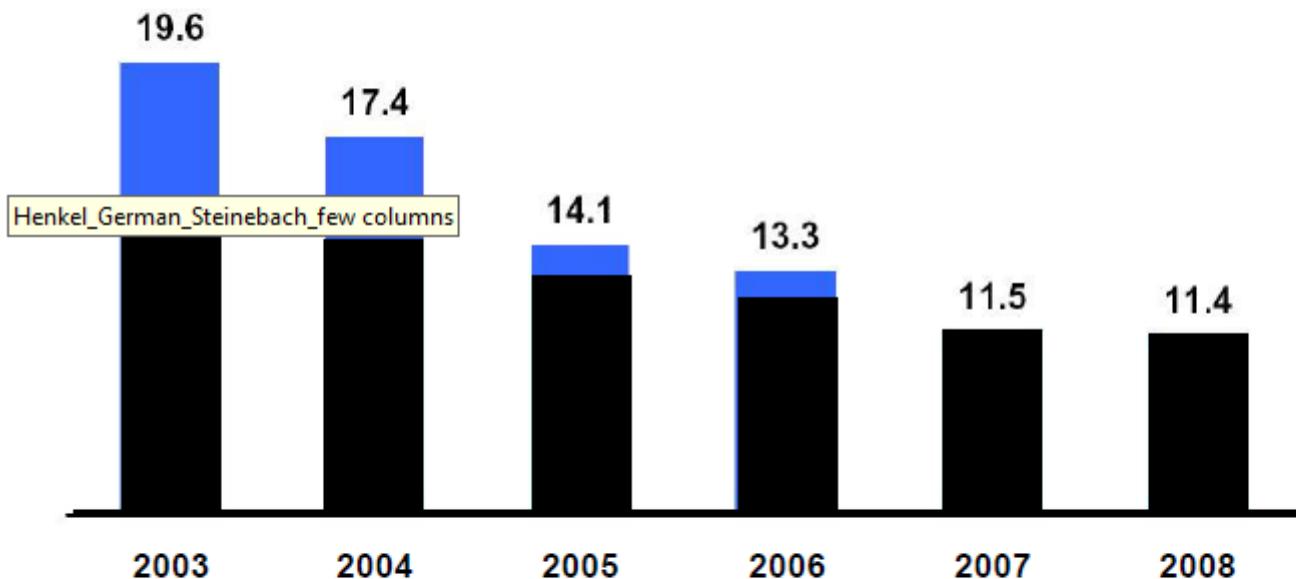


## We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

2003..2008

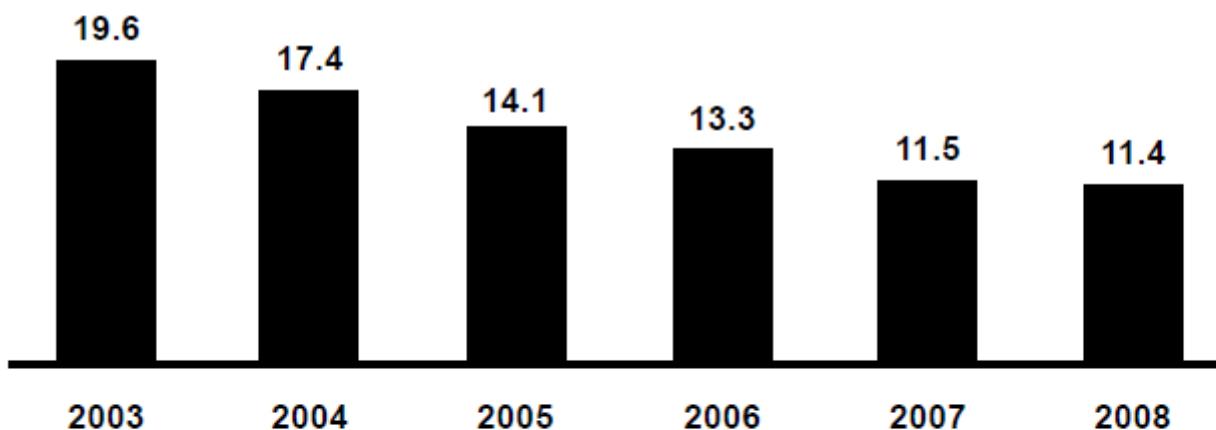


## We reduced the Net Working Capital per Sales

Henkel AG

**Net Working Capital per Sales in %**

2003..2008



# Conceptual rules



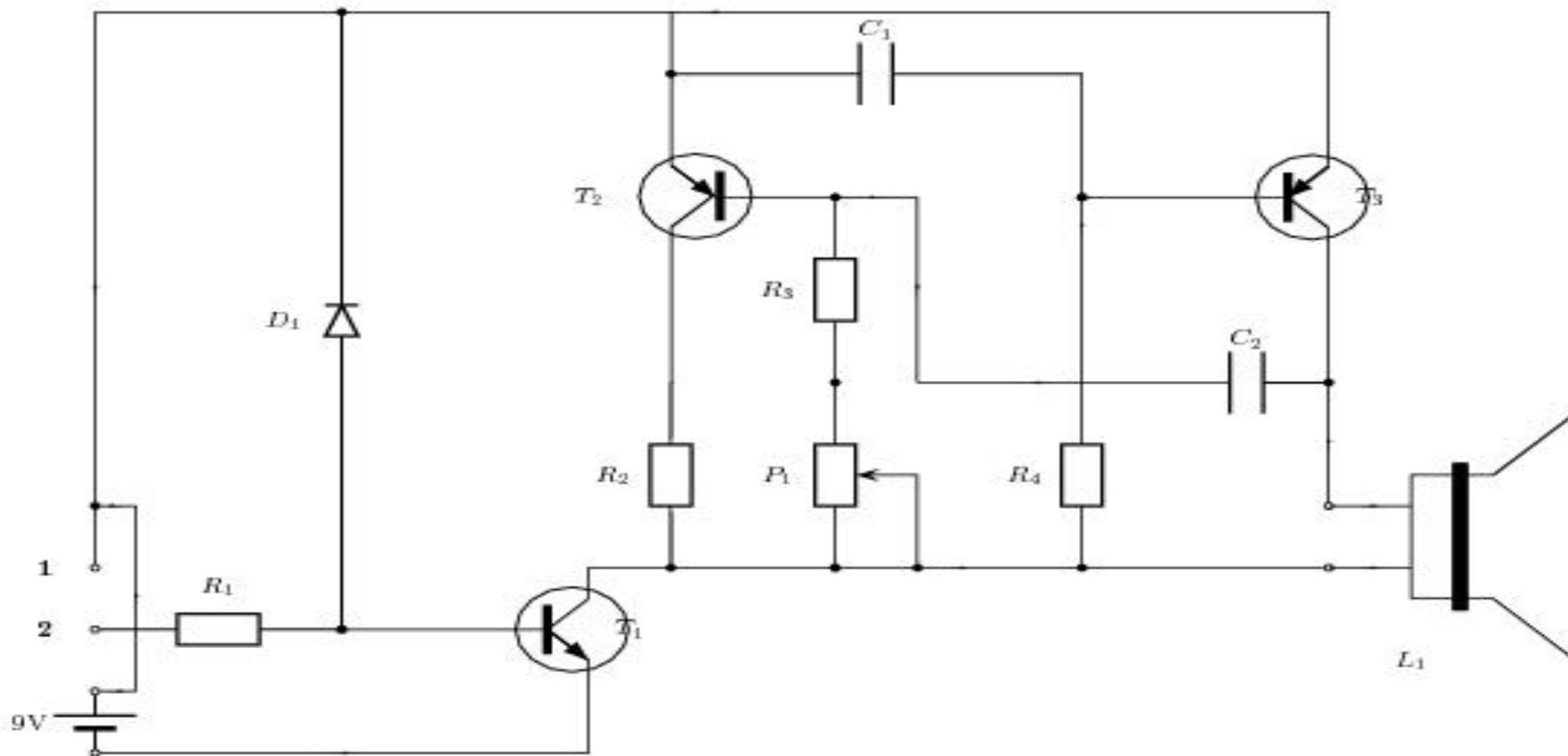
**SAY**

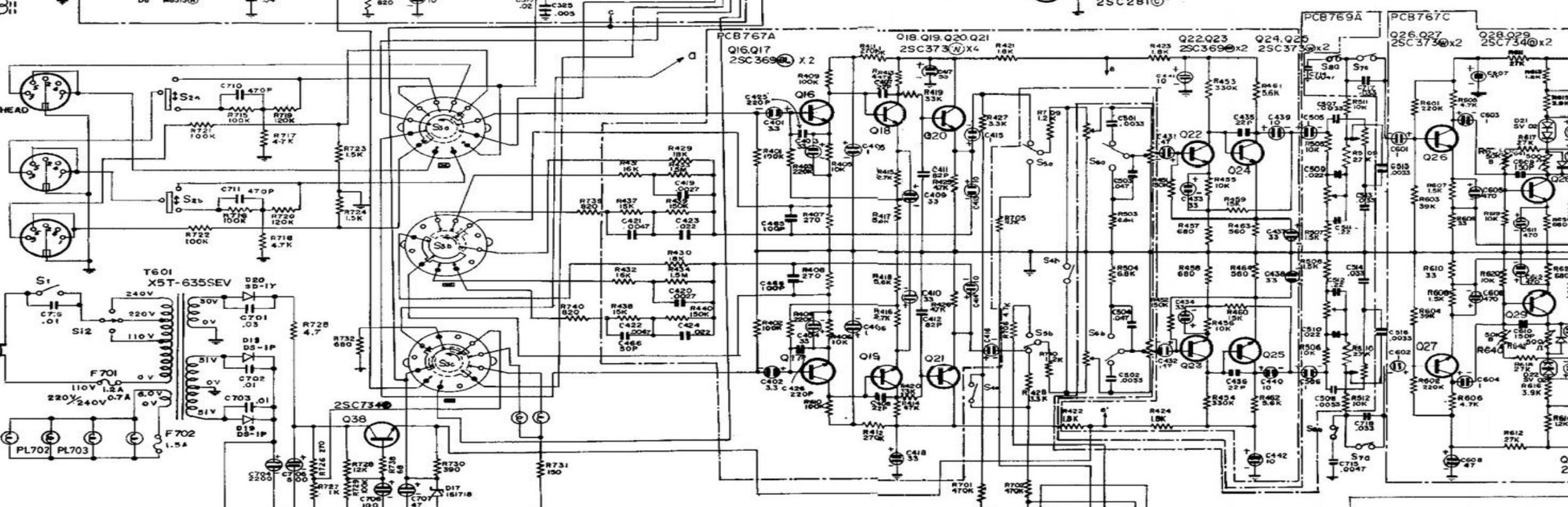
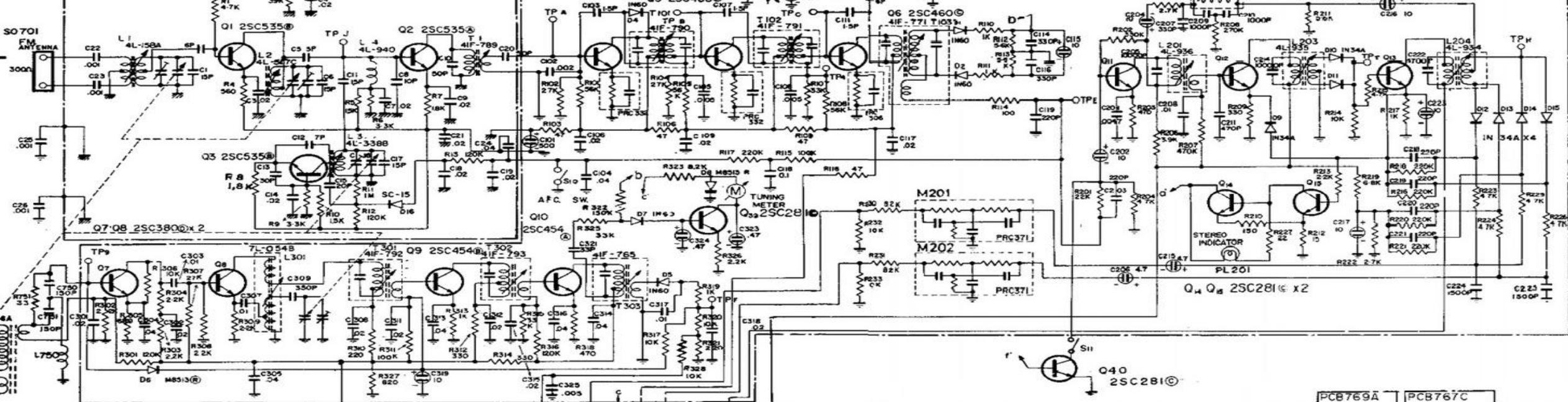
**CONDENSE** Increase information density

**EXPRESS** Choose proper visualization

**SIMPLIFY** Avoid clutter

**STRUCTURE**



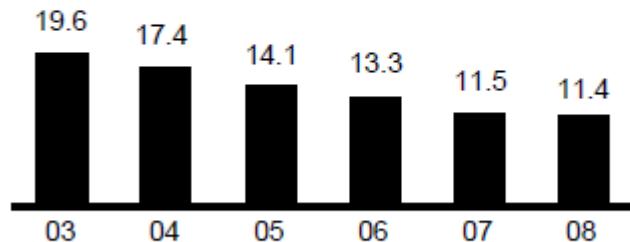


## We reduced the Net Working Capital per Sales

Henkel AG

**Net Working Capital per Sales** in %

2003..2008

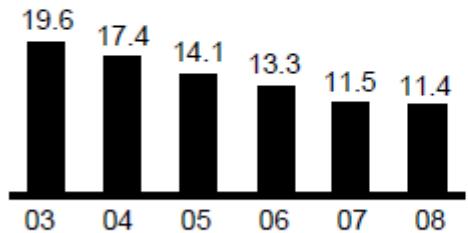


## We reduced the Net Working Capital per Sales

Henkel AG

**Net Working Capital per Sales in %**

2003..2008

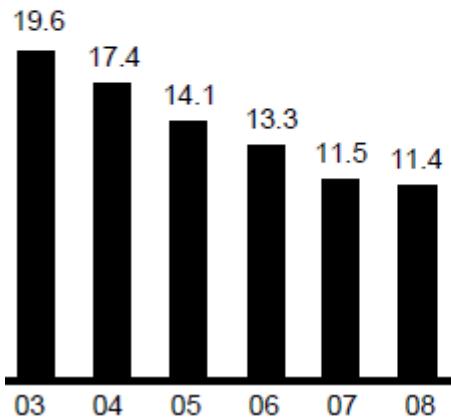


## We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

2003..2008

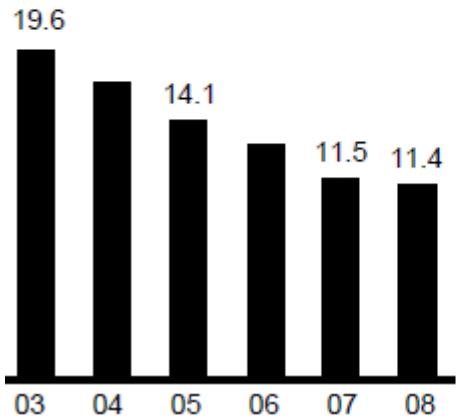


## We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

2003..2008

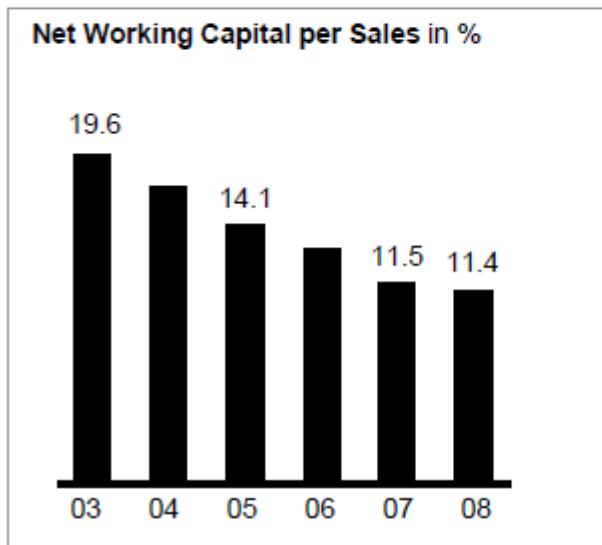


We reduced the Net Working Capital per Sales

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Henkel AG

2003..2008

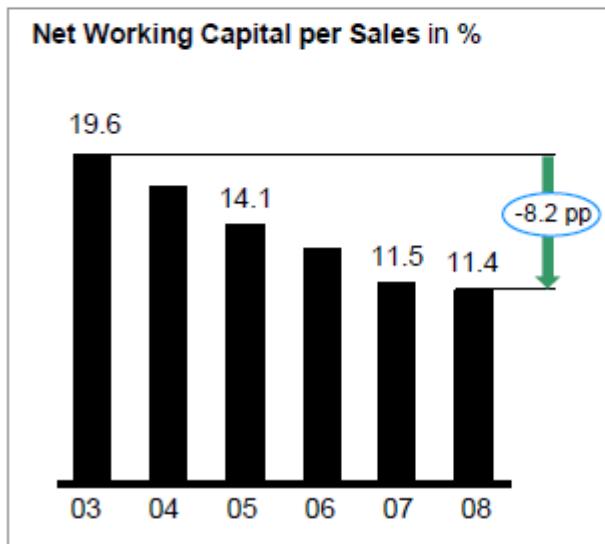


We reduced the Net Working Capital per Sales by 8.2 pp...

---

Henkel AG

2003..2008



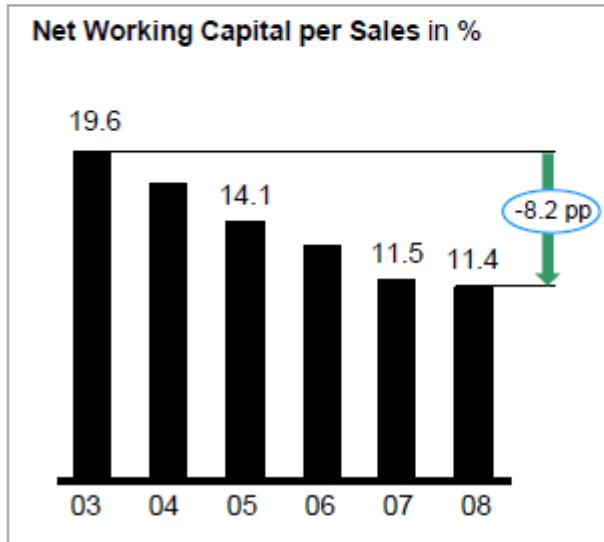
We reduced the Net Working Capital per Sales by 8.2 pp,  
we achieved this by reduced Net Working Capital...

---

Henkel AG

**Calculation of Net Working Capital**

2003..2008

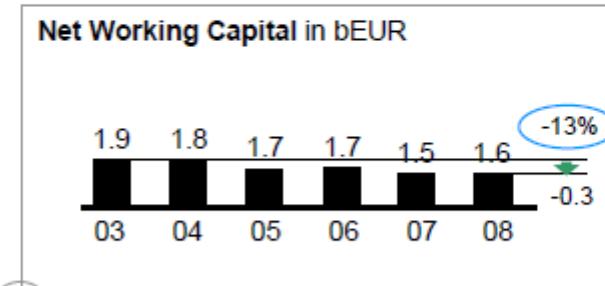
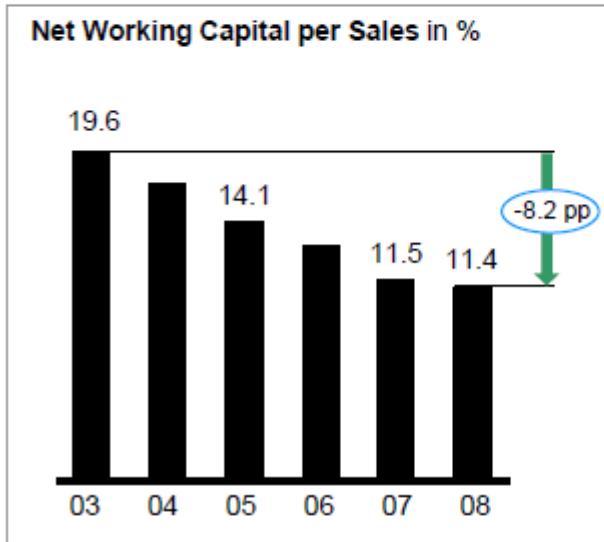


We reduced the Net Working Capital per Sales by 8.2 pp,  
we achieved this by reduced Net Working Capital (-0.3)...

Henkel AG

**Calculation of Net Working Capital**

2003..2008



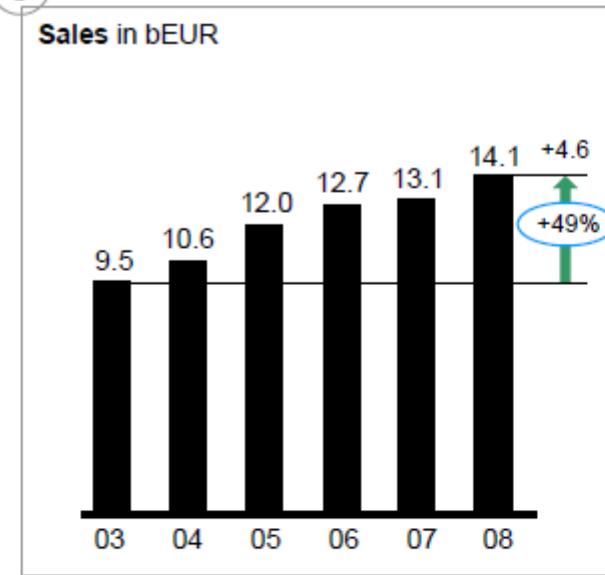
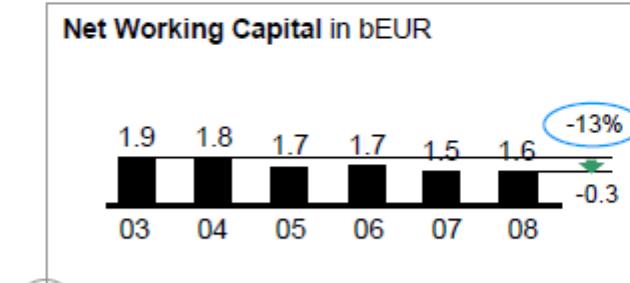
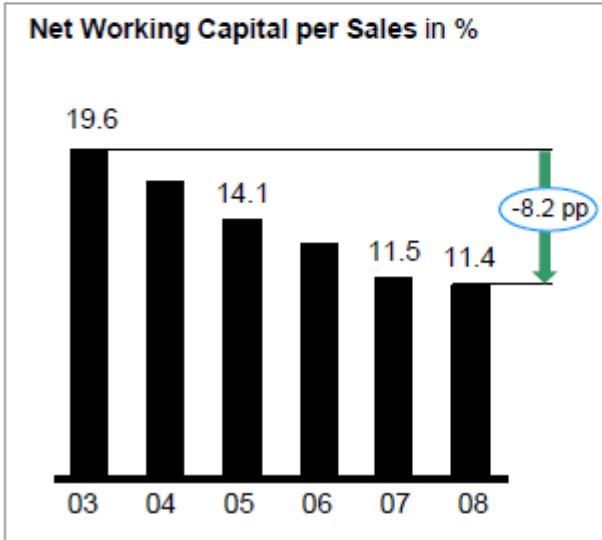
We reduced the Net Working Capital per Sales by 8.2 pp,  
we achieved this by reduced Net Working Capital (-0.3) and growing sales (+4.6)



Henkel AG

### Calculation of Net Working Capital

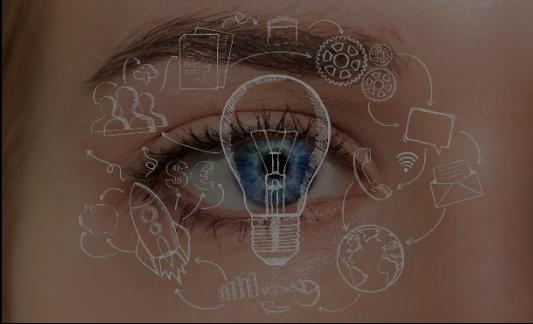
2003..2008



Conceptual  
rules



Perceptual  
rules



**SAY**

**STRUCTURE**

**CONDENSE**  
**CHECK**  
**EXPRESS**  
**SIMPLIFY**

**UNIFY** Apply  
semantic  
notation

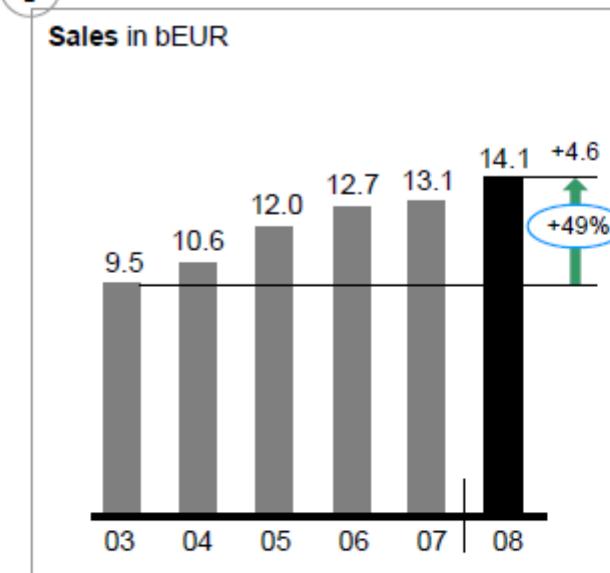
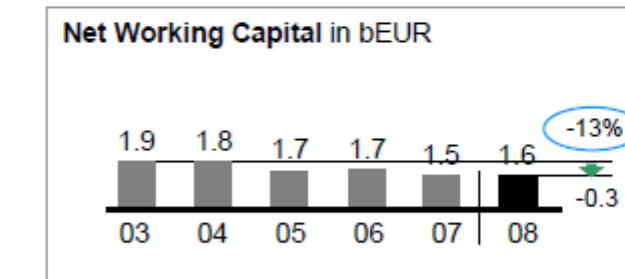
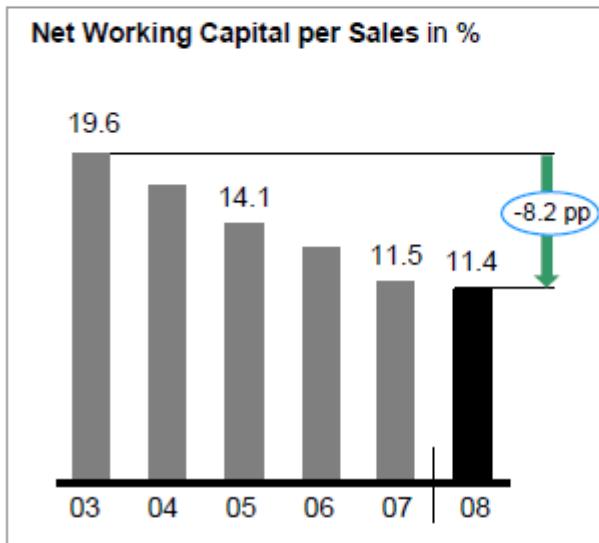
We reduced the Net Working Capital per Sales by 8.2 pp,  
we achieved this by reduced Net Working Capital (-0.3) and growing sales (+4.6)

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Henkel AG

### Calculation of Net Working Capital

2003..2008



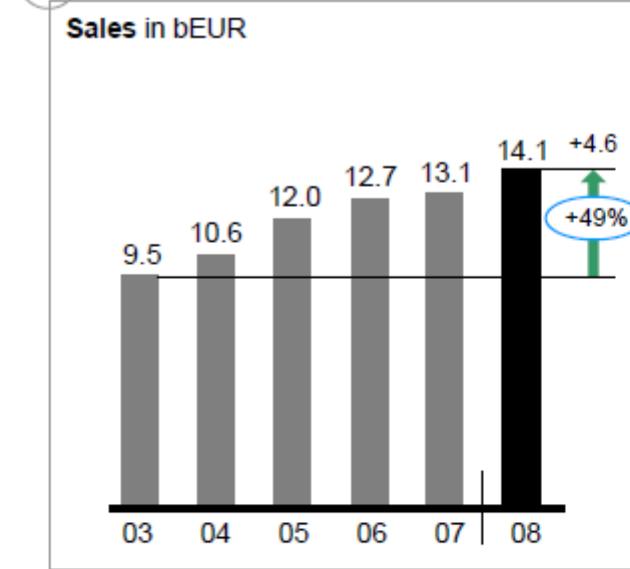
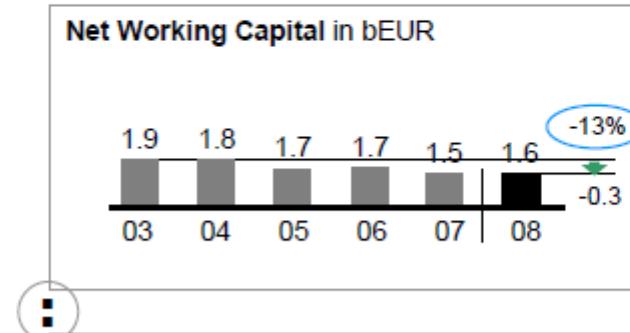
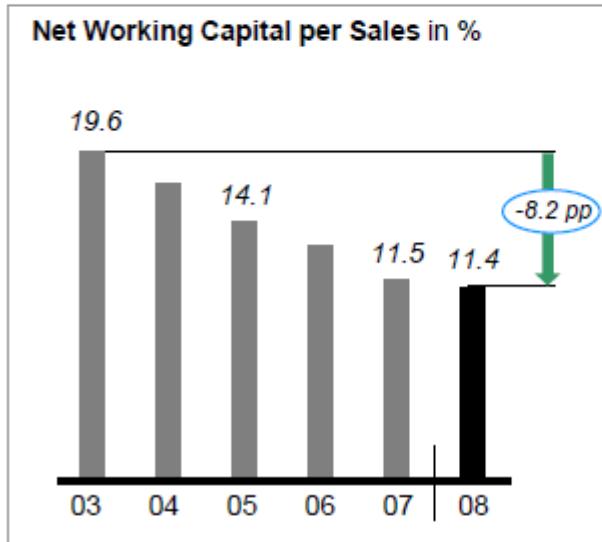
We reduced the Net Working Capital per Sales by 8.2 pp,  
we achieved this by reduced Net Working Capital (-0.3) and growing sales (+4.6)

---

Henkel AG

**Calculation of Net Working Capital**

2003..2008



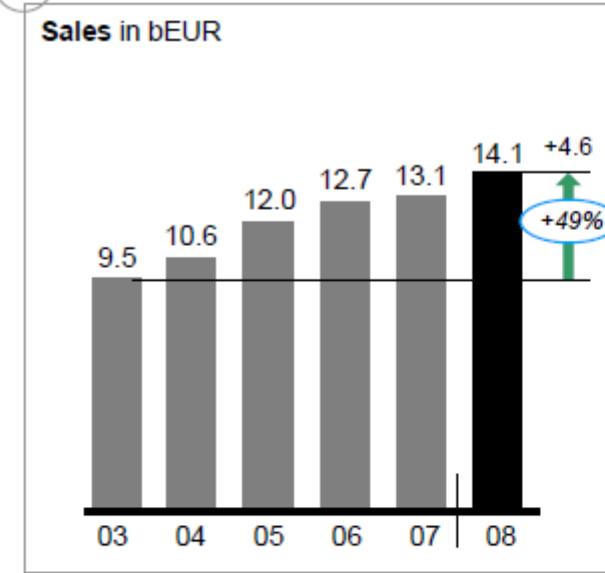
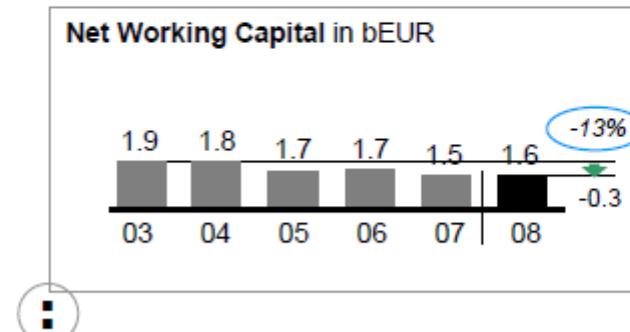
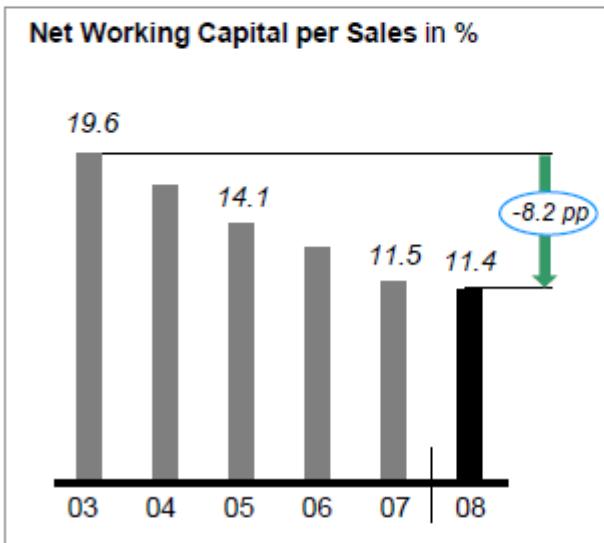
We reduced the Net Working Capital per Sales by 8.2 pp,  
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---

Henkel AG

**Calculation of Net Working Capital**

2003..2008

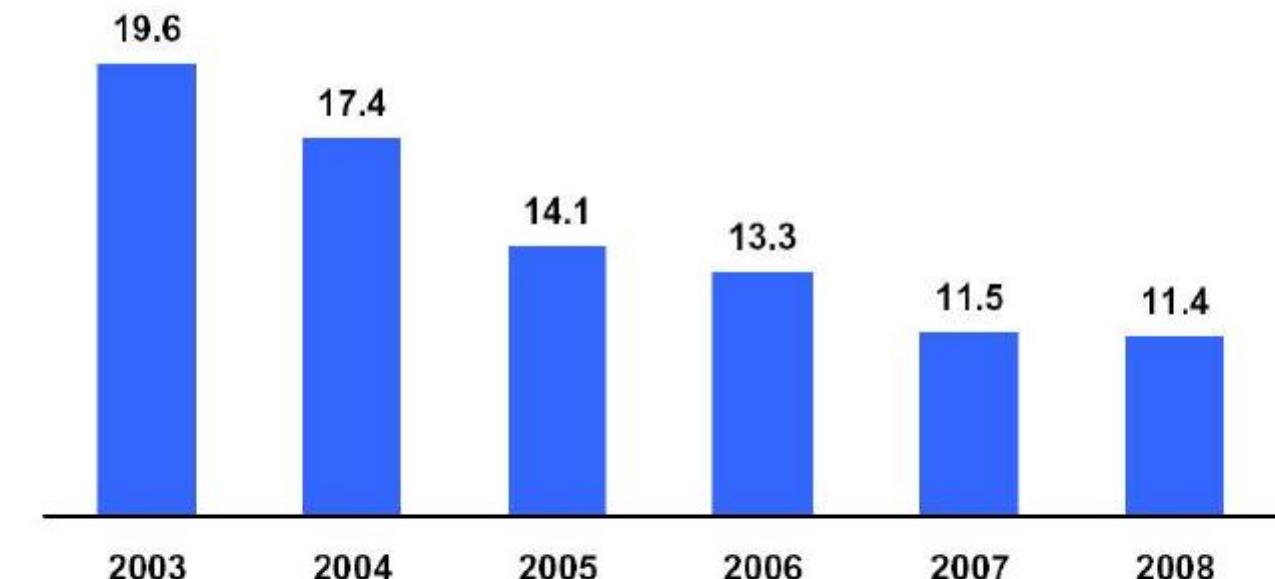




## Development of Net Working Capital

**Henkel**  
*A Brand like a Friend*

NWC/sales ratio in %



→ NWC stabilized on low PY level

1

2

3

4

FY 2008 Key Financials

36

## 5.- Show me . Samples



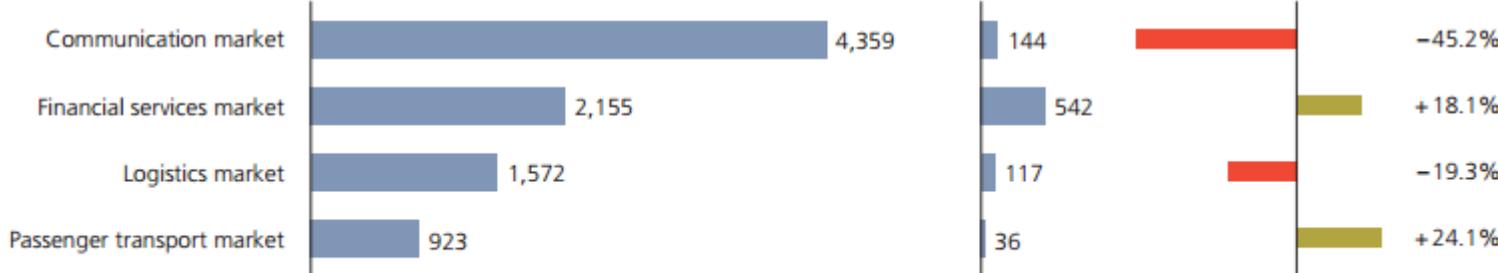
**PHILIPS**

**AMSEL**  
ASSESSORS

Fundamental structural change in core business

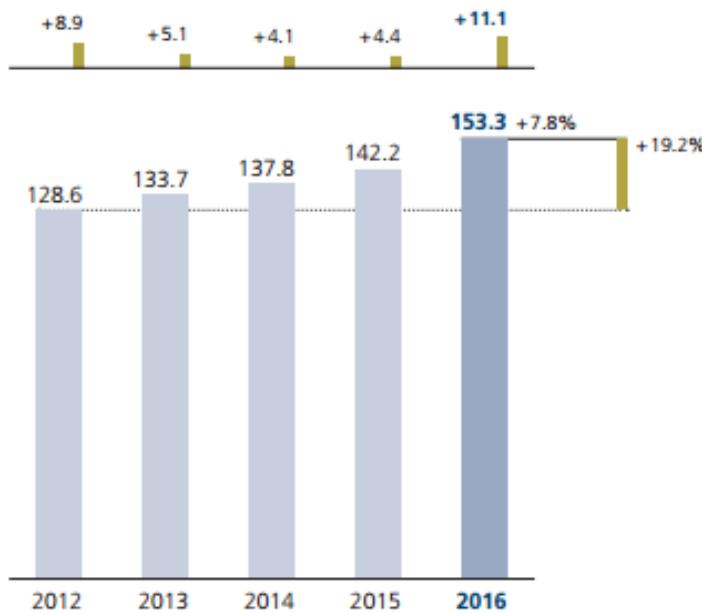
Operating income (before consolidation) in CHF million  
2016

Operating profit in CHF million  
2016



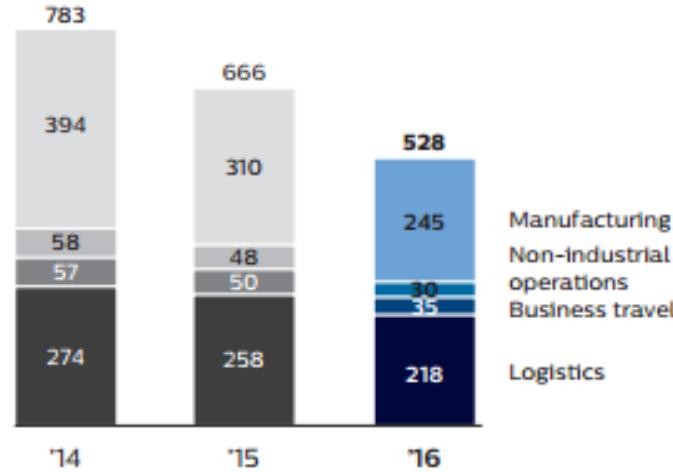
Faster expansion of services.

Passenger transport market | Kilometres covered in millions of km  
2012 to 2016  
2012 = 100%



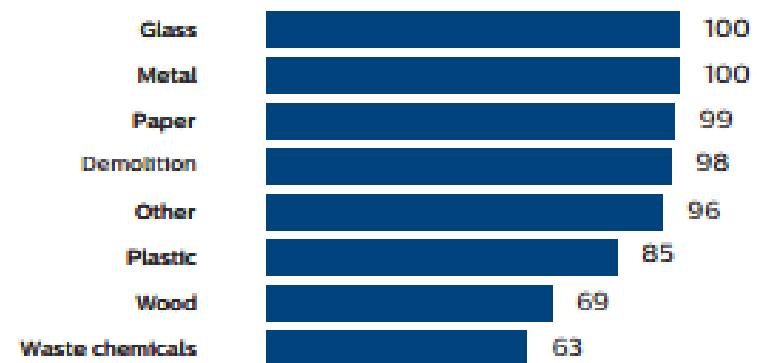
Philips Lighting  
**Operational carbon footprint in kilotonnes**  
CO<sub>2</sub>-equivalent  
2014 - 2016

---

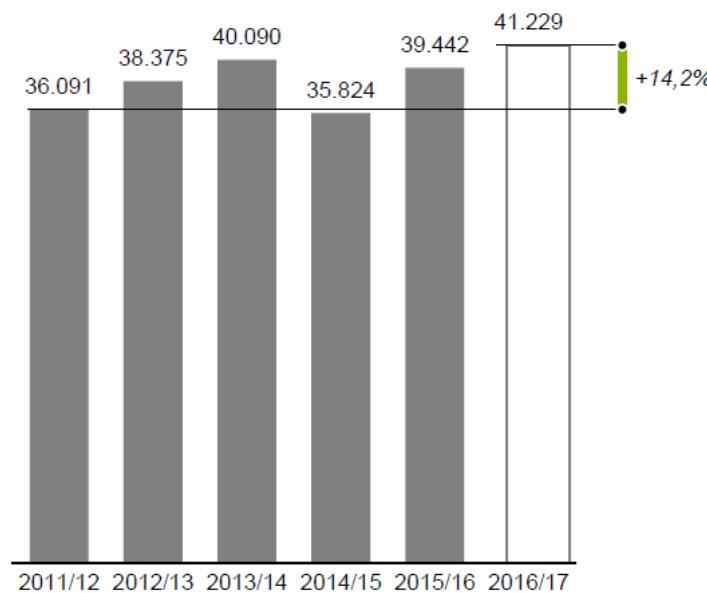


Philips Lighting  
**Industrial waste categories delivered for recycling in %**  
2016

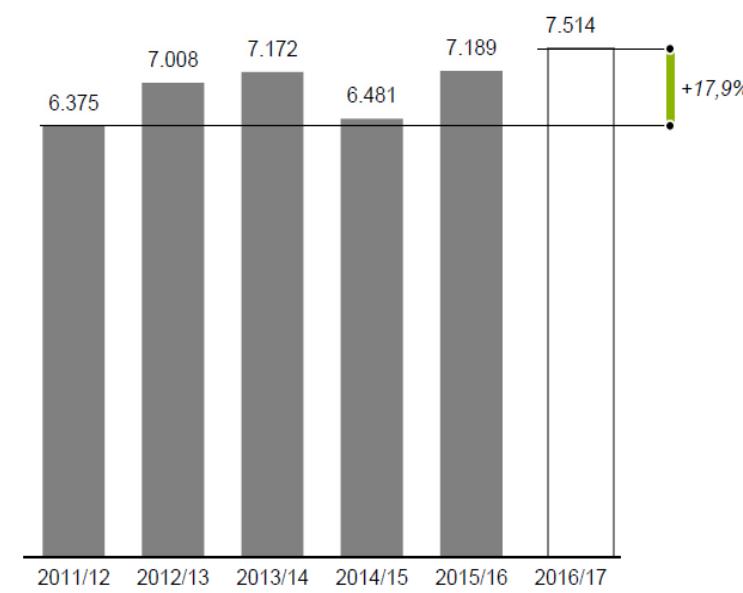
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Arrossaires del delta de l'Ebre  
**Tn d'Arròs Closca per campanya**  
2011..2017



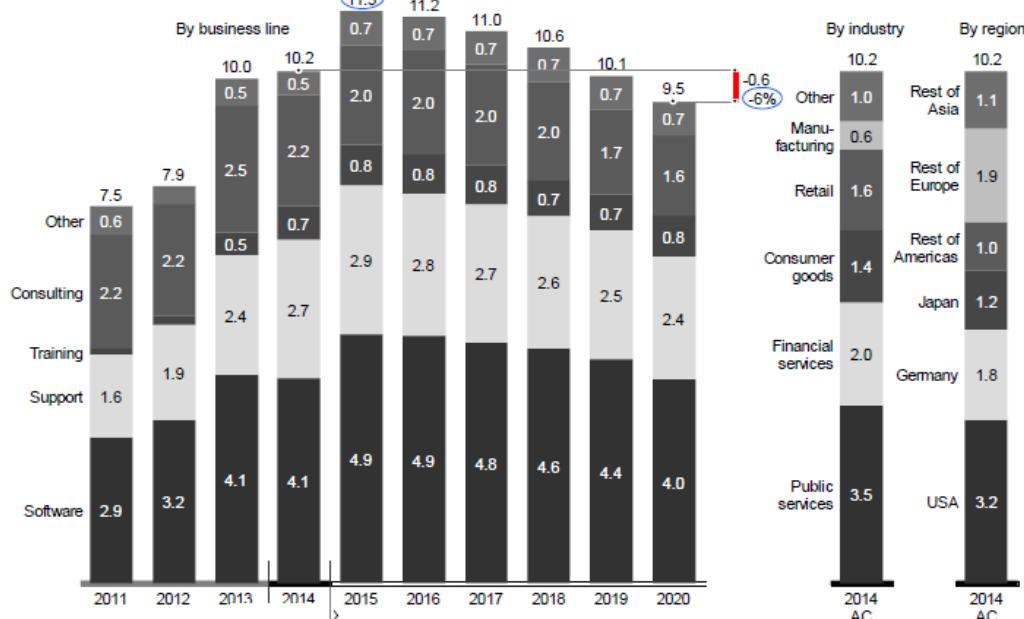
Arrossaires del delta de l'Ebre  
**Kg/Hectàrea**  
2011..2017



## 6.- Hands-on . How to? Praxis & Templates

Without new products our net sales will drop continuously until 2020  
(-6% compared to 2014) after a peak in 2015 (mEUR 11.3)

Alpha Software GmbH  
Net sales in mEUR  
2011..2014 AC, 2015..2020 PL



2016-03-21\_rh

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Worldwide we achieved net sales of mCHF 3 691,  
USA net sales (mCHF 287) presents the biggest share outside of Europe (8%)

Pharmaceutical Inc.  
Net sales in mCHF (sorted ↓)  
2014 AC

	Direct	Retail	Wholesale
Switzerland	172	136	146 454
Germany	160	135	142 437
Austria	102	188 ①	125 415
France	178	88	78 344
USA	82	96	109 ② 287 8%
UK	79	105	84 268
Poland	87	100	66 253
Spain	83	83	58 224
Rest of Europe	41	88	47 176
Portugal	61	44	12 117
Brazil	52	36	27 115
Sweden	42	42	17 101
Ireland	56	34	97
Finland	48	35	13 96
Japan	22	16	26 64
Denmark	24	21	52
South Korea	10	16	12 38
India	11	14	32
Canada	15	12	32 ③
Norway	13	22	
Rest of world	39	15	13 67
World	3 691	100%	

① Austria retail: Vienna „Golden Line“  
is mCHF 98 of mCHF 188

② USA wholesale: 50% above plan  
because of new channel partners at the  
East coast

③ Canada: 40% below plan because of the  
delayed Alpha project

2015-12-09\_rh

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The contribution margin will be below previous year during the next two months  
but we expect an average monthly growth of mEUR +7 (+4%) resp. mEUR +82 for the full year

Furniture Inc.  
**Contribution margin in mEUR**  
2015 AC, FC and ΔPY, ΔPY%

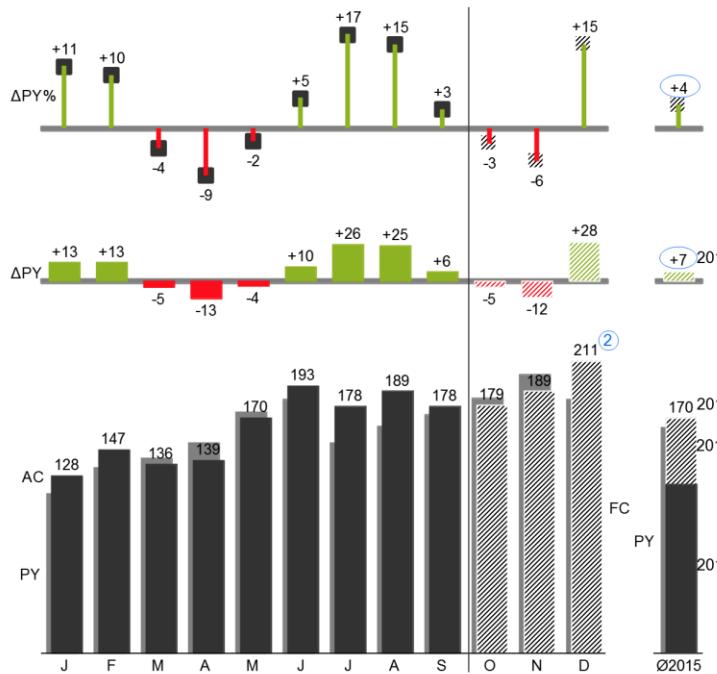


Chart template 03A



- ① **2015 Forecast:** mEUR +82 is not including the new product line F23, no currency effects are expected
- ② **Dec. Forecast:** mEUR 211 is mEUR 28 higher than last year mainly because of the additional business with Beta (mEUR 30 per month)

2015 ΔPY: +82 (=12 x 6.8) ①  
2015 AC+FC: 2 037 (=12 x 169.8)  
2015 FC: 579 of 2 037 = 28%  
2015 AC: 1 458 of 2 037 = 72%

18 states make up for 88% (mUSD 1 625) of USA net sales (mUSD 1 844), California presenting the highest variance vs. plan (mUSD +34)

Housing and Construction Inc.  
**Net sales in mUSD (sorted by ΔPL)**  
2015-Q2: AC, PL and ΔPL, ΔPL%

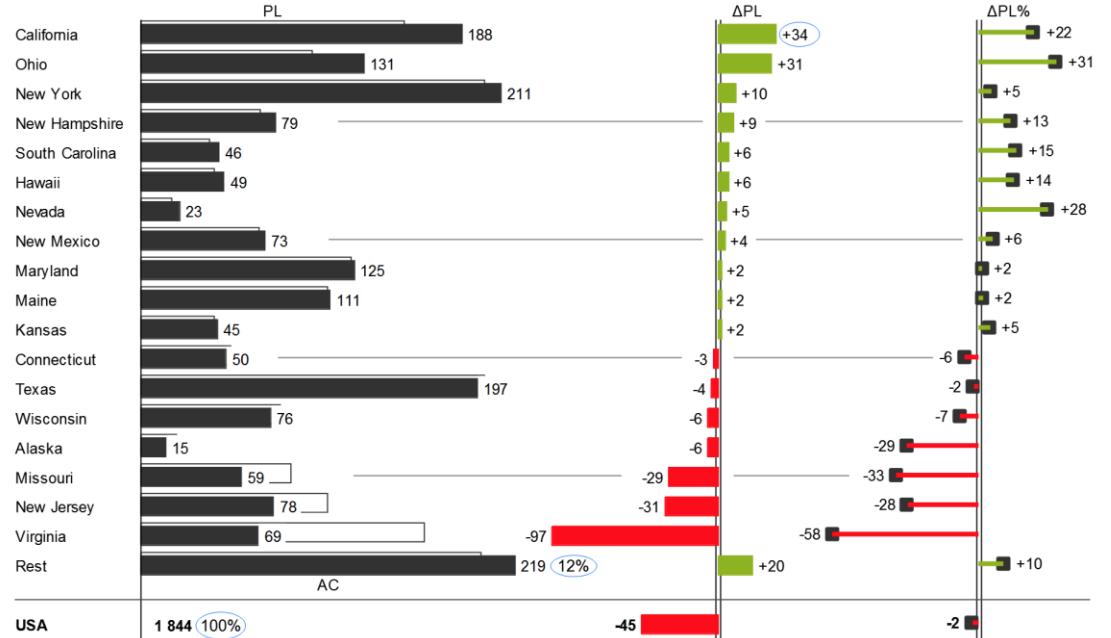
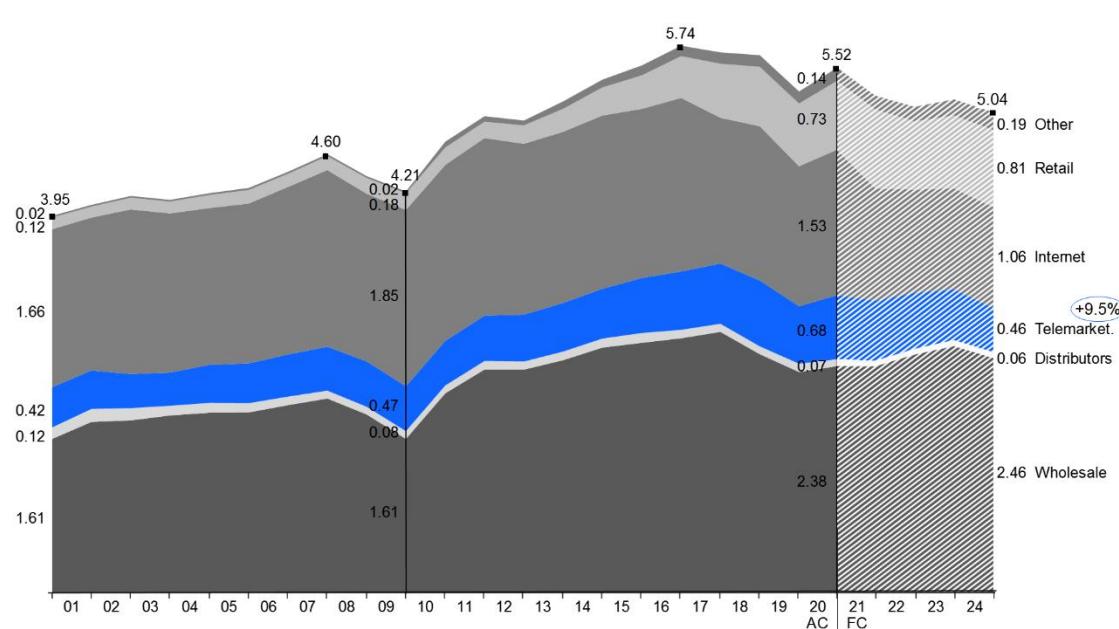


Chart template 04A



The telemarketing forecast for week 24 is mEUR 0.46 which is mEUR 0.04 higher than week 01 (+9.5%)

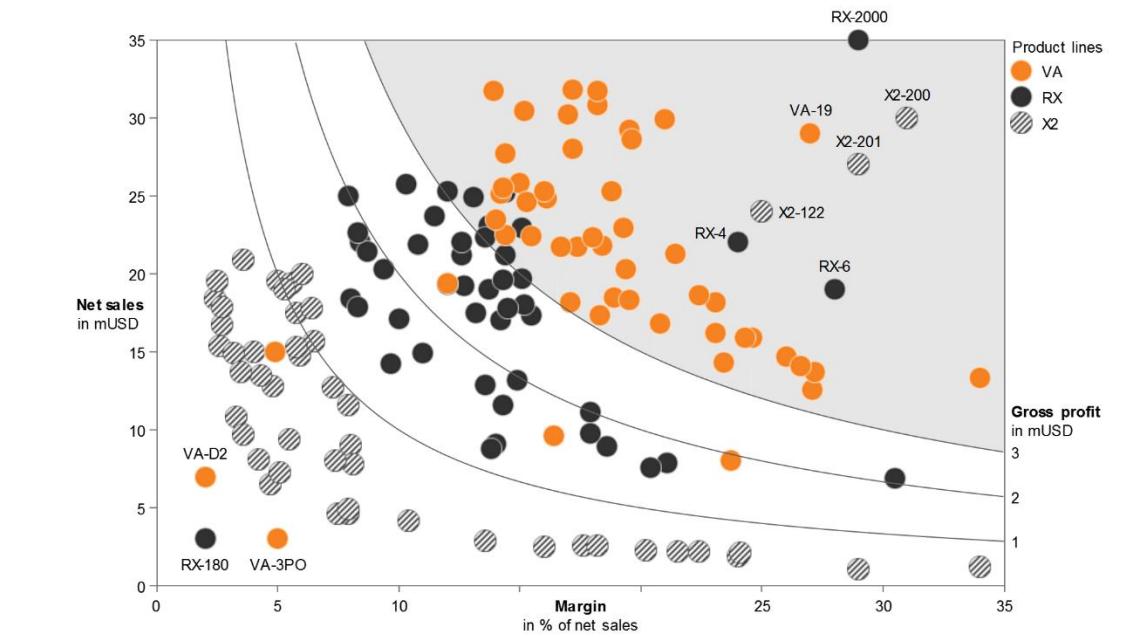
Fashionware, Inc.  
Accounts receivable by sales channels in mEUR  
2015-W01..24 (Fri at noon)



2015-12-11\_rh

2014 we had 45 products of the product line VA in the gross profit segment of mUSD 3 and above

Alpha AG, Paper Division  
Net sales and gross profit in mUSD, margin in %  
2014 AC



2015-12-09\_rh

The two SBUs acquired in December 2015 are positioned in little attractive markets

Strategic business units, Alpha AG Germany  
Product market portfolio  
2013 and 2015

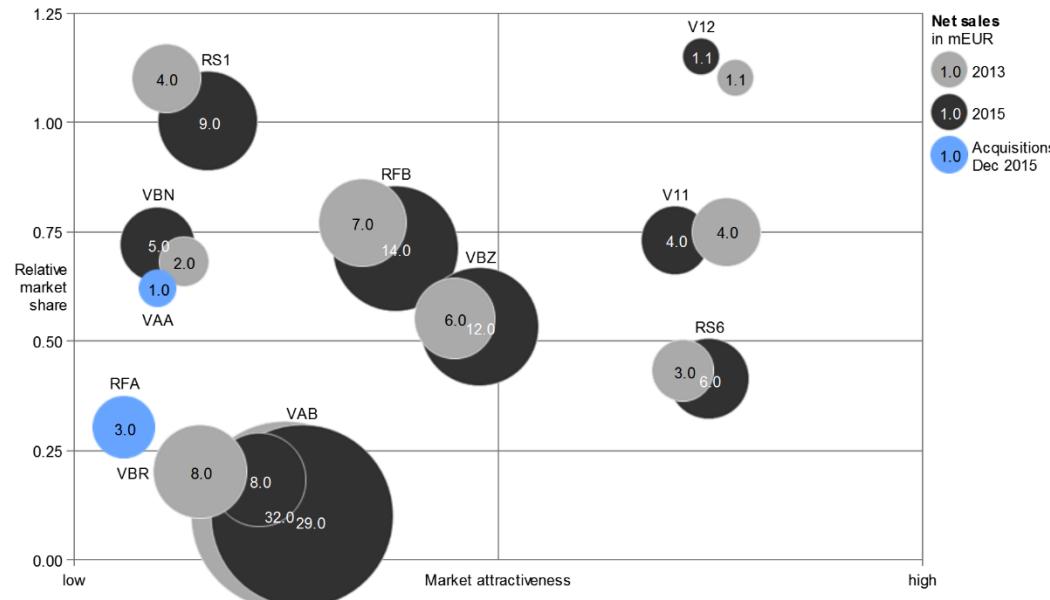


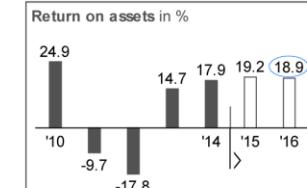
Chart template 10D

We plan to achieve an ROA of around 19% in 2016 despite of increasing assets

Alpha Corporation  
ROA tree  
2010..14 AC, 2015..16 PL

① **Return plan:** mEUR 5.3 in 2016 elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam vol-

② **Net sales plan:** mEUR 23.6 in 2016  
Lorem e duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing



③ **Assets plan:** mEUR 28.0 in 2016 Lorem ipsum dolor sit amet, consetetur et ea rebum. Stet clita kasd gubergren, no sea takimata asdfa sd asdf fa fsasdfa sdasd

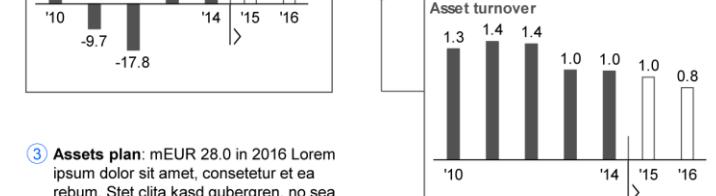
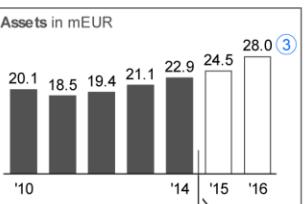
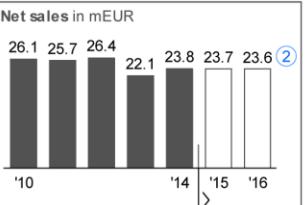
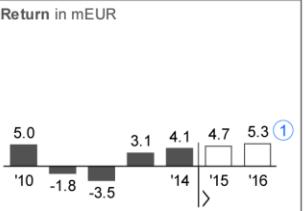
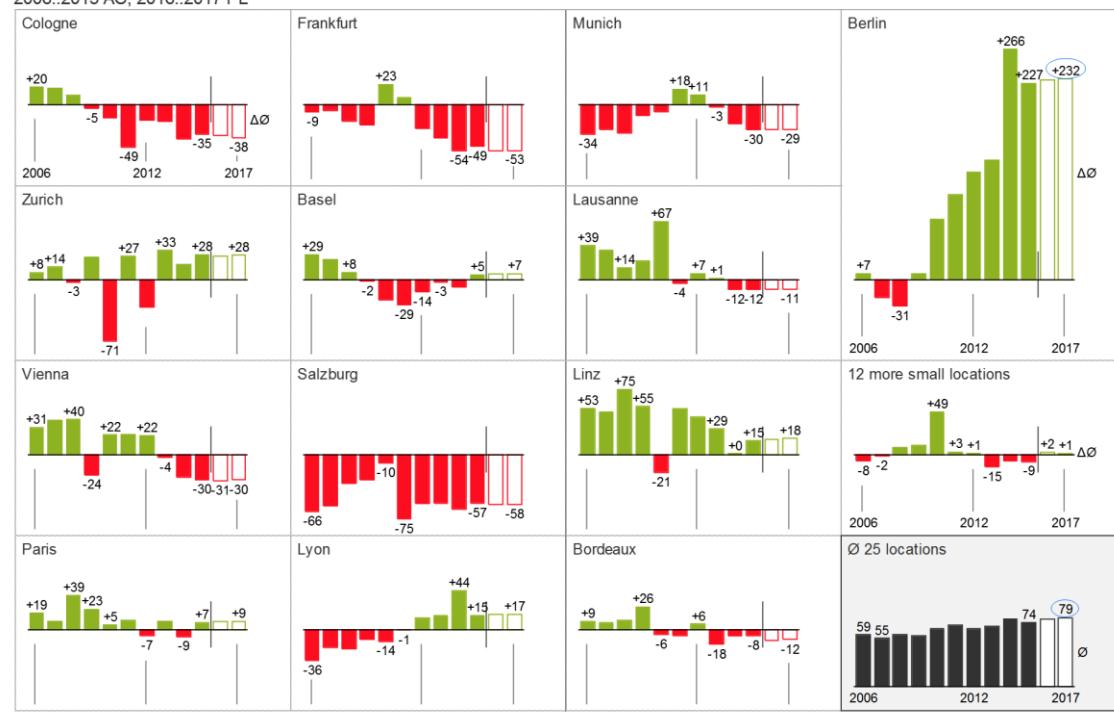


Chart template 11A



Berlin will further be above overall average in 2016 and 2017,  
in 2017 its profits will be mEUR 232 above location average (mEUR 79)

Beta Corp, 25 locations of Central Europe  
Net profit in mEUR, absolute variance from location average ( $\varnothing$ )  
2006..2015 AC, 2016..2017 PL



2015-12-09\_rh

Chart template 13C



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Electronic Inc.  
Profit after tax in kEUR  
2014 PY, PL, AC

November

PY	PL	AC	AC-PY	AC-PL	
560	590	559	-1	-0%	-31 -5% Austria
56	72	58	+2	+4%	-14 -19% Belgium
140	149	134	-6	-4%	-15 -10% France
345	279	260	-85	-25%	-19 -7% Germany
78	91	86	+8	+10%	-5 -5% Poland
77	81	86	+9	+12%	+5 +6% Sweden
61	70	66	+5	+8%	-4 -6% Switzerland
502	498	545	+43	+9%	+47 +9% Other
<b>1 819</b>	<b>1 830</b>	<b>1 794</b>	<b>-25</b>	<b>-1%</b>	<b>-36 -2% Europe</b>
119	109	121	+2	+2%	+12 +11% Brazil
65	71	59	-6	-9%	-12 -17% Canada
346	326	311	-35	-10%	-15 -5% USA
438	401	399	-39	-9%	-2 -0% Other
<b>968</b>	<b>907</b>	<b>890</b>	<b>-78</b>	<b>-8%</b>	<b>-17 -2% Americas</b>
54	66	62	+8	+15%	-4 -6% Australia
266	204	231	-35	-13%	+27 +13% China
9	12	11	+2	+22%	-1 -8% Japan
234	311	255	+21	+9%	-56 -18% Other
<b>563</b>	<b>593</b>	<b>559</b>	<b>-4</b>	<b>-1%</b>	<b>-34 -6% Rest of world</b>
<b>3 350</b>	<b>3 330</b>	<b>3 243</b>	<b>-107</b>	<b>-3%</b>	<b>-87 -3% World</b>

① Austria: kEUR +431 mainly due to additional profits from product B in June (+230) and July (+251)

2016-04-09\_rh

Table template 01A



PY	PL	AC	AC-PY	AC-PL
5 078	5 611	5 509	+431 ① +8%	-102 -2%
531	529	484	-47 -9%	-45 -9%
1 290	1 488	1 354	+64 +5%	-134 +1%
3 124	2 815	2 850	-274 ② -9%	+35 +1%
816	818	854	+38 +5%	+36 +4%
809	722	764	-45 -6%	+42 +6%
604	582	678	+74 +12%	+96 +16%
5 602	6 022	5 441	-161 -3%	-581 -10%
<b>17 854</b>	<b>18 587</b>	<b>17 934</b>	<b>+80 +0%</b>	<b>-653 -4%</b>
1 205	1 254	1 314	+109 +9%	+60 +5%
629	656	718	+89 +14%	+62 +9%
3 406	3 124	3 239	-167 -5%	+115 +4%
4 166	4 219	4 008	-158 -4%	-211 -5%
<b>9 406</b>	<b>9 253</b>	<b>9 279</b>	<b>-127 -1%</b>	<b>+26 +0%</b>
517	609	588	+71 +14%	-21 -3%
2 107	1 925	2 399	+292 +14%	+474 +25%
67	87	144	+77 +115%	+57 +66%
2 351	2 099	2 145	-206 -9%	+46 +2%
<b>5 042</b>	<b>4 720</b>	<b>5 276</b>	<b>+234 +5%</b>	<b>+556 +12%</b>
<b>32 302</b>	<b>32 560</b>	<b>32 489</b>	<b>+187 +1%</b>	<b>-71 -0%</b>

② Germany: kEUR -274 because of two new competitors since November 2013 (Alpha) and March 2014 (Beta)

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Electronic Inc.  
Profit after tax in kEUR  
2014 PY, AC

	November			
	PY	AC	ΔPY	ΔPY%
560	559		-1	-0
56	58		+2	+4
140	134		-6	-4
345	260		-85	-25
78	86		+8	+10
77	86		+9	+12
61	66		+5	+8
502	545		+43	+9
<b>1 819</b>	<b>1 794</b>		<b>-25</b>	<b>-1</b>
119	121		+2	+2
65	59		-6	-9
346	311		-35	-10
438	399		-39	-9
<b>968</b>	<b>890</b>		<b>-78</b>	<b>-8</b>
54	62		+8	+15
266	231		-35	-13
9	11		+2	+22
234	255		+21	+9
<b>563</b>	<b>559</b>		<b>-4</b>	<b>-1</b>
<b>3 350</b>	<b>3 243</b>		<b>-107</b>	<b>-3</b>

① Austria: kEUR +431 mainly due to additional profits from product B in June (+230) and July (+251)

② Germany: kEUR -274 because of two new competitors since November 2013 (Alpha) and March 2014 (Beta)

Table template 02A

	January_November			
	PY	AC	ΔPY	ΔPY%
Austria	5 078	5 509	+431	+8
Belgium	531	484	-47	-9
France	1 290	1 354	+64	+5
Germany	3 124	2 850	-274	-9
Poland	816	854	+38	+5
Sweden	809	764	-45	-6
Switzerland	604	678	+74	+12
Other	5 602	5 441	-161	-3
<b>Europe</b>	<b>17 854</b>	<b>17 934</b>	<b>+80</b>	<b>+0</b>
Brazil	1 205	1 314	+109	+9
Canada	629	718	+89	+14
USA	3 406	3 239	-167	-5
Other	4 166	4 008	-158	-4
<b>Americas</b>	<b>9 406</b>	<b>9 279</b>	<b>-127</b>	<b>-1</b>
Australia	517	588	+71	+14
China	2 107	2 399	+292	+14
Japan	67	144	+77	+115
Other	2 351	2 145	-206	-9
<b>Rest of world</b>	<b>5 042</b>	<b>5 276</b>	<b>+234</b>	<b>+5</b>
<b>World</b>	<b>32 302</b>	<b>32 489</b>	<b>+187</b>	<b>+1</b>

SoftCons International Inc.  
Profit and loss statement in mUSD  
2012..2015 PL and AC (FC)

	2012		2013		2014		2015	
	PL	AC	PL	AC	PL	AC	PL	FC
+ Software revenue	467	453	543	265	73	278	561	560
+ Support revenue	99	87	132	87	87	90	140	131
+ Consulting revenue	145	121	231	121	122	128	199	213
= Revenue	711	661	906	473	482	496	900	904
- Cost of sales	282	231	199	122	138	128	221	223
= Gross profit	429	430	707	351	344	368	679	681
- Research and development expenses	79	78	91	78	98	104	123	124
- Selling and general administrative expenses	34	45	41	97	79	102	44	43
+ Other operating income	44	22	45	9	10	11	67	61
- Other operating expenses	88	76	63	11	14	8	89	85
+ Other financial income, net	-55	12	-6	3	4	5	4	-4
= Income from continuing operations before tax	217	265	551	177	167	170	494	486
- Income tax expenses	59	54	188	23	31	27	35	31
= Income from continuing operations	158	211	363	154	136	143	459	455
+ Income from discontinued operations	16	6	1	6	4	8	72	74
= Net income	174	217	364	160	140	151	531	529

① Software 2013: mUSD 265 Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

② Support 2013: mUSD 87: Satoque penatibus dolor sit amet, consectetuer ad ipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natque penatibus et magnis dis parturi.

③ Consulting 2013: mUSD Sit amet, consectetuer adipiscing elit.

④ Other financial income 2012: mUSD -55 penatibus dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor.

⑤ Net income 2015: mUSD 529 penatibus dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natque penatibus et magnis dis parturi. Aenean massa. Cum sociis natque penatibus et magnis dis parturi. Aenean massa. Cum sociis natque penatibus et magnis dis parturi. Aenean massa.

Table template 03A



7.- Why not? Workshop on your next Board book

<https://es.linkedin.com/in/xaviersubirats>

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# International Business Communication Standards (IBCS<sup>®</sup>)

**AMSEL**  
ASSESSORS



## INTERNATIONAL BUSINESS COMMUNICATION STANDARDS (IBCS)

IBCS V1.0  
FINAL RELEASE



The International Business Communication Standards (IBCS or IBCS Standards) are practical proposals for the design of reports and presentations, meaning, in most cases, the proper conceptual, perceptual and semantic design of charts and tables.

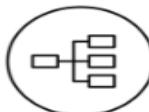
Business Communication meets the IBCS Standards if it complies with the rules of three categories comprising the three parts of IBCS:

[leave comment and show \(0\)](#)

**CONCEPTUAL RULES** help to clearly relay content by using an appropriate storyline. They comprise the SUCCESS rule sets **SAY** and **STRUCTURE** based on the work of authors such as Barbara Minto<sup>[1]</sup>.  
[More...](#)



SAY



STRUCTURE

**PERCEPTUAL RULES** help to clearly relay content by using an appropriate visual design. They comprise the SUCCESS rule sets **EXPRESS**, **SIMPLIFY**, **CONDENSE**, and **CHECK**, based on the work of authors such as William Playfair<sup>[2]</sup>, Willard Cope Brinton<sup>[3]</sup>, Gene Zelazny<sup>[4]</sup>, Edward Tufte<sup>[5]</sup> and Stephen Few<sup>[6]</sup>. [More...](#)



EXPRESS



SIMPLIFY

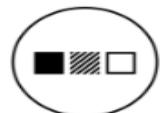


CONDENSE



CHECK

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UNIFY

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Register for the IBCS® Annual Conference on June 2, 2017 in Barcelona, Spain.

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## COMMENTS SINCE 2015-07-01

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**Shruthy Menon** 2016-09-29 09:47 am

EX 2 Replace inappropriate visualizations Replace-traffic-lights  
Need to learn how it works  
[More...](#)



0



**Denis Abdulkerimov** 2016-08-21 06:00 pm

UN 3.2 Unify scenarios 3.3.2.4-Plan and-Budget-period  
Just wondering as it should be an AC abbreviation or BU is more relevant for this diagram?  
[More...](#)



0



**Elias Teufel** 2016-08-18 03:51 pm

UN 4.2 Unify time series analyses Introduction  
As far as I know, the symbol for "average" is only used in germany.



0

Do you think that could be a problem for an international communication standard?

Maybe in some countries the report recipients would not know what the symbol means.  
[More...](#)



**Rolf Hichert** 2016-08-15 11:37 pm

Table types Variance-tables  
Here you touch a general topic concerning absolute und relative variances (deviations)  
- and it probably fits better to UN 4.1 or UN 5.3.



1

There is no IBCS suggestion for this yet.  
So let me give you my personal view on this:

1

Big *relative* variances rarely give insight in practical business situations.  
+200%, +300% or even more can only happen if the reference value is very small  
(what ever the reason is for this). This also means that the *absolute* variances probably  
are small and not relevant for the analysis.

2

In general, the analysis of *absolute* variances should be given much more attention.

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**Rolf Hichert** 2015-09-25 03:51 pm



CH 2 Avoid manipulated visualization elements, Use-  
creative-solutions-for-challenging-scaling-issues  
To my opinion, there are situations where these kinds  
of curved columns or bars might be useful (e.g., they  
were used in the annual report of the Swiss Post für  
[More...](#)



**Grischa Rehmer** 2016-12-05 11:09 am



UN 1 Unify terminology, 3.1.1-Terms-and-  
abbreviations

The most important point is, that we are able to  
distinguish between the different scenarios. 1-letter  
abbreviations do not allow this - at least not for plan  
[More...](#)



**Lars Schubert** 2016-12-11 03:16 pm



UN 4.1 Unify scenario analyses, Introduction

Although I agree that there is a need to show scenario

# IBCS WITH SUCCESS

Produce better business reports and presentations with these 98 rules.  
Many examples refer to financial topics, but also apply to other business areas.

presented by

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9 783932 540451

## Say

Convey a message

### SA 1 Introduce message

1 Situation "Our goal is 20% profit on sales!"  
Why?  
Reason A  
Reason B  
Reason C

2 Problem "The profit forecast is 25%"  
Why?  
Reason X  
Reason Y  
Reason Z

3 Question "How can we reach our goal?"  
...and now the message is the answer to this question!

### SA 2 Deliver message

4 Avoid redundant messages  
"Our profit has risen 20%!"  
"We should invest in these income people in order to..."  
"We had a peak in April by using..."  
"We can avoid the peak in April by using..."

5 Detect, explain, or suggest  
"Sales down!"  
"Prices up!"  
"Strategy change!"  
"Sales are mEUR 5 below..."  
"Explanation: ...because of a 10% increase..."  
"Suggestion: We should..."

SA 3 Retain the message, then explain it

## Unify

Apply notation standards

### UN 1 Unify terminology

Term Abbreviations short long Definition  
1 Return on Investment ROI Net. on Inv.  
2 Acronym abbrev. PBT Profit before tax  
3 Profit and loss P&L Profit & loss  
4 Human resources HR Human res.  
5 Net sales per capita NSG NS per cap.

6 Inter. 100.000.000 25 m 100.000.000 125.000 1.25 mCHF  
25 inter. 25.000 25 kg 25.000 25.000 25 kg  
25 sec. 25 sec. 25 sec. 25 sec. 25 sec.  
25 ton. 25 ton. 25 ton. 25 ton. 25 ton.  
25 mil. 25 mil. 25 mil. 25 mil. 25 mil.  
1.5.2015 8/3/2015 2015-08-01 2015-08-01 2015-08-01  
1.5.2015 8/17/2015 2015-08-01 2015-08-01 2015-08-01  
1.5.2015 8/31/2015 2015-08-01 2015-08-01 2015-08-01

7 UN 2 Unify descriptions  
The biggest variance is in France.  
France is the best performer.  
We should increase Alpha Corporation's Earnings per Share (EPS).  
Paris is the best performer.  
Paris is the best performer.

8 UN 2.1 Unify messages  
The biggest variance is in France.  
France is the best performer.  
We should increase Alpha Corporation's Earnings per Share (EPS).  
Paris is the best performer.  
Paris is the best performer.

9 UN 2.2 Unify titles and subtitles  
Net Sales Development from January to July 2015  
Alpha Corporation (mEUR)  
Profit per Employee in Division D  
Actual and Budget in 2015

10 UN 3 Unify the position of legends and labels  
Sales Jan Feb Mar Apr  
Berlin Zurich Vienna  
11 12 13 12 13  
5 5 5 4 4  
3 3 3 3 3  
1 1 1 1 1  
Jan Feb Mar Apr

## Condense

Increase information density

### CO 1 Use small components

1 CO 1.1 Use small fonts  
ABC Productions, Inc. London Board of Directors  
Log. Mkt. Sales Board of Directors  
TES AC CO Sales Log. Mkt. Sales Board of Directors  
Itali. Financ. Acc. Direct. Indir.

2 CO 1.2 Use small elements  
Profit Margin Sales Profit Margin Sales  
Revenue Profit Margin Sales Profit Margin Sales  
Revenue Profit Margin Sales Profit Margin Sales  
Revenue Profit Margin Sales Profit Margin Sales

3 CO 1.3 Use small objects  
7.4 7.4  
-3.4 -3.4  
4.5 4.5  
6.2 6.2

4 CO 2 Utilize space  
7.4 7.4  
-3.4 -3.4  
4.5 4.5  
6.2 6.2

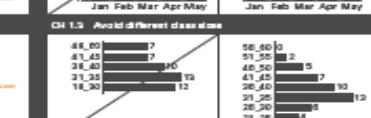
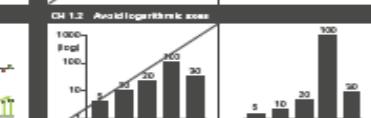
5 CO 2.1 Use narrow page margins  
Net Sales in EUR Jan Feb Mar  
Germany 501 458 346  
Austria 85 88 84  
France 88 90 98  
Italy 102 101 117  
Sweden 71 69 66  
Denmark 54 57 45

6 CO 2.2 Reduce empty space  
Sales in EUR Jan Feb Mar  
Germany 35 36 34  
Austria 23 22 23  
France 35 36 34  
Italy 27 28 26  
Sweden 21 22 20  
Denmark 14 15 13

## Check

Ensure visual integrity

### CH 1 Avoid manipulated axes



## Express

Choose proper visualization

### EX 1 Use correct object type

1 EX 1.1 Use correct chart type  
Time Structure Speciales

2 EX 1.2 Use correct table type  
Time table Variance table Growth table Sales Profit

3 EX 2 Replace inappropriate visualizations  
Variance table Growth table Sales Profit

4 EX 2.1 Replace pie, ring, and donut charts  
Pie chart Donut chart Bar chart

5 EX 2.2 Replace gauges, speedometers, and radar charts  
Berlin Paris Vienna Wien

6 EX 2.3 Replace radar, funnel, sphere, and spider charts  
Radar chart Funnel chart Sphere chart Spider chart

EX 2.4 Replace spaghetti charts

## Simplify

Avoid clutter

### SI 1 Avoid unnecessary components

1 SI 1.1 Avoid cluttered layouts  
Cluttered layout Clean layout

2 SI 1.2 Avoid colored or filled backgrounds  
Colored background Filled background

3 SI 1.3 Avoid animation and transition effects  
Animated chart Non-animated chart

4 SI 1.4 Use homogeneous wording  
Ambiguities Split division A Restructuring division B Split division C Improve division D

5 SI 1.5 Use homogeneous symbols and pictures  
Rainy Windy Snowy Stormy Sun Rain Wind Snowy Stormy

6 SI 1.6 Use homogeneous structures  
Non-overlapping structures Overlapping structures

## Structure

Organize content

### ST 1 Use homogeneous elements

1 ST 1.1 Use homogeneous items  
Flags of different countries

2 ST 1.2 Use homogeneous statements  
Objectives Improve quality Reduce costs Many salaries Reduce price

3 ST 1.3 Use homogeneous wording  
Ambiguities Split division A Restructuring division B Split division C Improve division D

4 ST 1.4 Use homogeneous symbols and pictures  
Rainy Windy Snowy Stormy Sun Rain Wind Snowy Stormy

5 ST 1.5 Use homogeneous structures  
Non-overlapping structures Overlapping structures

6 ST 2 Build non-overlapping business measures  
Project Data Steps Schedule Manager Team Results Expenses Manager Schedule Team Results Expenses

# IBCS® WITH SUCCESS

## SUCCESSFUL REPORTS AND PRESENTATIONS



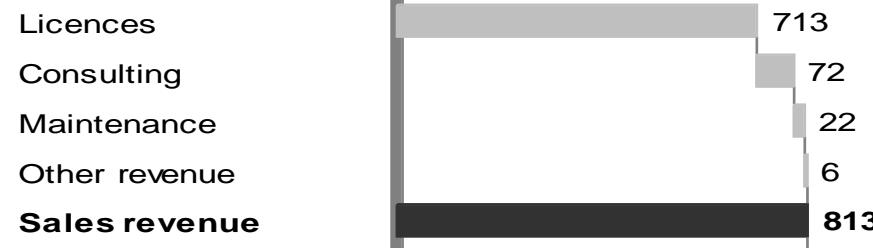
Find dates and locations on  
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## Other Samples

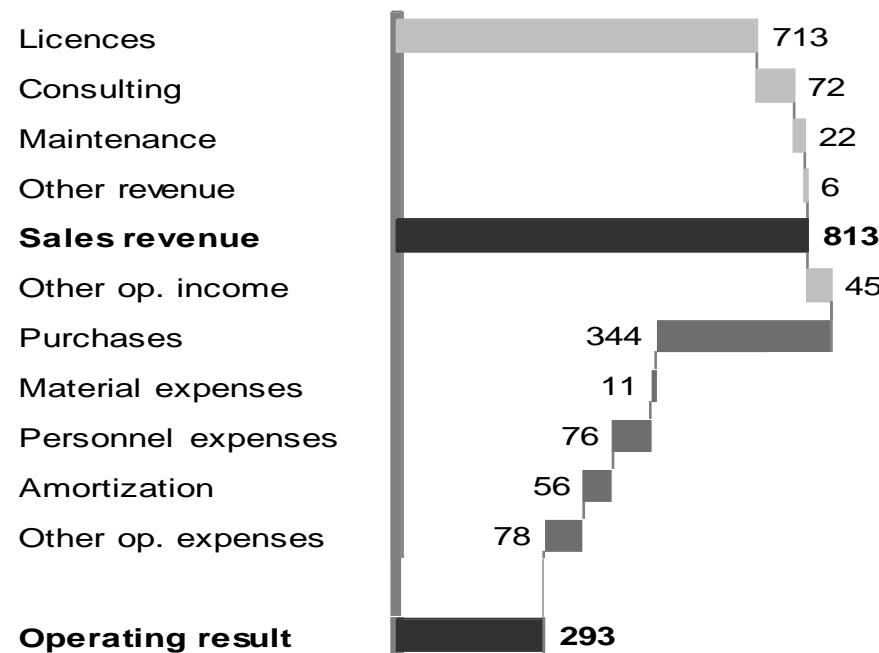


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**Profit and loss statement** in mEUR  
2014.

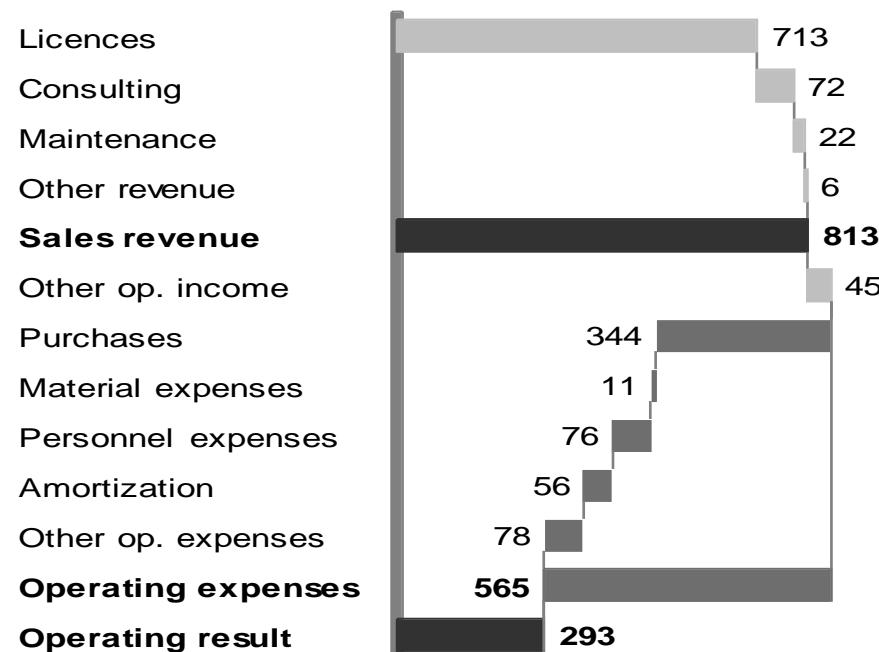
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2014.



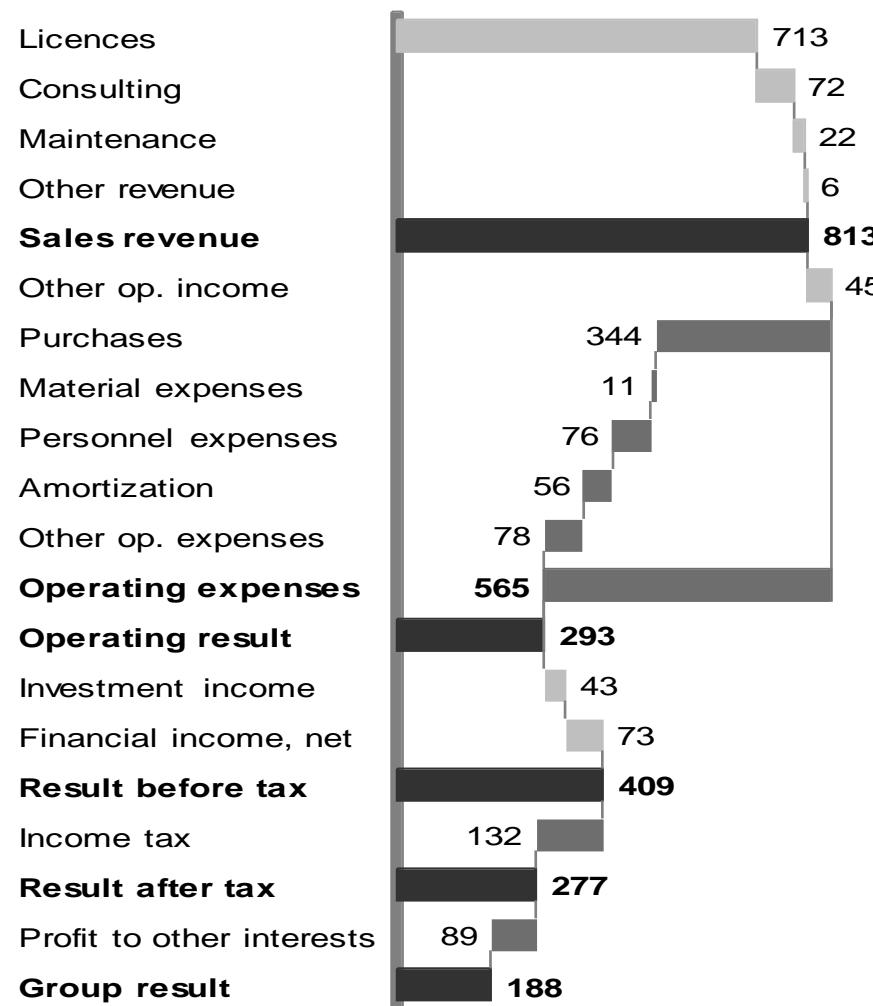
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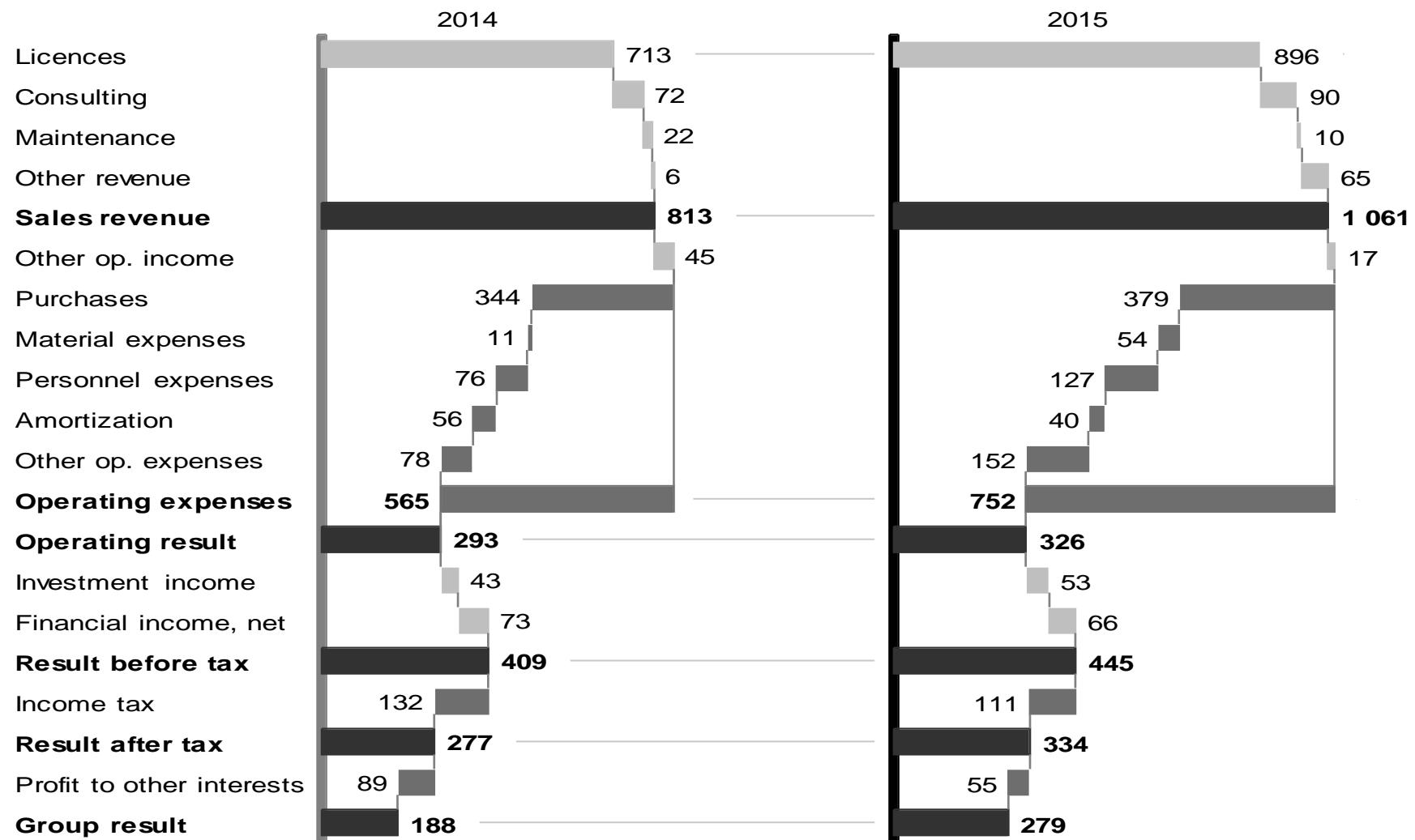
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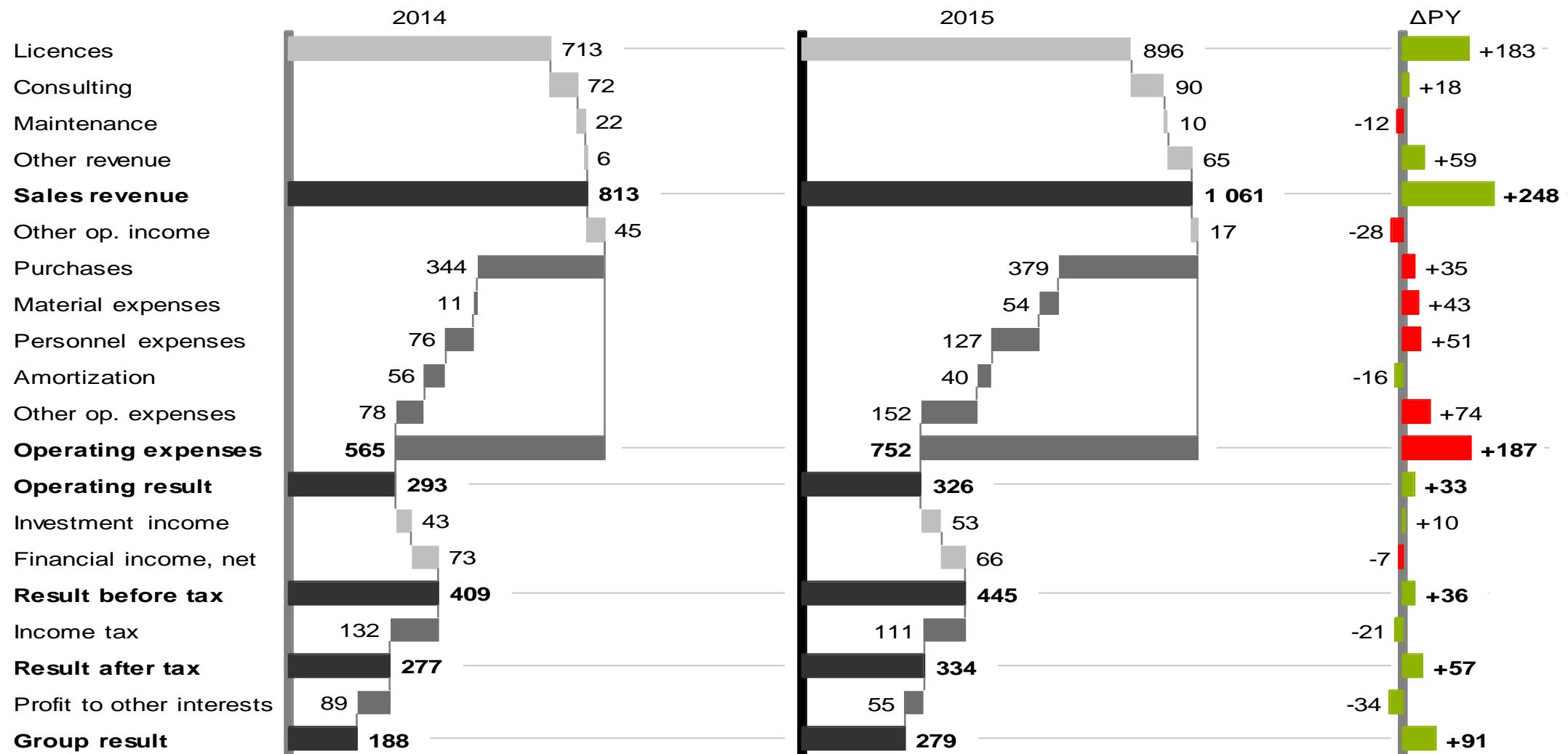
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2014.



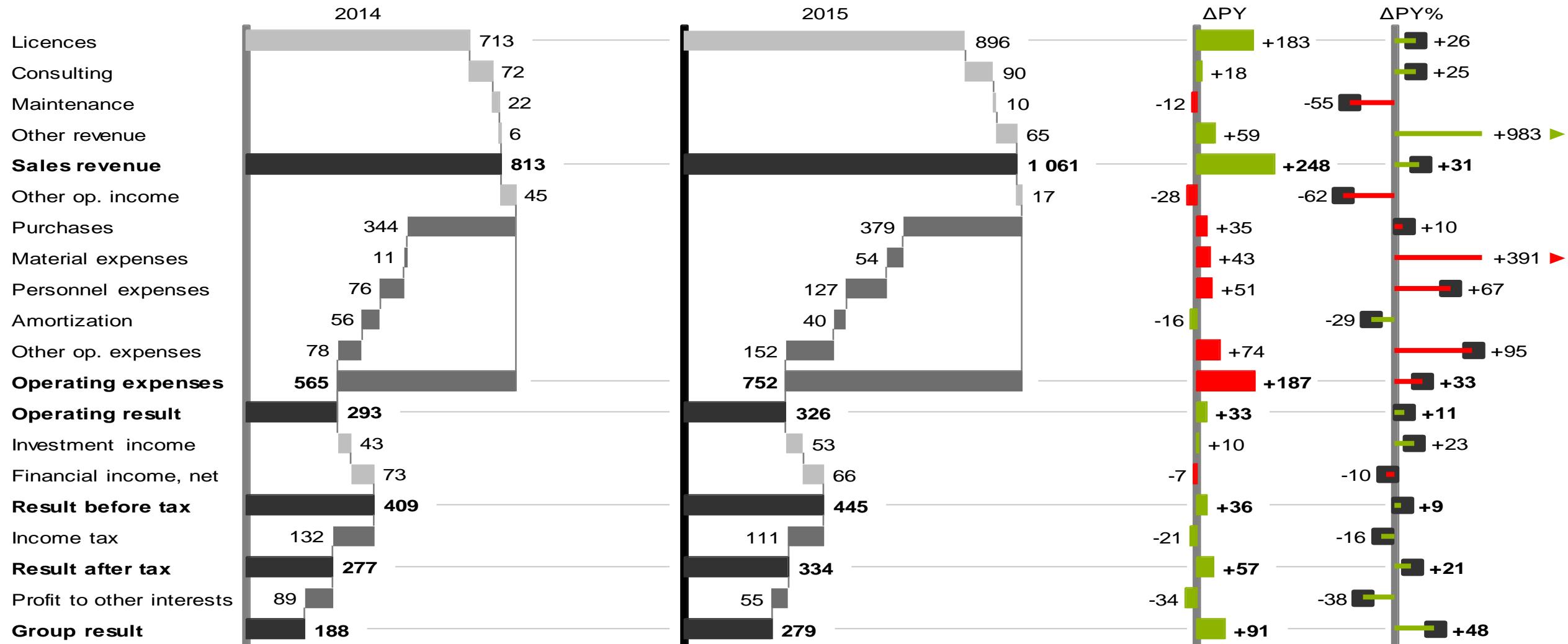
Software and Service Group  
**Profit and loss statement** in mEUR  
 2014, 2015



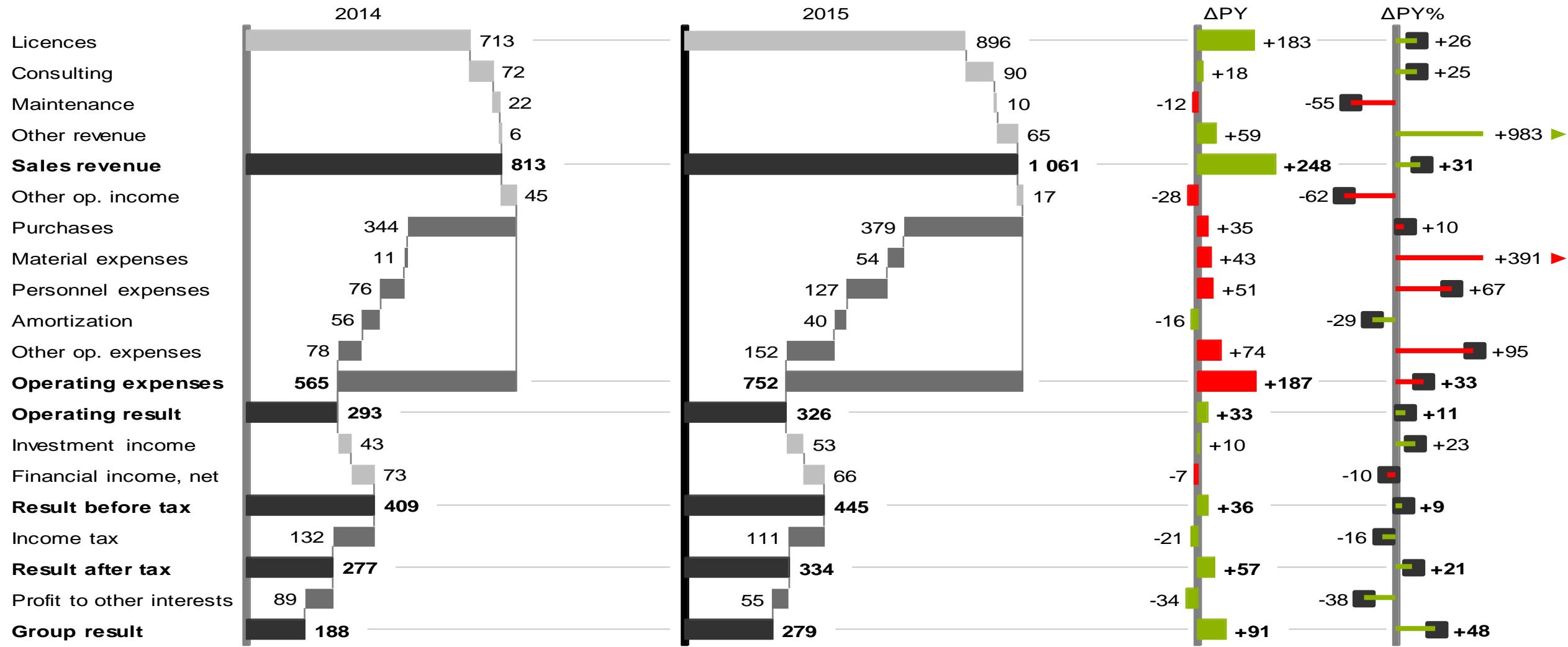
Software and Service Group  
**Profit and loss statement** in mEUR  
 2014, 2015 and ΔPY



Software and Service Group  
**Profit and loss statement** in mEUR  
 2014, 2015 and  $\Delta PY$ ,  $\Delta PY\%$



Software and Service Group  
**Profit and loss statement** in mEUR  
 2014, 2015 and ΔPY, ΔPY%

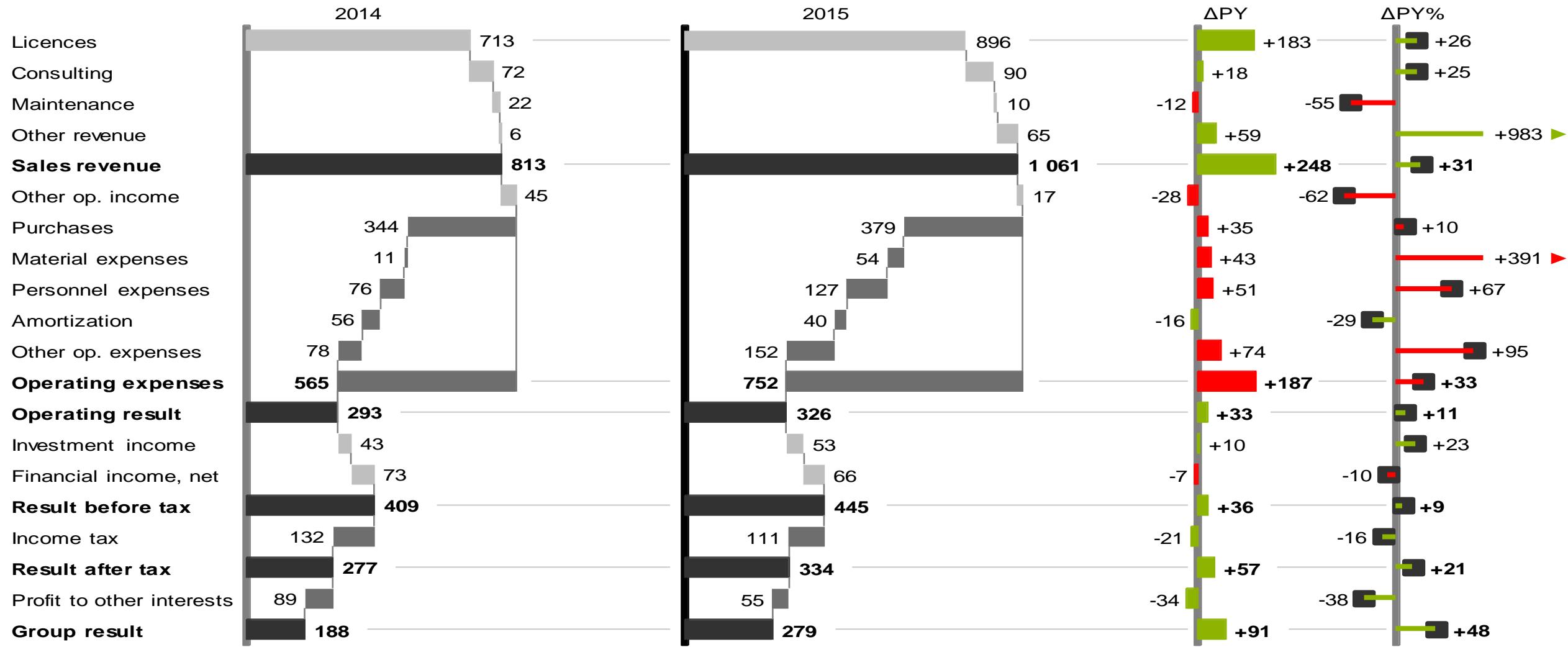


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Software and Service Group  
**Profit and loss statement** in mEUR  
 2014, 2015 and ΔPY, ΔPY%

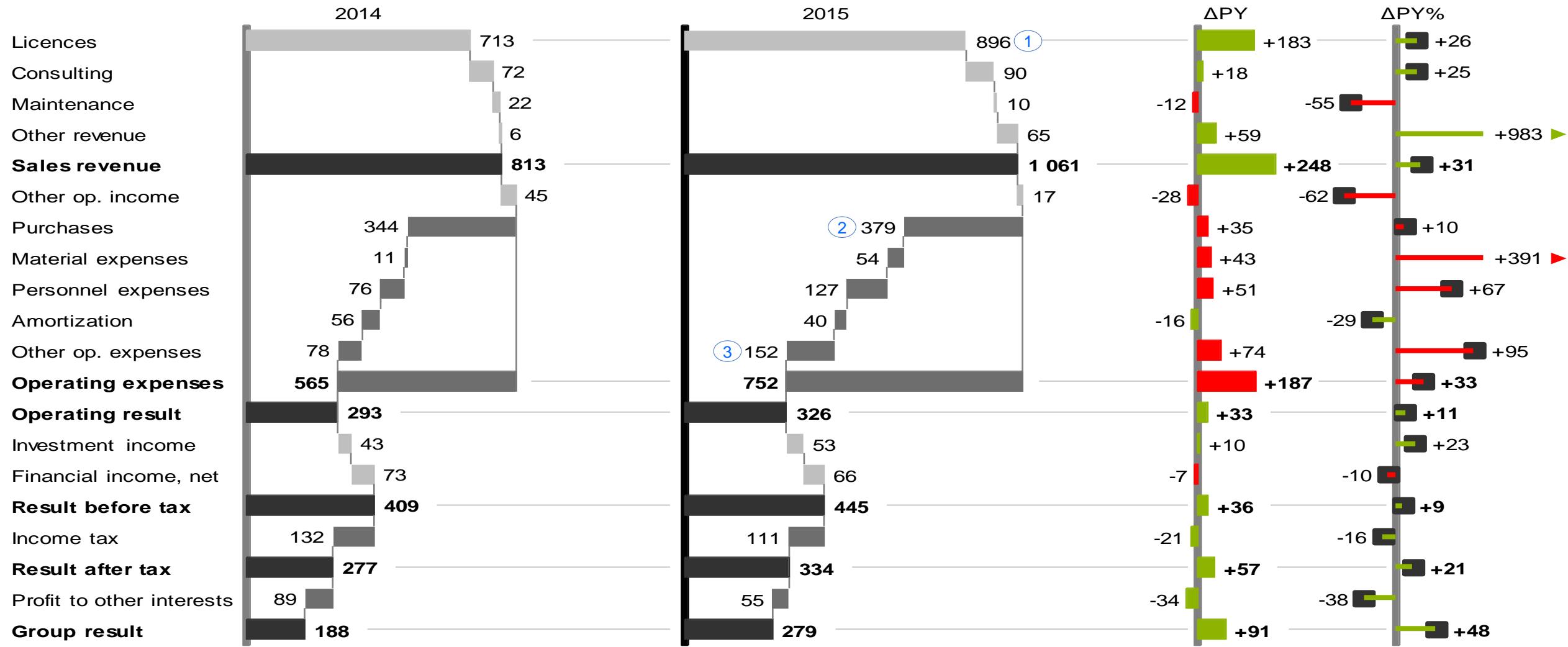


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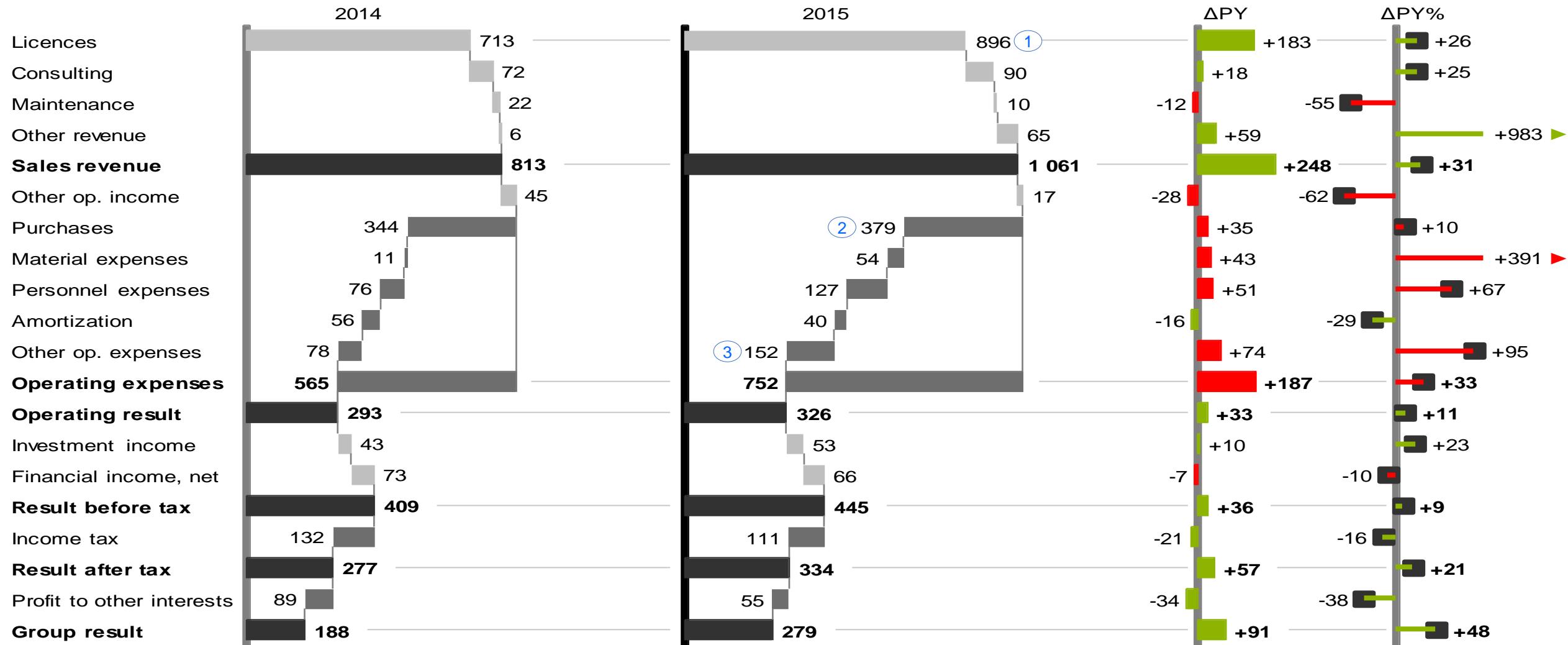
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Compared to 2014, the higher operating expenses (mEUR +187) were mainly compensated by higher license sales (mEUR +183), leading to a higher group result (mEUR +91)

Software and Service Group  
**Profit and loss statement** in mEUR  
 2014, 2015 and ΔPY, ΔPY%



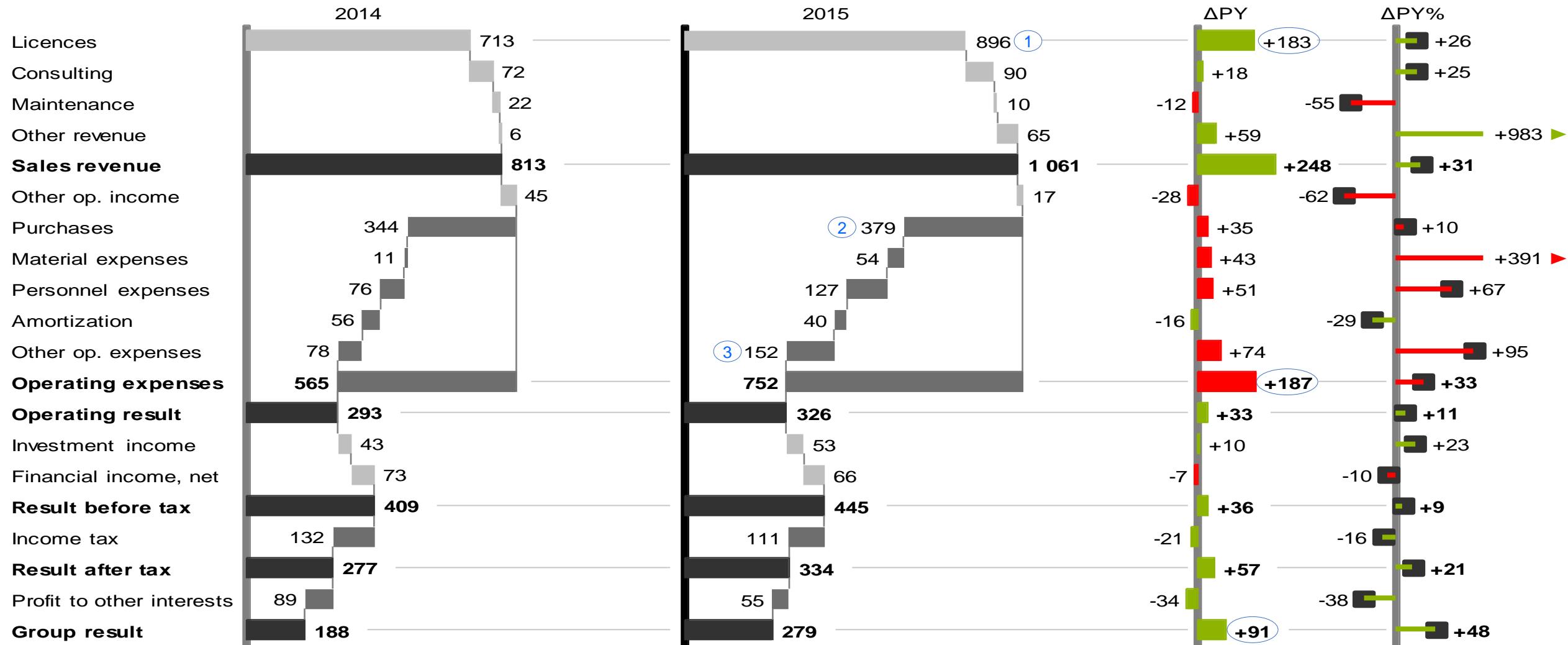
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