

IBCS® WITH SUCCESS

How communication standards help
understand reports and presentations

Economistas, Consejo General, Madrid 10/10/2017

Xavier Subirats



1/ Introducción. *Why now?*



William Playfair >>



William Petty-Lord Lansdowne >> Charles Gravier-Count de Vergennes>>



Louis XVI

4

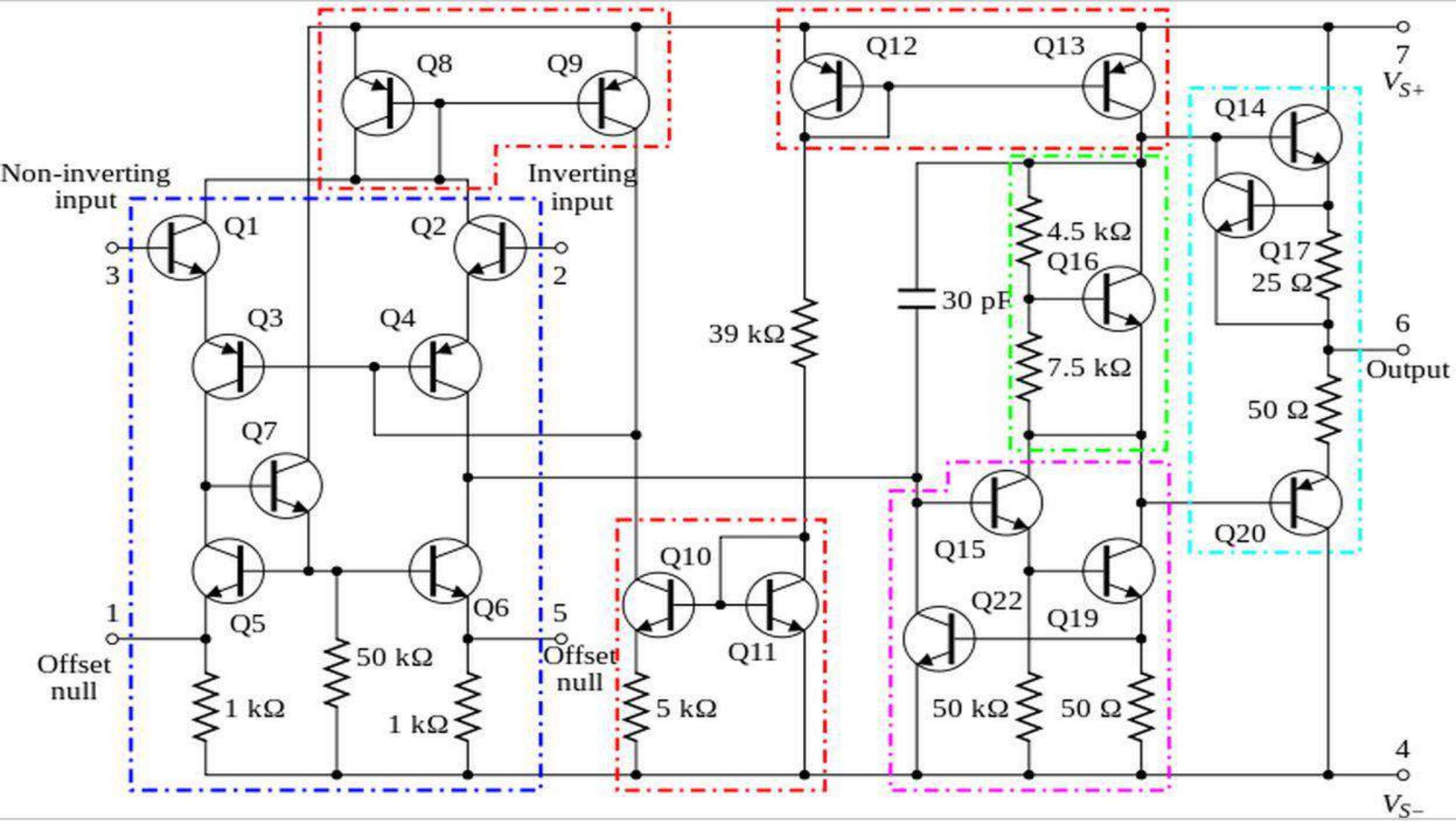
Musical score for page 4, measures 5 to 7. The score consists of three staves: Treble, Bass, and Alto. Measure 5 starts with a sixteenth-note pattern in the Alto staff. Measures 6 and 7 feature eighth-note patterns in the Treble and Bass staves. Measure 7 concludes with a sixteenth-note pattern in the Alto staff.

Measure numbers: 5, 7, 6, 5, 6, 5, 6, 6, 2, 6, 6, 7, 6, 3, 7, 2.

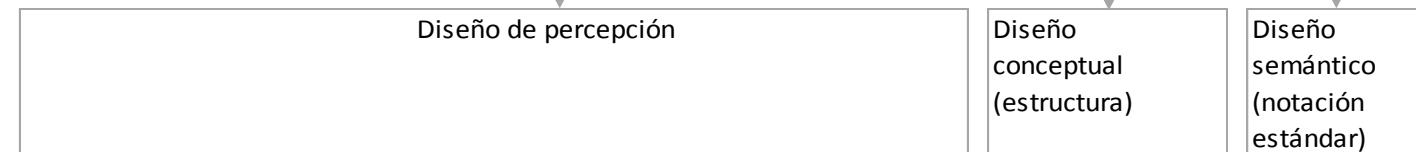
7

Musical score for page 7, measures 8 to 10. The score consists of three staves: Treble, Bass, and Alto. Measures 8 and 9 show eighth-note patterns in the Treble and Bass staves. Measure 10 concludes with a sixteenth-note pattern in the Alto staff.

Measure numbers: 8, 6, 2, 6, 6, 7, 6, 5, 6, 4, 2, 6, 7, 6, 4, 3, 7, 6, 5, 6.

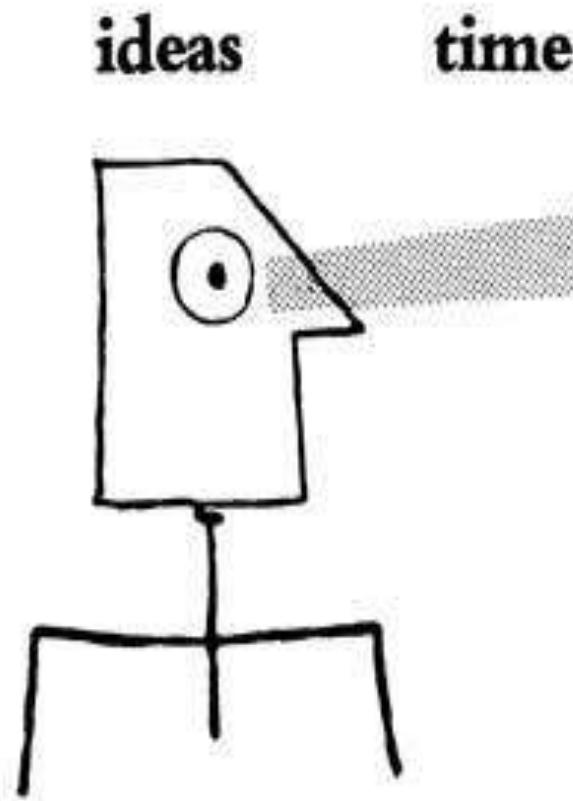


1779	1786	1913	1983	2004	1978	1985	2010
Johan H. Lambert (Alemania)	Playfair, W. (Gran Bretaña)	Brinson (EE.UU)	Tufte (EE.UU)	Few (EE.UU)	Minto (EE.UU)	Zelazny (EE.UU)	Hichert (Alemania)

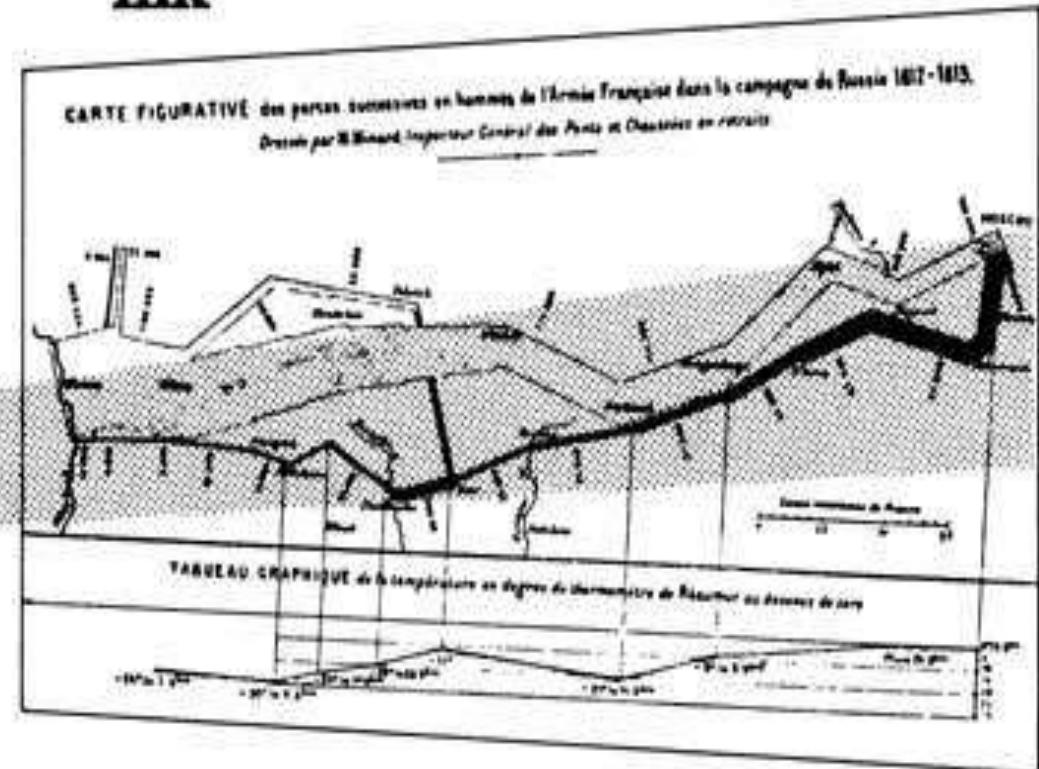


Marco de aplicación **SUCCESS**

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



space
ink



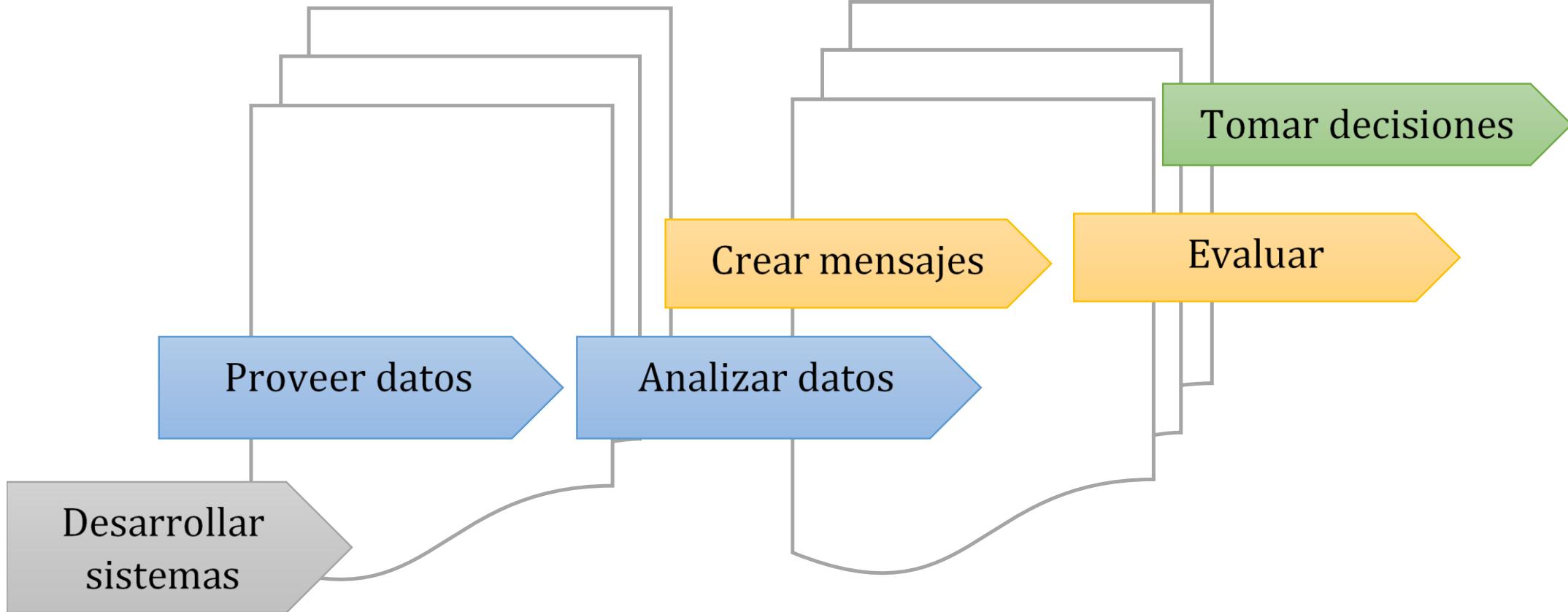
Edward Tufte : The Visual Display of Quantitative Information

2/ Beneficios

SISTEMAS DE INFORMACIÓN

Procesamiento de datos

Estadísticas y datos



CONTROLLERS

Controlling

Informes y presentaciones

DIRECTIVOS

Management

Tomar decisiones

Evaluar

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

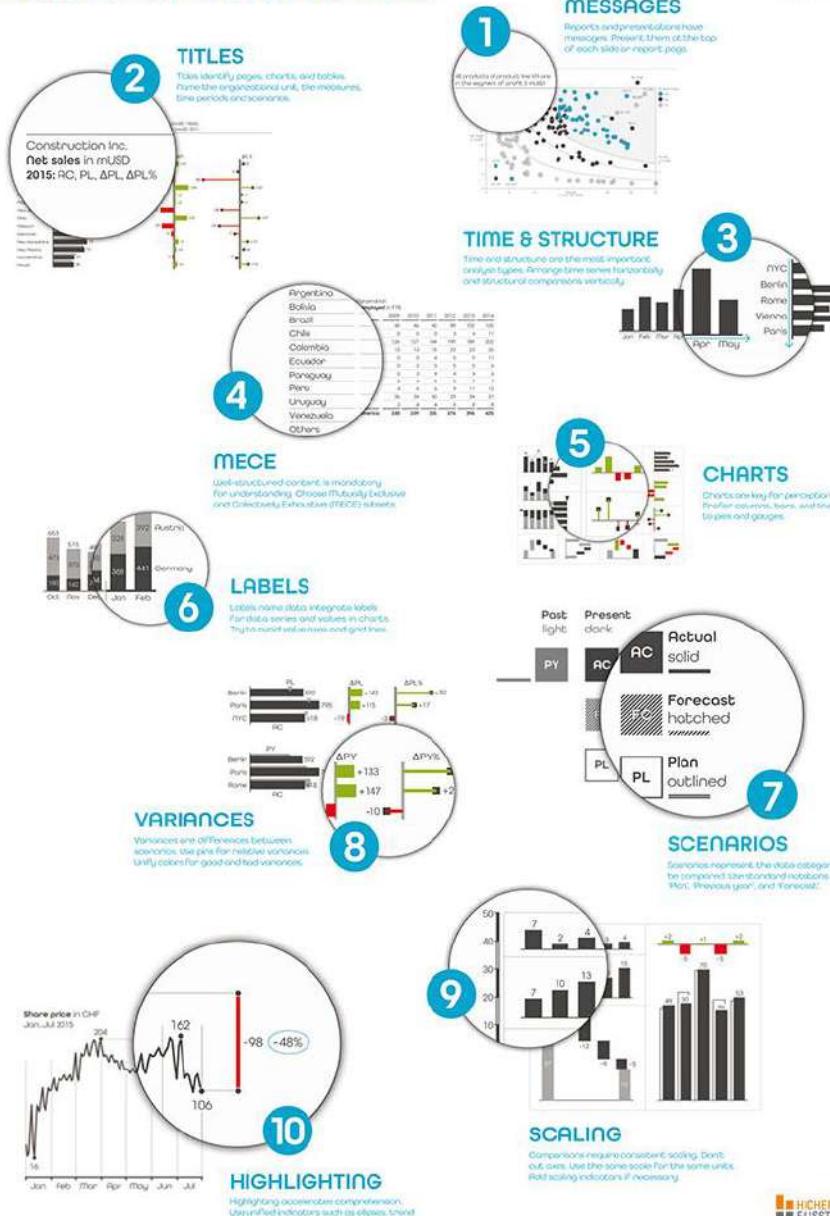
3/ Principios. Top Ten Principles

IBCS TOP TEN

Standards For Business Communication



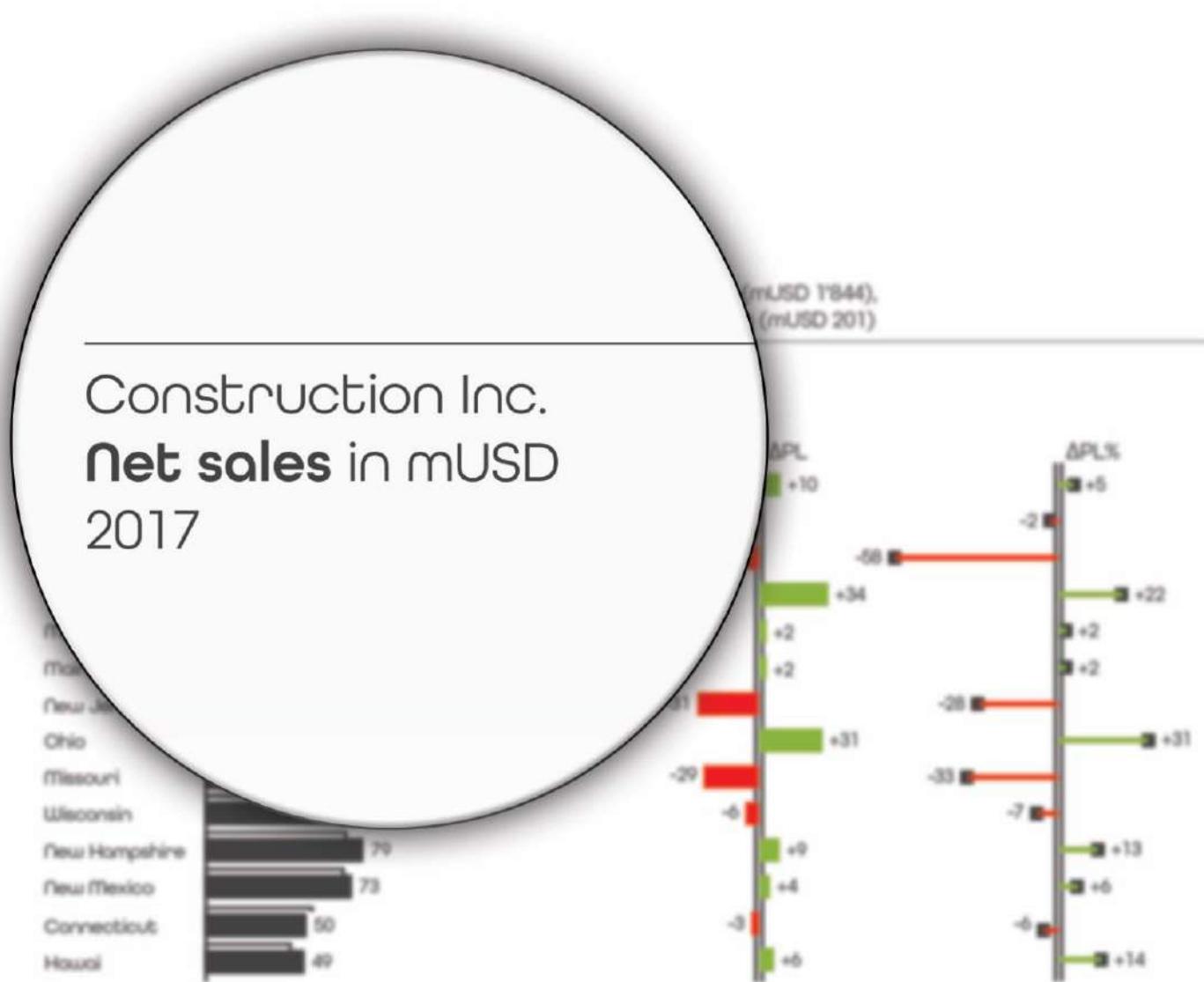
IBCS.org



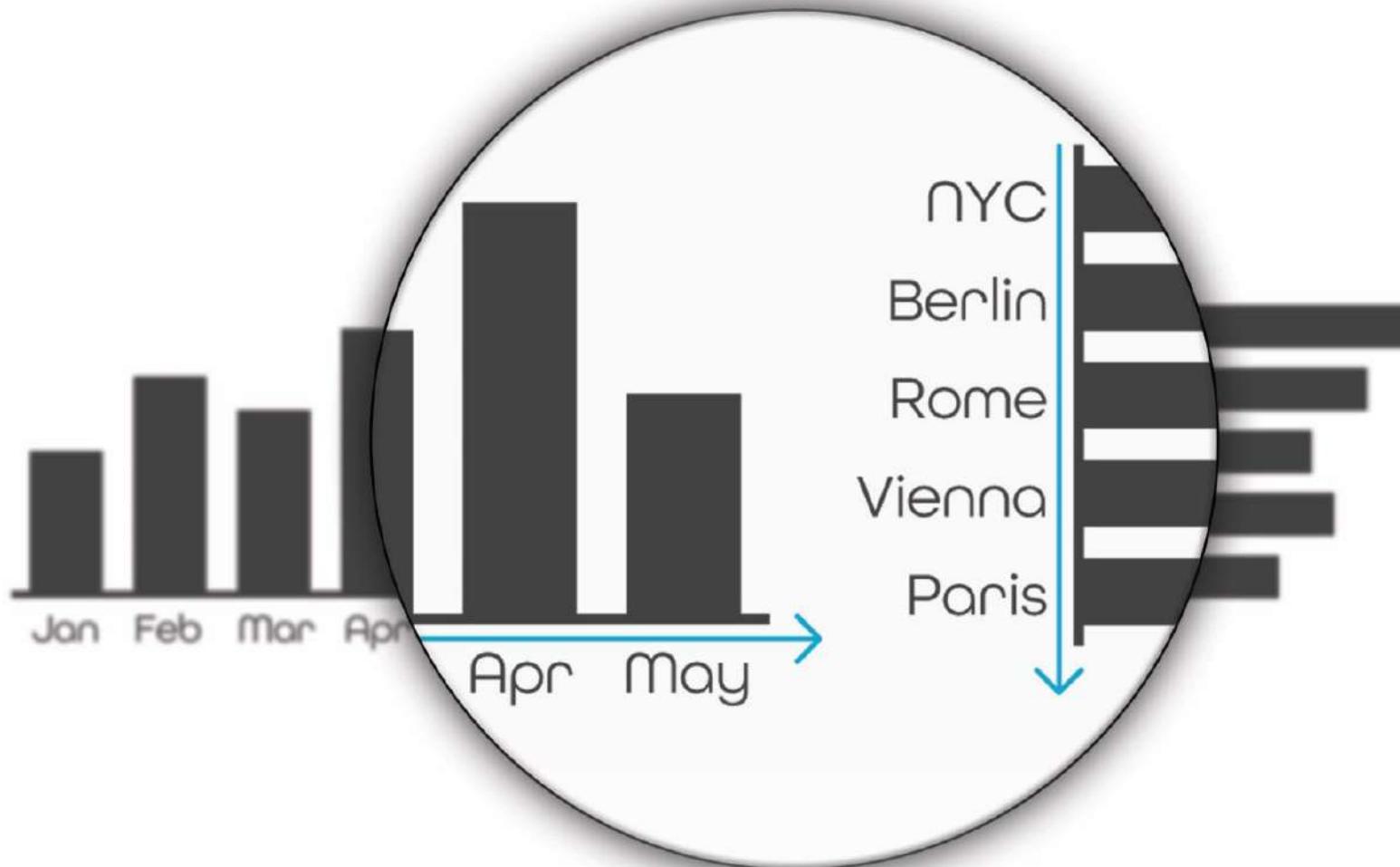
1.- Mensajes: debe figurar un mensaje en cada página del informe o de la presentación.



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.

Argentina

Bolivia

Brazil

Chile

Colombia

Ecuador

Paraguay

Peru

Uruguay

Venezuela

Others

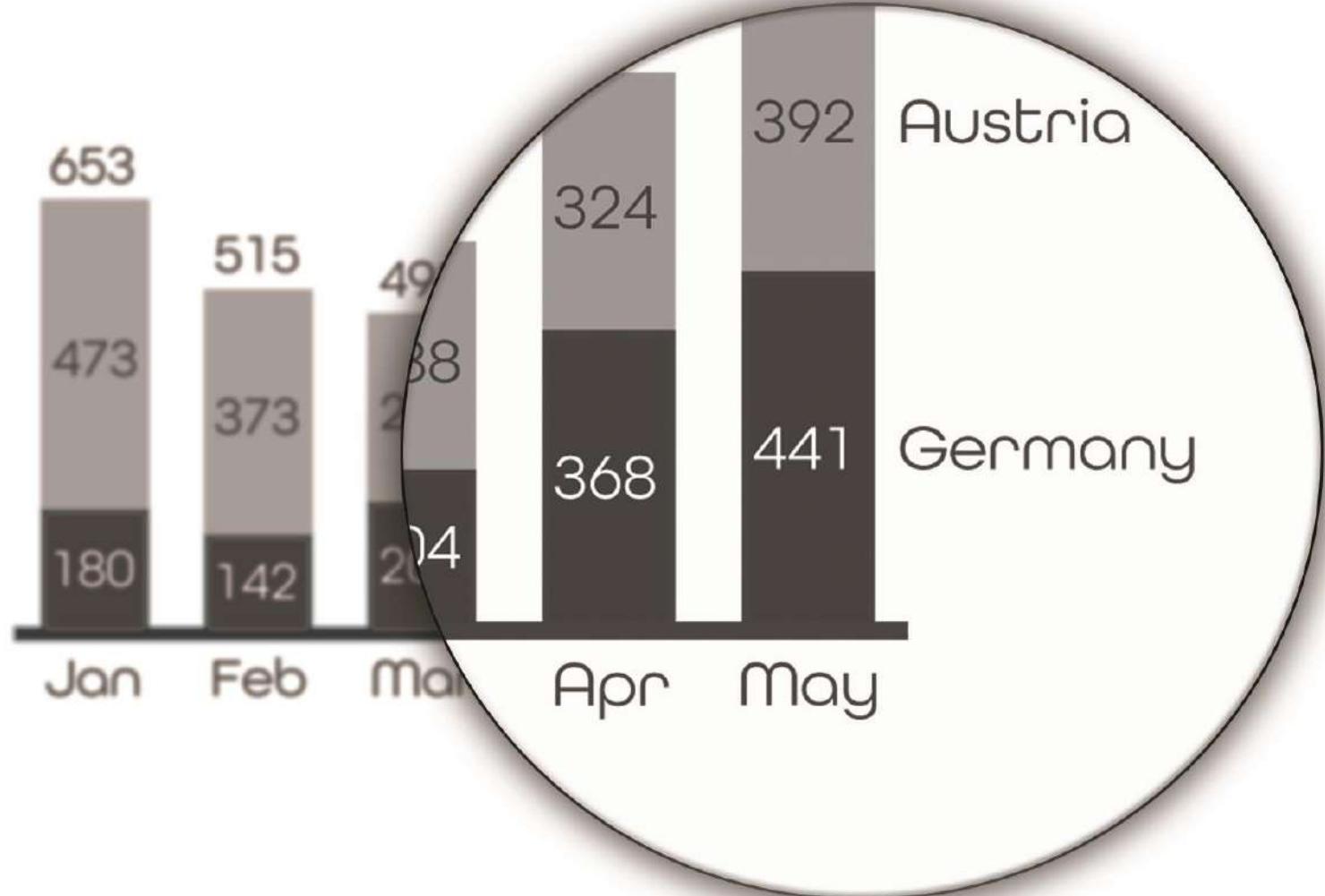
Corporation
employed in FTE

	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

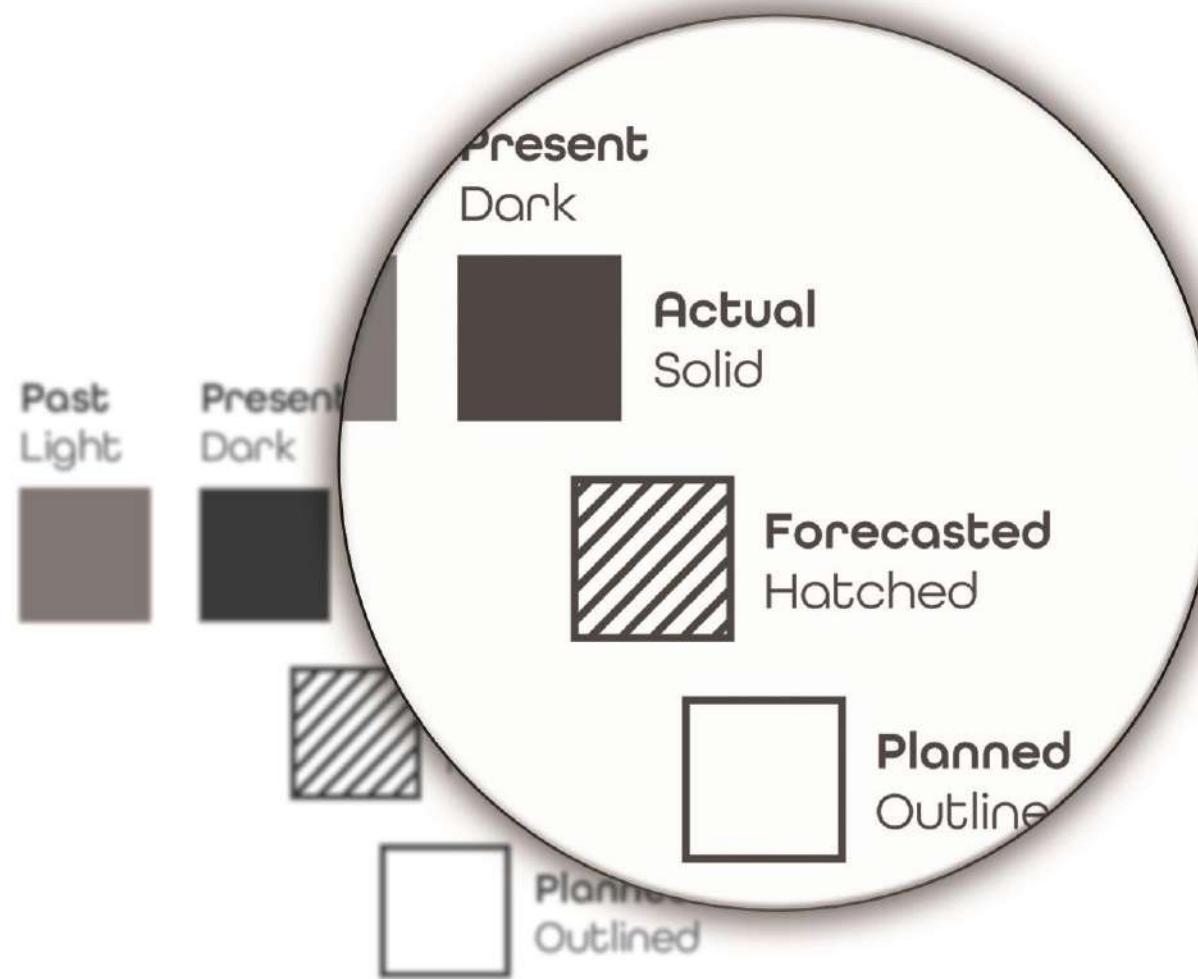
5.- Gráficos.



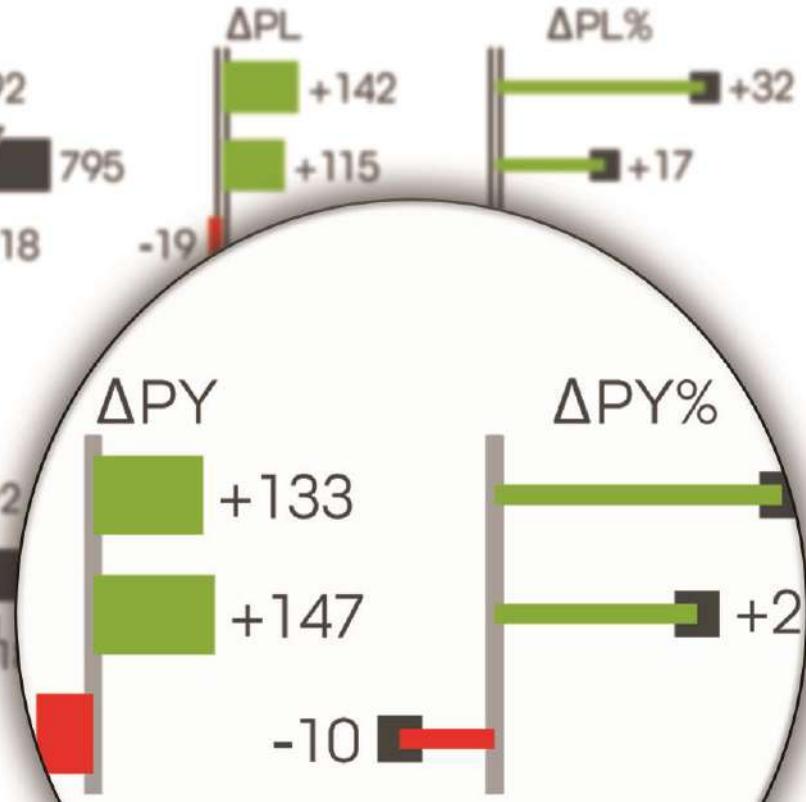
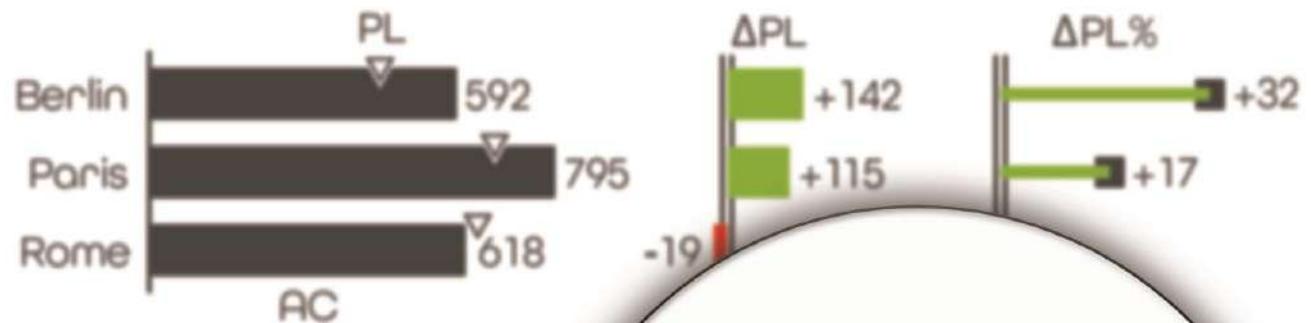
6.- Etiquetas: las etiquetas deben ir integradas en los gráficos, no separadas.



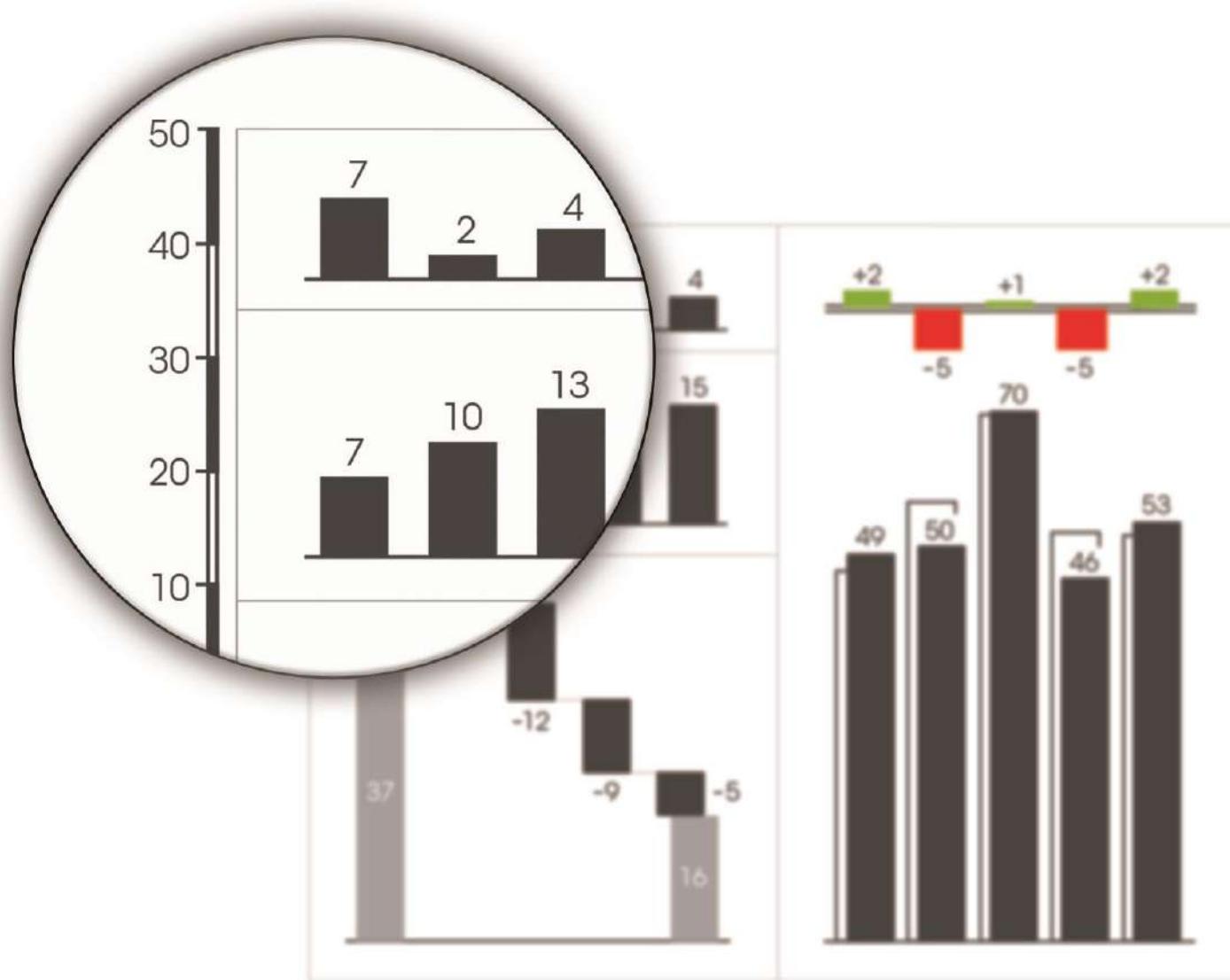
7.- Escenarios: hay que usar color oscuro sólido para los datos del ejercicio actual, el gris para el ejercicio previo, el remarcado para el presupuesto o el plan y las rayas diagonales (*hatched*) para las estimaciones.



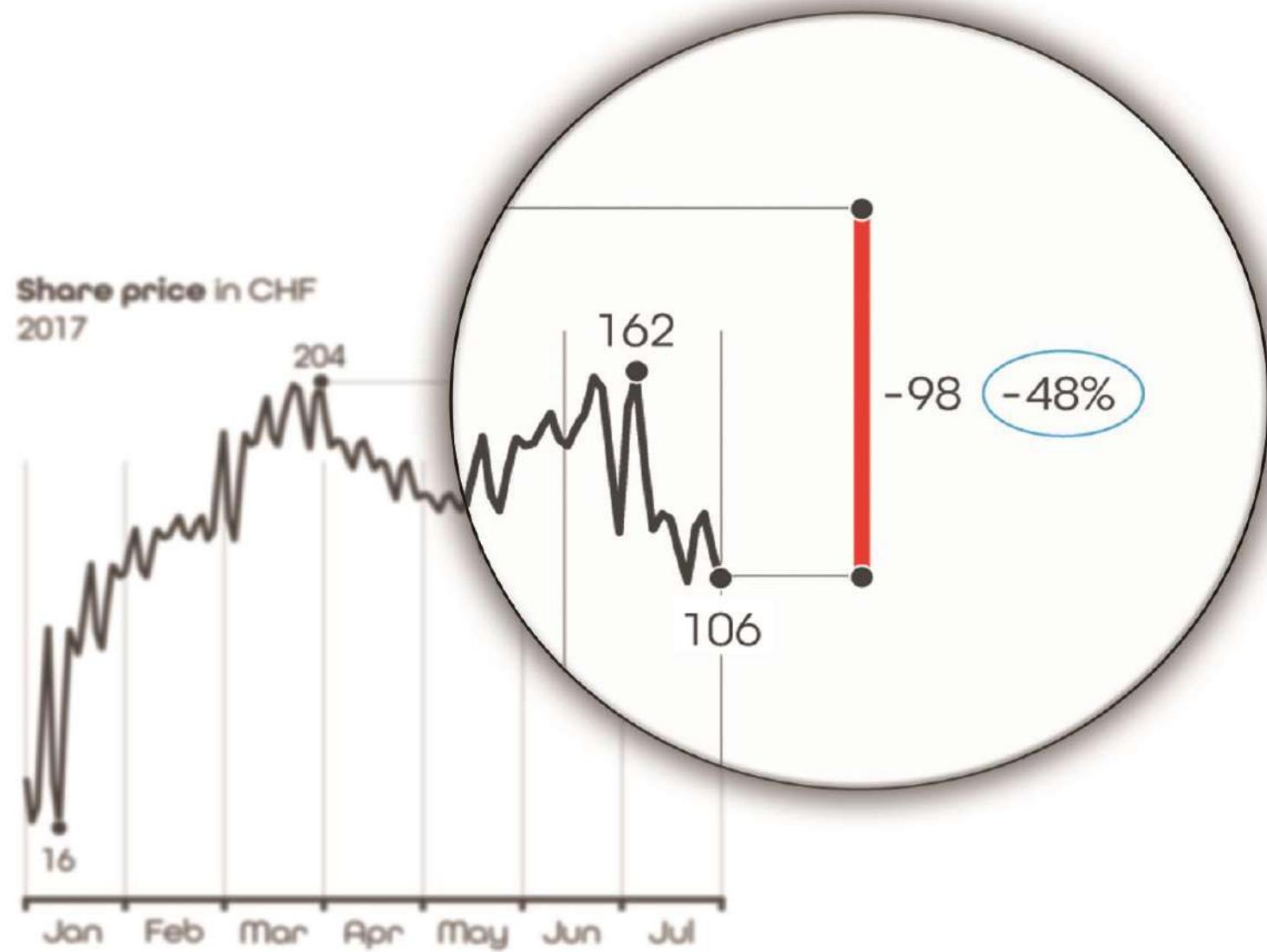
8.- Variaciones: las variaciones positivas (para un objetivo determinado) deben ir en verde y las negativas en rojo.



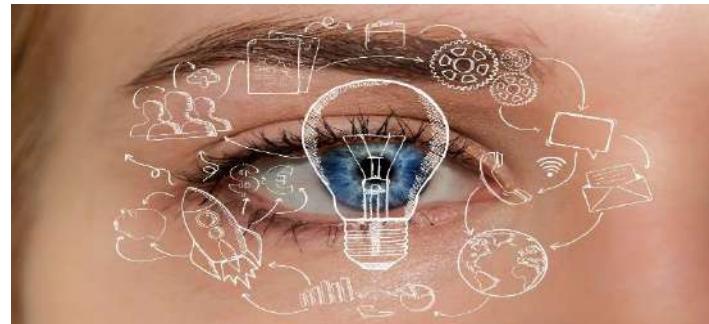
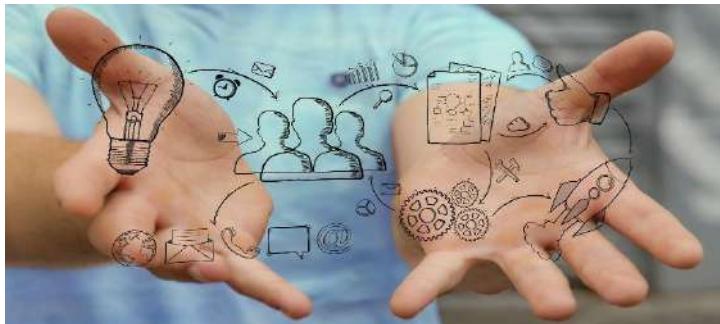
9.- Escala: las escalas deben ser correctas y homogéneas.



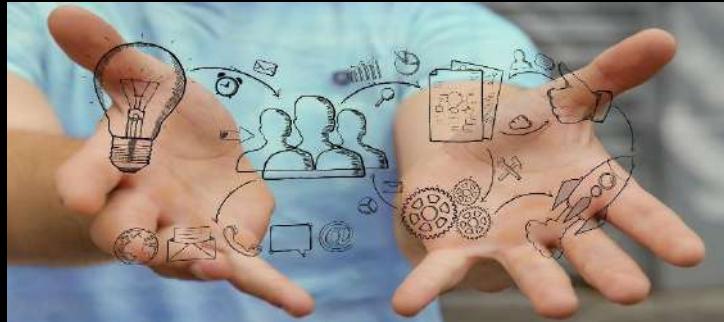
10.- Remarcar.



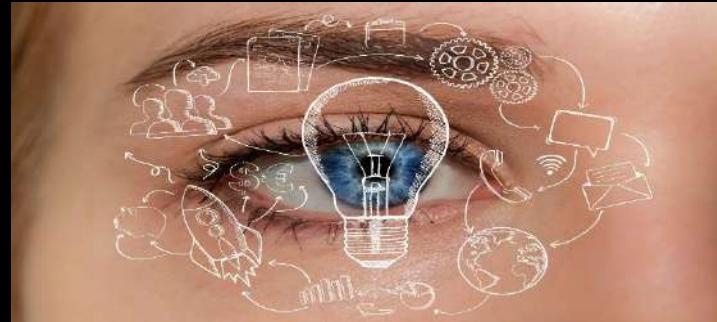
4.- Método: *How to?* >> SUCCESS



Conceptual rules



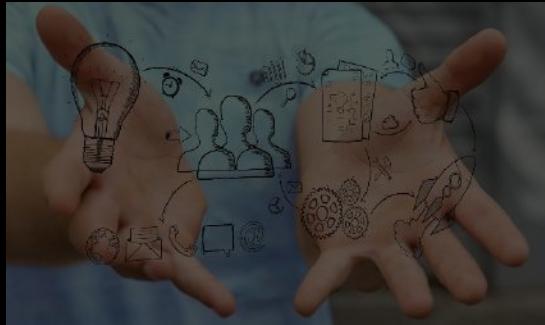
Perceptual rules



Semantic rules



Conceptual
rules



Perceptual
rules



Semantic
rules



SAY

STRUCTURE

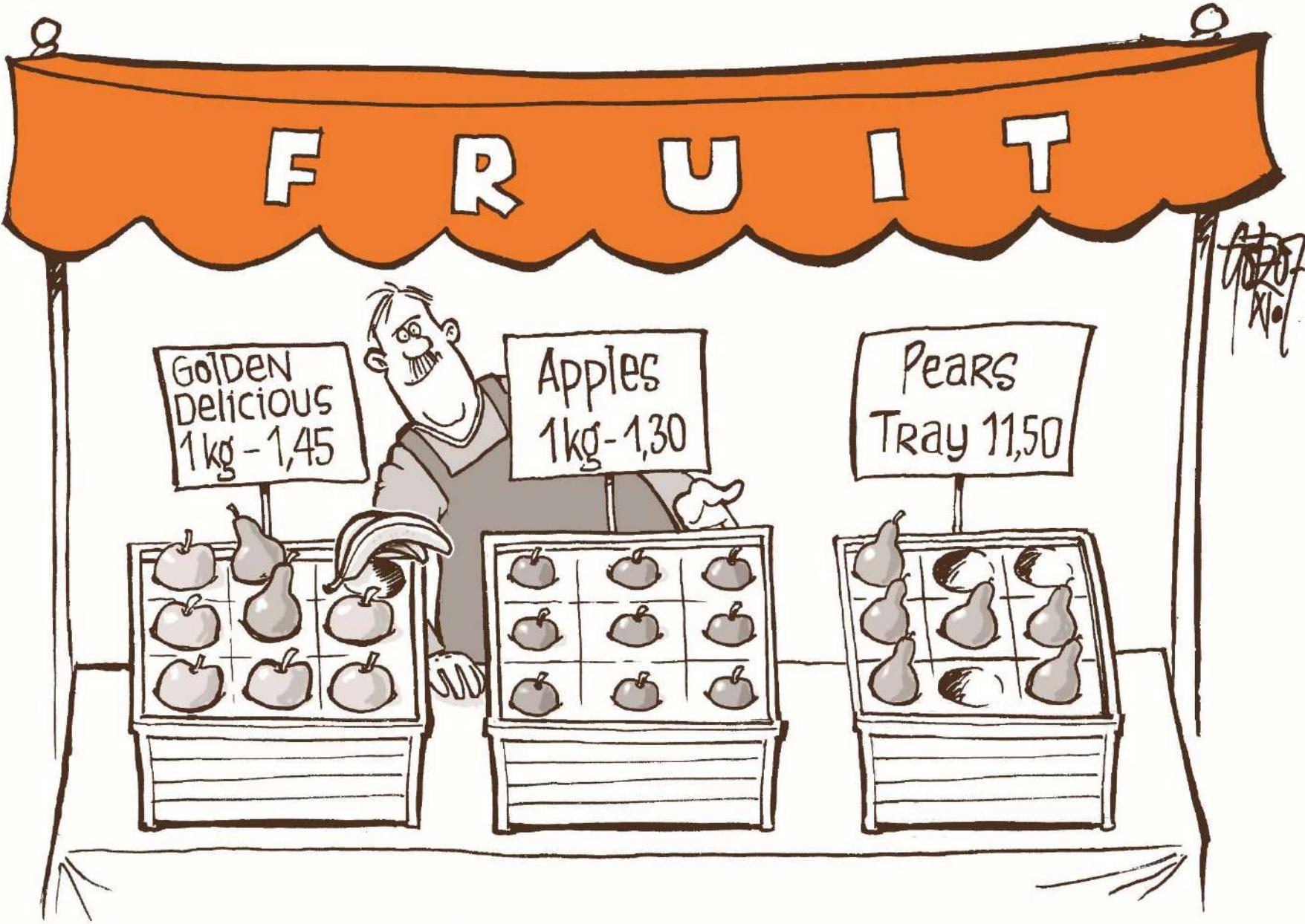
CONDENSE
CHECK
EXPRESS
SIMPLIFY

UNIFY

SAY Convey a message

SAY Convey a message

STRUCTURE Organize content



NOT UNIFORM – NOT MUTUALLY EXCLUSIVE – NOT EXHAUSTIVE

Conceptual rules



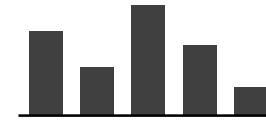
SAY

EXPRESS Choose proper visualization

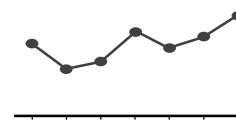
STRUCTURE

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

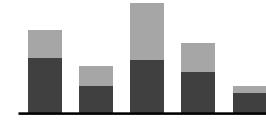
Comparing growth rates

Waterfall

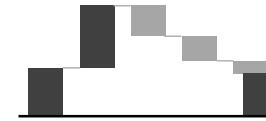
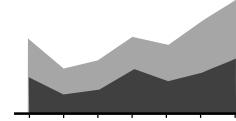
Contributions to growth (columns) or calculations (bars)

Time series

Columns Few data points

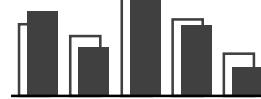


Lines and areas Many data points

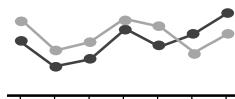


Time series

Columns (cont.)



Lines and areas (cont.)



Structures

Bars (cont.)

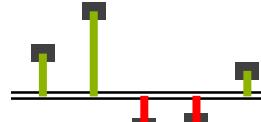
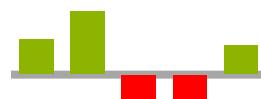


Grouped
Comparisons

Red and green
Absolute variances

Red and green pins
Relative variances

Red and green waterfall
Contributions
to variance



Conceptual rules



SAY

EXPRESS Choose proper visualization

SIMPLIFY Avoid clutter

STRUCTURE

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

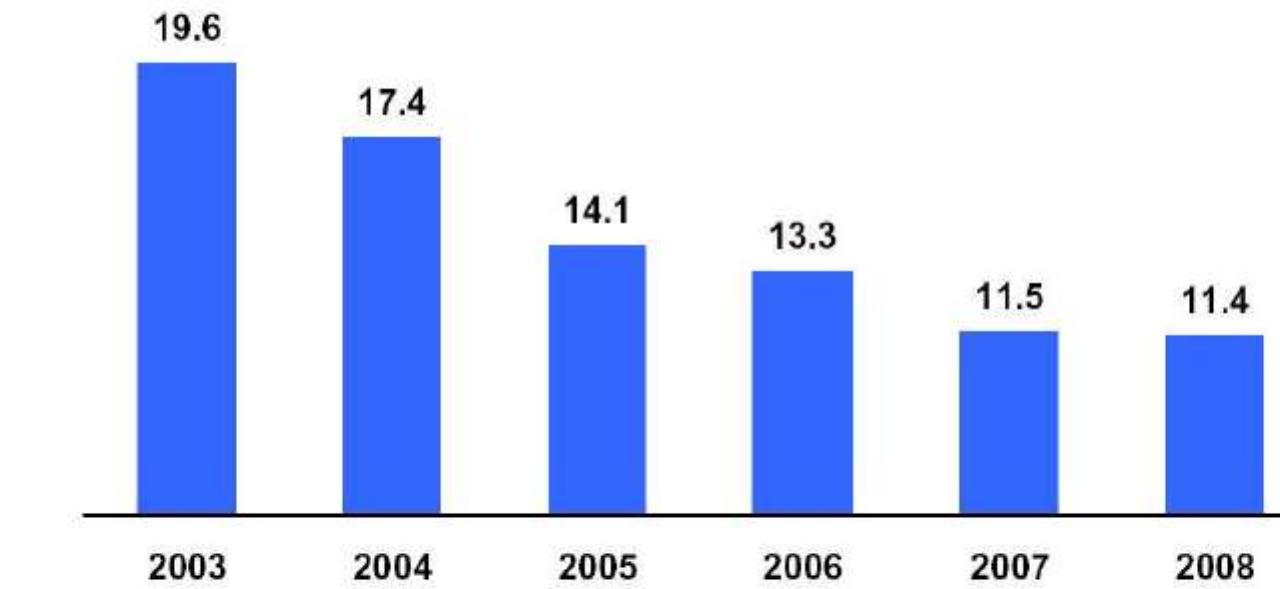
3

4

FY 2008 Key Financials

36

NWC/sales ratio in %

 1 2 3 4

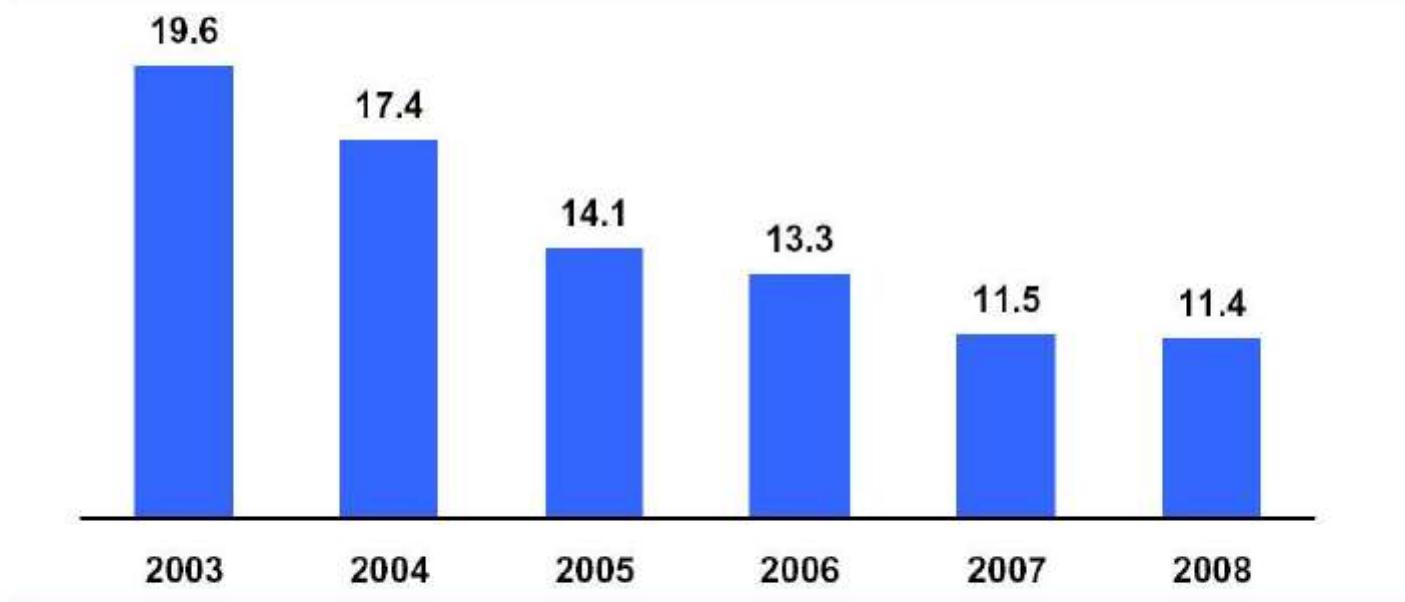
FY 2008 Key Financials

36

We reduced the Net Working Capital per Sales



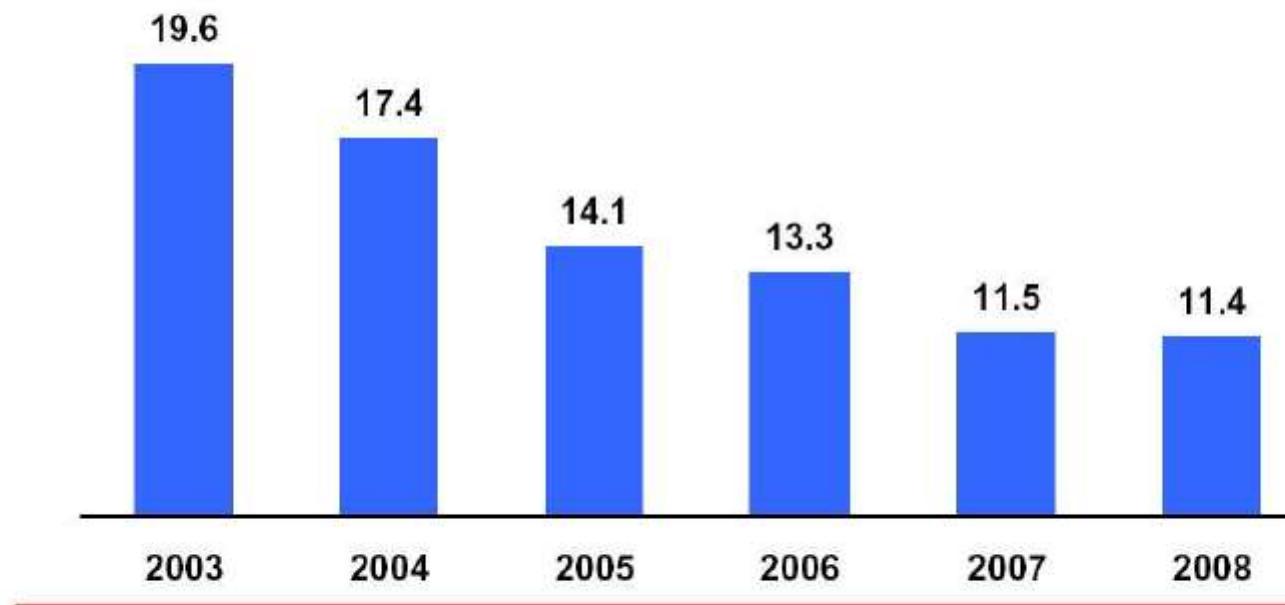
NWC/sales ratio in %



We reduced the Net Working Capital per Sales



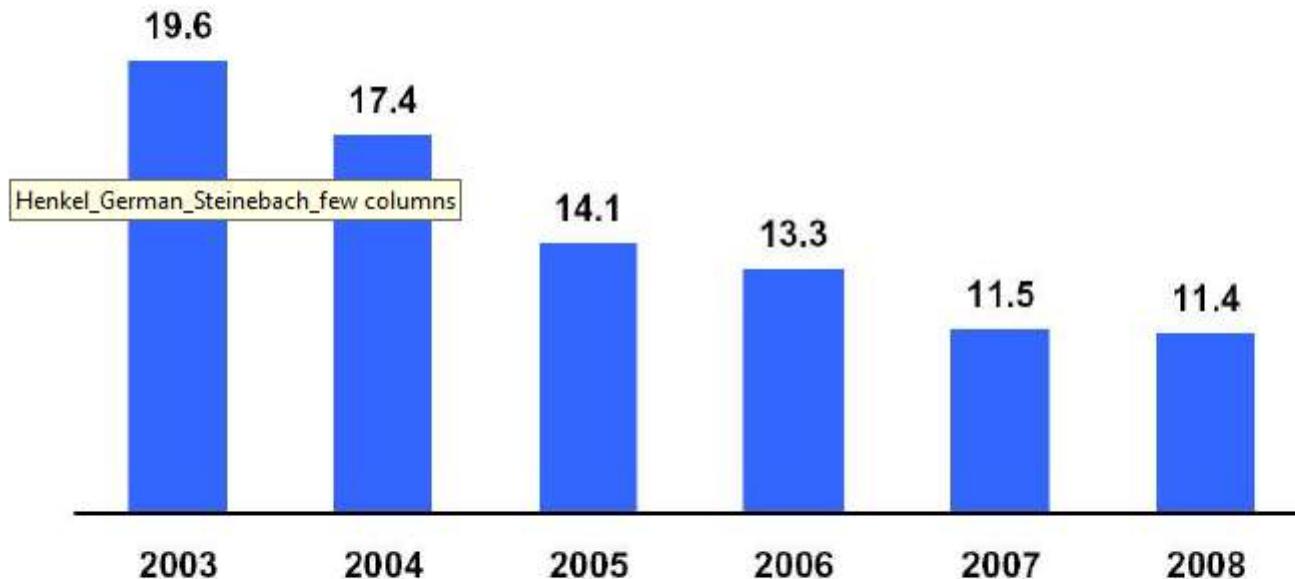
Net Working Capital per Sales in %
2003..2008



We reduced the Net Working Capital per Sales

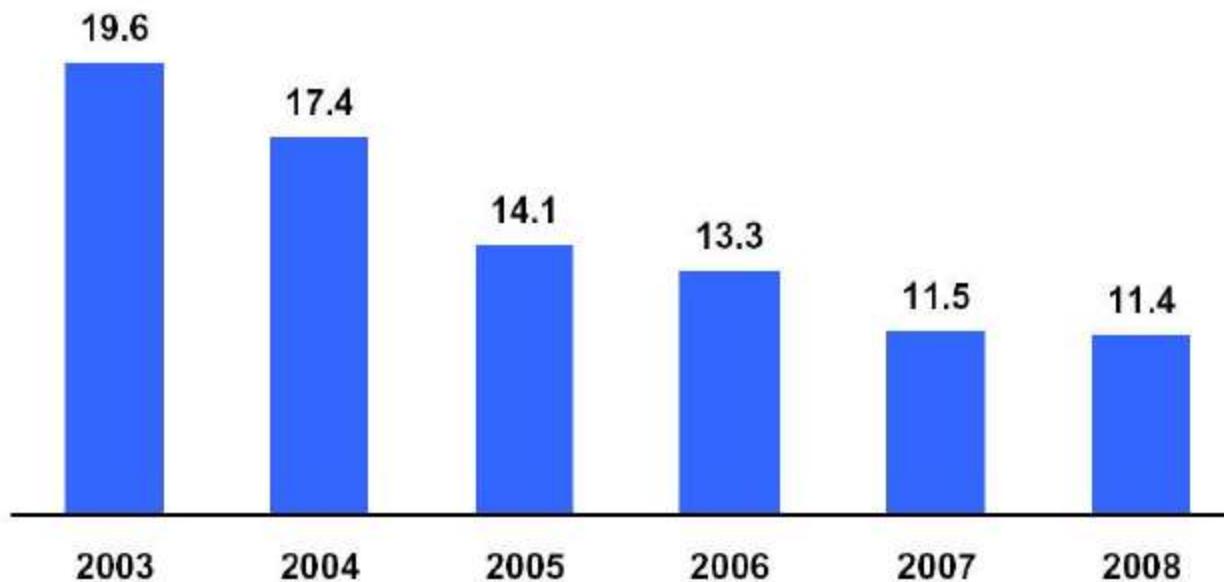


Net Working Capital per Sales in %
2003..2008



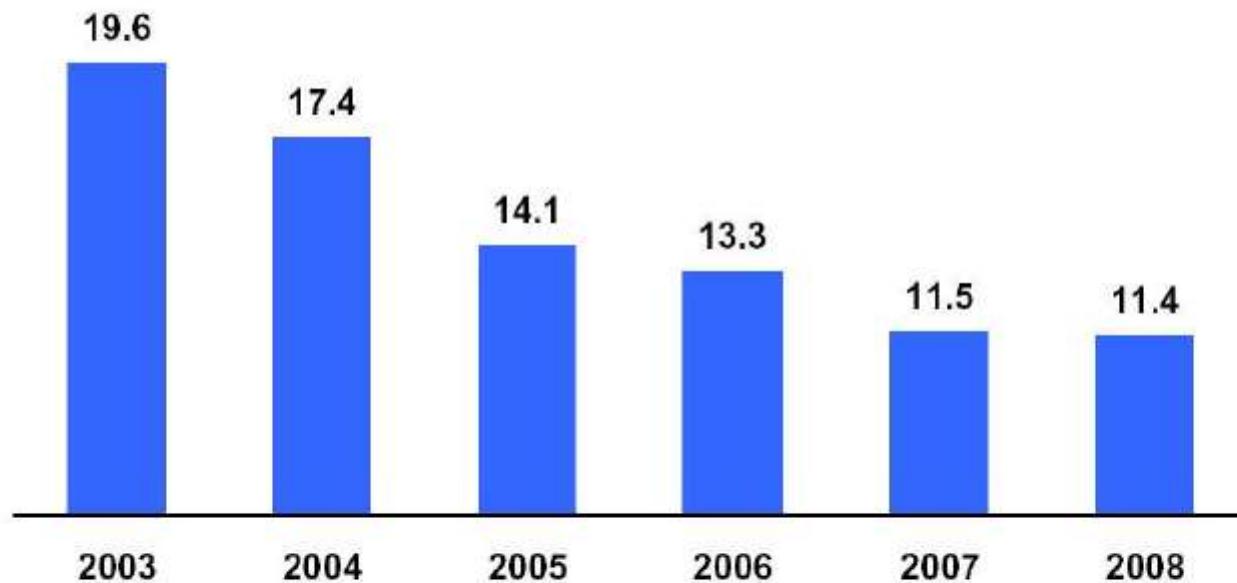
We reduced the Net Working Capital per Sales

Net Working Capital per Sales in %
2003..2008



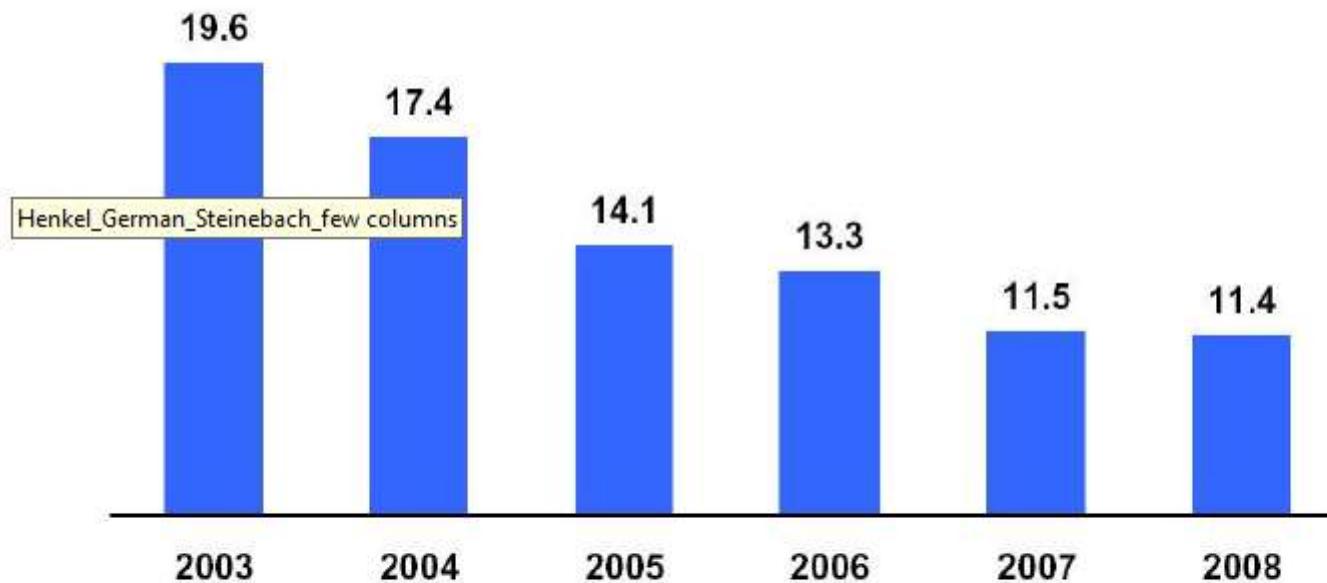
We reduced the Net Working Capital per Sales

Net Working Capital per Sales in %
2003..2008



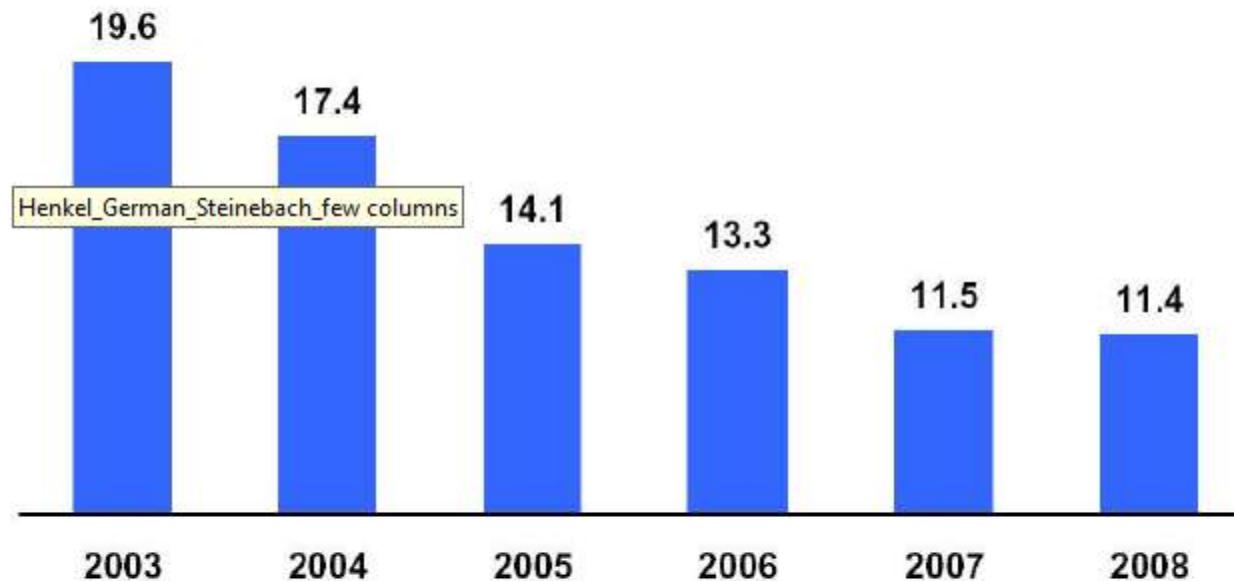
We reduced the Net Working Capital per Sales

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

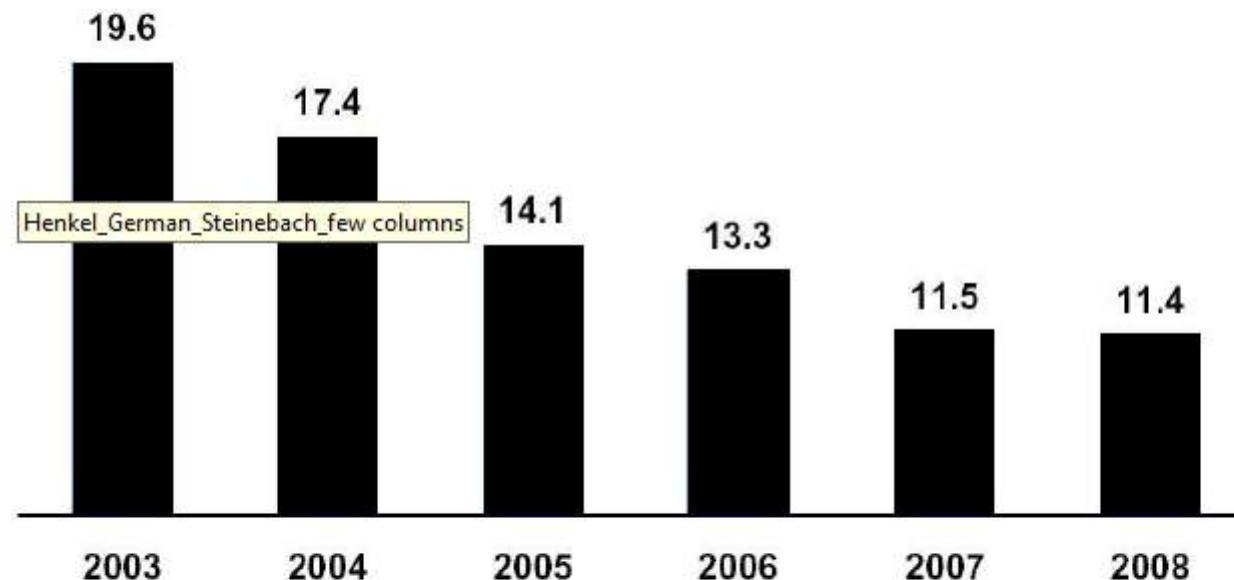


We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

2003..2008



Conceptual rules



SAY

CONDENSE Increase information density

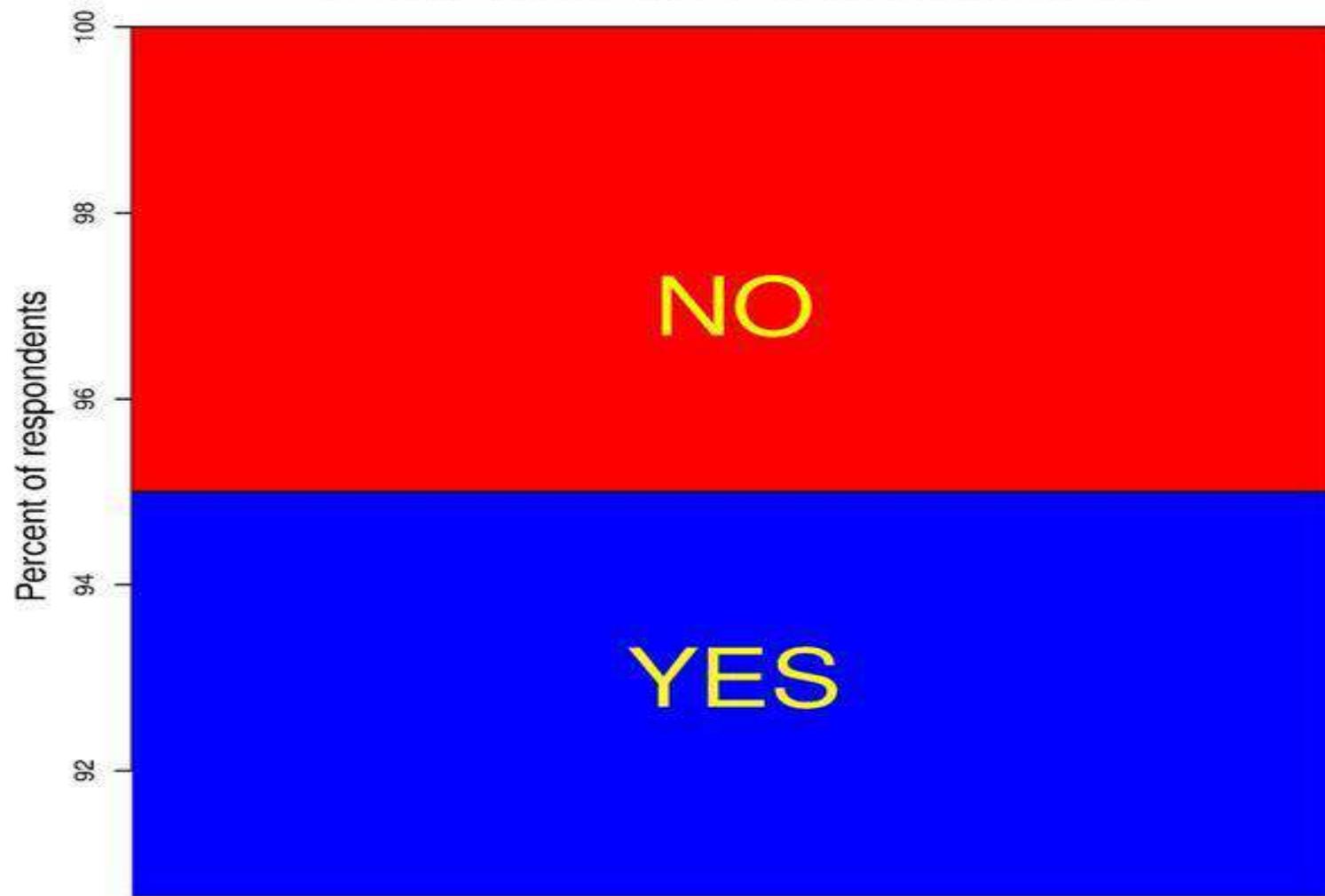
CHECK Ensure visual integrity

EXPRESS Choose proper visualization

SIMPLIFY Avoid clutter

STRUCTURE

Is truncating the Y-axis dishonest?

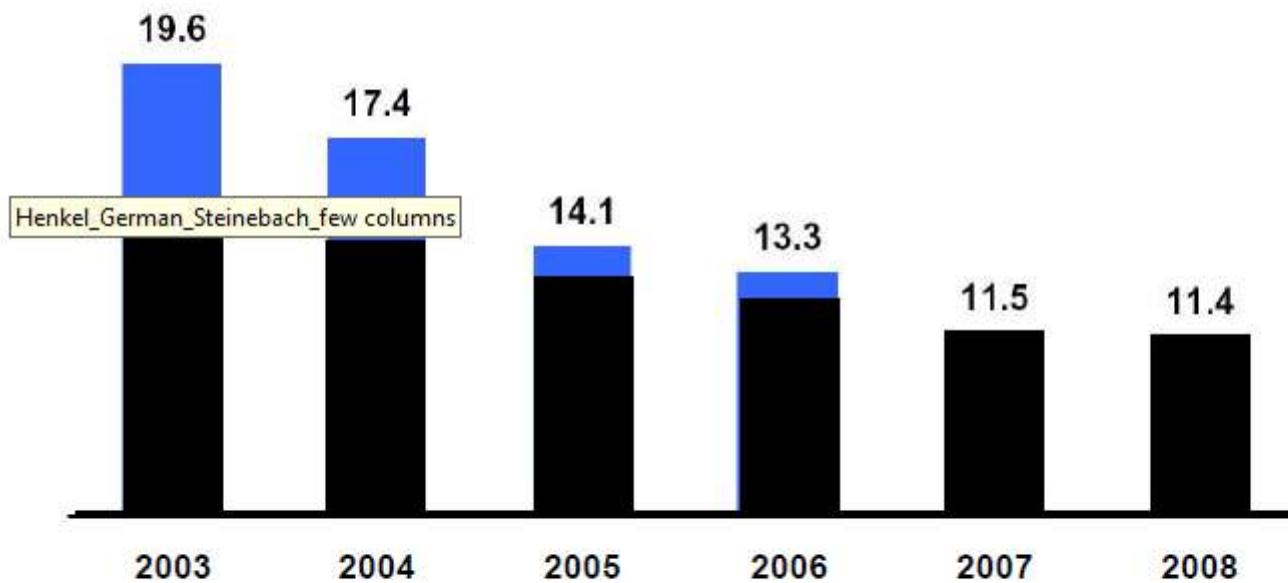


We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

2003..2008

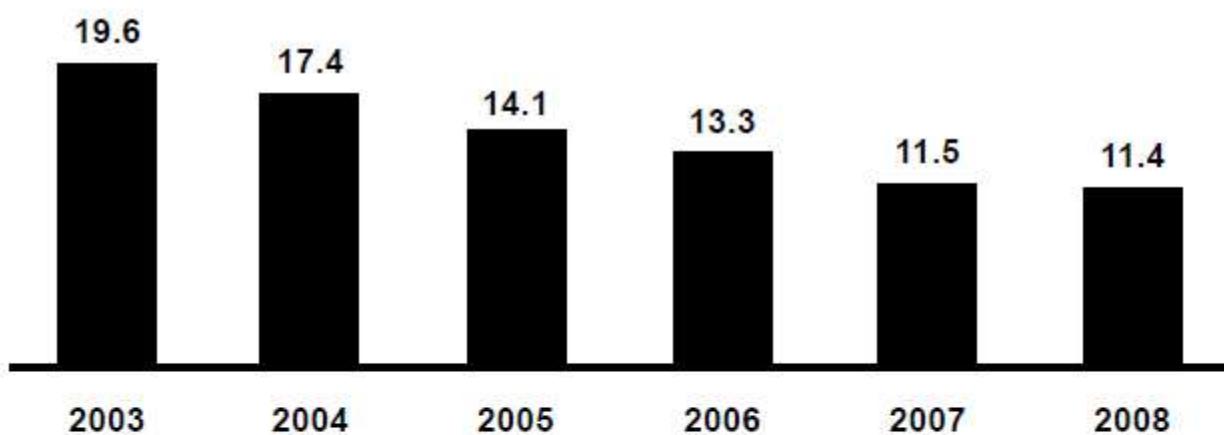


We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

2003..2008



Conceptual rules



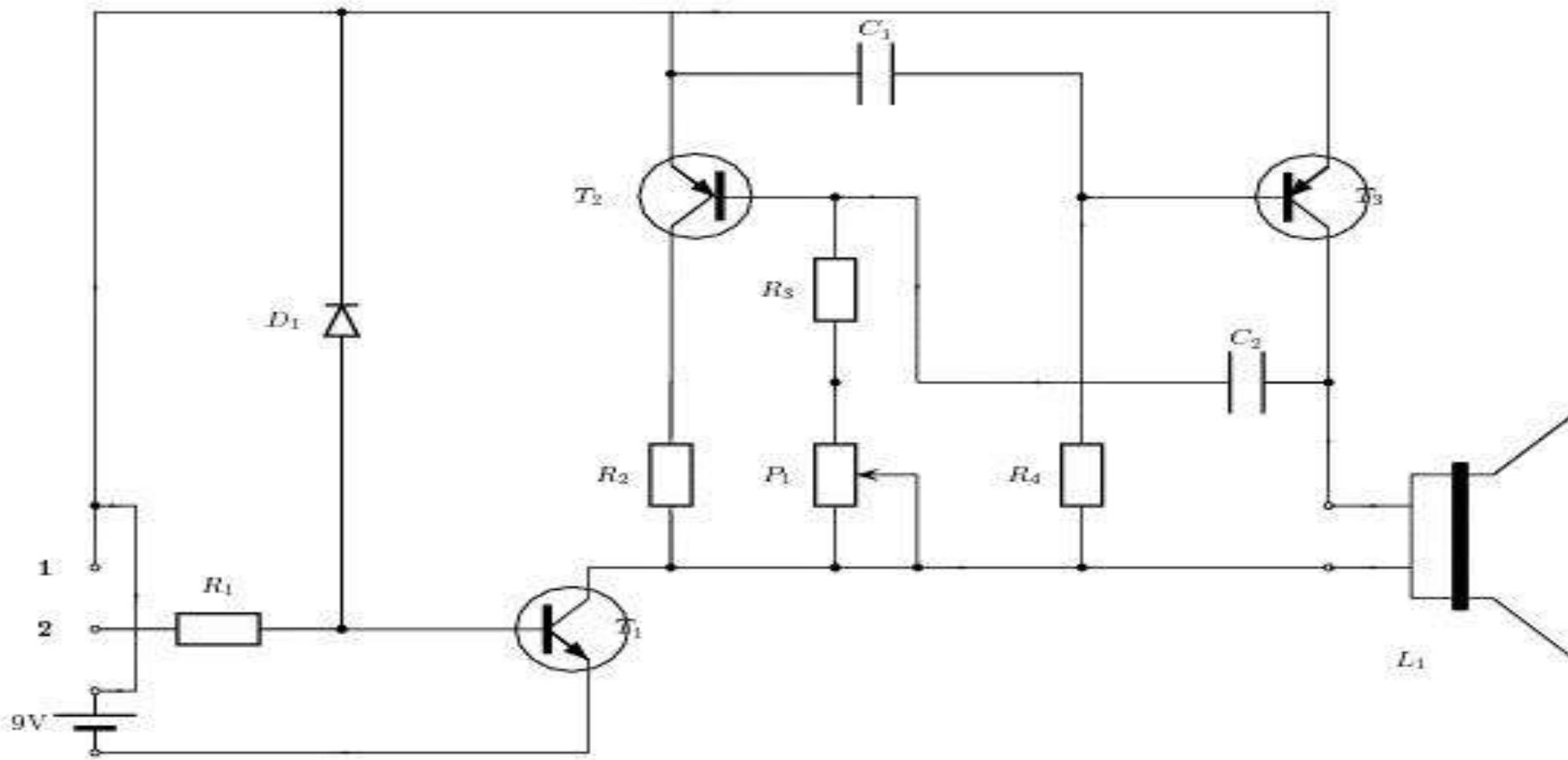
SAY

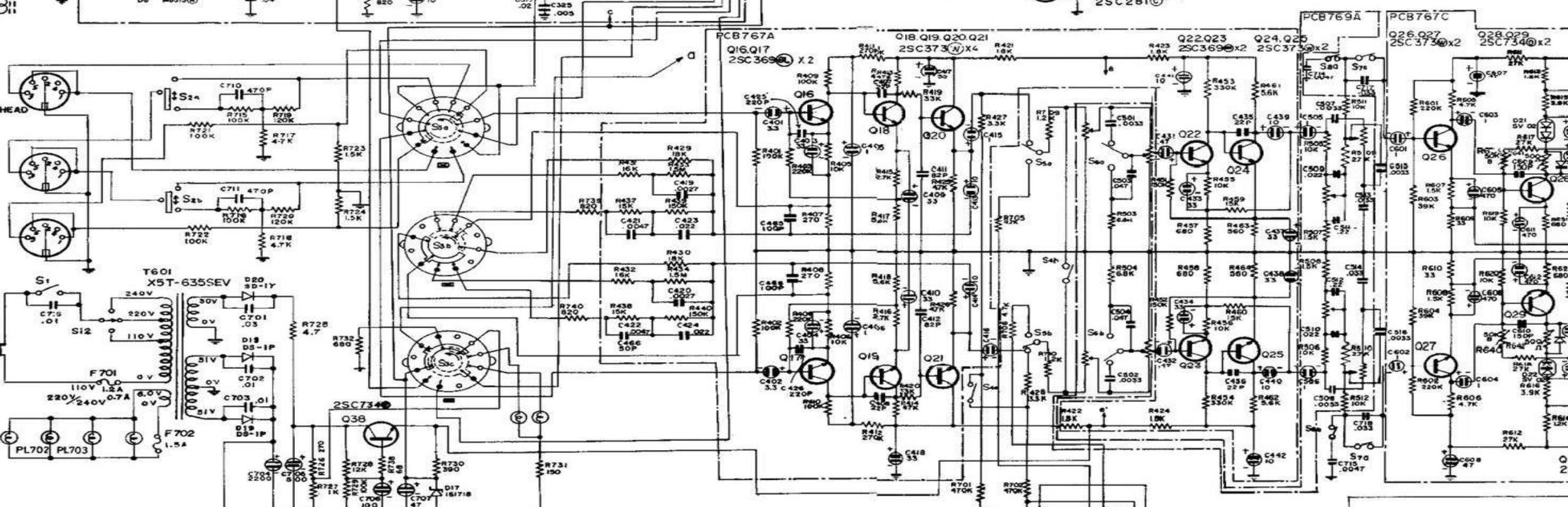
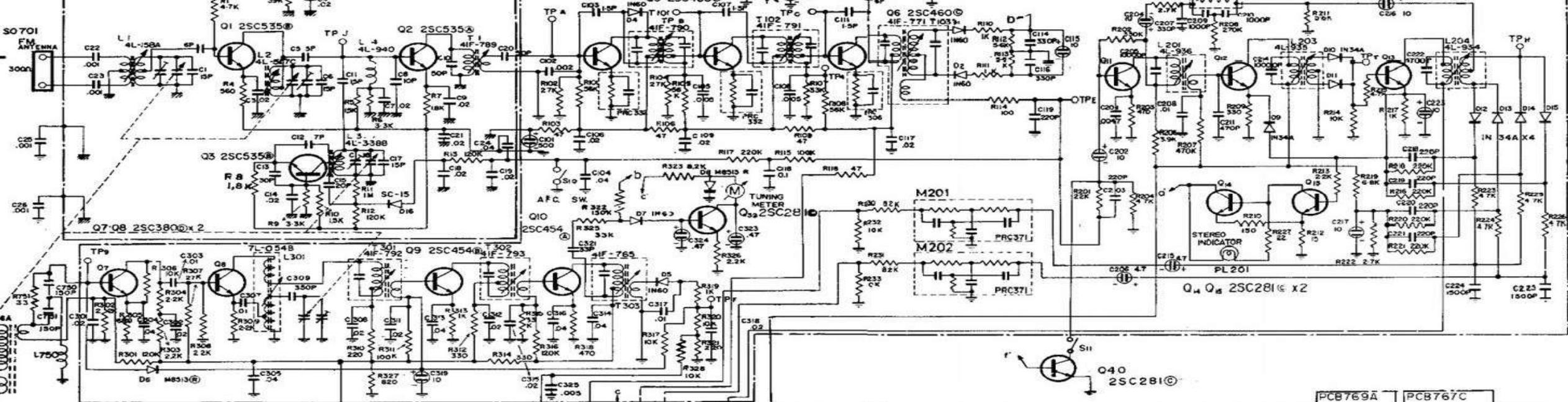
CONDENSE Increase information density

EXPRESS Choose proper visualization

SIMPLIFY Avoid clutter

STRUCTURE



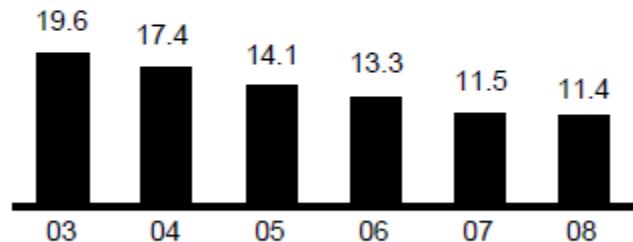


We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

2003..2008

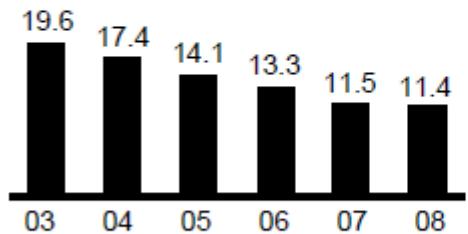


We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

2003..2008

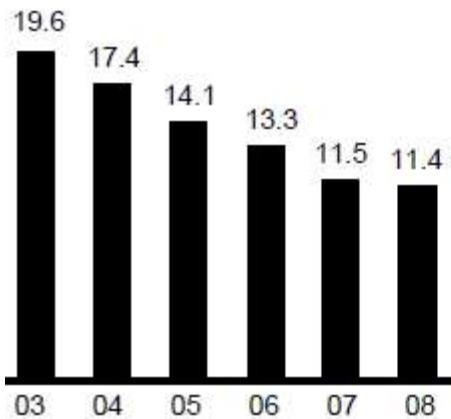


We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

2003..2008

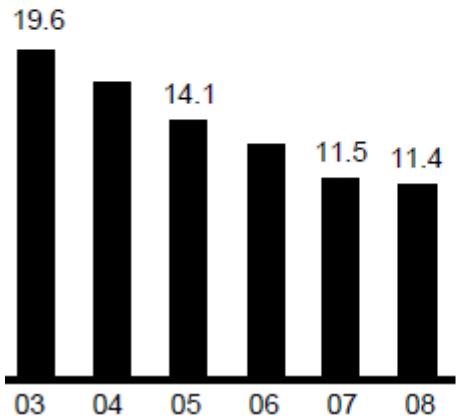


We reduced the Net Working Capital per Sales

Henkel AG

Net Working Capital per Sales in %

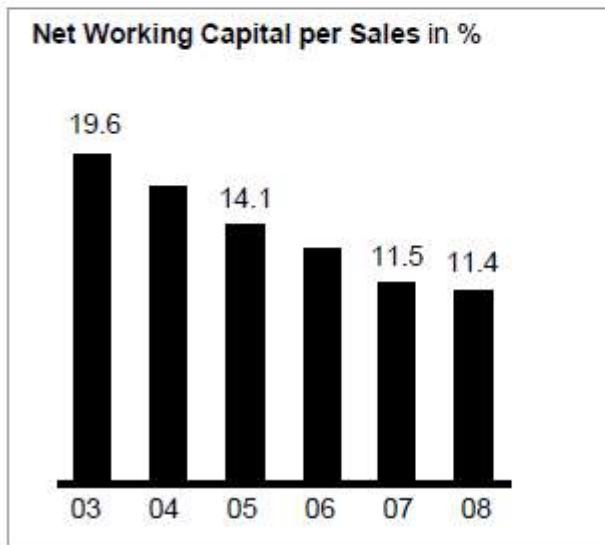
2003..2008



We reduced the Net Working Capital per Sales

Henkel AG

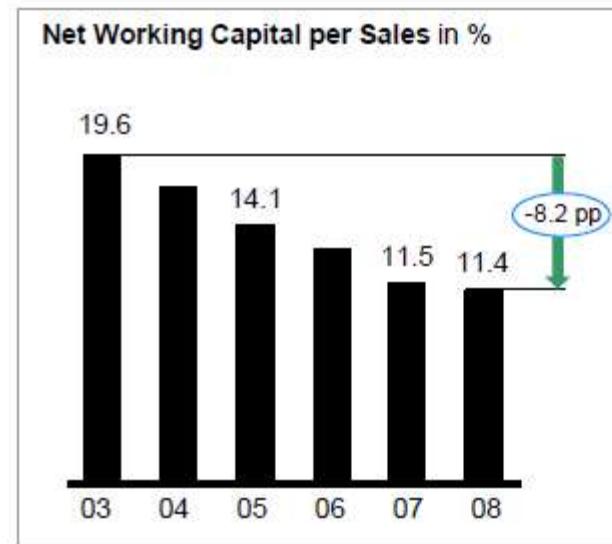
2003..2008



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

Henkel AG

2003..2008

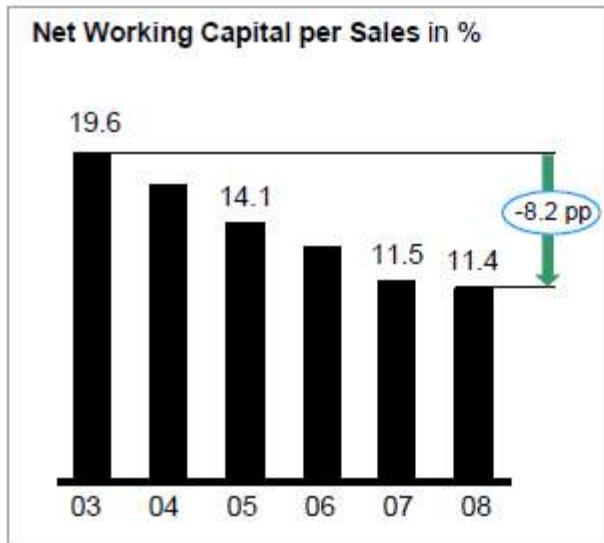


We reduced the Net Working Capital per Sales by 8.2 pp,
we achieved this by reduced Net Working Capital...

Henkel AG

Calculation of Net Working Capital

2003..2008

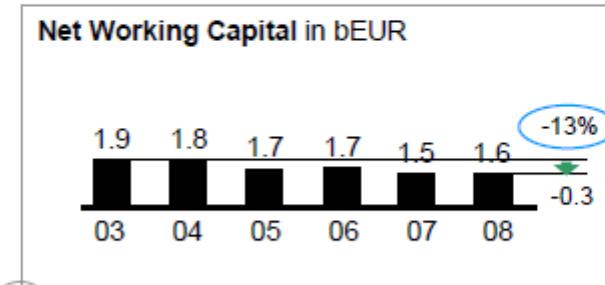
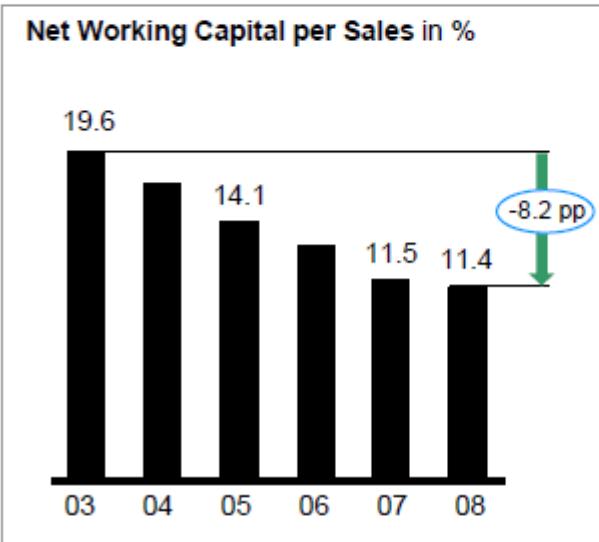


We reduced the Net Working Capital per Sales by 8.2 pp,
we achieved this by reduced Net Working Capital (-0.3)...

Henkel AG

Calculation of Net Working Capital

2003..2008



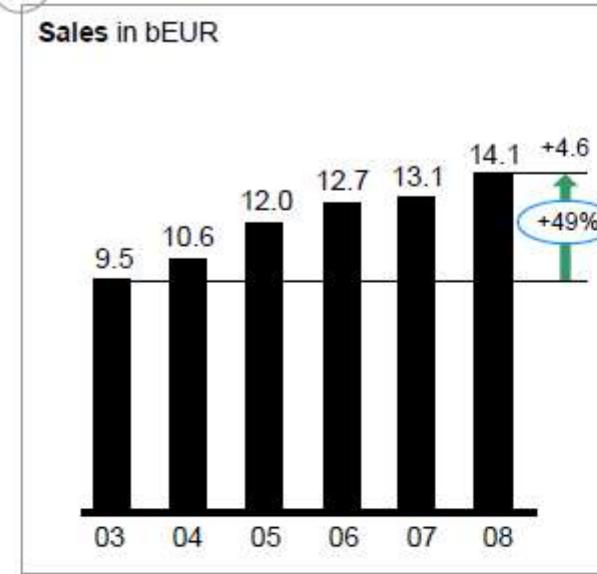
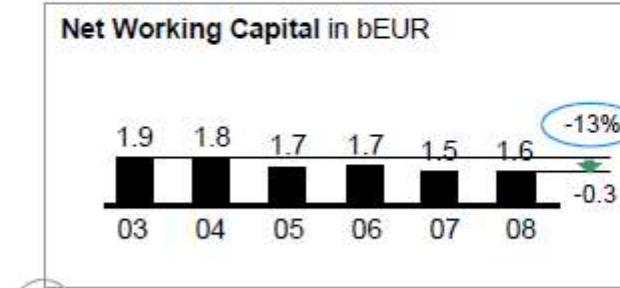
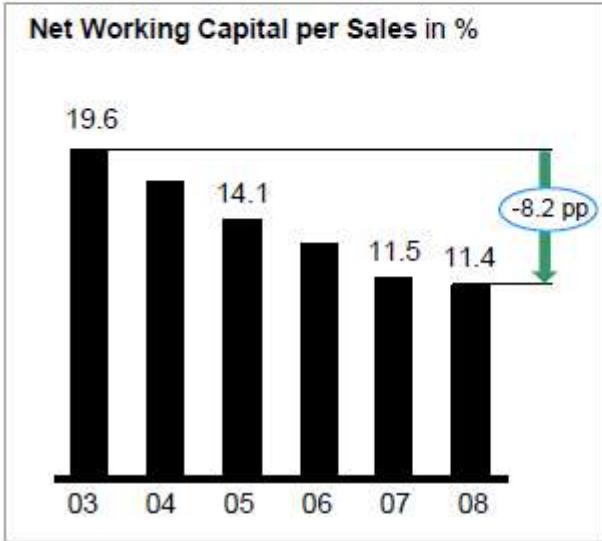
We reduced the Net Working Capital per Sales by 8.2 pp,
we achieved this by reduced Net Working Capital (-0.3) and growing sales (+4.6)



Henkel AG

Calculation of Net Working Capital

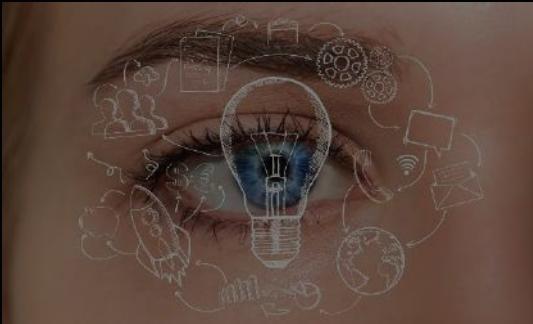
2003..2008



Conceptual
rules



Perceptual
rules



SAY

STRUCTURE

CONDENSE
CHECK
EXPRESS
SIMPLIFY

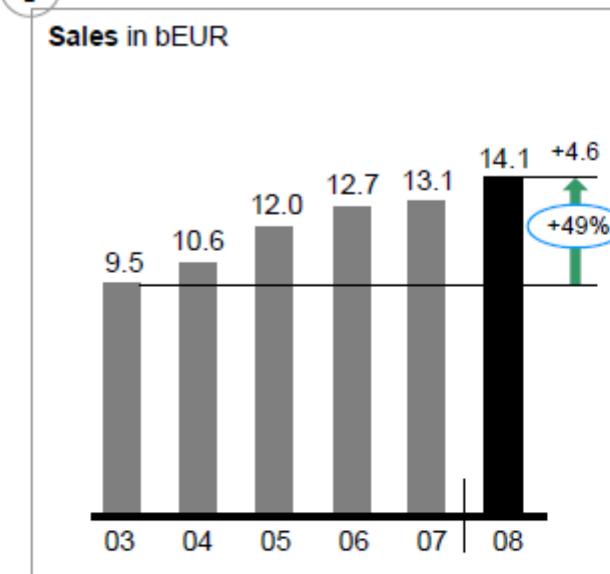
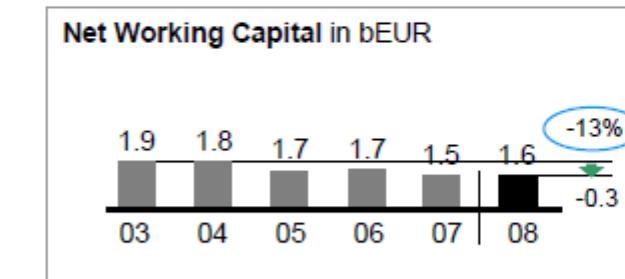
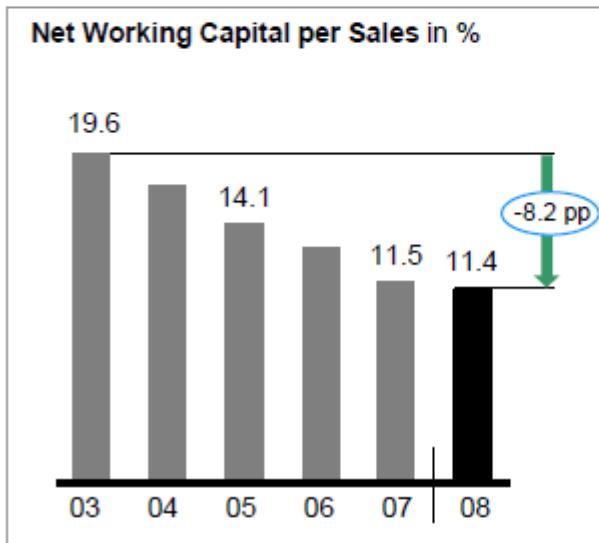
UNIFY Apply
semantic
notation

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)

Henkel AG

Calculation of Net Working Capital

2003..2008

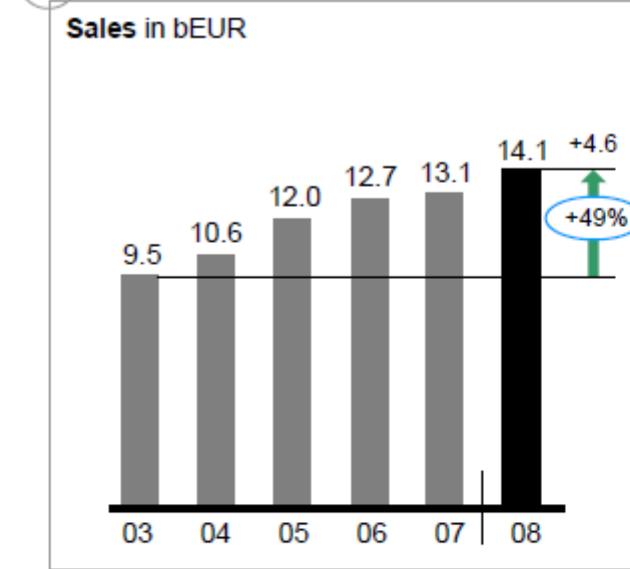
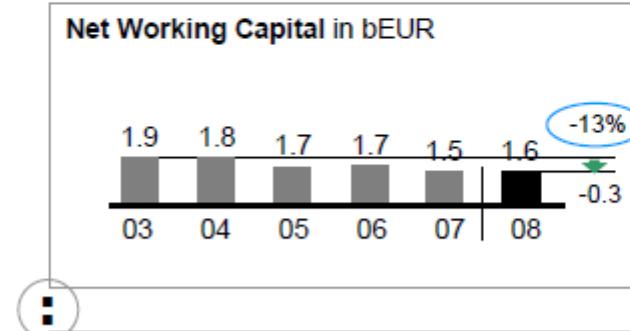
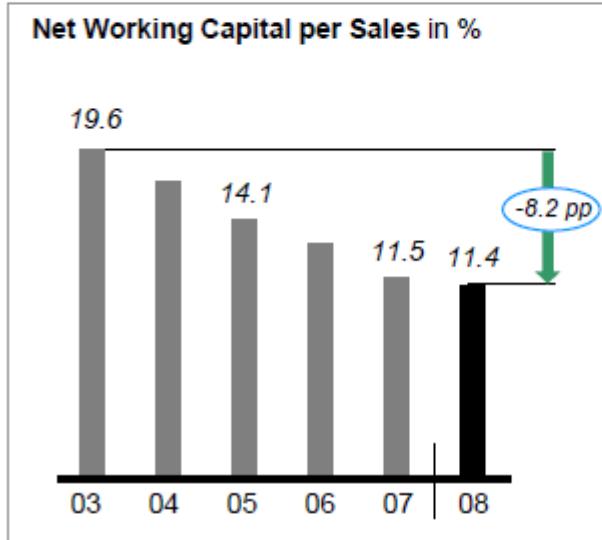


We reduced the Net Working Capital per Sales by 8.2 pp,
we achieved this by reduced Net Working Capital (-0.3) and growing sales (+4.6)

Henkel AG

Calculation of Net Working Capital

2003..2008

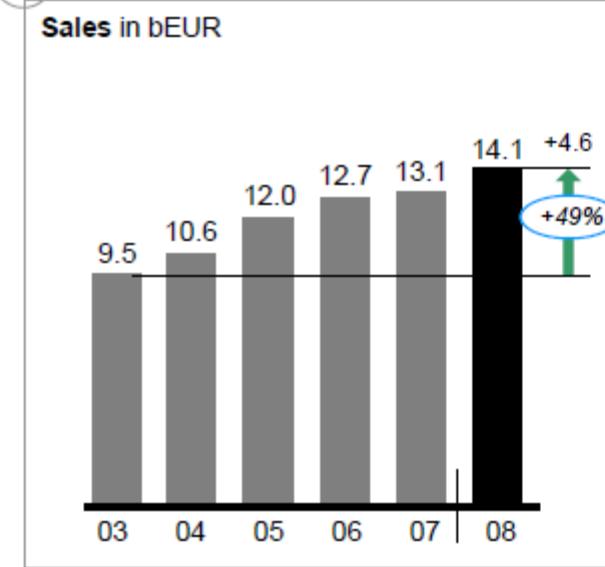
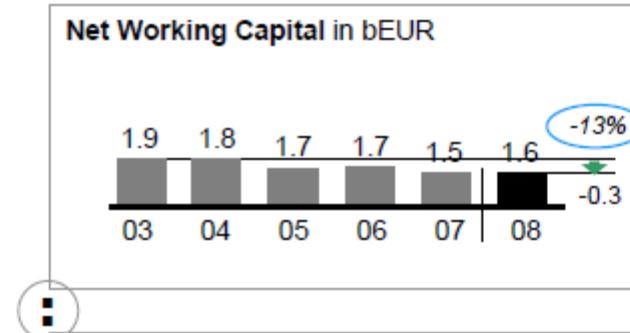
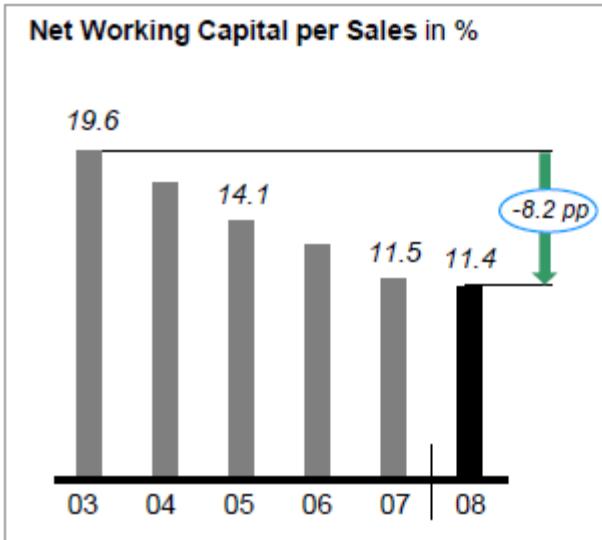


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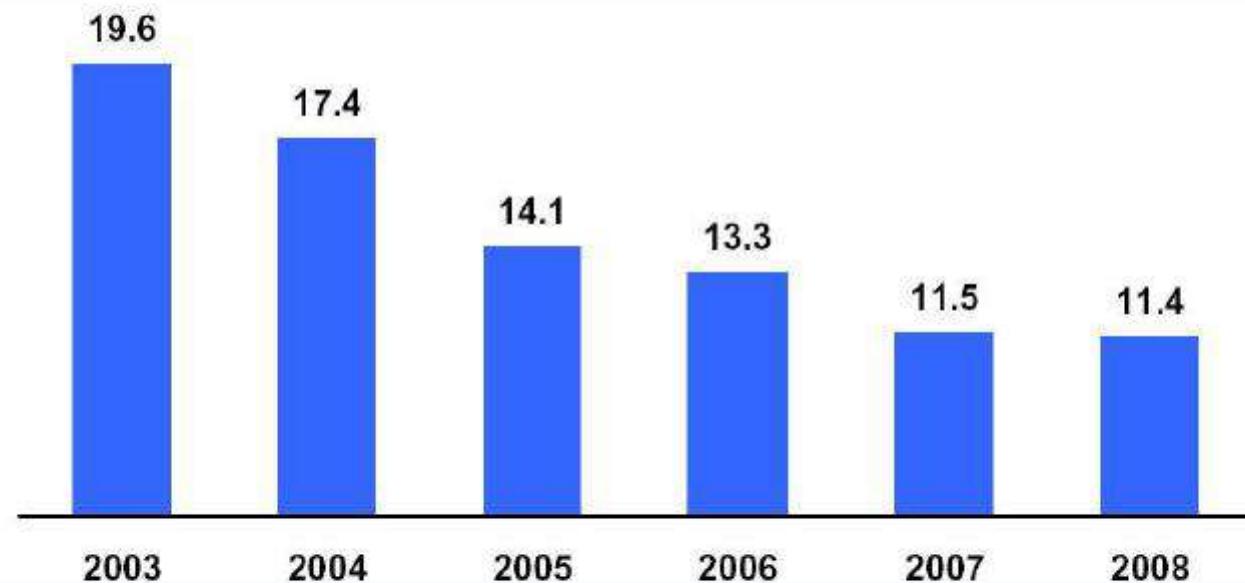


Henkel

A Brand like a Friend

Development of Net Working Capital

NWC/sales ratio in %



→ NWC stabilized on low PY level

1

2

3

4

FY 2008 Key Financials

36

5.- Ejemplos. Show me.





UNSERE PERSPEKTIVE

Haus Graz – Leistungsbericht 2016

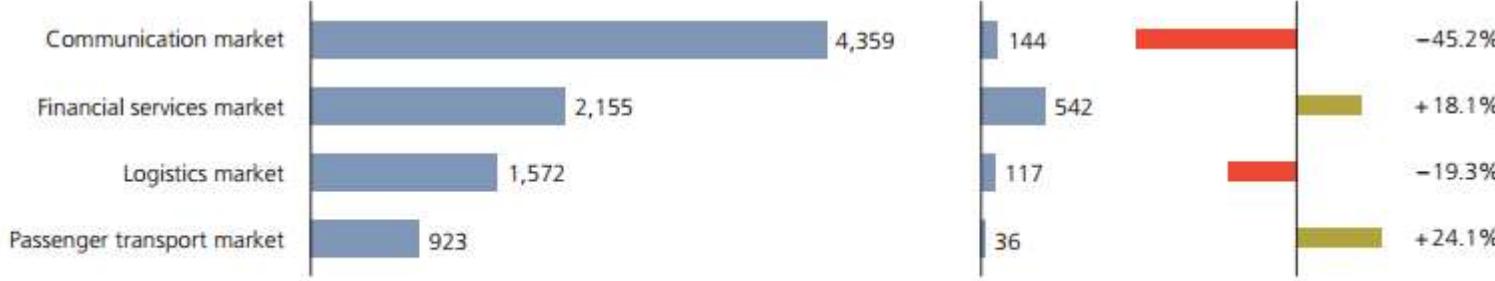
STADT
GRAZ

GRAZ

Fundamental structural change in core business

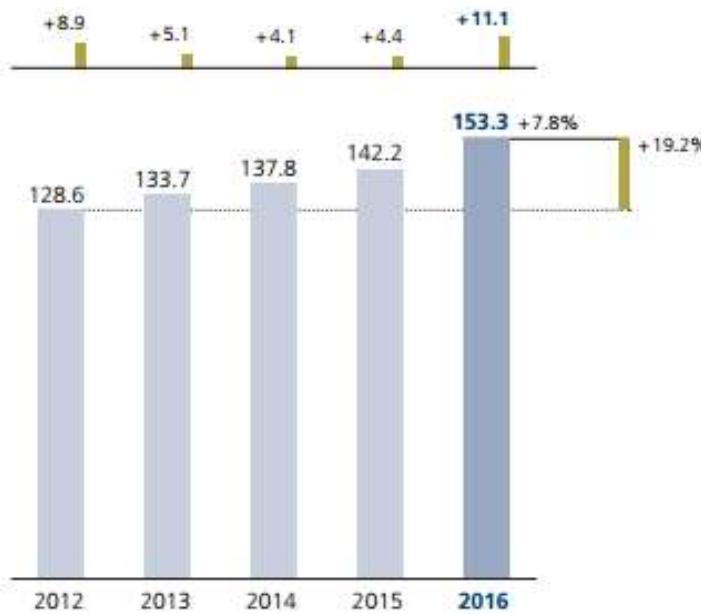
Operating income (before consolidation) in CHF million
2016

Operating profit in CHF million
2016



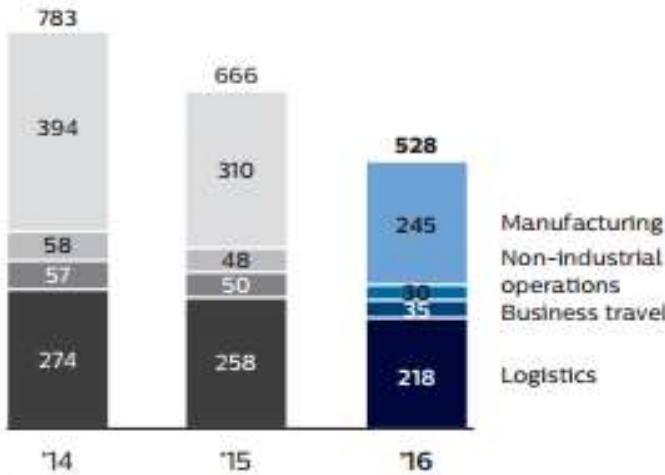
Faster expansion of services

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



Philips Lighting
Operational carbon footprint in kilotonnes
CO₂-equivalent
2014 - 2016

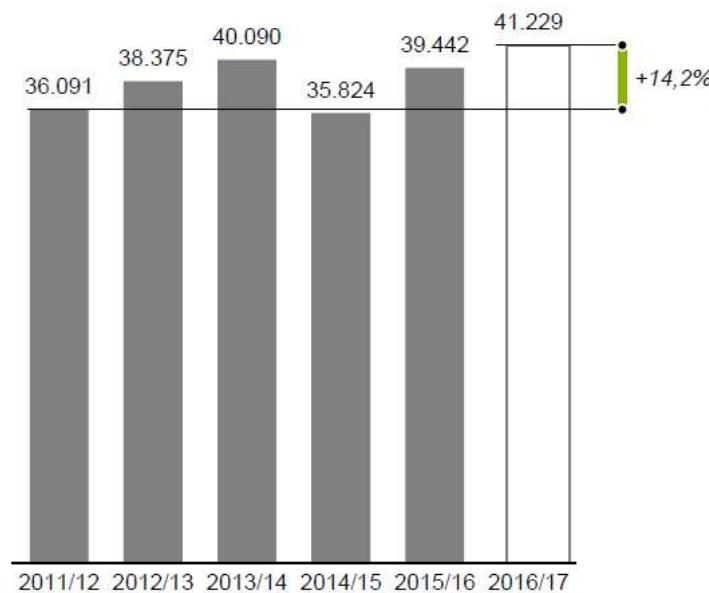
PHILIPS



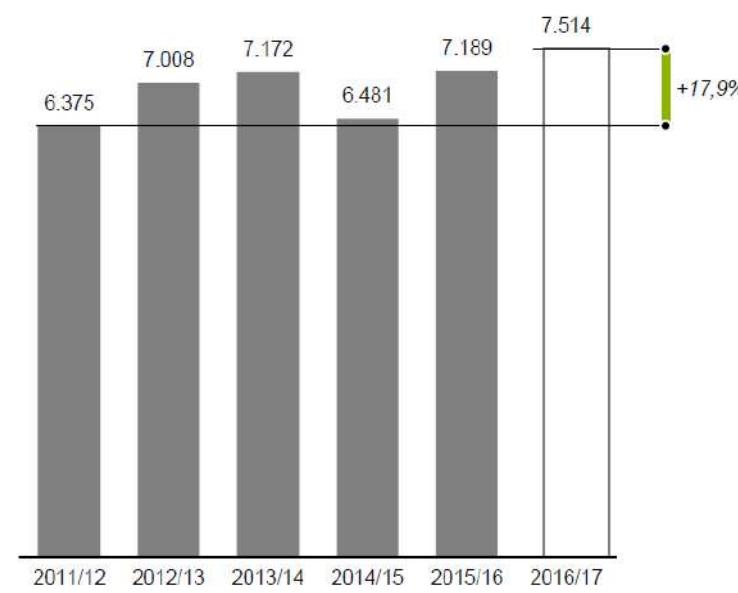
Philips Lighting
Industrial waste categories delivered for recycling in %
2016



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



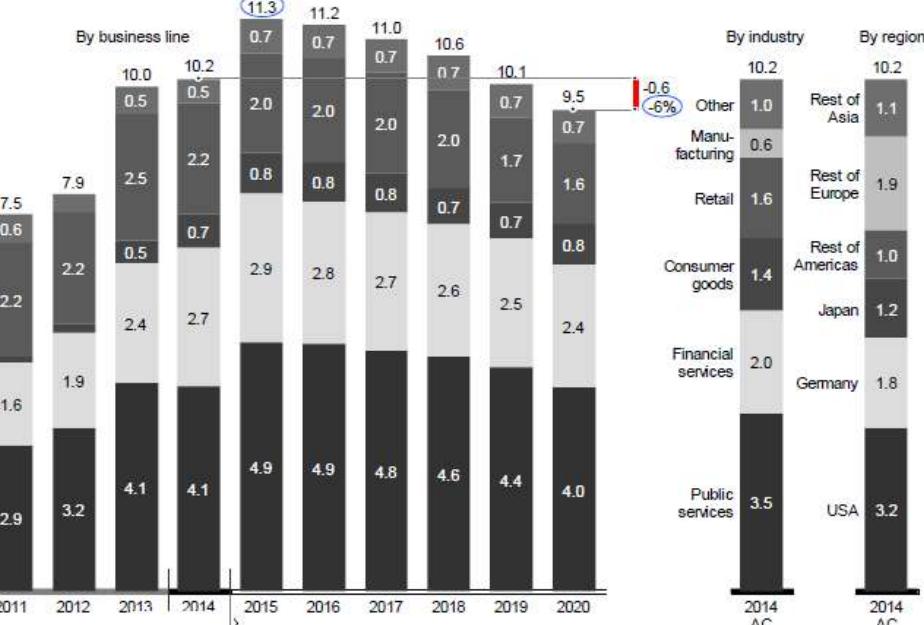
Arrossaires del delta de l'Ebre
Kg/Hectàrea
 2011..2017



6.- Plan de acción . *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)

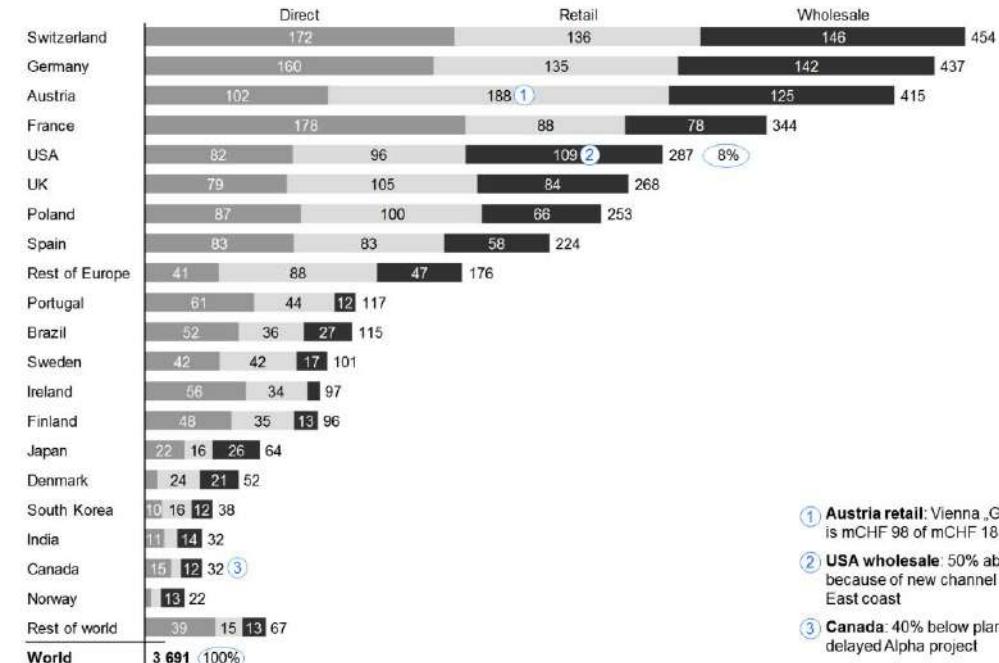
Alpha Software GmbH
Net sales in mEUR
2011..2014 AC, 2015..2020 PL



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

Chart template 02B

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



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

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%

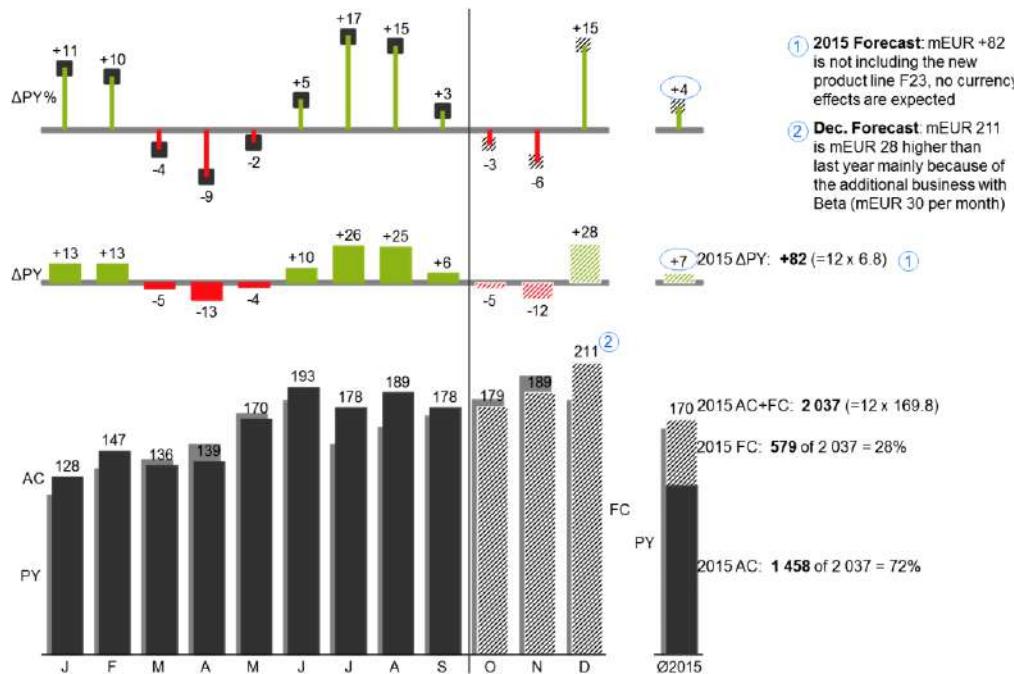


Chart template 03A

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%

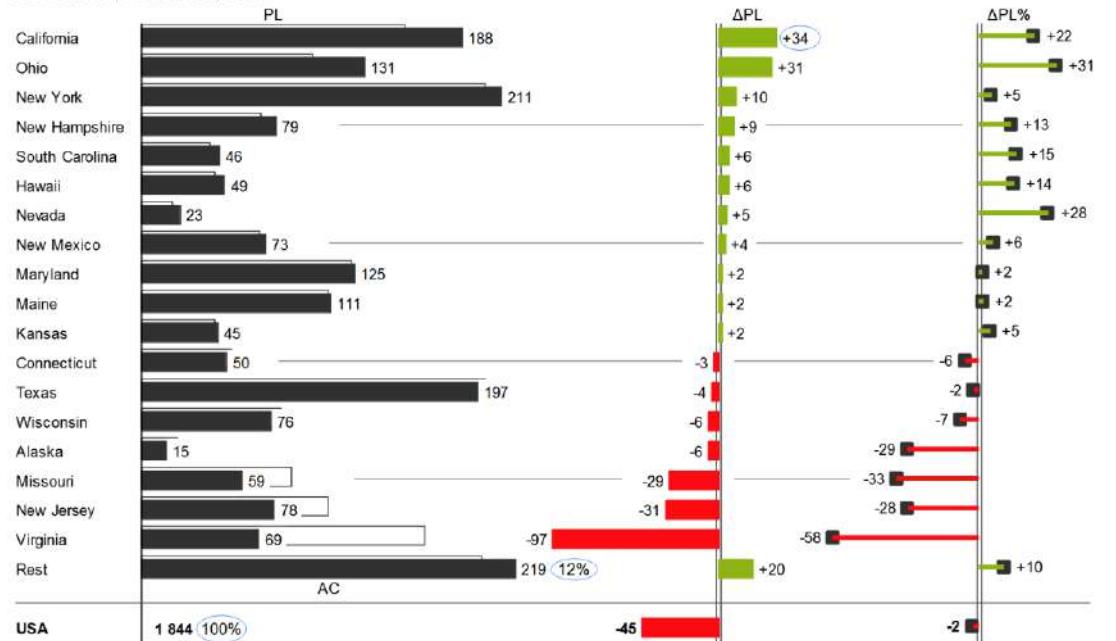
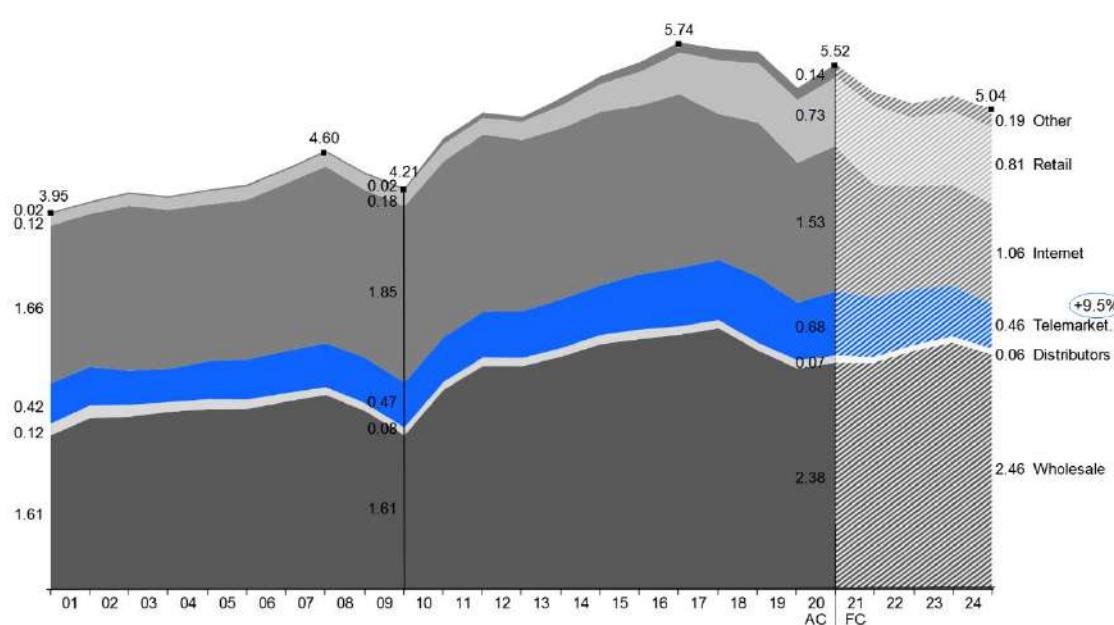


Chart template 04A

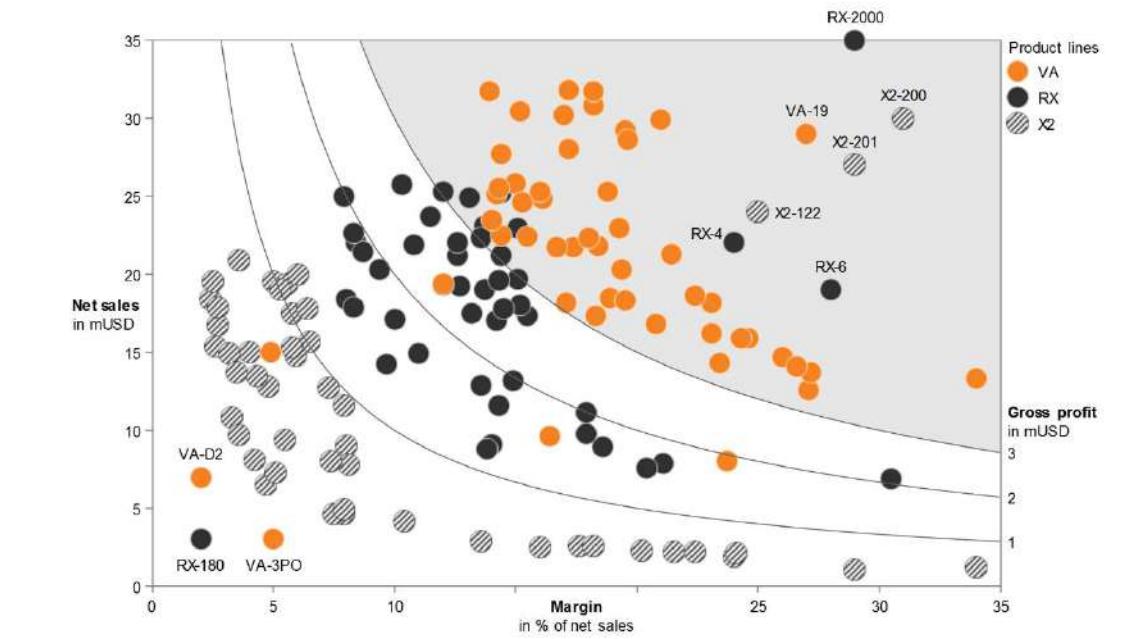
The telemarketing forecast for week 24 is mEUR 0.46 which is mEUR 0.04 higher than week 01 (+9.5%)

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



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



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

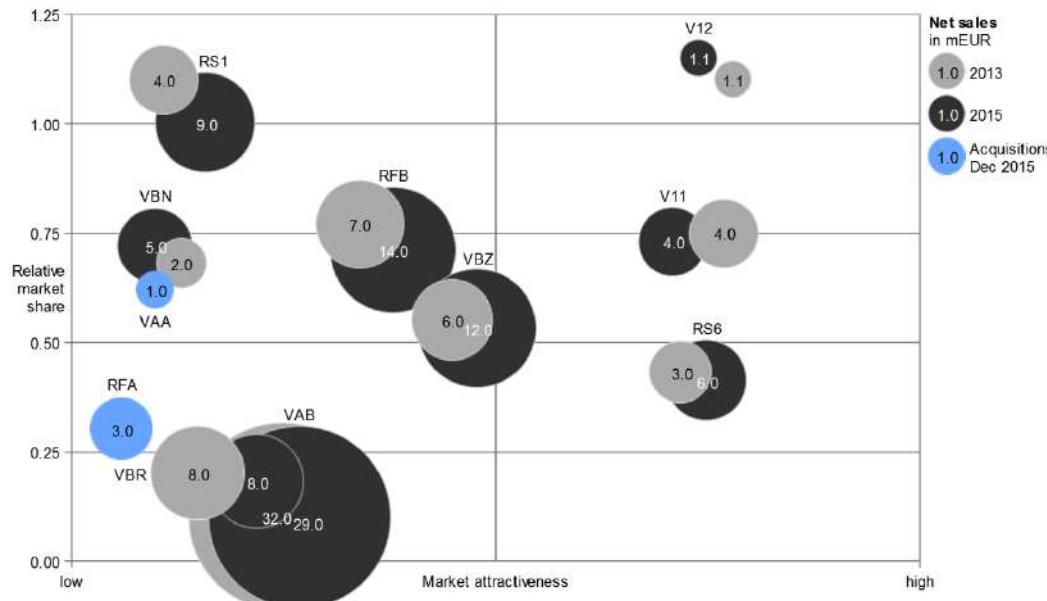


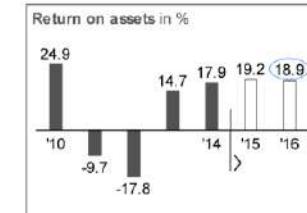
Chart template 10D

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-

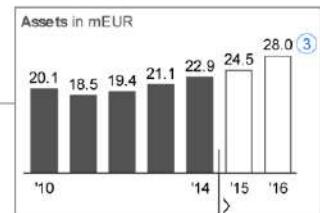
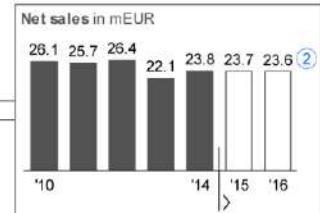
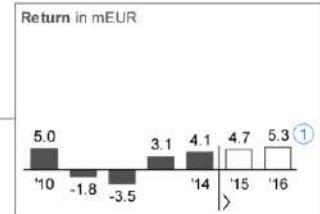
② **Net sales plan:** mEUR 23.6 in 2016
Lorem e duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing



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 sfasd fa sdasdf



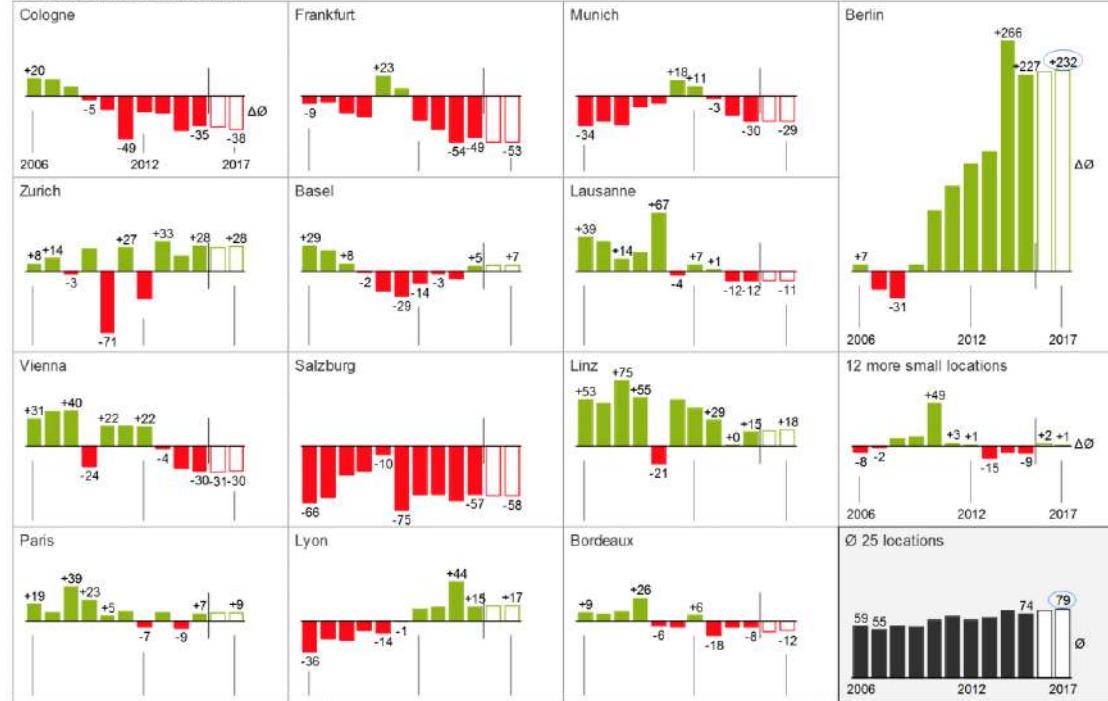
Chart template 11A



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 (Ø)

2006..2015 AC, 2016..2017 PL



2015-12-09_m

Chart template 13C



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

Table template 01A



November						January_November						
PY	PL	AC	AC-PY	AC-PL		PY	PL	AC	AC-PY	AC-PL		
560	590	559	-1	-0%	-31	-5%	Austria	5 078	5 611	5 509	+431 ① +8%	-102 -2%
56	72	58	+2	+4%	-14	-19%	Belgium	531	529	484	-47 -9%	-45 -9%
140	149	134	-6	-4%	-15	-10%	France	1 290	1 488	1 354	+64 +5%	-134 -9%
345	279	260	-85	-25%	-19	-7%	Germany	3 124	2 815	2 850	-274 ② -9%	+35 +1%
78	91	86	+8	+10%	-5	-5%	Poland	816	818	854	+38 +5%	+36 +4%
77	81	86	+9	+12%	+5	+6%	Sweden	809	722	764	-45 -6%	+42 +6%
61	70	66	+5	+8%	-4	-6%	Switzerland	604	582	678	+74 +12%	+96 +16%
502	498	545	+43	+9%	+47	+9%	Other	5 602	6 022	5 441	-161 -3%	-581 -10%
1 819	1 830	1 794	-25	-1%	-36	-2%	Europe	17 854	18 587	17 934	+80 +0%	-653 -4%
119	109	121	+2	+2%	+12	+11%	Brazil	1 205	1 254	1 314	+109 +9%	+60 +5%
65	71	59	-6	-9%	-12	-17%	Canada	629	656	718	+89 +14%	+62 +9%
346	326	311	-35	-10%	-15	-5%	USA	3 406	3 124	3 239	-167 -5%	+115 +4%
438	401	399	-39	-9%	-2	-0%	Other	4 166	4 219	4 008	-158 -4%	-211 -5%
968	907	890	-78	-8%	-17	-2%	Americas	9 406	9 253	9 279	-127 -1%	+26 +0%
54	66	62	+8	+15%	-4	-6%	Australia	517	609	588	+71 +14%	-21 -3%
266	204	231	-35	-13%	+27	+13%	China	2 107	1 925	2 399	+292 +14%	+474 +25%
9	12	11	+2	+22%	-1	-8%	Japan	67	87	144	+77 +115%	+57 +66%
234	311	255	+21	+9%	-56	-18%	Other	2 351	2 099	2 145	-206 -9%	+46 +2%
563	593	559	-4	-1%	-34	-6%	Rest of world	5 042	4 720	5 276	+234 +5%	+556 +12%
3 350	3 330	3 243	-107	-3%	-87	-3%	World	32 302	32 560	32 489	+187 +1%	-71 -0%

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)

2016-04-09_m

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

	November				January_November				
	PY	AC	ΔPY	ΔPY%	PY	AC	ΔPY	ΔPY%	
560	559		-1	-0	Austria	5 078	5 509	+431	+8
56	58		+2	+4	Belgium	531	484	-47	-9
140	134		-6	-4	France	1 290	1 354	+64	+5
345	260		-85	-25	Germany	3 124	2 850	-274	-9
78	86		+8	+10	Poland	816	854	+38	+5
77	86		+9	+12	Sweden	809	764	-45	-6
61	66		+5	+8	Switzerland	604	678	+74	+12
502	545		+43	+9	Other	5 602	5 441	-161	-3
1 819	1 794		-25	-1	Europe	17 854	17 934	+80	+0
119	121		+2	+2	Brazil	1 205	1 314	+109	+9
65	59		-6	-9	Canada	629	718	+89	+14
346	311		-35	-10	USA	3 406	3 239	-167	-5
438	399		-39	-9	Other	4 166	4 008	-158	-4
968	890		-78	-8	Americas	9 406	9 279	-127	-1
54	62		+8	+15	Australia	517	588	+71	+14
266	231		-35	-13	China	2 107	2 399	+292	+14
9	11		+2	+22	Japan	67	144	+77	+115
234	255		+21	+9	Other	2 351	2 145	-206	-9
563	559		-4	-1	Rest of world	5 042	5 276	+234	+5
3 350	3 243		-107	-3	World	32 302	32 489	+187	+1

^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

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	① 273	278	561	560
+ Support revenue	99	87	132	87	② 87	90	140	131
+ Consulting revenue	145	121	231	121	③ 122	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	④ 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, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

^② Support 2013: mUSD 87 Satoque penatibus dolor sit amet, consectetur ad ipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis partur.

^③ Consulting 2013: mUSD Sit amet, consectetur adipiscing elit.

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

^⑤ Net income 2015: mUSD 529 penatibus dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis partur.

Table template 03A



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

xsubirats@amsel.es

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INTERNATIONAL BUSINESS COMMUNICATION STANDARDS (IBCS)



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.

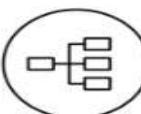
Business Communication meets the IBCS Standards if it complies with the rules of three categories comprising the three parts of IBCS:

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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^[1]. [More...](#)



SAY

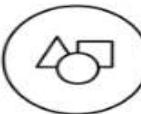


STRUCTURE

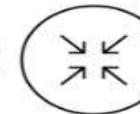
PERCEPTUAL RULES help to clearly relay content by using an appropriate visual design. They comprise the SUCCESS rule sets **EXPRESS**, **SIMPLIFY**, **CONDENSE**, and **CHECK**, based on the work of authors such as William Playfair^[2], Willard Cope Brinton^[3], Gene Zelazny^[4], Edward Tufte^[5] and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



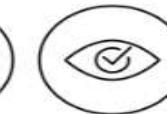
EXPRESS



SIMPLIFY

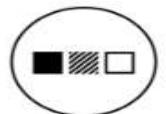


CONDENSE



CHECK

SEMANTIC RULES help to clearly relay content by using a uniform notation (*IBCS Notation*). They comprise the SUCCESS rule set **UNIFY** based on the work of Rolf Hichert and other IBCS Association contributors. [More...](#)



UNIFY

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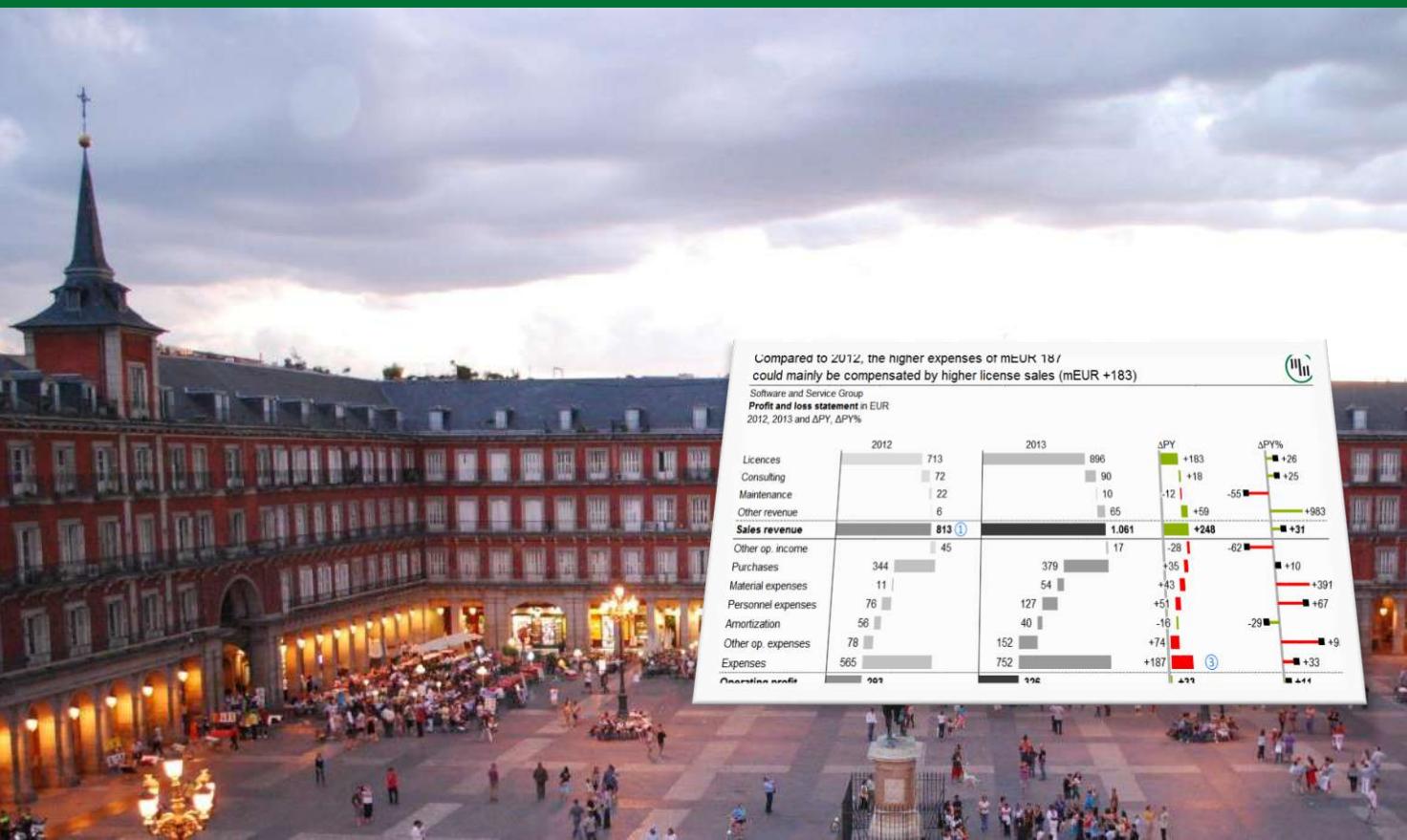
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Madrid

23 de noviembre 2017

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Una formación de Excel / Zebra BI con muchos ejemplos, las mejores prácticas, numerosos consejos y trucos para resolver problemas en la elaboración de informes.

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COMMENTS SINCE 2015-07-01

Page: [12](#) [13](#) [14](#) [15](#) [16](#) [17](#) [18](#) [19](#) [20](#) [21](#)**Shruthy Menon** 2016-09-29 09:47 amEX 2 Replace inappropriate visualizations Replace-traffic-lights
Need to learn how it works[More...](#)

0

**Denis Abdulkerimov** 2016-08-21 06:00 pmUN 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 pmUN 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 pmTable 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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TOP 5 POPULAR COMMENTS

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

3

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

3

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

3

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.

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9 783932 540451

presented by

Say

Convey a message

Unify

Apply notation standards

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 30%"
 Why?
 Reason X
 Reason Y
 Reason Z

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

SA 2 Deliver message

4 Avoid redundant messages
 Our profit has been...
 We had a peak in April!
 We can avoid the peak in April by using...

5 Detect, explain, or suggest
 Sales down!
 Prices up!
 Strategy change!

UN 1 Unify terminology

1 UN 1.1 Uniform terms and abbreviations
 Terms Abbreviations short long Definition
 +Return on Investment ROI Ret. on Inv.
 +Accrualsivable APL Accrualsivable
 +Profit before tax PBT Profit b. tax
 +PBL Profit & loss PBL...
 +Human resources HR Human res.
 +Net sales per capita NSpc Net per cap.

2 UN 1.2 Uniform numbers, units, and dates
 UN 1.2.1 Uniform numbers
 25 int. 100,000,000 25 m 100,000,000 25 m
 25 100,000,000 100,000,000 100,000,000 100,000,000
 30 sec. 1234567 CHF 20 + 123,456,789 20 +
 22 tons 5 GUR USG kg
 1.5.2015 1.5.2015 1.5.2015 1.5.2015
 1.5.2015 1.5.2015 1.5.2015 1.5.2015
 Jun/03/15 Jun/03/15 Jun/03/15 Jun/03/15

3 UN 2 Unify descriptions
 UN 2.1 Uniform messages
 The biggest variance is in Paris.
 ...because we have...
 We should increase...
 Alpha Corporation Profit in EUR.
 Paris Rome

4 UN 2.2 Uniform titles and subtitles
 Net Sales Development from July 2015
 Alpha Corporation Profit in EUR.
 Profit in EUR and Euro per Employee in Division D
 Actual and Budget in 2015
 2015 AC, EU

UN 3 Unify dimensions

5 Definitions
 Sales are measured below...
 Explanation...
 ...because of a 10% increase...
 Suggestions...
 ...and this is what we should...

Condense

Increase information density

CO 1 Use small components

1 CO 1.1 Use small fonts
 ABC Productions, Inc. London Board of Directors
 Log. TES Sales Dr. Ind.
 ABC Productions, Inc. London Board of Directors
 Log. TES Sales Dr. Ind.
 Logistics Finance Sales
 Italy Spain Acc. Direct Indir.

2 CO 1.2 Use small elements
 Data visualization
 Small elements
 Large data visualization
 Large elements

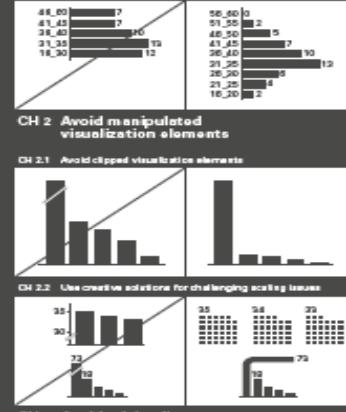
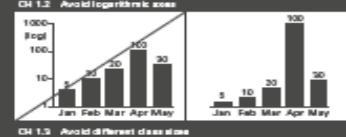
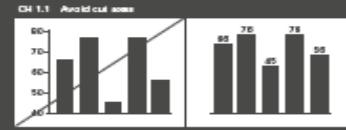
3 CO 1.3 Use small objects
 Bar chart with small bars
 Bar chart with large bars

4 CO 2 Utilize space
 CO 2.1 Use narrow page margins
 CO 2.2 Reduce empty space
 CO 2.3 Add data
 CO 2.4 Add data

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 Specieless

2 EX 1.2 Use correct table type
 Time table Variable table Cross-table Sale Profit

Time	Country	Sale	Profit
Italy	14.15	350	-331
Austria	26.37	23,265	-1,123
USA	26.37	23,265	-1,123
France	32.37	23,993	2,358
Rest Europe	11.15	11,997	156

3 EX 2 Replace inappropriate visualizations
 EX 2.1 Replace pie, ring, and donut charts


EX 2.2 Replace gauges, speedometers



Simplify

Avoid clutter

SI 1 Avoid unnecessary components

1 SI 1.1 Avoid cluttered layouts



2 SI 1.2 Avoid colored or filled backgrounds



3 SI 2 Avoid animation and transition effects
 Animation Split division A Restructuring division B Split division C Improve division D

4 SI 2.1 Avoid decorative components



Structure

Organize content

ST 1 Use homogeneous elements

1 ST 1.1 Use homogeneous items



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

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

4 ST 1.4 Use homogeneous symbols and pictures
 Sun Rain Wind Snow Storm



ST 2 Build non-overlapping elements

Project Beta - Name - Steps - Categories - Manager - Zebra - Team - Results - Milestones - Calendar - Schedule - Details

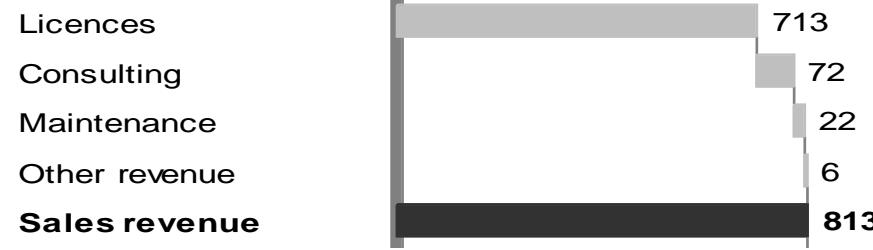


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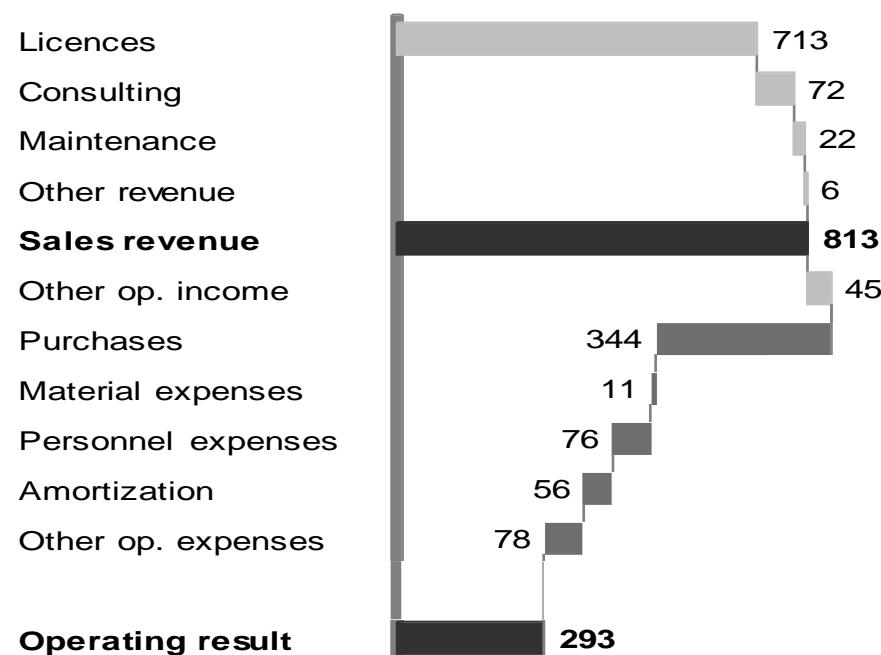
Other Samples

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Profit and loss statement in mEUR
2014.

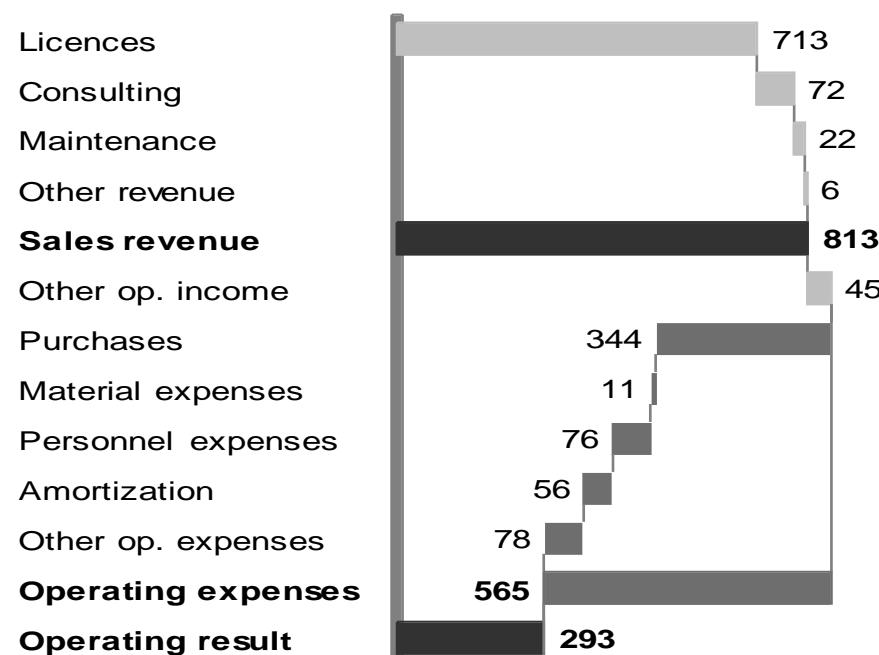
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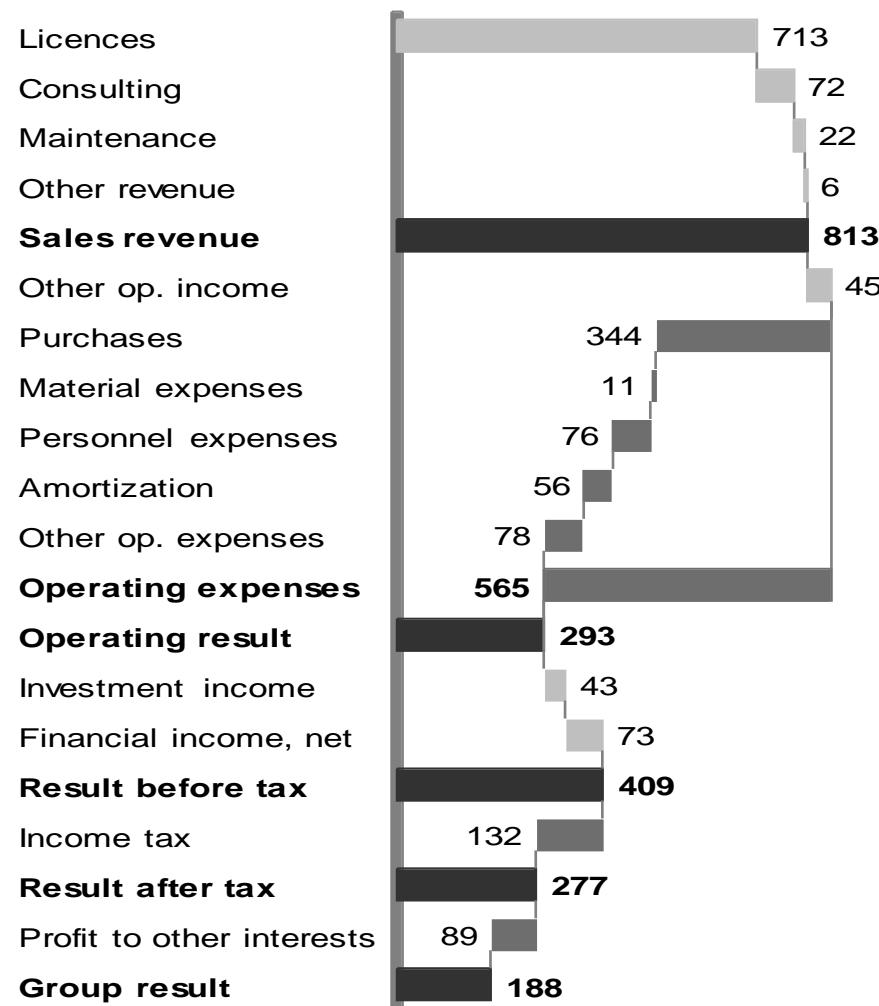
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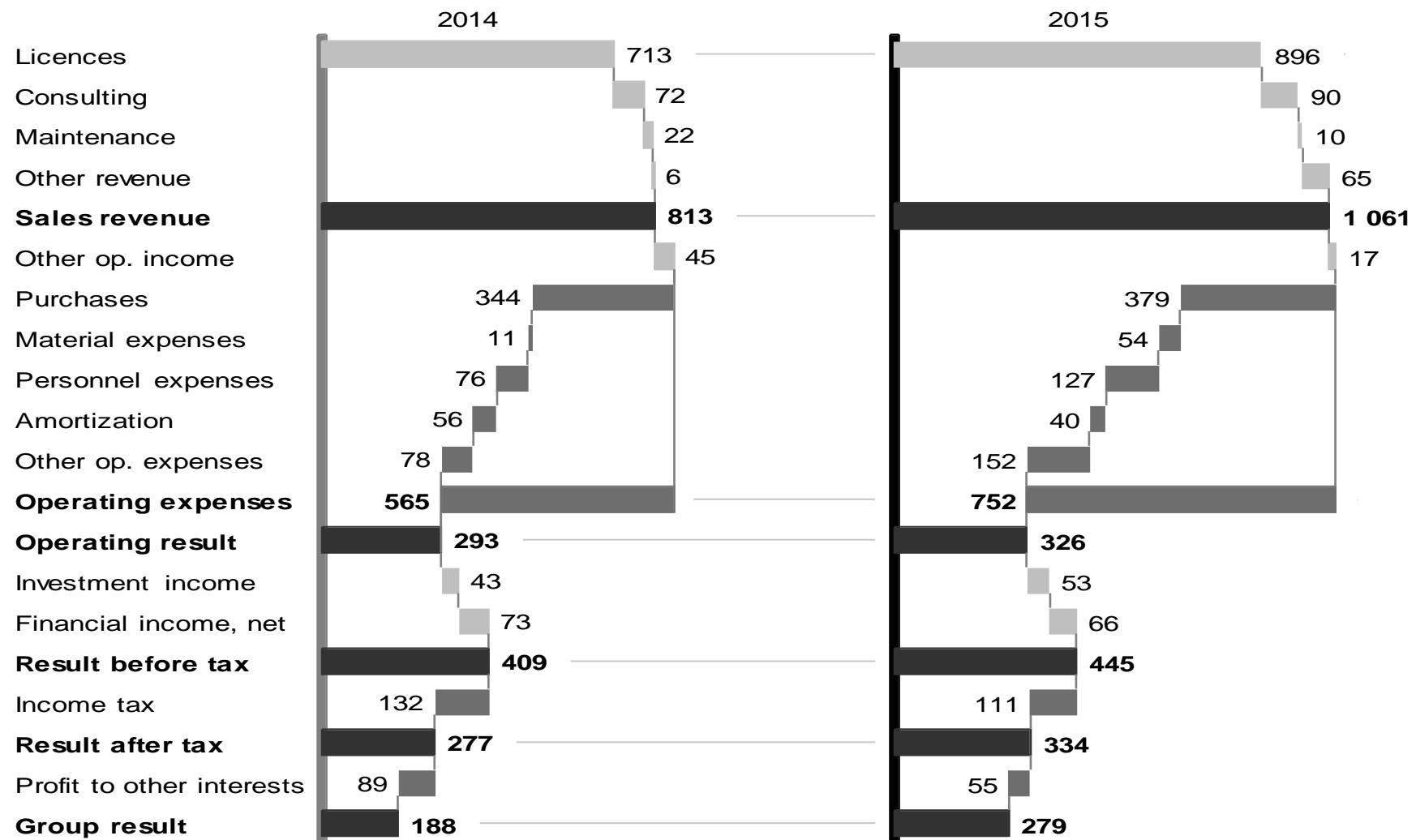
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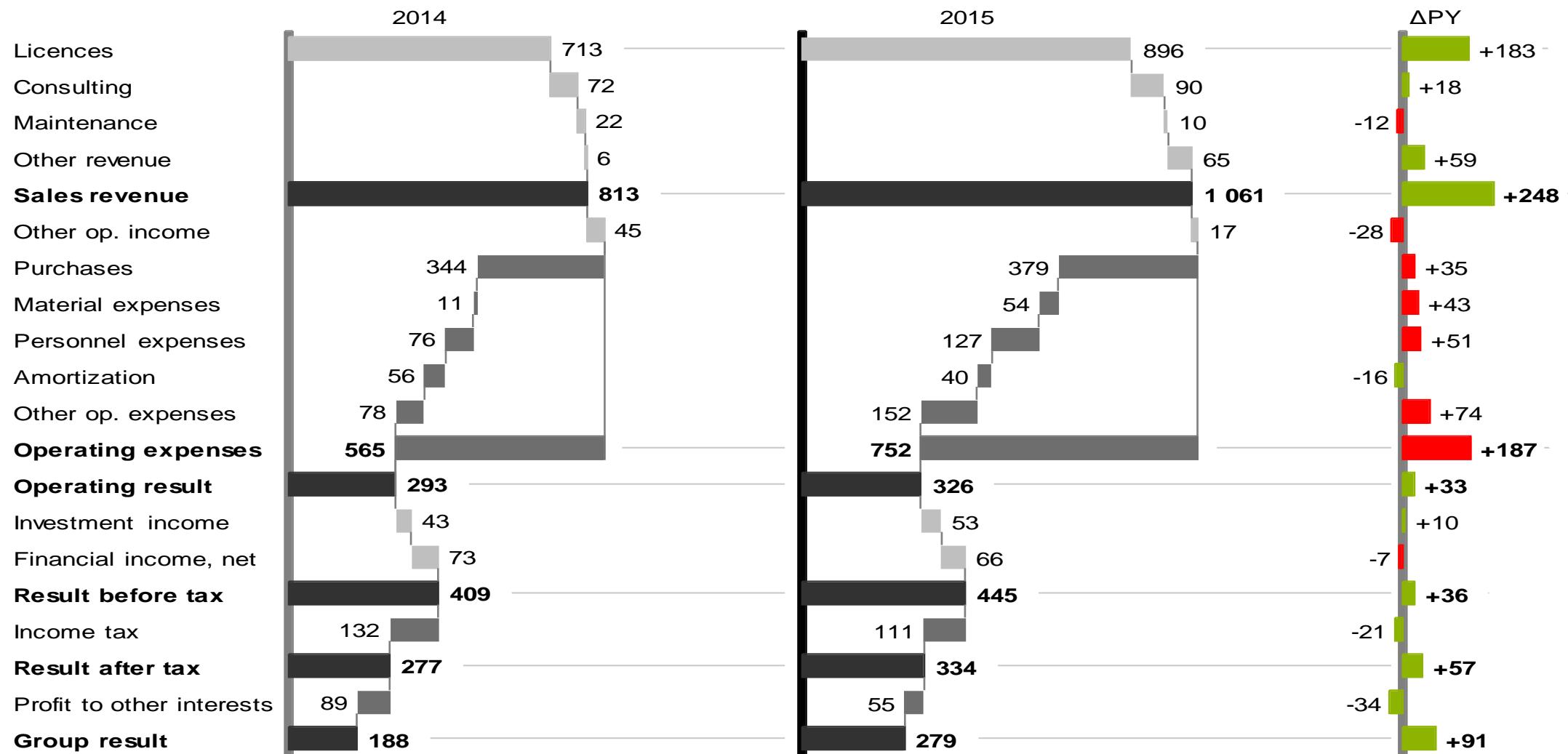
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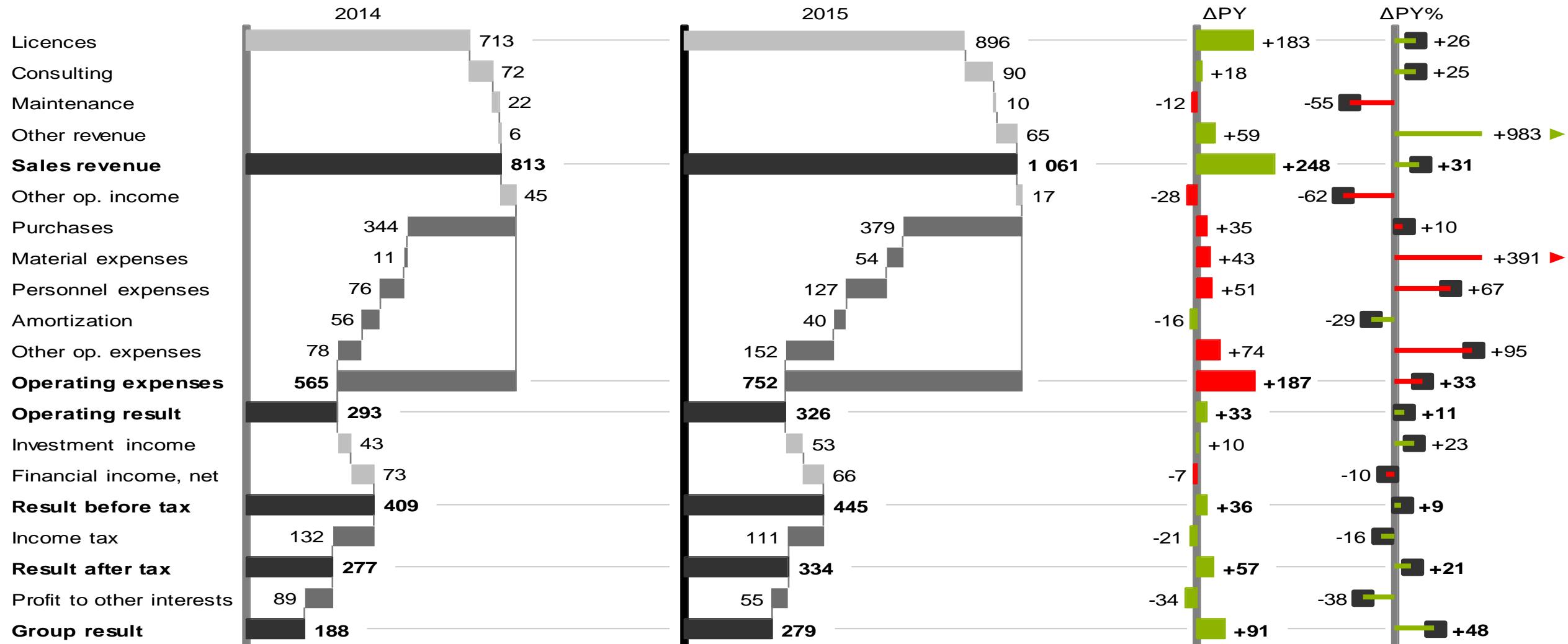
Software and Service Group
Profit and loss statement in mEUR
 2014, 2015



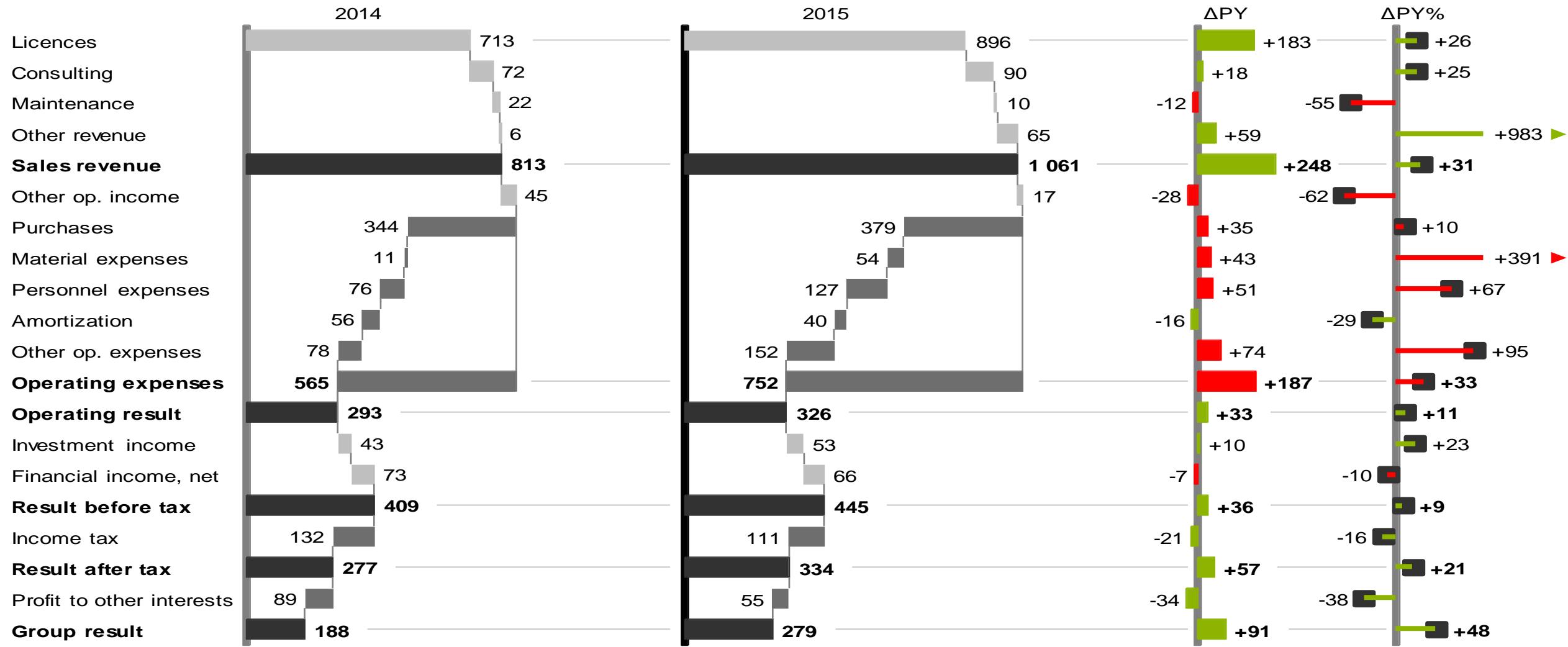
Software and Service Group
Profit and loss statement in mEUR
 2014, 2015 and ΔPY



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



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

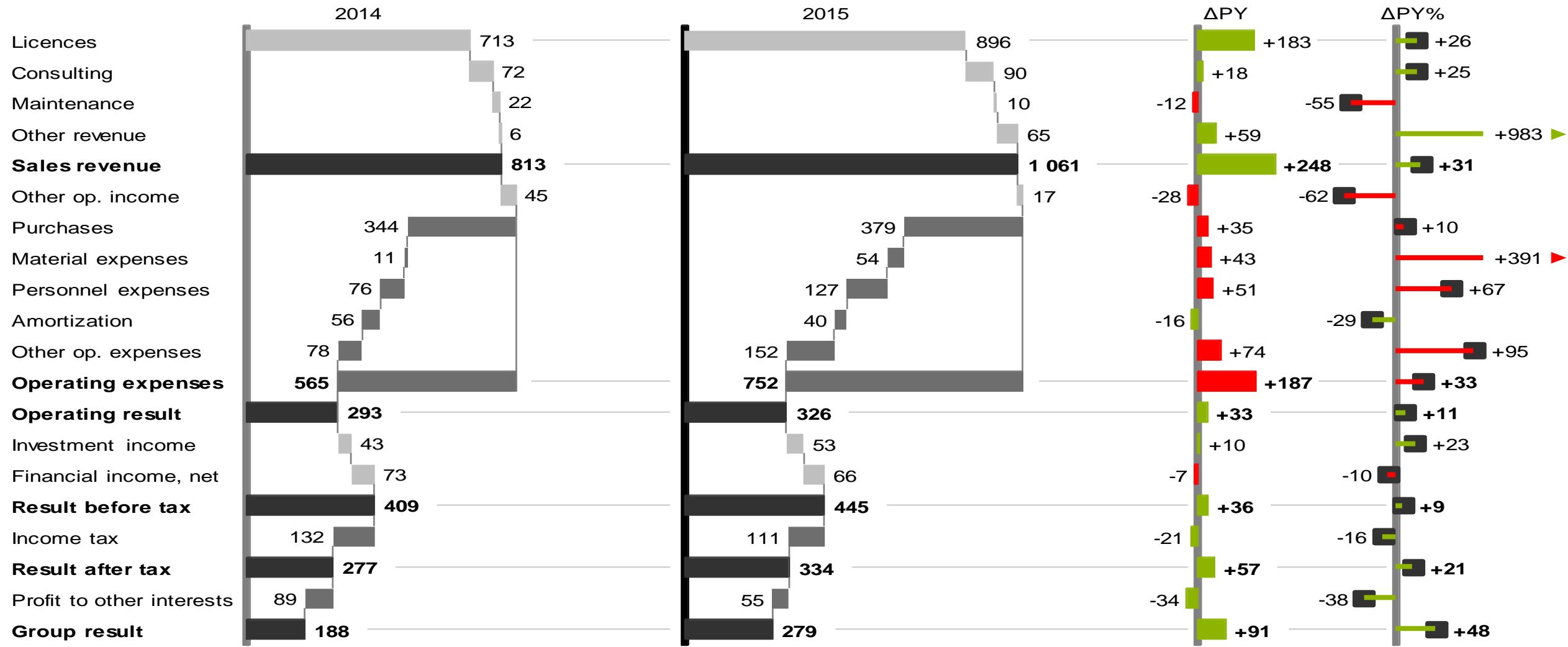


Licences 2014: mEUR 896 Lorem ipsum dolor sit amet,
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Purchases 2015: mEUR 379 clita kasd gubergren, no sea
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Other op. expenses: mEUR 152 ay eirmod tempor invidunt
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Software and Service Group
Profit and loss statement in mEUR
 2014, 2015 and ΔPY, ΔPY%

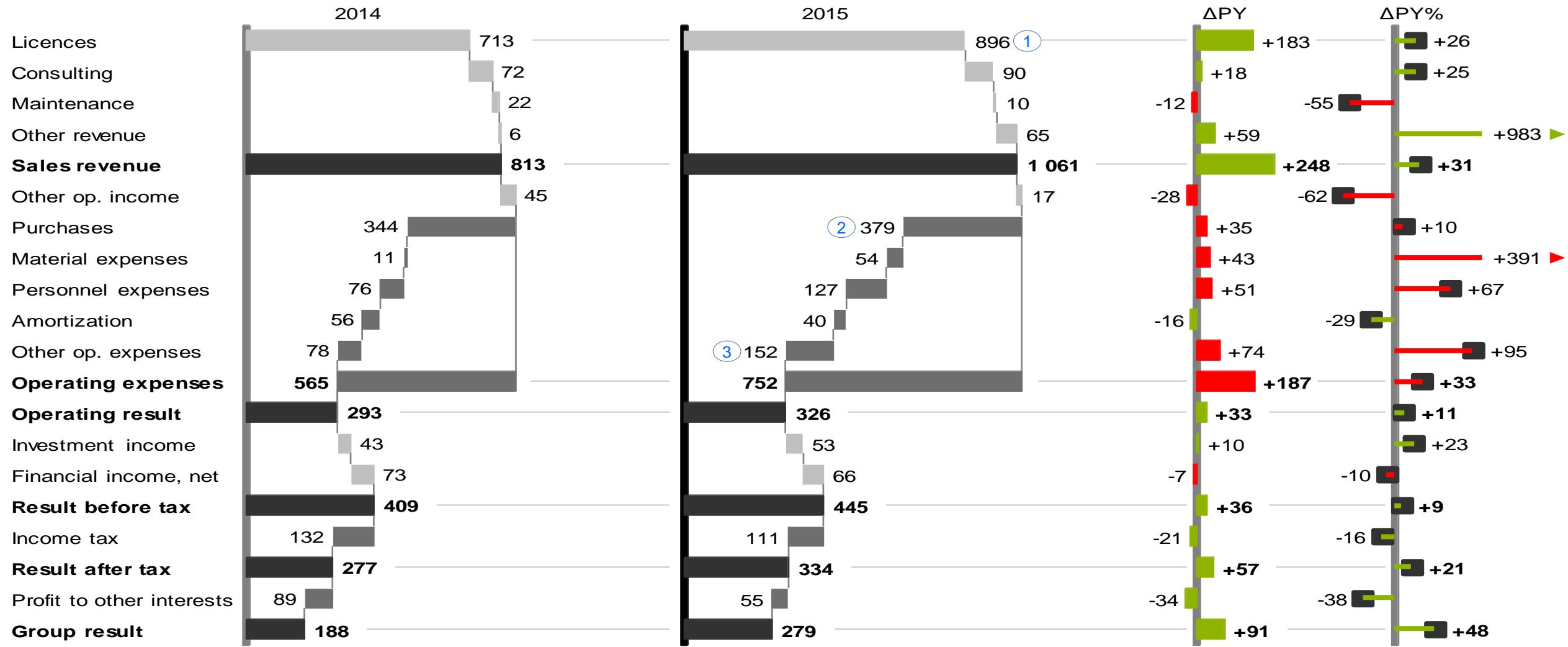


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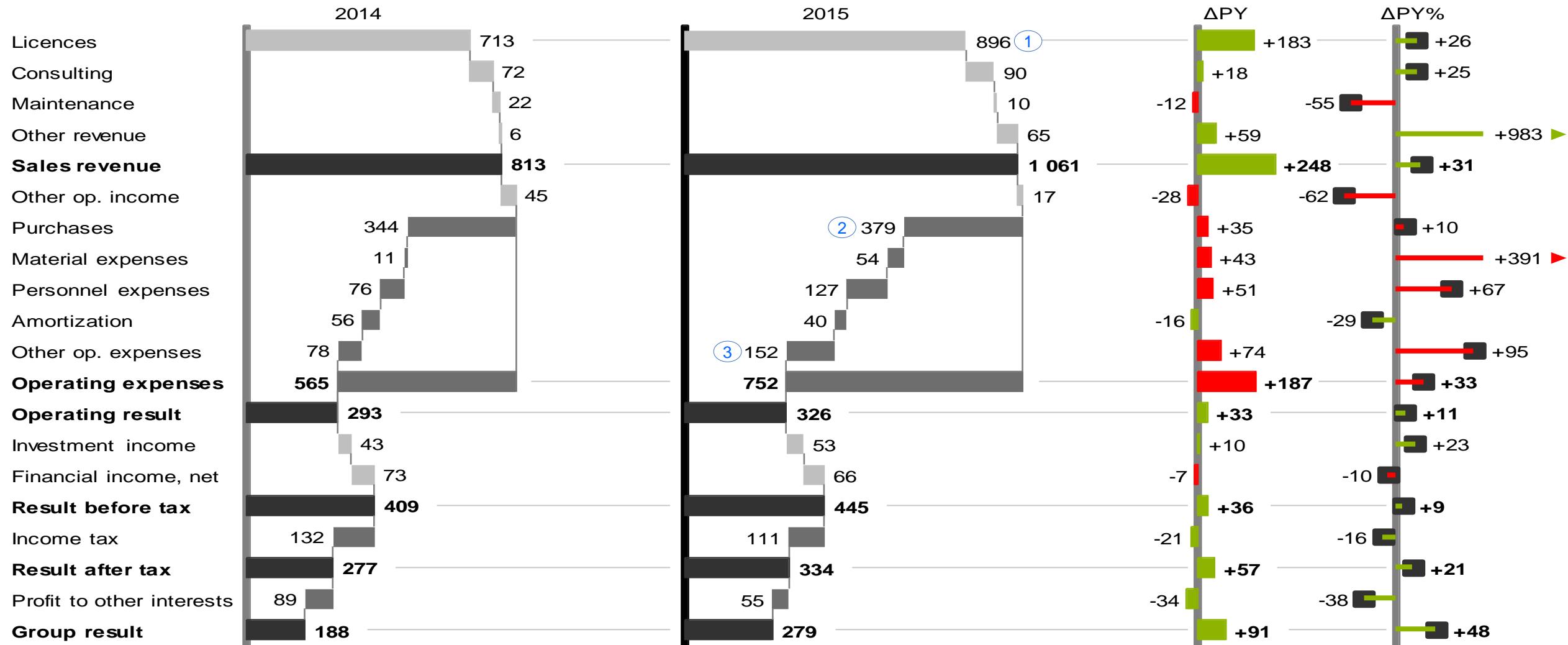
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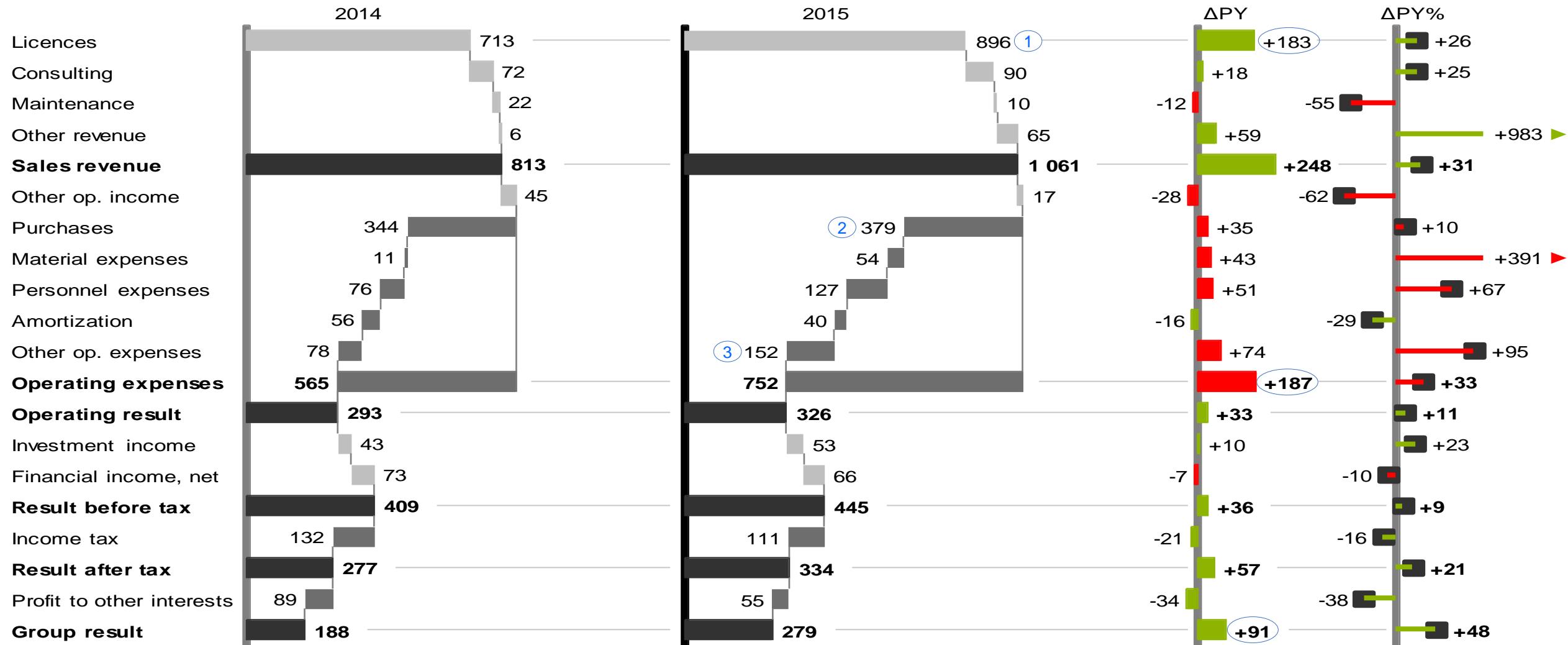
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