Value Portal Internal

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Infographics Toolkit

Infographics are visual representations of information, data or knowledge intended to present information quickly and clearly. They improve awareness and understanding by utilizing graphics to enhance the human visual system's ability to see patterns and trends. Below you will find the steps for setting up and managing a successful infographic development process, along with helpful questions, guidelines and resources to keep your creation engaging and valuable.

	Questions/Advice	Notes/Special instructions
Getting started	• What's your goal? • Who's your audience? • How will you deliver the infographic? • How/where will you get the data? (Is it available? Who has it?) • Who is the sponsor/backing?	Considering and answering these questions at the outset will get you off to the right start. The following sections here will help you fine tune those answers, and your efforts.
Audience	Who views it?	If it is an internal audience, you have more leeway with design; if it is external, it needs to meet the stricter EY Information Design branding guidelines
	Determine purpose/audience	• Define the story you want it to tell • What is the business problem or opportunity you want to address? • Who is the intended audience?
Process	This is an iterative process, from concept to initial release...and always striving to improve	
	How are you going to gather info for your infographic?	• Consider using a OneNote shared notebook 　○ Develop, use and maintain a data gathering template in OneNote (here is an example)
	What is your cadence?	This will help you determine • milestones/due dates • data soliciting communications schedule • back-ups for your data providers and infographic preparers
	What information/data is available to you?	Consider any dependencies, such as people, vendors and criteria
	How to set-up and manage a successful infographic development process:	
	Assign roles and responsibilities.	One or more people should be responsible for managing the communication, development, review and maintenance of the infographics. This includes regular meetings, and receiving and incorporating feedback from stakeholders, contributors and the audience.
	Determine a 'publication' date	Having a date when your infographic is to be published allows you to communicate, develop, and distribute the infographics in a timely and consistent basis. It helps set expectations for contributors and recipients alike. The cadence -- such as monthly or quarterly -- depends on the business need/desire.
	Establish and communicate guidelines for posting/submitting data	The guidelines ensure the value and suitability of the contribution; they can change as the infographic evolves. Once established, the guidelines are communicated and reinforced throughout the development process.
	Send emails to data providers and stakeholders	Develop and use email templates for each phase of the infographic cycle: data contribution (solicit and reminder); Service Owner review; and publishing of the final version
	Create a data-posting repository.	This is where the solicit/reminder emails will direct contributors to enter their data. Placed in a shared location, its design/layout should reinforce the guidelines. Again, a OneNote notebook is a great option here.
	Post final versions to a repository/gallery	When a wider audience than your stakeholders could benefit from viewing your infographic, place them in a shareable library/location. Then be sure to tell your wider audience about it, which includes a link to that repository.
Design	Will it be seen on its own or will it be presented?	• If on its own, make sure it speaks for itself with simple, direct words and images (watch the acronyms)
	How do you want to categorize your info?	
	For each metric ask "Does it tell your story in a way your audience can quickly and easily understand/appreciate?"	
	Each metric – and the layout as a whole -- should highlight and showcase key information	• Balance style and density of information • Draw eye to key areas 　○ prime spot: upper left 　○ least prime spot: lower right • Add context (such as dates, process changes, unusual circumstances)
	What is the flow?	
	If it will be created on a recurring basis, periodically change some of the metrics to keep the look and messaging fresh.	Introduce/update periodic markers such as • progress • indication of referenced fiscal year • increase (up arrow) or decrease (down arrow)
	A story can be negative as well as positive; it can highlight anomalies or areas of improvement	
	Vary the content	• Include different types of images - data, charts, quotes, roadmaps, etc. • Vary text size/boldness of key benefits: make them bigger, a different branding color, and/or bold • Use icons to draw attention to/and encapsulate a metric
Resources	Templates	Infographic 3 and 4-column PowerPoint Template
	Iconography	• External sources (typically have costs associated) 　○ EY pictograms 　○ Images • The EY Branding Zone 　○ The Noun Project curates icons from graphic designers across the world and then creates handy catalogues 　○ Other libraries
	Creating Infographics	• https://neilpatel.com/blog/12-infographic-tips/ • https://www.canva.com/learn/how-to-design-infographics/ • https://www.creativeblog.com/advice/how-to-create-great-infographics • https://www.lifehack.org/articles/work/how-to-create-stunning-infographics-in-30-minutes.html
Examples	Visit the Service Performance & Adoption Value Portal at servicevalueportal.ey.net to see infographics created by many teams	Examples: • Infographics 　○ Service Introduction Management 　○ Enterprise Workplace Technology 　○ End User Technology Experience (select from Monthly and periodic Area/Country/Service Line views