

Presentation Design Workflow:

Steps, Handoffs, and Improvement



- Defined workflows turn deck production into repeatable, owned steps



- Three pillars: steps, handoffs, and continuous improvement



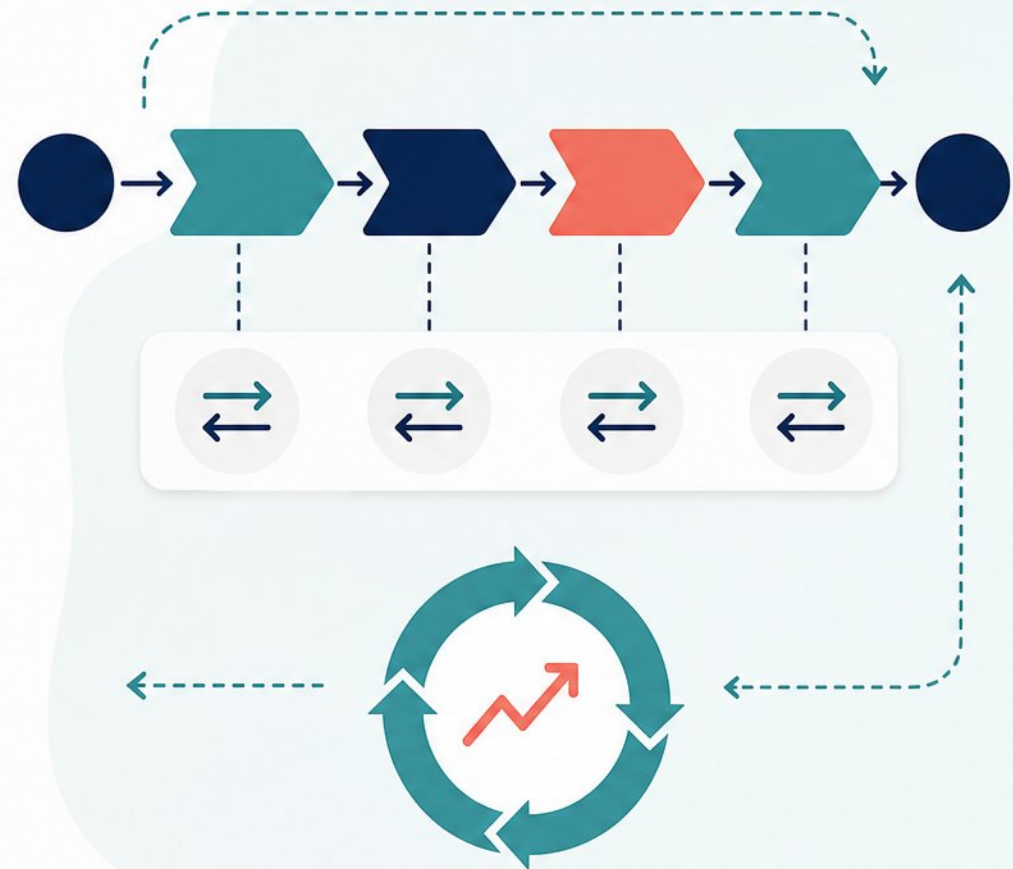
- Failure modes: unclear ownership, late changes, brand drift, rework



- You will map six stages and define handoff criteria



- You will run a lightweight improvement cycle on real decks



Why Presentation Workflows Break Down



- Decks are treated as documents, so no one owns scope, story, or quality



- Last-minute content collapses design time and degrades quality



- Misaligned stakeholders on audience and objective create late contradictory feedback



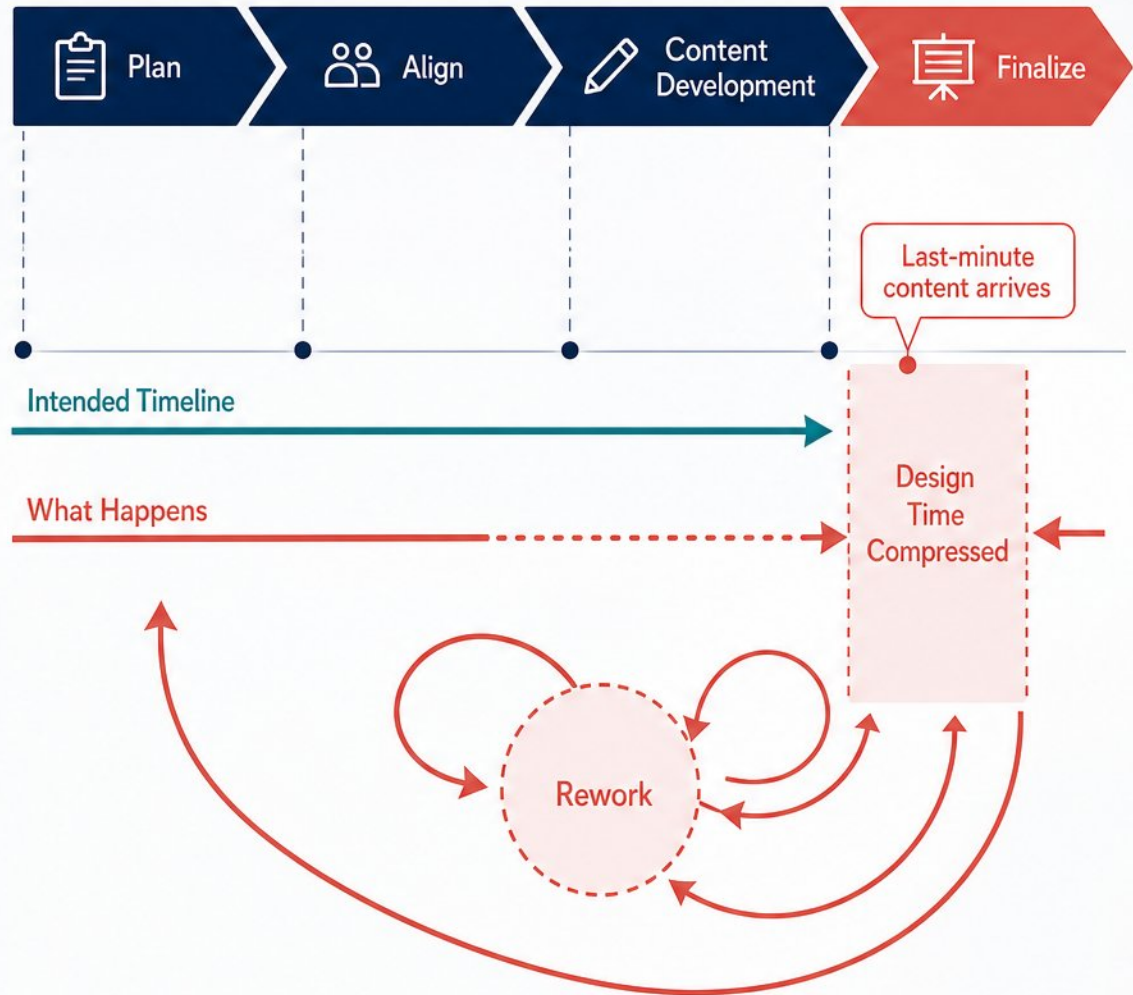
- Rework hides real costs: duplicated effort, version confusion, brand drift, presenter anxiety



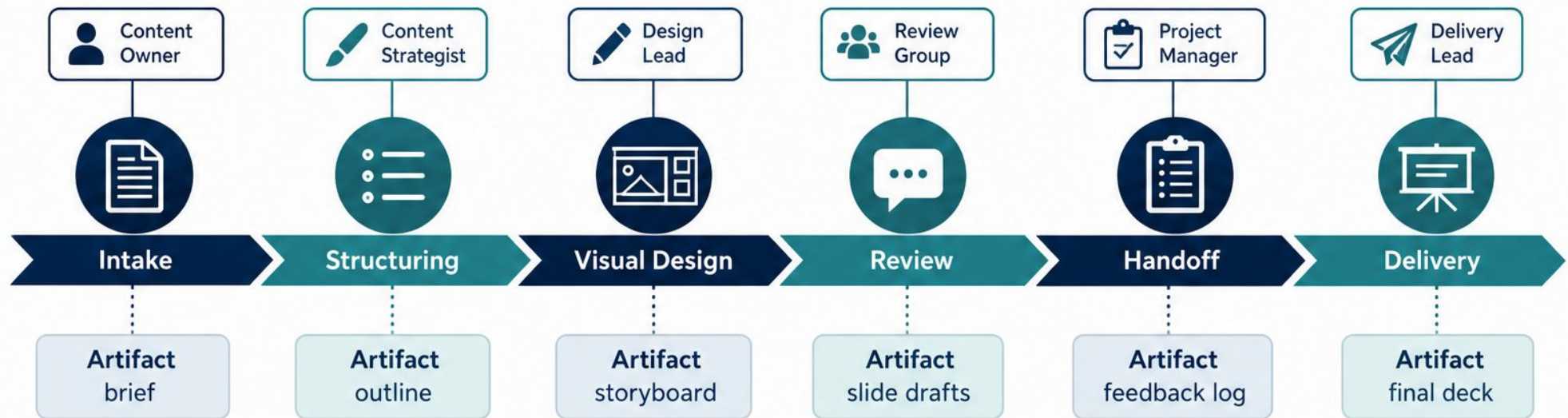
- Redundant content creation adds ~40% to production time



- Typical projects run 1.8–2.5 revision rounds



Core Concepts: A Six-Stage Lifecycle and the Roles Behind It



- Six repeatable stages: intake, structuring, visual design, review, handoff, delivery



- Each stage produces an artifact: brief, outline, storyboard, slide drafts, feedback log, final deck



- Separate content ownership from design ownership to prevent scope creep



- RACI roles: Responsible, Accountable, Consulted, Informed



- Exactly one Accountable owner per task — never shared



Step 1: Intake and Scoping the Presentation



- Intake checklist: audience, objective, format, length, deadline, brand rules, decision required



- Convert vague requests into a clear creative brief before any design begins



- Agree success criteria and non-negotiables upfront, before review starts



- Triage requests: accept, negotiate, redirect, or decline based on impact and capacity



- Brief review is the gate to production – incomplete briefs guarantee revision cycles

INTAKE BRIEF CHECKLIST



Audience _____



Objective _____



Key Message _____



Format _____



Deadline _____



Brand Rules _____



Decision Required _____

TRIAGE DECISION



ACCEPT



NEGOTIATE



REDIRECT



DECLINE

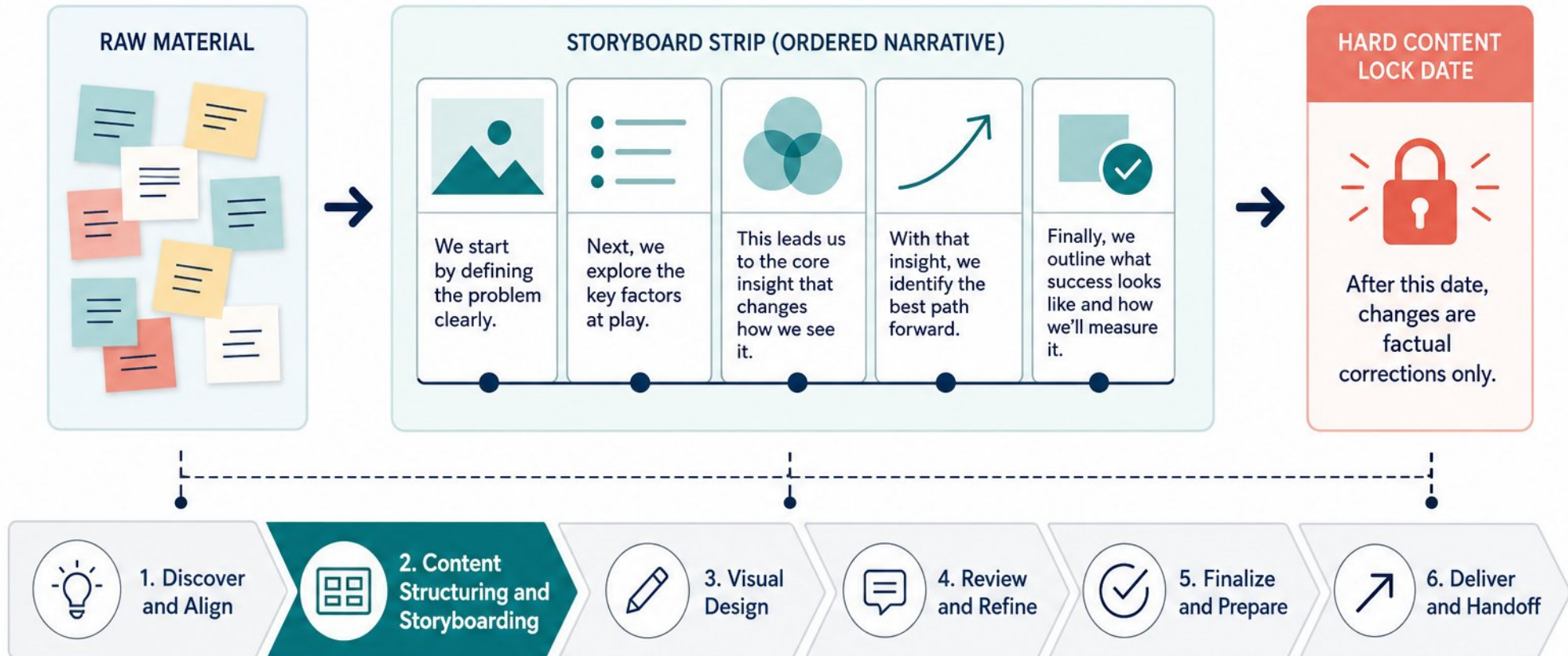
HANDOFF GATE

Entry criteria: Clear, complete brief with all sections filled

Exit criteria: Brief approved and ready for design

Step 2: Content Structuring and Storyboarding

- Turn raw material into narrative: hierarchy, emotional arc, slide-level story
- Outline and storyboard reviews happen before any visual design starts
- Write slide titles that carry the message, not just label the topic
- Lock content at a hard lock date; later changes are factual corrections only
- Storyboarding separates thinking from designing, removing downstream rework





Step 3: Visual Design and Build



- Build slide drafts from the approved storyboard; don't reopen the story



- Apply brand systems consistently: slide master, locked fonts, approved layouts



- Design for delivery context: in-room projection, screen share, self-serve reading



- Run quality checks before review: hierarchy, contrast, alignment, whitespace, chart clarity



- Design accessibility in: alt text, contrast, reading order, unique slide titles

MASTER LAYOUT

Locked

FONTS

Aa Aa

COLOR TOKENS

CONTRAST CHECKER

ALT TEXT

- ✓ Purposeful description
- ✓ Reading order considered
- ✓ Key information included
- ✓ Decorative elements ignored

Handoffs: Defining Clear Ownership Transfers

Handoff 1 Content to Design



Definition of Ready

- ✓ Entry criteria
- ✓ Exit criteria

Handoff Package

- 📄 Source files
- 🖼️ Assets
- 💬 Feedback log
- 📋 Decision log
- ❓ Open questions

Handoff 2 Design to Review



Definition of Ready

- ✓ Entry criteria
- ✓ Exit criteria

Handoff Package

- 📄 Source files
- 🖼️ Assets
- 💬 Feedback log
- 📋 Decision log
- ❓ Open questions

Handoff 3 Review to Final



Definition of Ready

- ✓ Entry criteria
- ✓ Exit criteria

Handoff Package

- 📄 Source files
- 🖼️ Assets
- 💬 Feedback log
- 📋 Decision log
- ❓ Open questions

Handoff 4 Final to Presenter



Definition of Ready

- ✓ Entry criteria
- ✓ Exit criteria

Handoff Package

- 📄 Source files
- 🖼️ Assets
- 💬 Feedback log
- 📋 Decision log
- ❓ Open questions



- Four handoff points: content to design, design to review, review to final, final to presenter



- Each handoff needs entry and exit criteria, written as a definition of ready



- Standard handoff package: source files, assets, feedback log, decision log, open questions



- Rituals that make handoffs work: kickoffs, design reviews, sign-off meetings, one point of contact



- Handoff latency hides most delay — measure the gaps, not just cycle time

Review, Feedback, and Approval Without Rework



- Name every review: direction, craft, or decision — never mix them



- Send a pre-read: problem, constraints, two or three decision questions



- Ask for observations, not instructions; log all input with reason codes



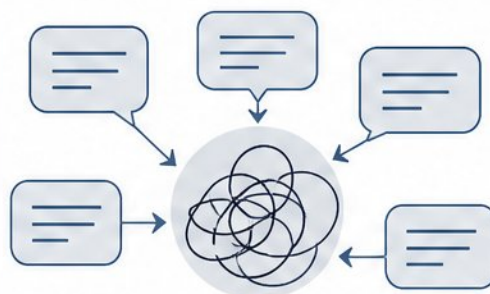
- Timebox each round; define gates with one accountable sign-off



- Version control plus a hard lock date stops endless iteration

Unlabeled, Open Review

Mixed feedback creates confusion and rework.



Feedback Log (Unstructured)

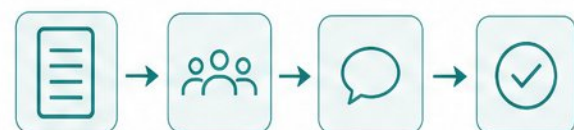
	_____	×
	_____	×
	_____	×
	_____	×

Contradictory instructions.
No context. No consolidation.

VS.

Named, Timeboxed Review

Clear intent, focused input, consolidated decisions.



Pre-Read Problem Constraints Decision Questions	Named Review Direction, Craft, or Decision	Observations Not Instructions	Gate with One Accountable Sign-Off
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Feedback Log (Reason-Coded)

	_____	Clarity
	_____	Feasibility
	_____	Alignment
	_____	Risk

Consolidated, reason-coded input.
Clear decisions. No rework.

Measuring the Workflow: Metrics That Reveal Bottlenecks



- Scorecard: median cycle time, first-pass approval rate, rework percentage, throughput



- Handoff latency and approval wait time show where work queues



- Most delay is waiting, not making



- Pair speed with quality and risk; never read one metric alone



- Segment by presentation type and complexity — no unfair comparisons



- Keep a change log; compare the same cohort before and after

WORKFLOW SCORECARD



Median
cycle time



First-pass
approval rate

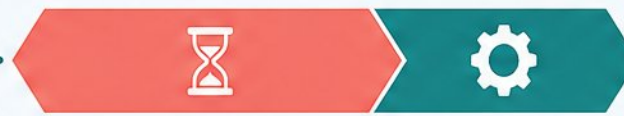


Rework
percentage



Throughput

MOST DELAY IS WAITING, NOT MAKING



Waiting Time

Working Time

Focus on reducing waiting and handoff delays
to improve the entire workflow.

Improving the Workflow: Retros, Reuse, and Design Systems



- Run a lightweight retro after every major deck: worked, friction, change



- Build reusables deliberately: templates, slide libraries, chart components



- Design system adoption cuts recurring design effort by roughly 20%



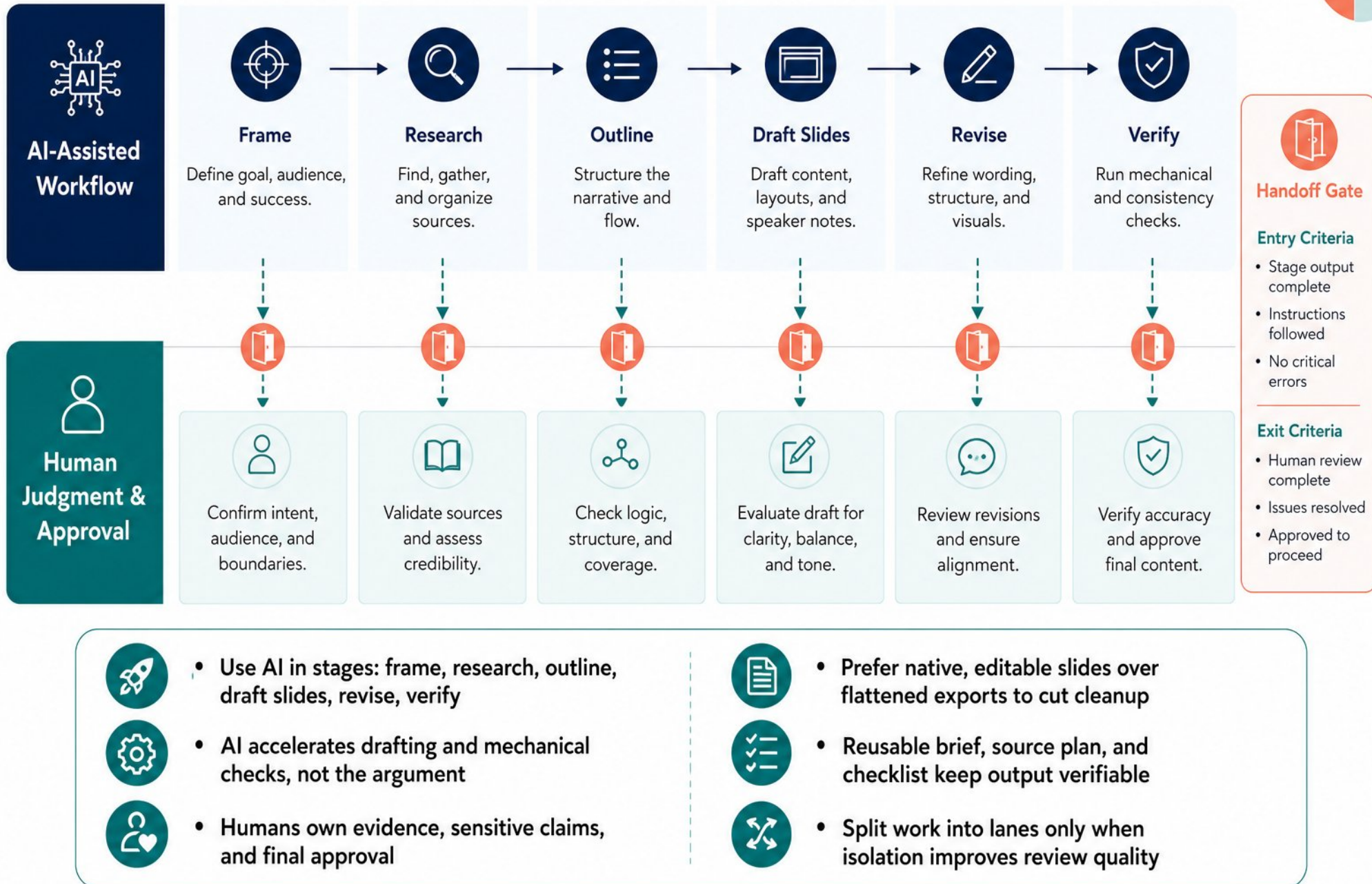
- Governed master deck library: brand consistency plus personalization guardrails



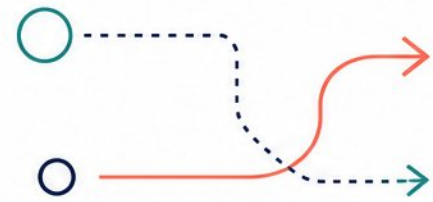
- Show ROI with cycle time, rework reduction, and on-time delivery trends



AI in the Workflow: Where It Helps and Where Judgment Stays Human



Practical Playbook: Templates, Role Assignment, and First Steps



**INTAKE FORM**
Project title
Requester
Objective

Audience
Key message(s)

Deadline

**CREATIVE BRIEF**
Background

Goals

Audience
Key message(s)

Tone & style
Deliverables

**STORYBOARD TEMPLATE**






**FEEDBACK LOG**
Reason codes
☐ ? Clarification needed
☐ X Content incorrect
☐ 🔄 Not on brand
☐ T Too text-heavy
☐ 📊 Data outdated
☐ ... Other
Notes

**HANDOFF CHECKLIST**
☐ Final content approved
☐ Brand and style check
☐ Data and links verified
☐ Source files included
☐ Accessibility check
☐ Notes and change log included
☐ Handoff complete



- Starter assets: intake form, brief, storyboard, feedback log, handoff checklist



- Assign roles by team size; name one workflow owner



- 30-60-90 plan: map process, pilot one deck type, then scale



- Avoid overtight templates, skipped training, governance without usable assets



- Train by role: requesters on briefs, designers on handoffs, approvers on sign-off



- Fewer decisions, faster handoffs, consistent quality



30 DAYS
Map the process



60 DAYS
Pilot one deck type

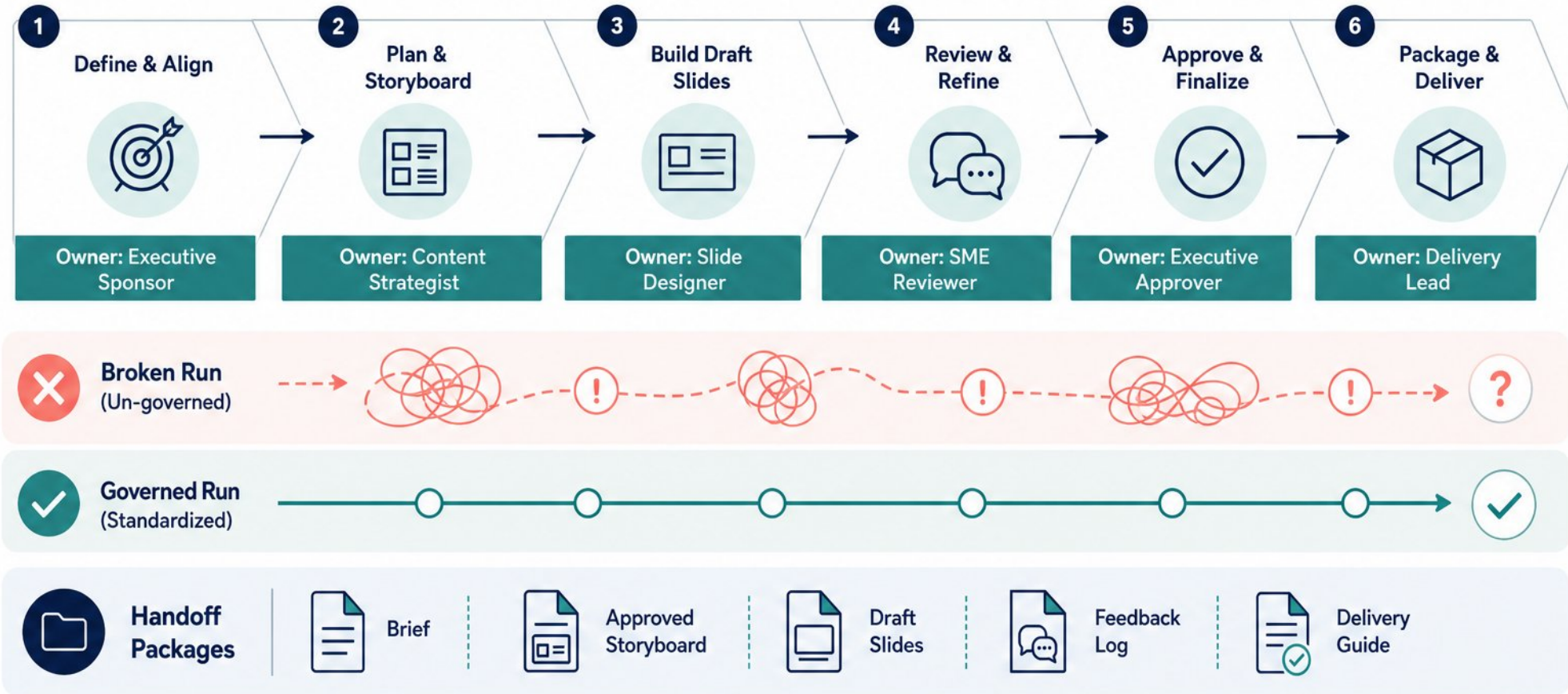


90 DAYS
Scale and standardize



Workflow Scenario: Running the Full Cycle on One Deck

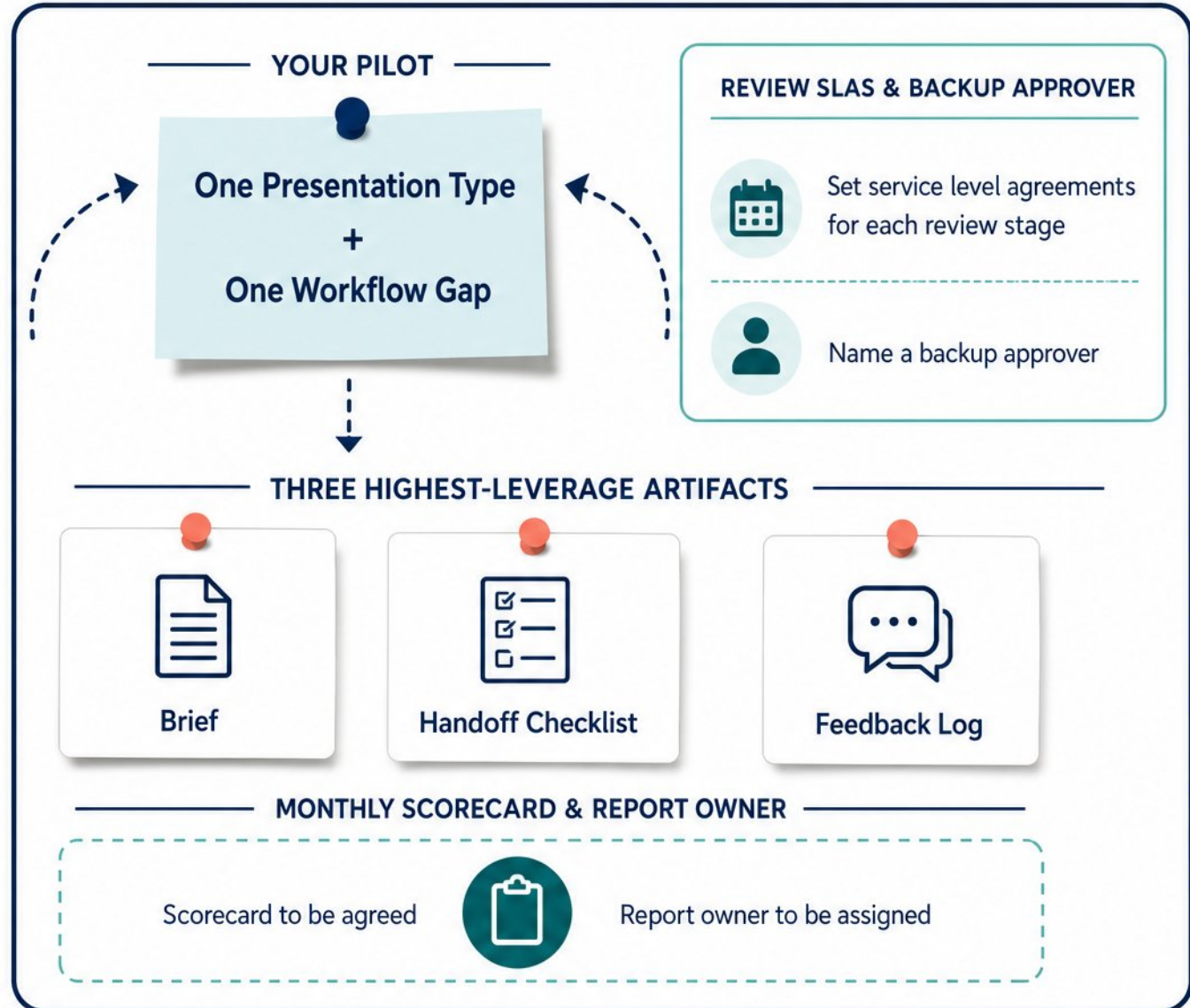
One 20-slide executive deck from start to finish across six stages, with named owners at each transition.



- Walk one 20-slide executive deck through all six stages, owners named
- Handoff packages: brief, approved storyboard, draft slides, feedback log, delivery guide
- Compare a broken run against a governed run on the same brief
- Debrief against the scorecard: cycle time, first-pass rate, rework percentage
- Identify the largest measurable gain and what to standardize next

Action Planning: Your Next 30 Days

-  - Pick one presentation type and one workflow gap as your pilot
-  - Draft or adapt the three highest-leverage artifacts: brief, handoff checklist, feedback log
-  - Set service level agreements for each review stage; name a backup approver
-  - Agree on the scorecard you will review monthly and who owns the report
-  - Commit to one retrofit or reusable asset after every major deck



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