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# **Developing Effective Presentations: Tactics and Tips**

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## Course Overview

I was excited at first when a friend of mine suggested developing a course on making presentations.

"This will be a snap!" I thought because I had built a career in the corporate world making presentations. But as I began to think more about it, I remembered all the planning and effort that went into the design of the slides (or pages on a flip chart), their content, sequence, visual impact, length of the presentation, the strategy behind the presentation, and many other considerations.

As it all began to come back to me, I realized "a snap" was not the best description. It used to involve a lot of hard work and effort because there are different kinds of presentations used for different reasons.

For example, a presentation intended to **give information** to the audience such as the announcement of a new policy or a new initiative would be much different from one designed to **get information** such as getting feedback about a recent issue or event.

But as simple as that sounds, you can break it down farther into "give-information-with-no-discussion-expected" (such as the upcoming blood drive with the where, when, why details included) or "give-information-and-expect-a-lot-of-discussion" such as the company is changing health plans in the fall with a new premium and co-pay schedule.

Then there is **brainstorming (problem solving) or strategic planning** presentation when you must filter the useful ideas from the flood of chatter that always results.

And none of those has anything in common with a presentation that must be **persuasive so you can get something** such as additional resources or approval for a new initiative.

At that point, my mind was racing. I started to think about what else a potential presenter must consider before getting started.

Here are a few things included in this course:

- ***Presentations aren't given in a vacuum; there must be some meeting management skills considered, too.***
- ***What is the purpose of the presentation/meeting building toward?***
- ***You must start with the desired outcome in mind and then design backwards from there.***
- ***What are the specific takeaways that you must have as a result of your presentation?***

- **Assuming that “time is money”, how can you determine whether the cost of the meeting (salaries, resources, and anything else) is justified by your presentation? (A link to the bullet above)**
- **Who must be in the meeting? Who should be in it? Is there anyone who should not?**
- **How will you engage the audience as quickly as possible? (You’ll have about the first seven seconds to either grab them or lose them!)**
- **If it’s an information giving presentation, will you also need handouts? If so, what will they contain? When will you give them out – before, during, or after your presentation?**
  - **Will you anticipate a lot or a little discussion afterward?**
  - **Will there be follow-up meetings?**
  - **How much do you tell them each time?**
- **If it’s an information getting presentation, how will you collect the data without derailing the meeting? When will there be a follow-up to share the results of the data collected?**
- **If it’s a brainstorming/problem solving (BS/PS) presentation/meeting, how will you collect the data quickly? Since this is typically a creative process, it is easy to get off-track with the flow of ideas. How will you stay on track without discouraging contributions?**
- **If it’s a persuasive presentation, how can you make your case more compelling? How much data should you provide to make your case but not so much that it gets bogged down in minutia? Can you imagine what questions they could ask instead of just focusing on the ones they probably will ask and be prepared for them?**

I will assume in this course that you will be making a PowerPoint presentation because that is the world standard. However, traditional flip charts can be used successfully with this same content.

Having resolved those first few considerations, you must then package it with “10-20-30” as a guideline:

- “10” = the maximum number of slides you should have. Remember, the audience thinks their time is valuable and you don’t want them to think you are wasting it.
- “20”= the maximum length of time it should take. Adults catch on quickly and if you haven’t made your point by now, staying longer won’t help very much.
- “30”= the minimum sized font you should use on your slides

Finally, research conducted by the National Training Laboratories<sup>1</sup> identified average training retention rates by method of training/teaching used. Although your presentation may not be formal training, you can see how the retention rates vary with the method of presentation.

Training/Teaching Method	Retention Rate
Teach Others or Use Immediately	90%
Practice by doing	75%
<b>Discussion Group (Presentation Q&amp;A)</b>	50%
Demonstration	30%
Audio-visual	20%
Reading	10%
<b>Lecture (the “data dump” method)</b>	<b>5%</b>

**Please keep in mind that you are dealing with busy adults who may think they have a lot of better things they could be doing instead of sitting through another presentation.**

We will focus on keeping your content crisp, focused, and use the *least amount of time necessary to achieve the desired outcome*.

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<sup>1</sup> <http://lowery.tamu.edu/Teaming/Morgan1/sld023.htm>

## The WIIFM (“What’s in it for me?”) Factor

Whether your audience is voluntary or mandated, each individual is mentally weighing the value of the time they will spend listening to your presentation in relation to what they could be doing elsewhere. *The extent of their engagement and retention is based on the simple, self-serving concept going through everyone’s mind as they sit waiting for you to begin: “what’s in it for me” (WIIFM) to spend time listening to you?”*

Think back to the last presentation you attended. Did any of these thoughts go through your head?

- “So what? Why would I care about this?”
- “OK, I got it! Let’s move on...”
- “Where is he going with this?”
- “How much longer am I going to have to endure this?”

Those are some of the most common unseen obstacles your presentation will have to overcome with your audience if you want it to be successful.

Also, the WIIFM concept is not necessarily bad: it’s natural to think about your self-interest. And it’s not always about money or tangible things. It could be about improved self-image, enhanced status or reputation.

We have already highlighted this phrase for you that applies to every presentation you will create from today forward: **ALWAYS BEGIN WITH THE QUESTION “WHAT’S IN IT FOR THEM (WIIFT) TO BE HERE TODAY?” AND DESIGN YOUR PRESENTATION TO DELIVER THE ANSWER!**

We will talk a lot more about this as we move through this course.

## What this course is NOT

This course is about the *strategy and mechanics of designing an effective presentation* and conducting a successful meeting within which the presentation is made.

It does NOT cover verbal presentation skills or visual design techniques. Toastmasters and Dale Carnegie are two very well-known and well-respected sources for gaining presentation skills while endless examples of creating visually compelling PowerPoint presentations abound on the Internet.

## Learning Outcomes

As a result of completing this course, the participant will be able to:

1. Determine which of the four kinds of presentations/meetings he (she) will conduct
2. Construct tools useful in data gathering, organizing, and analysis
3. Develop a plan for a Brain Storming/Problem Solving presentation/meeting that will engage the audience and gather useful and relevant data quickly
4. Keep the presentation/meeting on track while maintaining good will with the participants
5. Design a persuasive presentation with a high probability for success!
6. Use three powerful and effective data generation techniques for brainstorming or problem-solving meetings.
7. Generate useful data from a group while minimizing follow-up work for the presenter/facilitator (YOU!)
8. Avoid a “worst case” outcome scenario by using an effective design tactic
9. Quickly and effectively get the attention of the audience

## The Four Kinds of Presentations



Earlier, we briefly touched on the four different kinds of presentations that you may be called upon to make in your career. Their purpose and design are distinctly different, yet many people approach the task of making a presentation as if there were only one way to do it.

We'll help you understand how they differ and provide some tools that have proven very effective over a long career in the corporate world.

We'll cover them in this order:

1. **Give Information** (Here are two kinds of this)
  - a. There is little follow-up discussion anticipated
  - b. There is much follow-up discussion anticipated
2. **Get Information**
  - a. The Measured Scale
  - b. Start-Stop-Continue
  - c. Generate and Prioritize a List
3. **Problem Solving**
  - a. The Sticky Note Chain
  - b. The Obituary Analysis
  - c. The Strategic Grid
4. **Persuasive**

Our sample later in this course is an actual presentation designed to persuade executives to authorize funds or other resources for a specific purpose. (It worked!!)



## #1 - The GIVE INFORMATION Presentation

This presentation is the simplest to deliver but one of the harder ones to design. It is easy to think the “give information” presentation is just about telling them (the audience) something. After all, “I talk, they listen – how hard can that be?”

The problem lies in the fact that this can easily become a data-dump which is famous for having the least amount of retention of all the communication methods. (Look back at the chart on page 3.)

The focus is determining what you want them to know that's new afterwards, how you will tell them, the order in which you will present your information, whether there will be any questions allowed, or discussion encouraged afterward. (Hint: questions increase retention.)

Let's look into this a little more.



### Structuring the Give Information Presentation

There are two probable scenarios with this kind of presentation, and we'll help you plan for both of them.

#### Scenario #1 - Little follow-up discussion is anticipated

Suppose the annual company blood drive were coming up and you had to make sure everyone knew about it. But is the real intent of this announcement **in the eyes of the sponsoring executive** that everyone knows or that everyone knows, and we get a lot of participation?



Also, this is a fairly straightforward concept not requiring a lot of discussion. Nearly everyone knows how it works; they just have to decide if they want to participate. In other words, “what's in it for me” to give blood? **So your presentation strategy should be to make it easy for audience members to get something out of it as well as easy for them to access the opportunity.**

Your presentation must play to their egos since the rewards of blood donations are usually self-gratifying (unless they offer something besides cookies and juice drinks afterwards). The first, attention grabbing slide could say something like:



- “You can be a hero!” (This plays to their self-image)
- “Will your department donate the most?” (Competition)
- “A chance to give back to your community” (Patriotism).

We have all heard the saying that a picture is worth a thousand words so do not hesitate to include appropriate clip art images in your presentation to facilitate the message.

If **step one** of your presentation strategy is to get the audience engaged and ready to act (give blood in this case), then **step two** is seizing the moment and have a sign-up roster ready for them immediately after you finish.

If they sign up for the blood drive in front of their friends so everyone can see how heroic they are, you'll get a much bigger response than if you give them enrollment slips they can fill out and send back in from the privacy of their desks.

This blood drive scenario can work for any simple informative presentation in which it is all one-way (you talk, they listen) or you talk and they (you hope) act on your message. Clearly, there won't be a lot of discussion after your presentation: they either sign up or they don't.

The slide sequence can be this simple:

- 1) Slide #1 – **Present the problem** and **explain why it is important to each of them**.
- 2) Slides #2 – 4 – **Describe the current situation requiring action**. Show pictures of the need for blood, the ease of giving blood, ask if anyone in their family has undergone surgery where blood was needed, graphs of how much their company has donated in the past.
- 3) Slide #5 – **Describe a solution for this condition**. Explain how they can become part of the solution to this problem that can include anyone in the audience (more 'what's-in-it-for-them').
- 4) Slide #6 – **A call to action RIGHT NOW!** (Have the signup sheet ready!)

There may be a few questions regarding logistics or clarification of something you said but it really doesn't have to be much more than these few slides.

## Scenario #2 - Much follow-up discussion is anticipated

Suppose that you're to give a presentation that you know is going to generate a lot of discussion but you're not ready to go into great detail yet. You just want the people to know it is coming.

We'll use the example of announcing the new health insurance plan to which the company will be switching in the fall. This is a common "Give Information" topic. It may be there are longer, more extensive informational meetings planned before the roll-out, so this is just an announcement.



Regardless of your seeing it as a simple "heads-up" presentation acting in the best of good-faith ways, something as important and potentially controversial as this will require a lot of dialogue with employees. The critical decision is when, where, and how it will happen.

The point here is to think about **what can happen** at the meetings, **not what you expect to happen**. Always, what can happen is a worst-case scenario.

When planning a presentation which has the potential for a lot of controversy or discussion, you know it can get derailed quickly and taken off into a new direction: especially if there are vocal audience members with personal agendas to display. So we will plan for the worst case here.

Also, if anyone has ever had a bad experience with the old plan or has heard negative things about the new one, we don't want them launching into "war stories" or "I heard..." gossip and cause us to lose control of the meeting.

First, let's go back to the course overview on page 1 and look at some the bullet items listed and consider them in relation to this meeting where there may be a lot of confusion about why the change, what it means to each of them, and that questions may come that could force us into more detail than we're planning at this initial meeting.

### 1) Presentations aren't given in a vacuum; there must be some meeting management skills considered, too.

- a) Can you use the 10-20-30 formula on page 2 as a guideline to reduce the temptation of saying too much in this initial meeting?
- b) Can you identify what topics or information you **will not** reveal in this initial meeting as well as what you will?

Let's pause for a moment here. We do not want you to give the audience the impression there are hidden agendas or secrets here that they aren't qualified to know; that will only feed their desire to know.

There are many legitimate reasons why you are not going to address these topics in case they come up and you should tell them so:

- It has not been decided yet
  - We are waiting for some outside factor that we can't control
  - Laws or regulations may forbid it
  - Any legitimate reason – just tell them why you cannot get into it at this time (never just say “we’re not discussing that now” because that sounds sinister and will destroy trust and good will quickly)
- c) If you cannot respond to a question – you're not ready to go into detail yet – how will you gracefully decline to answer and still retain good will with the audience?
- d) Can your first or second slide convey what's in it for them with the new program and then list highlights – the things you **will reveal** (but not details) - on the next few slides?
- e) Can you use a “parking lot” flip chart sheet(s) to capture questions for which you are not prepared to answer? (A ‘parking lot’ is a common method to record questions, have audience members see that you have heard them, and you can politely say something like ‘this will be covered in the later meetings’ or ‘we’ll send out a follow-up notice to everyone with these questions addressed’.)



It allows them to be heard and gives you a way to avoid getting distracted and off message.

- f) Do you have a strong finish that tells them the next stage of information and what they can expect?

## **2) What is the purpose of the presentation/meeting?**

- a) Can you write a single statement about the purpose of the meeting?

Here's an example: “The purpose of this meeting is to.

- Announce our new health plan,

- List the additional benefits and improvements over the old one
- Give them a high-level summary of it after the meeting in a printed handout
- Tell them about the more comprehensive informational meetings set for the next quarter."

**3) You must start with the desired outcome in mind and then design backwards from there.**

An easy way to do this is to complete this sentence: *"As a result of attending this presentation, audience members will (what specifically):"*

- *Know something new (what specifically)– intellectual gain*
- *Learn something new (what specifically)– skill development*
- *Have something new (what specifically) – handouts or goods of some sort*

Once you have a clear understanding of what they will walk away with, you can design your presentation to lead them (and you) up to that outcome.

**4) Assuming that "time is money", how can you determine whether the cost of the meeting (salaries, resources, and anything else) is justified by your presentation?**

This is a 'guesstimate' at best but is useful in limiting your invitee list and the length of time it takes for the presentation/meeting.

Suppose you're planning to invite 10 engineers to a two-hour meeting. In your company, engineers at this level make (a reasonable estimate on your part) \$125,000/year.

That converts to \$23.67/hour if they worked a 40-hour week. (Of course the reality is that engineers at this level haven't worked as few as forty hours a week in a long time. This is just a way to calculate the cost in terms of productivity of the meeting.)

The ten people in the presentation audience (not including you who are giving it) will cost the employer \$473.40 in non-productive time for this 2-hour meeting.

Here's the question: *"Is what they will gain from your meeting worth \$473 to the employer?"*

While it's true that some meetings with topics about safety or OSHA will never be measured in a cost/benefit analysis, this is a way to keep in mind the value of their time versus the value of what they'll get from your presentation.

**5) Who must be in the meeting? Who should be in it? Is there anyone who should not?**

Can you invite only supervisors and rely on them to spread the message to their people?

The 'should not' are usually contractors who may work in a department but are not company employees.

**6) How will you engage the audience as quickly as possible? (You'll have about the first seven seconds to either grab them or lose them!)**

Is there a visual prop that you can use to demonstrate the problem? Maybe three reams of paper dropped dramatically on the podium before you say anything would demonstrate the amount of paper that's wasted in a month doing rework and do-overs. (Your presentation is about reducing waste.)

**7) If it's an information giving presentation, will you also need handouts? If so, what will they contain? When will you give them out – before, during, or after your presentation?**

Include in the handout the key information and also references they can go to for more information.

If you give out the information as they come into the room, they'll be looking at it during your presentation. Also, it gives them a source of information about which to ask questions and potentially derail your program.

Telling them there will be handouts available with much more detailed information at the door on the way out usually works best from a meeting management point of view.

## **Summary**

The "WORST CASE" concept we mean to convey is when the presentation/meeting gets completely out of control by a barrage of unexpected (or unprepared for) questions, audience members may get shouting at each other, or some particularly aggressive audience member tries to take over the meeting attempting to push his or her personal agenda.

If you will use these seven items as a guide, your presentation should stay on track. (Or at least not go as badly as it could have!)

## #2 - The GET INFORMATION Presentation



There is more to the Get Information presentation than just asking people for their input.

As a minimum, you must consider:

- What 'deliverables' or outcomes do I want?
  - Are these the right people to give that to me?
  - Why would they want to give me the information? ("What is in it for them?")
- What is the most effective way to structure the presentation to maximize the time available?
  - Is there an efficient way to collect the information to reduce the follow-up work on me?

You will soon realize there is very little 'presentation' happening with this model because the focus of attention is getting information from the audience, not them listening to you. Consequently, your role becomes more of a moving around and active meeting facilitator than a stand-up and stand still facilitator.

*The Get Information presentation differs from the brainstorming/problem solving (BS/PS) types in one key feature: it deals with current or past situations (i.e., known entities or opinions) while BS/PS deals with the future or 'what-if' scenarios.*

We will use three presentation models to help you understand this presentation type:

- The Measured Scale
- Start-Stop-Continue, and
- List Generation and Prioritization.



## The Measured Scale

This is a good way to obtain a quantitative value for people's attitudes about a service, a product, a company program, or nearly anything about which someone is likely to have an opinion.

A familiar and very effective means of collecting quantifiable data about something is by asking people to fill out a Likert Scale. These are nothing new to us, but few actually know what they are and how to construct them.

The Likert scale is a great way to collect data based on a five, seven, or nine-point rating scale. [Rensis Likert](#) (pronounced "lick-urt") invented the scale as a scientific method to measure attitudes.

The Likert scale measures attitudes from one extreme to the other. You've no doubt participated in a survey where you were asked to respond based on the Likert scale. Here's a sample Likert scale:

Circle the response that most closely matches yours:

"Vanilla is my favorite flavor of ice cream"

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree



With a Likert Scale, the key is to make a statement, generally positive, and ask the respondent to indicate his attitude about your statement.

Personally, I always modified the classic Likert Scale a little by taking out the mid-point choice – the "neither agree nor disagree" – because I wanted their actual opinion, not simply give them an easy out.

However, I also did not want to include a numerical 'non answer', the '3', in my calculations of all the other responses, so I added a non-numerical option where they could indicate they had no opinion.



My response sheets looked like this:

1. Strongly disagree
2. Disagree
3. Agree
4. Strongly agree

X = Neither agree nor disagree

This way, if they had a legitimate opinion about the statement, they could either agree or disagree on a measured scale or honestly say they had no opinion without affecting my numbers. I did not want to force them into an answer they did not actually believe.

Another suggestion is not to burden them with an exhaustive survey because most will quickly get tired, realize they have a lot of work to do (or think they could be making better use of their time) and just speed through to get finished.

Instead try hard to separate what you **have to know** from what you **want to know**. (**The critical few instead of the curious many.**)

Then construct your survey with positively worded statements about the topic and let them give you information.

OK, that's enough about the survey instrument. Let's get back talking about the presentation. We can revise the model we followed a few pages back.

**1) Presentations aren't given in a vacuum; there must be some meeting management skills considered, too.**

- a) Can you use the 10-20-30 formula on page 2 as a guideline to tell them how important their opinions are, how their input will be used, and what (if anything) is in it for them (either today or some point in the future) to share their opinions?
- b) Do you have a strong finish that tells them the next stage of information and what they can expect?

**2) What is the purpose of the presentation/meeting?**

Can you write a single statement about the purpose of the meeting?

Here's an example: *"The purpose of this meeting is to determine how well our leadership class is meeting participant needs by using a Likert Scale to survey participants who have completed it within the past six months."*

**3) You must start with the desired outcome in mind and then design backwards from there.**

Unlike the prior presentation (Giving Information), the presenter seeks desired outcomes for the organization instead of for the audience.

An easy way to do this is to complete this sentence: *"As a result of conducting this survey, we will have established a benchmark of numerical values associated with twenty key aspects of our leadership class."*

If you know what the "twenty key aspects of the leadership class" are, it will be easy to construct a survey using positively worded statements.

**4) Assuming that "time is money", how can you determine whether the cost of the meeting (salaries, resources, and anything else) is justified by your presentation?**

Review this explanation from the previous presentation.

**5) Who must be in the meeting? Who should be in it? Is there anyone who should not?**

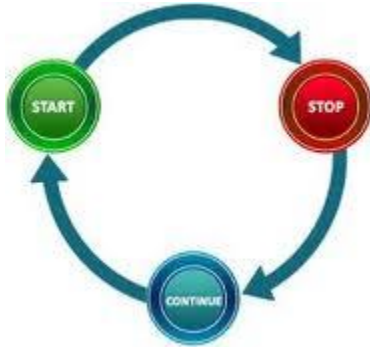
Who are the people most likely to have the information you need? That is your audience.

**6) How will you engage the audience as quickly as possible? (You'll have about the first seven seconds to either grab them or lose them!)**

If you need something from them, the easiest way to get it is to play to their egos. (WIIFM again). Help them realize how important this survey is, how important their opinions are, and what may be different in the future as a result of their collective effort.

The more important they feel, the greater the effort and thought they will put into their answers.

## Start – Stop – Continue



This is one of the simplest and most powerful means of data collection in use today.

Basically, you are asking your audience to think about an event, a program, policy, or situation they have experienced (usually a company sponsored event like a leadership development program) and tell you how to make it better by:

- “What should we **START** doing in the leadership development program that we are not doing now?”
- “What should we **STOP** doing in the leadership program that we are doing now?”
- “What should we **CONTINUE** doing in the leadership development program?”

Let's look at the by-now familiar review of presentation development questions if we want to do a STOP-STOP-CONTINUE presentation.

### 1) Presentations aren't given in a vacuum; there must be some meeting management skills considered, too.

- a) Can you use the 10-20-30 formula on page 2 as a guideline to tell them how important their opinions are, how their input will be used, and what (if anything) is in it for them (either today or some point in the future) to share their opinions?
- b) Do you have a strong finish that tells them the next stage of information and what they can expect?

### 2) What is the purpose of the presentation/meeting?

Can you write a single statement about the purpose of the meeting?

Here's an example: *“The purpose of this meeting is to determine how we can improve our leadership class by asking past participants for their opinions on what we should START, STOP, or CONTINUE doing going forward.”*

**3) You must start with the desired outcome in mind and then design backwards from there.**

Like the prior presentation (The Measured Scale), the presenter seeks desired outcomes for the organization instead of for the audience.

An easy way to do this is to complete this sentence: *"As a result of conducting this exercise, we will have identified specific actions suggested by past participants that will improve our leadership class going forward."*

All you have to give each of them is three pieces of paper and something with which to write. Then say, "Write START, STOP, and CONTINUE at the top of the pages and tell us what you think about improving our leadership program."

Briefly explain the concept of the process again if necessary and let them work on their own.

Since the pages are labeled start, stop, continue, it is easy to sort into piles so you can go through pulling out the best ideas.

**4) Assuming that "time is money", how can you determine whether the cost of the meeting (salaries, resources, and anything else) is justified by your presentation?**

Review this explanation from the previous presentation.

**5) Who must be in the meeting? Who should be in it? Is there anyone who should not?**

Who are the people most likely to have the information you need? That is your audience.

**6) How will you engage the audience as quickly as possible? (You'll have about the first seven seconds to either grab them or lose them!)**

Just like the previous presentation where you need something from the audience, the easiest way to get it is to play to their egos. (WIIFM again). Help them realize how important this survey is, how important their opinions are, and what may be different in the future as a result of their collective effort.

The more important they feel, the greater the effort and thought they will put into their answers.

## Generating and Prioritizing a List

In this situation, you want to create a list of responses and then prioritize them all within the context of the presentation/meeting. This is an easy, yet very powerful, method of data collection.

We'll demonstrate how this works by assuming that we have been in a project meeting all morning and now it's lunch time. The twelve people sitting around the table cannot seem to agree on where to have lunch.

Since we're off-site and have limited transportation available, we can't go in twelve separate directions so we have to decide as a group where we will go.

You step up to the erasable board (or flipchart) while saying, "This isn't a problem. We can figure this out very quickly!"

First you ask them to name the possible choices available and list them vertically like this while numbering sequentially:

1. Pizza
2. Chinese Food
3. Bar-B-Que
4. Subway
5. Standard Hamburger Place

Next, you set up a scoring box (like the one at the right) by pairing the response numbers **VERTICALLY** like this. The rationale is that you are forcing them to pick between two forced selections at a time – which is easy to do – instead of all of them trying to pick between five choices at once – which is simply chaotic.

Look at the box. The first pair #1 and #2 represents Pizza and Chinese Food on your generated list from the group.

Now you say, "Looking AT ONLY PIZZA and CHINESE FOOD, raise your hand WITHOUT DISCUSSION when I point to your preference."



1				
2				
1	2			
3	3			
1	2	3		
4	4	4		
1	2	3	4	
5	5	5	5	

You count the number of hands for each and announce the winner. Let's say Pizza had the most votes between the two and you underline #2.

Move to the next set and compare them VERTICALLY saying, "Now, vote between #1 Pizza and #3, BBQ." →

BBQ gets most votes, so you underline #3.

On to a vote between #2 and #3, Chinese food wins and you underline #2.

You continue through this voting for matched pairs until you have considered every vertical combination. Then count the number of times each choice "won" the vote in its matchup.

1. Pizza = 4 wins
2. Chinese Food = 3 wins
3. Bar-B-Que = 3 wins
4. Subway = 0 wins
5. Standard Hamburger Place = 0 wins

It's PIZZA FOR LUNCH!!

You have discovered **their preference** using **their input** making it difficult for someone to complain about the outcome. If you as the presenter/facilitator do not care where you go to lunch, refrain from voting and reserve yourself as the tiebreaker if everyone agrees to it. Otherwise, if you can't break the final tie between the final two choices, do something democratic like flipping a coin.

You still would have been able to generate and prioritize a list of possibilities in a very short time.

1			
<u>2</u>			
1	<u>2</u>		
<u>3</u>	3		
1	2	3	
4	4	4	
1	2	3	4
5	5	5	5

## #3 – The PROBLEM-SOLVING Presentation

This presentation method involves the greatest amount of interaction between the presenter/facilitator and the group of any other method covered in this course. You will rarely use many more than 3 slides in any of these because you will be spending more time actively leading their BS/PS sessions than you will standing wisely behind the lectern with your slideshow.

The slides may be as minimal as:

**1. Welcome to the Big Project Brain Storming Meeting**

**2. Lunch is coming in at 11:30 for a 1-hour break**

**3. Restrooms down the hall to the right**



4. (A fourth for special directions or an announcement)

Seriously, you are not only collecting some data about known topics or experiences (such as with the 'Getting Information' types covered earlier) but also asking them to call on their skills and experience to speculate about the future. You will not need many slides.

These techniques are very energetic and productive and you, as the facilitator, must be very comfortable using them because you are their guide through the brain-storming chaos! More slides will simply delay getting started.

The three techniques of brain storming/problem solving (BS/PS) we will cover in this course are:

- The Sticky Note Chain
- The Obituary
- The Strategic Grid

As you become more familiar with them, you will discover many opportunities for their application around you at work.

## The Sticky Note Chain

This is a simple technique that encourages collaboration, brain storming, and creativity plus having the additional benefit of the data being sorted as it is collected. A big win for you!

Our example comes from the mythical Big Project and we all are members of this team.

Let's use our guideline to set the stage for this event.

### **1) Presentations aren't given in a vacuum; there must be some meeting management skills considered, too.**

- a) Can you use the 10-20-30 formula on page 2 as a guideline to tell them how important their opinions are, how their input will be used, and what (if anything) is in it for them (either today or some point in the future) to share their opinions?
- b) The three slides we mentioned earlier are probably sufficient for this plus an extra one we will describe below.

### **2) What is the purpose of the presentation/meeting?**

Can you write a single statement about the purpose of the meeting?

Here's an example: *"The purpose of this meeting is to collect ideas and suggestions for process improvements in our project execution."*

### **3) You must start with the desired outcome in mind and then design backwards from there.**

Once again, the presenter seeks desired outcomes for the organization instead of for the audience.

An easy way to do this is to complete this sentence: *"As a result of conducting this exercise, we will have identified specific actions suggested by current team members that will improve our project execution practices and reduce direct and indirect costs,"*

All you have to give them is a pack of sticky notes and a pencil and ask them to wait for your directions.

### **4) Assuming that "time is money", how can you determine whether the cost of the meeting (salaries, resources, and anything else) is justified by your presentation?**

Review this explanation from the previous presentation.



**5) Who must be in the meeting? Who should be in it? Is there anyone who should not?**

Who are the people most likely to have the information you need? That is your audience.

**6) How will you engage the audience as quickly as possible? (You'll have about the first seven seconds to either grab them or lose them!)**

Just like the previous presentation where you need something from the audience, the easiest way to get it is to play to their egos. (WIIFM again). Help them realize how important this activity is, how important their opinions are, and what may be different in the future as a result of their collective effort.

The more important they feel, the greater the effort and thought they will put into their answers.

The value of this technique depends on how widely you want data collected. If you want it project wide, you must list specific topics that encompass the project like this:

- 1) Project Accounting
- 2) Project Management
- 3) Project Procurement
- 4) Project Human Resources
- 5) Project Safety
- 6) Project group "X"
- 7) Project group "Y"
- 8) Project group "Z"

Make a slide listing those topics that you will leave up on the screen for their reference while working - don't get more than 9 or 10 topics or it becomes too chaotic.

Now hand out the packs of sticky notes, put up a slide like this, and say,

*"We ask for your help on improving our project in these eight project areas.*

*Work independently without discussion and think about process improvement suggestions you have in these key areas.*

**#5 Project Safety**

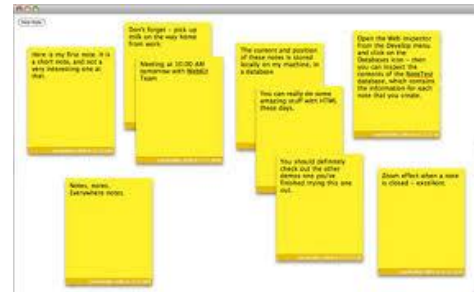
*Rotate the leader of the morning safety meeting to increase our engagement and boost morale*

When you think of one, write the project area at the top (like this slide with Project Safety) and write your idea for improvement under it. ("Rotate the leader of the meeting....")

Keep writing them about as many areas listed here as you can! Ask for more sticky notes when you need them.

After you have listed a few, bring them up and post them along the line I've drawn on the wall there. If you have more than one idea about the same topic, stick them below each other making a vertical chain.

If there is no chain started for your heading, then start one. While you are up there, take a moment to read what the others have written; maybe it will stimulate some more ideas with you.



And NO, WE DON'T NEED YOUR NAME ON IT!"

In a very short time, you will have long chains of sticky notes with ideas about the topics you have selected. If your project is like many others on which I've worked, there will be many repetitions and attempts at humor as distractions. But there will also be some gems waiting for discovery.

Not only will it go quickly, but the data is also sorted for you, the participants have had a chance to be heard, and you may discover some brilliant (or disturbing) information!

## The Obituary Analysis


This sounds like a morbid approach to brainstorming, but it can reap vital rewards if participants feel free to participate without recrimination afterward. It is most useful in project planning or early in the project at latest.

As the facilitator, you are using minimal slides again:

1. **Welcome to the Big Project Brain Storming Meeting**
2. **Lunch is coming in at 11:30 for a 1-hour break**
3. **Restrooms down the hall to the right**



However, the 4<sup>th</sup> slide tells them something about this meeting:



Dearly Beloved,

We have gathered here today to write the obituary for the Big Project for which we all had such great hopes only to see it crashing down in flames!

Rest in Peace, Big Project

Now that is an attention getter because the Big Project hasn't even begun yet! You all are still in the planning stage.

What you will do in this case is to *project yourself 24 months into the future (or any amount of time that's reasonable in your situation), ASSUME THE PROJECT FAILED, and identify actual conditions today that could have led to it.*

Then hand out sticky notes and use the same format you did in the previous model except in this situation, **they decide what the project topic will be** (the upper half of the note) and then they identify which of today's real conditions within the project topic could have led to the demise.

Invite them to post them in chains along the wall, read each other's, and let their imaginations flow!

Afterward, the PM and any assisting key project members have a list of issues that theoretically killed the project. He or she can begin taking steps to remove the potential problem or develop a work-around that will diminish its impact.

For example, some potential topics and their issues could be:

1. **“Project Leadership** - The project champion left, and momentum just died”
2. **“Project Design & Construction** - The turf wars between design and construction were more important than successful project execution.”
3. **“Project Procurement** - Our source for the critical component went bankrupt and delivery stopped.”
4. **“Project Management** - We never heeded the warning signs that the project was slipping beyond recovery.”

Some of the topics you receive may seem to be so far-fetched that they defy reality while others may seem so obvious you wonder why someone took the time to write them down. This process of collecting reasons the project died is about getting *as many ideas as possible as early as possible*. Save the judgment until later because you do not want to inadvertently discourage anyone from speaking up.

Please remember this; the most critical idea may come from your least expected source.

**1) Presentations aren't given in a vacuum; there must be some meeting management skills considered, too.**

- a) Can you use the 10-20-30 formula on page 2 as a guideline to tell them how important their opinions are, how their input will be used, and what (if anything) is in it for them (either today or some point in the future) to share their opinions?
- b) The three slides we mentioned earlier are probably sufficient for this plus an extra one we described above.

**2) What is the purpose of the presentation/meeting?**

Can you write a single statement about the purpose of the meeting?

Here's an example: *“The purpose of this meeting is identify current conditions that could lead to the death of the project if left unaddressed.”*

**3) You must start with the desired outcome in mind and then design backwards from there.**

Once again, the presenter seeks desired outcomes for the organization instead of for the audience.

An easy way to do this is to complete this sentence: *"As a result of conducting this exercise, we will have written the project's fictional obituary from causes based on specific, potentially fatal conditions identified by current team members."*

All you have to give them is a pack of sticky notes and a pencil and ask them to wait for your directions.

**4) Assuming that "time is money", how can you determine whether the cost of the meeting (salaries, resources, and anything else) is justified by your presentation?**

Review this explanation from the previous presentation.

**5) Who must be in the meeting? Who should be in it? Is there anyone who should not?**

Who are the people most likely to have the information you need? That is your audience.

**6) How will you engage the audience as quickly as possible? (You'll have about the first seven seconds to either grab them or lose them!)**

Just like the previous presentation where you need something from the audience, the easiest way to get it is to play to their egos. (WIIFM again). Help them realize how important this activity is, how important their opinions are, and what may be different in the future as a result of their collective effort.

The more important they feel, the greater the effort and thought they will put into their answers.

And, welcoming them to their project's funeral is bound to get their attention!

## The Strategic Grid

This is a strategic planning tool that can be used anytime a group wants to improve on-going work processes or avoid as many conflicts as possible with their new project. *It can help a department develop their strategy with maximum employee participation.*

You will soon discover that it combines elements of the Chaining Ideas and Obituary models of presentations/meetings.

Finally, you will need to put the template diagram into a slide and explain how it works before you get into the real exercise.

.....

This example is an auto license department trying to come up with a way to improve the way they issue tags.

### **“CHANGING THE WAY WE ISSUE AUTO LICENSE TAGS”**

(Course author note: An explanation of each section follows this template.)

Factors that will assure success		Factors that will assure failure									
1	Communicate with all internal vendors and customers	A	Equipment does not work								
2	Employee training on new equipment and procedures	B	No teamwork or support from internal vendors, customers or department employees								
3	Public support	C	System problems								
4	No problems with equipment	D	Creates problems – public complains								
5	Production increases in same amount of time	E									
Tactics we can use to encourage success and avoid failure		1	2	3	4	5	A	B	C	D	E
Have informative meetings with all areas with minutes provided to all.		X	X	X				X			
Maximum employee input regarding practices, policies, training, and implementation.		X	X		X		X	X	X	X	
Conduct dry runs with “customers” from other departments			X	X	X	X	X	X	X	X	
Proper testing frequently		X	X		X		X			X	
Back-up plans if system fails					X		X		X		
Team development celebration & support activities		X	X		X	X	X	X	X		
(What else?)											

**Factors that will assume success or failure** –This is where you as the facilitator leads the group and asks for the *significant few* (verses the trivial many) factors that, if they occur, will spell success or failure for our project.

Tips to keep in mind here are:

- You do not need to have an equal number of failure and success factors
- You do need to make sure one group is numbered and the other with letters. It does not matter which is which. The reason will be evident soon.

**Success and failure factors do not have to be listed as opposites in each column. “Public Support”, success factor #3, does not have to be repeated in the ‘failure’ column as “no public support”. One listing is sufficient.**

**Tactics we can use to encourage success and avoid failure** are broad action ideas. They can be assigned to subcommittees for more detailing and action later in the process. Put an “X” in the column under each number or letter (the success or failure factors they represent) that the tactic addresses.

For example, the tactic “*Have informative meetings with all areas with minutes provided to all*” addresses success factors 1, 2, and 3 plus failure factor “B”.

Continue adding tactics until all of the success and failure factors have been addressed sufficiently to get started safely. (This is not intended to make it forever bullet-proof.)

This tool will help you get off to a safe start by making sure you have not missed addressing and success or failure factors: just look in the column under each factor. If there is not an “X”, it has been missed.

It is up to the team to determine whether they feel one tactic is sufficient for a safe start or they would feel safer with two or three more.

As you can see, it is a simple way to plan strategically with the department members involved and who now have a vested interest in the successful outcome of the initiative.

WORK SHEET: Use this template in your presentation

Factors that will assure success		Factors that will assure failure									
1		A									
2		B									
3		C									
4		D									
5		E									
Tactics we can use to encourage success and avoid failure		1	2	3	4	5	A	B	C	D	E

**1) Presentations aren't given in a vacuum; there must be some meeting management skills considered, too.**

- a) Can you use the 10-20-30 formula on page 2 as a guideline to tell them how important their opinions are, how their input will be used, and what (if anything) is in it for them (either today or some point in the future) to share their opinions?
- b) The three slides we mentioned earlier are probably sufficient for this plus an extra one we described above.

**2) What is the purpose of the presentation/meeting?**

Can you write a single statement about the purpose of the meeting?



Here's an example: *"The purpose of this meeting is analyze current conditions that can lead to success or failure of the start of our project and devise strategies to increase the chance of a successful start."*

**3) You must start with the desired outcome in mind and then design backwards from there.**

Once again, the presenter seeks desired outcomes for the organization instead of for the audience.

An easy way to do this is to complete this sentence: *"As a result of conducting this exercise, we will have devised a strategic plan to get our project off to a successful start."*

**4) Assuming that "time is money", how can you determine whether the cost of the meeting (salaries, resources, and anything else) is justified by your presentation?**

Review this explanation from the previous presentation.

**5) Who must be in the meeting? Who should be in it? Is there anyone who should not?**

Who are the people most likely to have the information you need? That is your audience. In this case, everyone involved in the day-to-day activities.

**6) How will you engage the audience as quickly as possible? (You'll have about the first seven seconds to either grab them or lose them!)**

Just like the previous presentation where you need something from the audience, the easiest way to get it is to play to their egos. (WIIFM again). Help them realize how important this activity is, how important their opinions are, and what may be different in the future as a result of their collective effort.

Make sure they understand that their future is truly in their hands as a result of this exercise and the implementation of their suggestions.

Once again, the more important they feel, the greater the effort and thought they will put into their answers.

## #4 The PERSUASIVE Presentation

In theory, the Persuasive Presentation should be fairly straight-forward. Essentially, all you have to do is present your case in a way that makes it easy for them (the people from whom you are seeking action) to say "YES!!"

We'll gradually work toward that dream here but must first inject some harsh doses of reality.

When people who are not used to making presentations attempt to make one, they forget to be themselves. Suddenly, they think they must become someone else who uses big words, corporate jargon, and buzzwords and phrases in an attempt to be seen as what they (the presenter) thinks a peer of the audience would act and sound like.

Too many times it comes across as a distraction to the message and failure results. Let's look at some of the common self-imposed obstacles that occur.

### **TOO MANY WORDS**

A common fault of many novice presenters is their desire to become more convincing by using more words than necessary. A simple way to test your presentation is to ask yourself, **"What would I say if I were just talking (assuming basic knowledge of sentence structure and grammar) to the person instead of making this presentation?"**

Simplify these statements in the areas below each sentence.

This note is to let you know we are sponsoring a company picnic next month at the county park down by the lake. If you need directions, please do not hesitate to contact us.

In the event of a hiring freeze, in the majority of instances, we will not be required to lay off any of our staff.

## AVOID JARGON or “BUZZWORDS”

Assume your audience does not recall or know all of the jargon or buzzwords associated with your area. **Do not risk embarrassing your listeners by making them ask, “What does that mean?”**

## REDUNDANT (and repeating) EXPRESSIONS

Another problem with many new presenters is using meaningless or redundant expressions. Just because we hear them in daily use does not mean they are appropriate.

Draw a line through the redundant part of each expression or replace it with a more appropriate word.

(Do not look now but the answers are on the next page.)



Advance planning	For a period of ten days
Ask a question	Just exactly
As to whether	Irregardless
My personal opinion	As yet
At this point in time	Absolutely essential
At a later date	Refer back
At the present time	True facts
Basic fundamentals	Whether or not
Specific example	Written down
Answer back	But nevertheless
Brief moment	Close proximity
On a regular basis	Close scrutiny
Period of time	Combine together
Cut half in two	Recur again
Completely empty	Thorough investigation
Concise summary	Consensus of opinion
Sufficient enough	Continue on
Started off with	Exact opposites
Merged together	First of all
Repeat again	Your favorite?

Advance planning	For a period of ten days
Ask a question	Just exactly
As to whether	Irregardless
My personal opinion	As yet
At this point in time “Now” or “Then”	Absolutely essential
At a later date	Refer back
At the present time Just say “now”	True facts
Basic fundamentals	Whether or not
Specific example	Written down
Answer back	But nevertheless
Brief moment	Close proximity
On a regular basis	Close scrutiny
Period of time (time period)	Combine together
Cut half in two (or cut in half)	Recur again
Completely empty	Thorough investigation
Concise summary	Consensus of opinion
Sufficient enough	Continue on
Started off with	Exact opposites
Merged together	First of all
Repeat again	Your favorite?

## CLICHÉS (and other overused) EXPRESSIONS

Clichés add unnecessary words that reduce the effectiveness of our communication.

Rewrite these clichéd expressions into phrases with fewer words and more effectiveness.

Please be advised that at the present time we have no available job openings. Thank you for your consideration.

As per our telephone conversation, enclosed please find two copies of our agreement. Please read this information at your earliest possible convenience – but not before our meeting on Tuesday. After you have an opportunity to review this agreement, please call me. Thank you for your consideration.

## **ESCHEW OBFUSCATION**

**(Avoid big, redundant, or meaningless words)**

Many people use big words when they want to sound impressive or unwittingly write clumsy sentences trying to sound “official”. Unfortunately, it often has the opposite result on the reader. If you focus on the BEST word, NOT THE BIGGEST, your writing will flow more naturally and be easier to understand.

Rewrite these clumsy expressions into phrases with fewer words and more effectiveness.

Further notification for all affected parties will follow this correspondence.

Prior to your departure on a daily basis, please power down your PC, secure all sensitive documents within your work cubicle, secure your cubicle, and terminate illumination as you depart.

## **Your Presentation Strategy with Executives**

Burn this question into your “memory chip” for recall when you are trying to persuade someone to act: **WHAT IS IN IT FOR THEM?** (Once again, the acronym is “WIIFT”)

You have a greater chance of success with your proposal if you focus on demonstrating how your ideas will help them:

### **1.) Save money**

- a) By not spending new money (cost savings)
- b) By spending less money (cost reduction)

### **2.) Save time**

- a) By reducing overtime (cost savings)
- b) By reducing the time it takes to complete a process (increased productivity).



- c) By reducing the number of people needed to accomplish something (cost savings).
- d) By reducing the time needed for rework or error correction (increased productivity).

Naturally, when you help them look good, your reputation improves, too!

Additionally, your proposal should use carefully selected words or phrases to increase their confidence in what you are proposing. These words and phrases are known as “hard references” which carry greater weight in their mind than do “soft” ones.

For example, saying, “It will cost exactly \$43,123.87” carries greater weight than saying, “We estimate it should cost about \$43,000.”

This model results from many years of making financial presentations and proposals before corporate executives. (It averaged a 90+% success rate!)

## **A Model for Your Presentation**

This is a successful proposal from a bank's data processing manager as the old process of handing paper checks began to give way to the new technology of “image” processing that is common today. This request for new software was made in a PowerPoint presentation. Although the data contained is outdated, the strategy behind the persuasive construction of the presentation remains valid today.

**(A personal note from the course author: In the culture of the bank from which this was taken, a proposal was never brought before executives without having supporting documentation available if it was asked for by an executive. This is a copy of the supporting text used in that presentation. The specific slides are long gone but we provide some guidance on how it should look later in this section.**

**Veteran presenters knew it was unwise to waste the executives' time by presenting too much information if unrequested.**

**Although it was a very painful experience learning how much to say and how much to have available if requested, it did speed the project approval process and teach our managers how to make effective and powerful presentations for any financial situation.)**

The supporting text of the presentation is in the shaded box. The text color has been changed to correspond to the strategic analysis of each section in the margin.

The “attention grabber or hook” is the **bold** statement that talks about saving money (reduced headcount) and increasing efficiency (micro line read rate increase) which reduces costs. These are two topics guaranteed to grab an executive’s attention.

The blue type is a brief and factual summary of the current conditions that we wish to change.

The red type is what we want to do in an attempt to fulfill the “dream” in the attention grabber section above.

Notice the words “We can..” in the grabber. It describes the possible dream IF YOU WILL HELP US.

(You never say “We will...” because there are no guarantees in life.)

The black text is the “call to action”.

We have teased the executives by dangling the money-saving dream in front of them, we have explained what the situation is like now, described our plan to make their desires a reality, how we will recover the costs, and here’s what it will cost to do that.

The ball is in their court.

## EXECUTIVE SUMMARY

**We can reduce our Items Processing headcount and meet Federal Reserve deadlines earlier with changes in sorter machine software. We can also achieve a check micro line read rate increase from 48% to 70+%.**

The amount of checks we present nightly to the Federal Reserve from our three processing centers is determined by two primary factors:

- The amount we can clear, either mechanically via the sorters or manually by clerks keying data.
- The volume of work received.

Atlanta and Birmingham have old systems with outdated, non-Windows software while Florida is comparatively new complete with industry standard Windows NT software. This older equipment is at its maximum capacity and cannot expand while Florida still can.

Atlanta and Birmingham consistently have higher labor and maintenance costs per unit volume of work processed than does Orlando. Our labor and sorter maintenance costs will continue to increase with our work volume if we do not act soon to change the present conditions.

We recommend two major changes in our present situation.

- Upgrade the software in the Birmingham and Atlanta sorters to XXXX that we use in Orlando. It is a proven platform that will allow us to expand our capacities in Birmingham and Atlanta. This will also decrease our non-productive “downtime” as shown in attached comparisons between centers and give us a uniform platform across all three centers.
- Second, that we install “Speed-read” software in all three centers to increase our sorter “read rate” from an average 48% of checks to over 70%. This will have a dramatic decrease in the amount of manual labor required to process checks plus allow us to meet more Fed deadlines earlier.

We budgeted \$900,000 this year for this project based on vendor estimates. Unanticipated installation wiring code changes in our city require an additional \$85,000. This results in an impact of \$85,000 more than we had budgeted.

We request approval to spend \$900,000 that was budgeted and an additional \$85,000 for the local building code for a total of \$985,000.

We will recover this within 5 years from labor and maintenance savings.

Use this summary model to make sure you have addressed most of the issues that will probably come up when you present your proposal to an executive. Remember that there is no “cook book” that will guarantee success every time. This will help you cover the most likely issues.

Although that model has been very successful, there are additional unseen factors to consider when making a persuasive presentation.

1) First, and most important, don't forget the saying that **YOU ONLY GET ONE CHANCE TO MAKE A GOOD FIRST IMPRESSION.**

- a) Speak well, confidently, smile often as you try to relax
- b) Be sure you look the part – not over or under dressed
- c) Most importantly, act as if you genuinely deserve to be there. (You're not some beggar hoping for handouts)

Put your plan together carefully and then present it to knowledgeable people in a mock presentation many times before going before the executives to uncover flaws and strengthen them before your **BIG CHANCE.**

2) Assume success and go with a pre-written approval for them to sign (if they will.) It can be something as simple as a copy of the slides and ask the top exec at the table if he (or she) would mark it approved so you can get the ball rolling.

Naturally, they'll expect to see a formal document via the accepted approval request channels but getting something now can help you get the other members of your project moving.

3) Be sure to disclose any risk before someone asks you the question. This helps preserve your credibility because you brought it up first and it will not look like you were trying to hide something or did not think of it. (Rest assured they are thinking **RISK!**)

4) Use 'hard numbers' as much as possible. \$4,565,450 has greater credibility than saying “just over four-and-a-half million dollars.”

5) Be sure you can explain clearly why this recommendation is the best choice in case the approver wants to know why you recommend this particular action and not something else.

Also, make sure you have available a list of **YOUR REFERENCES.** Do not provide this unless asked (it may be distracting to your proposal).

List the names, titles, and telephone numbers of people (employees or vendors) from whom you collected data or who can offer additional information if needed.



6) Tell them how it will pay for itself by having a spreadsheet available (if they ask for it.)

**1) Presentations aren't given in a vacuum; there must be some meeting management skills considered, too.**

- a) Can you use the 10-20-30 formula on page 2 as a guideline?
- i) We suggest using the "hook" statement as the first slide to get their attention.
- ii) Break the current conditions (blue text) into 2 or three slides
- iii) Use a single slide for each recommended change you want to make
- iv) Make the budget number topics separate bullets on the same slide for ease of visual comparison
- v) Make the request for approval and the means for recovery on the same slide to soften the impact of the money request.
- vi) The final slide should tell them the ball is in their court (diplomatically, of course) by saying something like, "May we start tomorrow?"

It gently presumes approval and may nudge any possible fence sitters your way (hopefully.)

**2) What is the purpose of the presentation/meeting?**

Can you write a single statement about the purpose of the meeting?

Here's an example: *"The purpose of this meeting is to gain executive approval to spend an approved \$900,000 and an unanticipated additional \$85,000 to upgrade our check clearing software and processes."*

**3) You must start with the desired outcome in mind and then design backwards from there.**

Once again, the presenter seeks desired outcomes for the organization instead of for the audience.

An easy way to do this is to complete this sentence: *"As a result of this presentation, our department will have approval to spend \$985,000 to upgrade our Items Processing department."*

**4) Assuming that "time is money", how can you determine whether the cost of the meeting (salaries, resources, and anything else) is justified by your presentation?**

Obviously, this does not apply in this situation.

**5) Who must be in the meeting? Who should be in it? Is there anyone who should not?**

Who are the people most likely to have influence on the decision without going higher than necessary?

**6) How will you engage the audience as quickly as possible? (You'll have about the first seven seconds to either grab them or lose them!)**

Clearly the opportunity to save money (reduced headcount and greater processing efficiency) is guaranteed to grab their attention.

Finally, these are phrases guaranteed to make an executive salivate. Build your opening "hook" statement around them when possible.

- Increase efficiency
- Increase productivity
- Improve customer service
- Increase quality
- Reduce risk
- Reduce existing expenses
- Saving or avoiding future expenses
- Reduce work hours
- Reduce rework
- Save time