14

Types of Presentations

## Chapter Outline

Chapter Objectives

After reading this chapter, you should be able to prepare and deliver the following types of presentations:

1. Briefing
2. Status report
3. Final report
4. Feasibility report
5. Training session
6. Explanation
7. Proposal
8. Sales presentation
9. Welcoming remarks
10. Introducing another speaker
11. Honoring a person or institution
12. Toast
13. Presenting and accepting an award
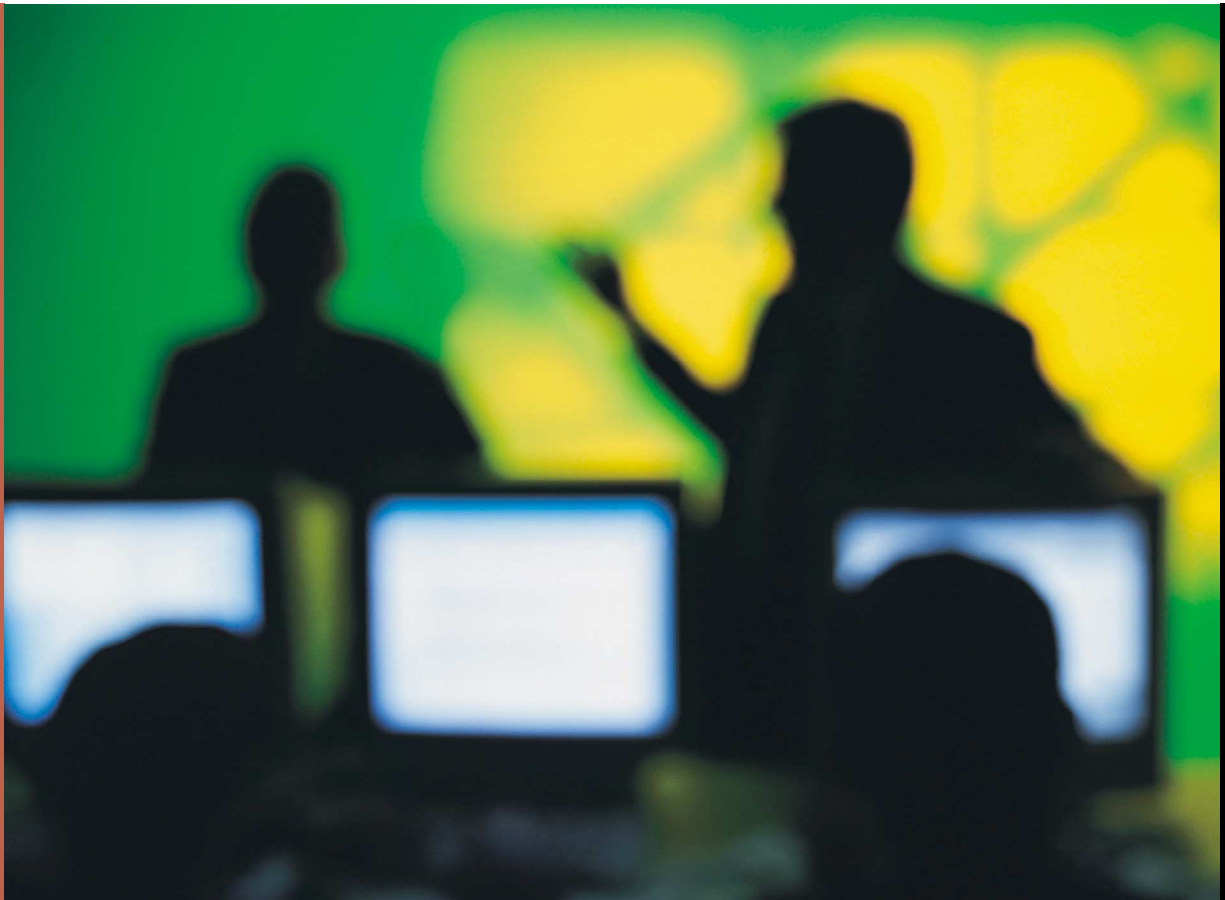
A fter reading this far, you know how to deliver an effective presentation. The strategies you learned in Chapters 10 through 13 will serve you well, but specific situations call for specific approaches. The proposal you deliver in the morning calls for a different approach from the toast you give at a dinner that evening. Likewise, the design that works well in a training session will sound out of place when you give or accept an award.

This chapter will give you guidelines for special types of business and professional presentations. It builds on the skills you have already learned, helping you gain the extra margin of effectiveness that can make your presentations interesting and effective—even outstanding.

Informative Presentations

Most informative presentations fall into one of four categories: briefings, reports, training, and explanations. The following pages outline specific guidelines for planning and delivering each type.

Briefings

Briefings are short talks that give an already interested and knowledgeable audience members the specific information they need to do their jobs. Some briefings update listeners on what has happened in the past. For example, nurses and police officers

on the web

Successful Presentations

The Virtual Presentation Assistant at **http://www. ukans.edu/cwis/units/coms2/vpa/vpa.htm** provides tools for developing presentations, assistance in numerous aspects of speaking, and links to various other public-speaking websites. For a refresher in business presentations, visit **http://www. presentingsolutions. com/effectivepresentations.html.** Although it is a commercially maintained site specializing in presentation equipment, this Web page contains news, trends, and tips from the business presentation world.

attend briefings before each shift to learn what has been happening since their last watch. Other briefings focus on the future. The executive chef of a restaurant might brief waiters about the details of the day's menu specials, and the account representative handling an advertising account might brief the agency's team about a client's interests and quirks before an important meeting. Although used for many purposes, briefings share the following characteristics:

- *Length.* As their name suggests, most briefings are short—usually no more than 2 or 3 minutes on a given subject.
- *Organization.* Because of their brevity, briefings usually don't require the kinds of attention-grabbing introductions or conclusions described in Chapter 11. They are organized in a simple way, usually topically or chronologically.
- *Content.* Briefings may summarize a position ("As you know, we're committed to answering every phone call within 1 minute"), but they usually don't make complex arguments in its favor. Most briefing attendees already know why they are there, and the main focus should be getting them ready to do the job at hand.
- *Presentational aids.* Some briefings may include simple visual aids ("Here's what our new employee ID badges will look like."), but they rarely contain the kind of detail found in longer and more complex presentations.
- *Language and delivery.* Because of their informal nature, briefings are usually quite conversational. Delivery is more matter-of-fact than dramatic.

Here is a sample briefing for a group of representatives who are preparing to staff a start-up company's exhibit booth at a trade show. Notice that the remarks are concise and well-organized. They briefly state a thesis ("How we handle ourselves will make a huge difference") and then lay out clear instructions for the sales team.

This is our first chance to show the public what we've got. The way we handle ourselves the next 3 days can make a huge difference in our initial year. I know you're up to the job. Here are a few last-minute items before we get going.

First, about the brochures: They were supposed to show up today via overnight mail, but they haven't arrived yet. Casey will keep checking with the mail room, and if they aren't here by 9:00 he will head over to the copy shop across the street and print out 500 fact sheets that we can use until the brochures arrive. So if the brochures are here, we'll use them. If they're not here, we hand out the fact sheets.

Table 14–1	Common Report Types

Progress/Status
- Contractor or architect's report to client
- Quarterly financial report to board of directors
- Monthly marketing report to marketing manager
- Annual report to public

Investigative
- Was a customer's complaint justified?
- Why has our overhead increased 15 percent in the last year?
- Is there gender bias in our hiring and promotions?

Feasibility
- Will staying open 24/7 be profitable?
- Can we afford to offer health insurance to part-time staff?

It's going to get very busy, especially mid-morning and mid-afternoon. You may not have as much time as you'd like to chat with visitors. At the very least, be sure to do three things. First, be sure each person is signed up for the drawing for our free Caribbean vacation. The information they give us on the sign-up sheets will help us track who visited our booth.

Second, be sure to invite each person to the reception we're giving tomorrow night. Give them one of our printed invitations so they know where and when it is.

Finally—and this is the most important thing—ask them what product they're using and how they like it. If they are happy with their current product, find out what they like about it and show them ways in which they might find ours even easier to use. If they don't like the product they're using, show them the features of ours.

Remember—stay upbeat and never criticize our competitors. Listen to the customers, and show them how our product can meet their needs. Any questions?

Reports

In a **report,** you give your audience an account of what you or someone you represent has learned or done. Reports come in an almost endless variety. Table 14–1 lists some common types. Some are internal, given to audiences within your organization. Others are external, delivered to outsiders such as clients, agencies, or the general public. Some reports are written, and others are oral. Even written reports are often presented orally. Some reports are extremely long and detailed, while others are quite brief. Finally, some reports are formal and others are presented informally.

An organization's culture determines the manner in which you present a report: brief or elaborate, with or without visual aids and question-and-answer sessions, and so on. Learn the conventions for your audience by watching accomplished colleagues and asking experienced (and successful) co-workers.

Status Reports   Probably the most common type of informative presentation is the **status report,** sometimes called a *progress report.* In many meetings, you can expect to hear someone ask, "How's the project going?"

The person asking this question usually doesn't want a longwinded blow-by-blow account of everything that has happened since your last report. You will gain the appreciation of your audience and boost your credibility by presenting a brief, clear summary of the situation. The following format will almost always serve you well. Cover each of the points briefly, and expect your listeners to pose questions when they want more information.

1. *Review the project's purpose.*

2. *State the current status of the project.* As relevant, include the people involved (giving credit for their contributions) and the methods you have used.

3. *Identify any obstacles you have encountered, and attempts you have made to over-come those obstacles.* If appropriate, ask for assistance.

4. *Describe your next milestone.* Explain what steps you will take, and when they will happen.

5. *Forecast the future of the project.* Focus on your ability to finish the job as planned by the scheduled completion date.

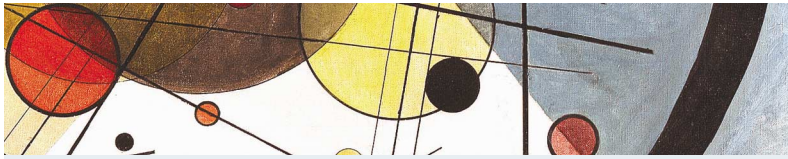A brief progress report would sound something like this:

On February 3, we were told to come up with an improved website for the company. [Reviews the project's purpose.] Paul and I have been exploring the sites of other companies in the field, and we've developed a list of features that our site should have. We'll be happy to share it with anybody who is interested. [Describes the current status of the project. In a longer progress report, the speaker might identify the features, and even give examples of them.]

We know we'll need a website designer soon, and we haven't found anybody locally whose work we like. [Identifies issues and problems. In a longer report, the speaker might list the shortcomings.] We would welcome any suggestions you might have. If you have some names and contact information, please e-mail it to me so we'll have it in writing.

We plan to pick a designer and have sketches ready by the end of next month. [Describes next milestone.] If we can do that, we should be able to have the new website up by the end of March, right on schedule. [Forecasts the future of the project.]

Final Reports   As its name suggests, a **final report** is delivered upon completion of an undertaking. The length and formality of a final report will depend on the scope of that undertaking. If you are describing a weekend conference to your colleagues it would most likely be quite short and informal. On the other hand, a task force reporting to top management or the general public on a year-long project would most likely deliver a detailed and much more formal report. You can adjust the following guidelines to fit your situation:

1. *Introduce the report.* State your name and your role unless everyone in the audience already knows you. Briefly describe the undertaking you are reporting on.

2. *Provide necessary background.* Tell your listeners what they need to know to understand why the project was undertaken, why you and others became involved, and any other factors that affected your approach.

career tip

Technical Reports

There are two types of technical reports: those given to technical audiences (colleagues in your workplace or at technical conferences) and those given to non-technical audiences (clients and customers with varying levels of expertise or officials in charge of money or decision making who don't share your level of mastery). Follow these guidelines for both types:

- Use language appropriate for your audience. For a nontechnical audience, use language that is understandable and teach technical terms that are essential to understanding the presentation. Jargon is useful for a technical audience that will understand it; use jargon with absolute precision.

- Use analogies to clarify concepts for a nontechnical audience, being certain to point out limits of an analogy.

- Adapt visual aids to the audience. The nontechnical audience needs visuals that make sense to non-experts; have extra visuals in even simpler formats to use if audience seems unclear. Knowledgeable audiences appreciate precise data presented in formats common to your field; have extra visuals with more technical data if the audience requires it.

- Watch your audience carefully. If they seem puzzled, try to slow down, reiterate key points, use additional examples, or in a small, interactive group, stop and ask about the puzzled looks. If an audience seems bored or is losing interest, try to become more animated with greater vocal variety and movement.

For more information on technical reports see Laura Gurak, Oral Presentations for Technical Communication *(Boston: Allyn and Bacon, 2000); and Michael Alley,* The Craft of Scientific Presentations *(New York: Springer-Verlag, 2002).*

3. *Describe what happened.* Explain what happened during the undertaking. Aim this discussion at the level of interest appropriate for your audience. For example, if others will be following in your footsteps, give details of challenges and how you dealt with them. If other persons were involved, mention them and offer your thanks.

4. *Describe the results.* Report on the outcomes of the undertaking. Include a discussion of successes and failures. Describe any future events related to your topic.

5. *Tell listeners how to get more information.*

A very abbreviated final report might sound like this:

Hi everybody. My name is Betsy Lane, and I'm the chair of our county's United Way campaign. [Self-introduction.]

As you know, United Way is dedicated to helping people in our community to help themselves develop healthier, more productive lives. We support over 50 agencies that provide a multitude of services: Promoting wellness for all ages and abilities, making sure that all children enter school ready to learn, helping people toward lifetime independence, sustaining safe neighborhoods, and educating young people for responsible adulthood. The need and the opportunities are great, and we set the bar high this year: $3 million. [Provides necessary background.]

This has been an especially challenging year for local nonprofits: The economy has been on the weak side, and there are more deserving causes and people needing support than ever. Rather than letting this situation discourage us, it energized the

United Way team. This year we were fueled by the efforts of almost 2,500 volunteers at over 400 organizations, large and small. Every one of them gave generously of their time and talents. [Describes what happened.]

I am delighted to tell you that, as of last Friday, we met our goal. The campaign has raised over $3,125,000 in donations and pledges for the coming year. This means we won't have to say "no" to a single organization. [Describes results.]

There is so much to tell you about this campaign and the work of so many terrific people. We do hope you'll read more about the effort that led to this year's success. Our report will be available in about 3 weeks, and in the meantime you can read the highlights on the United Way website. [Tells listeners how to get more information.]

For now, though, let's celebrate!

Feasibility Reports

A **feasibility report** evaluates one or more potential action steps and recommends how the organization should proceed. Would a bonus system increase profitability and retain employees? Is job sharing a good idea? Would subsidizing employees who use public transportation solve the parking problem? Feasibility studies help answer questions like these.

Most feasibility reports should contain the following elements.[1] Figure 14–1 illustrates how they would appear in a typical report.

1. *Introduction.* Briefly define the problem and explain its consequences. Explain why it is important to consider the alternatives you will be discussing. Briefly show the audience that you have approached this problem methodically. Consider explaining your conclusions, if the audience won't object strongly. If listeners are likely to object to your recommendation, consider postponing it until later in your presentation.

2. *Criteria.* Introduce the standards you used to evaluate alternative courses of action. For example,

   • Will the course of action really do what's wanted?

   • Can we implement it?

   • Will implementation fit within time constraints?

   • Can we afford it?

   Explaining your criteria is especially important if your recommendations are likely to be controversial. It's hard for anyone to argue with criteria like those above, so getting listeners to accept them before they hear your recommendations can be an effective way of selling your conclusions. (See the criteria-satisfaction organizational plan in Chapter 11.)

3. *Methodology.* Describe the process you used to identify and evaluate the plan(s) under consideration. The amount of detail you supply will depend upon the audience and situation. For a relatively minor project, your explanation will probably be brief. For a major feasibility study—especially when it's controversial or when your credibility is in question—you probably will need to describe your approach in detail.

4. *Possible solutions.* Provide a detailed explanation of each solution you considered.

5. *Evaluation of the solutions.* Measure the suitability of each solution against the criteria you listed earlier. Offer whatever supporting material is necessary to show how you arrived at your conclusions.

I. Introduction
A. Our company has had a strong year, and we want to give back to the community that has been so good to us. The Community Relations task force has had the job of finding a way to do this that works for both this company and the people we want to support. *(Background and preview of criteria)*
B. Rather than re-invent the wheel, we have researched successful programs and consulted with both our employees and the community to find an approach that is right for our town and our company. *(Preview of approach)*
C. We think we've found an approach that will harness our employees' talents to help the community.

II. Criteria
Our Community Relations task force determined that a good program must . . .
A. Provide genuinely useful outcomes for participating students
1. Useful workplace skills
2. Supportive personal relationships between volunteers and students
B. Work for employees
1. Generate enthusiastic volunteers
2. Fit into employees' work schedules
C. Fit within company's budget and workload needs
1. No slippage in deadlines
2. Minimal overhead cost to company
D. Generate goodwill for the company
1. Positive coverage in local media
2. Recognition from schools, community organizations

III. Methodology
We searched for model programs in two ways . . .
A. Identified existing programs and evaluated them according to criteria above
1. Via Web
2. In publications of human resources and public information organizations
3. Via surveys (e-mail and phone) of local schools and youth organizations
B. Solicited feedback for most promising programs from stakeholder groups:
1. Schools and community groups
2. Our employees
3. Key media contacts

IV. Possible solutions *(listed and evaluated)*
Based on our research, we identified two promising options. Each gives participating employees up to 3 weekly hours of paid "community service" time.
A. Employees participate in any local youth-based activity
1. Advantages: Employees choose setting in which they'll volunteer
2. Drawbacks: Spreading employees across many settings may reduce impact
B. The company "adopts" a local school, where employees volunteer.
1. Advantages: Focused effort maximizes results and publicity for company.
2. Drawbacks: Potential for imperfect match between school's needs and employee contributions. Doesn't meet the needs of employees who want to volunteer at their children's schools.

V. Recommendation and Conclusion
We recommend adopting a single school. Maximize success of program by
A. Choosing a nearby school for quick, easy access by employee volunteers
B. Working carefully with school staff to engineer a good fit between our volunteers and the school's needs
C. Making sure employees and their supervisors develop a volunteer schedule that doesn't reduce productivity
D. Establishing relationship with local media so our program can be used as a model for other companies

FIGURE 14–1
Feasibility Report Outline

6. *Recommendations*. Describe the solution that best fits the criteria provided ear-
   lier. If you have done a good job evaluating solutions using the criteria already
   introduced, the recommendation should be relatively brief and straightforward.

7. *Conclusion*. Briefly summarize your findings, showing how they can help solve
   the problem at hand.

Training

Training teaches listeners how to *do* something: operate a piece of equipment or use
software, relate effectively with the public, avoid or deal with sexual harassment—the
range of training topics is almost endless. Training can be informal, such as the sim-
ple advice an experienced employee gives a newcomer about how to transfer a tele-
phone call. At the other end of the spectrum, some training is extensive and highly
organized. Corporations including Disney, Anheuser-Busch, Dell Computer, Harley-
Davidson, and General Electric have full-blown institutes dedicated to training their
employees.[2]

Successful businesses recognize the value of training. One measure of its impor-
tance is the amount of time and money that firms invest in training their employees.
For example, at McDonald's, every person who takes an order or prepares food has
received 80 hours of instruction.[3] On any given day, International Business
Machines Corporation is training 22,000 of its employees somewhere in the world.
This sort of training doesn't come cheap. The annual cost of this training for IBM
is $1.5 billion, not counting the participants' time.[4]

Some training is done by experts. Large organizations have staffers who
design and deliver instructional programs. There are also firms and freelancers
who create and deliver training on a fee-for-service basis. (See the nearby "On
the Web" box for more information about professional trainers.) Despite the
existence of a training industry, the U.S. Bureau of Labor Statistics says that
almost 75 percent of all work-related training is delivered informally on the job.[5]
This fact suggests that, sooner or later, you will be responsible for designing and
delivering training no matter what your job may be. The information here will
help you do a good job.

Planning a Training Program   A successful training presentation begins long
before you face your audience, and it continues after you have finished speaking.
Most training experts agree about the importance of each of the following steps.[6]

Define the training goal   Training always aims to change the way your audience
acts, so the place to begin is to identify who you want to teach and the results you
want to bring about. The more specifically you can identify the target audience and
the desired outcome, the more successful your training will be. You can see the dif-
ference between vague and specific goals in these examples:

Vague: Train employees to deal more effectively with customer complaints.

Better: Everyone in the Sales and Customer Service departments will know
how to use the tactics of listening, asking questions, and agreeing to
deal more effectively with customer complaints.

Vague: Train the staff to use our new online purchasing system.

on the web

Training and Development Resources

Training and development is a big business, and several organizations are dedicated to helping professionals perform these jobs effectively. Among the best are:

- American Society for Training and Development **(www.astd.org).** This is the leading organization in training and development. The website offers information about research, developments in the field, publications, and other advice.
- International Society for Performance Improvement **(www.ispi.org).** This organization serves human performance technologists and designers, and it offers many resources for practitioners in this field.
- Prometheon Learning Resource Network **(www.prometheon.com).** This commercial site is a gateway to thousands of pre-screened learning providers, including: keynote speakers, public seminar companies, continuing education pro-

grams, customized training firms, and publishers. Detailed information is available on human resources, customer service, team building, and other related topics.

- *Training* magazine **(www.trainingmag.com).** This magazine offers reports, products, and services for training professionals. Much of this information will be useful for anyone who offers on-the-job instruction.
- Workshops by Thiagi **(http://thiagi.com/index. html).** An experienced trainer provides training games and tips, a free subscription to "Play for Performance," an online newsletter and archives, links to "freebies and goodies" (useful techniques and ideas for trainers), numerous handouts and articles, and links to other useful sites.
- Fun Team Building **(http://www.funteambuilding. com/top10.html).** This site contains "Top Ten Tips for Outstanding Trainers" and more resources.

Better: Employees who are authorized to buy new and replacement equipment will know how to use the new online purchasing system to locate vendors, place orders, track shipments, and check their department's purchasing budget.

See the discussion of "Specific Purpose" in Chapter 10 for more guidelines on defining goals.

Develop a schedule and list of resources   Once you have defined your goals and identified the target audience, you are ready to design the training. This step includes:
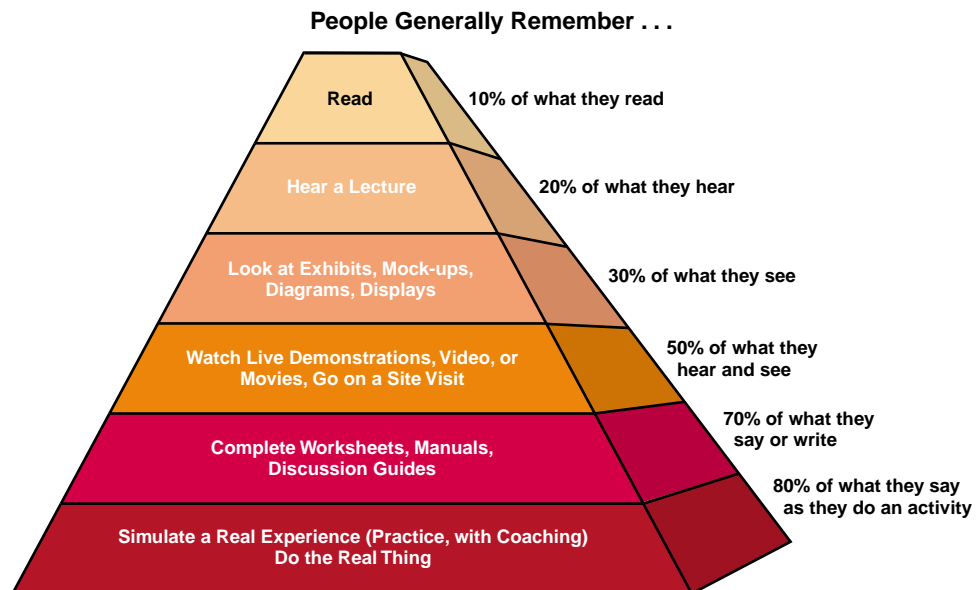
- Figuring how much time you will need to plan and publicize the training, and the steps you need to take between now and the time you deliver it.
- Identifying the staffing and physical resources you need, and making sure they are available. Line up the facility, and make sure its furnishings and layout suit your design. Identify the materials participants will need (pens, pencils, folders, name tags; or tents, refreshments, etc.) and the equipment you will use (computer, projection system, lectern, charts, etc.).
- Creating and/or purchasing any necessary training materials.

Choose the best training approach   Lecturing to a passive audience has its place, but it isn't the only way to train an audience. Figure 14–2 lists several ways you can present new information. It shows that listeners who are actively involved in a

FIGURE 14–2
Average Retention Rates of Various Training Methods
An important learning principle, supported by extensive research, is that people learn best when they are actively involved in the learning process. The "lower down the cone" you go, the more you learn and retain.

Source: NTL Institute, 300 N. Lee Street, Suite 300, Alexandria, VA 22314. 1-800-777-5227.

People Generally Remember . . .

Read — 10% of what they read

Hear a Lecture — 20% of what they hear

Look at Exhibits, Mock-ups, Diagrams, Displays — 30% of what they see

Watch Live Demonstrations, Video, or Movies, Go on a Site Visit — 50% of what they hear and see

Complete Worksheets, Manuals, Discussion Guides — 70% of what they say or write

Simulate a Real Experience (Practice, with Coaching) Do the Real Thing — 80% of what they say as they do an activity

presentation will understand and remember the material far better than a passive audience.[7] People will learn how to operate a particular machine, fill in a certain form, or perform a specified procedure much better with hands-on experience than they will if they are only told what to do. For example, Lever Corporation trains its representatives to sell industrial cleaning equipment by teaching them to operate the machines themselves.[8] A variety of other tools involve the audience in a way that boosts both understanding and interest: quizzes, contests, and having trainees teach one another.

Listeners are likely to understand and remember a message when you use more than one approach. You can show a diagram, for example, while you describe it. If you're discussing a physical object, you might display photos of it on slides or even bring in the object itself to show your listeners. If you are illustrating a process, you might decide to play a brief video of it. Talking about a new line of clothing or a new food product isn't nearly as effective as giving your audience a firsthand look or taste, for example. Likewise, telling listeners in a training session how to deal with customer objections isn't nearly as effective as demonstrating the procedure for them or letting them handle a situation themselves.

Organize your presentation   Use the tips in this section and see Chapter 11 for methods of organizing the overall presentation. The most reliable format is probably a problem–solution approach, since listeners are most likely to pay attention to the information you provide when they view it as solving a problem that they face.

Delivering the Training   When you finally are ready to deliver the training, several tips can help make it most effective.

Link the topic to the audience   Sometimes the intrinsic interest of the subject is reason enough to listen; for instance, most people would pay close attention to a session on employee benefits because they know these benefits are worth something to them personally.
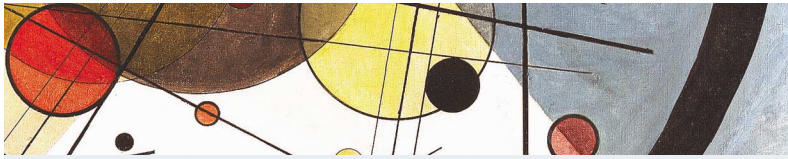
career tip

Adult Learning Styles

Adults in the workplace learn in ways that are different from methods used in educational institutions from primary school through university.

Adults learn best when

- Material is clearly relevant to their personal lives. Show them what personal value the training program will have for them. Encourage learners to explore and explain how they can use the material you present.
- Taking an active role in the training process. Don't just lecture. Give them a chance to experience the principles you are introducing.

- Training is aimed at their level of experience. Go over their heads and you will lose them; approach the topic too simplistically and you will insult and bore them.
- Given some control over the pace of learning. Be prepared to speed up or slow down your coverage in response to feedback from your audience.

Based on information in M. S. Knowles, "Adult Learning," in The ASTD Training and Development Handbook, *ed. R. L. Craig (New York: McGraw-Hill), 1996, pp. 553–65. For more information about adult learning, see* **http://www.gwu.edu/~tip/knowles.html** *and* **http://www.infed.org/lifelonglearning/b-andra.htm.**

What can you do with a subject that isn't intrinsically interesting? One way to boost interest is to show that listening will help the audience avoid punishment. ("Don't try to charge the company for anything you're not entitled to. If you do, you could lose your job.") A more pleasant and effective alternative involves demonstrating the payoffs that come from listening. A financial officer explaining new expense account procedures, for instance, might begin by saying, "We want to make sure you get the company to reimburse you for all expenses you're entitled to. I also don't want you to spend your own money, thinking the company will pay you back, and then find out it won't." Expense reporting might be a tedious subject to many people, but the chance to save money (or to avoid losing money) would interest most listeners.

Start with an overall picture   Every presentation needs an introduction. But when the goal is to inform listeners, a clear preview is especially important. Without an overview, your listeners can become so confused by your informational trees that they won't be able to see the conceptual forest. Orient the audience by sketching the highlights of your message in enough detail to help listeners see what they are expected to know and how you will explain it to them:

> This morning, we're going to learn about the new e-mail system. I'll start by spending a little time explaining how the system works. Then we'll talk about the four ways you can use the system. First I'll show you how you can send messages to any person or group of people in the company—instantly. Then we'll talk about how you can get messages others have sent you. After that you will learn how you can put items on the companywide bulletin board. Finally, I'll show you how you can take part in companywide electronic conversations about topics that interest you.
>
> I'll spend about 10 minutes describing each of these steps in detail, and after each description you'll get a chance to try out the system yourself. By the time we break for lunch, you should be able to use the system in a way that will save you time and hassles and keep you better informed about what you need to know to get
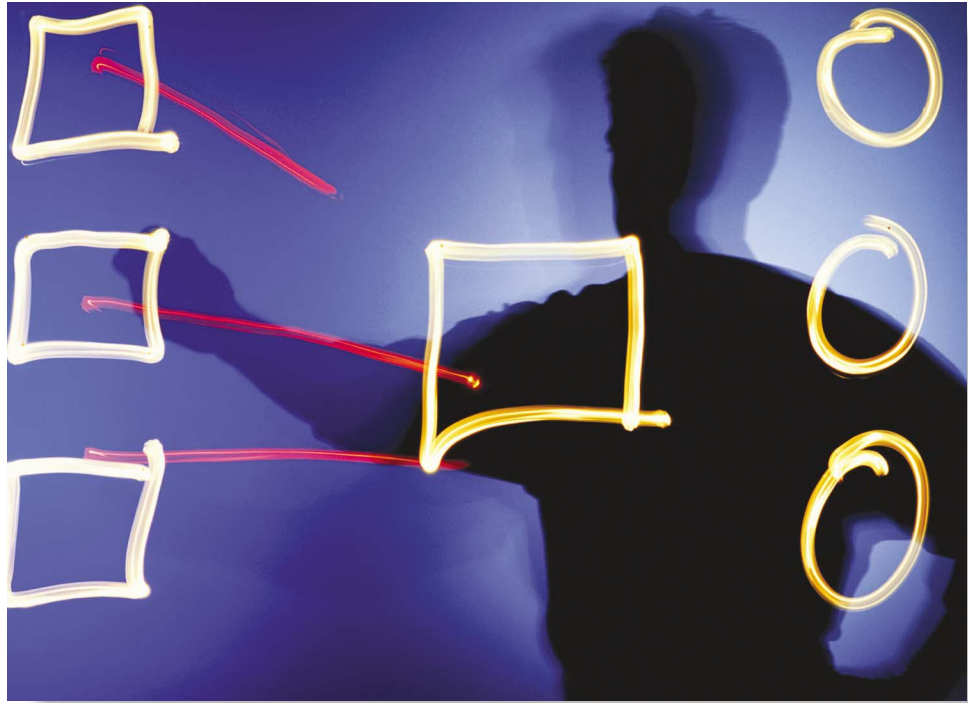
your job done. You won't be an expert, but you'll know enough to make the system work.

Emphasize the organization of your material   You can use a number of devices to help listeners understand the structure of your material:

- *Number items:* "The first advantage of the new plan is . . ." or "A second benefit the plan will give us is . . ."

- *Use signposts:* "We've talked about the benefits of our new health care plan. Now let's talk about who will provide them"; "*Another* important cost to consider is our overhead"; "*Next,* let's look at the production figures"; and "*Finally,* we need to consider changes in customer demand."

- *Use interjections:* "So what we've learned—and this is important—is that it's impossible to control personal use of office telephones."

- *Use repetition and redundancy:* "Under the old system it took 3 weeks—that's 15 working days—to get the monthly sales figures. Now we can get the numbers in just 2 days. That's right, 2 days."

- *Add internal summaries and previews:* "You can see that we've made great progress in switching to the new inventory system. As I've said, the costs were about 10 percent more than we anticipated, but we see that as a one-time expense. I wish I could be as positive about the next item on the agenda—the customer service problems we've been having. Complaints have increased. We do believe we've finally identified the problem, so let me explain it and show you how we plan to deal with it."

Cover only necessary information   You will usually be far more knowledgeable about the topic than is the audience to whom you speak. This knowledge is both a blessing and a potential curse. On the one hand, your command of the subject means that you can explain the topic thoroughly. On the other hand, you may be tempted to give listeners more information than they want or need.

If you cover your topic in too much detail, you are likely to bore—or even antagonize—your listeners. One personnel specialist made this mistake when briefing a group of staffers about how to file claims with a new health insurance carrier. Instead of simply explaining what steps to take when they needed care, he launched into a 20-minute explanation of why the company chose the present carrier, how that company processed claims at its home office, and where each copy of the four-part claims form was directed after it was filed. By the time he got to the part of his talk that was truly important to the audience—how to get reimbursed for out-of-pocket expenses—the staffers were so bored and restless that they had a hard time sitting still for the information. Don't make a mistake like this in your presentations: As you plan your remarks, ask yourself what your listeners need to know, and tell them just that much. If they want more information, they will probably ask for it.

Explanations

Explanations increase listeners' understanding of a subject. An orientation session for new workers falls into this category, as does a meeting in which a new employee-benefits package is introduced or a purchasing policy is explained. When a firm faces a major change in its business fortunes—whether this means growth or cutbacks—wise managers gather their employees and explain how the change will affect each one of them.

Some explanations are aimed at audiences outside the company. A utility company's representative describing the future of electrical rates to the Rotary Club meeting and a community official explaining the effects of new zoning ordinances on local industry are giving explanations. The sample speech that follows this section explains to employees how the company's tax-reduction plan will increase their real income.

The way you structure your explanation will affect how well the audience learns what you are trying to teach them. All the organizing principles in Chapter 11 apply to training sessions. Beyond these basic guidelines, two strategies will help make your ideas easy to follow.

Avoid Jargon   Sometimes you will be introducing trainees to specialized terms and language. This may be as simple as introducing new employees to your company jargon for departments ("If you need help with your computer, call IRD") or locations ("This is what we call the Annex"). Some jargon is necessary, but don't use any more than necessary. If you overwhelm your listeners with too much specialized terminology, you will probably bore them and leave them so confused that they'll give up trying to understand the material you are explaining.[9] Don't be a techno-snob: Tell people what they need to know in language they will understand.

Link the Familiar to the Unfamiliar   Research has shown that people have the best chance of understanding new material when it bears some relationship to information they already know.[10] Without a familiar reference point, listeners may have trouble understanding even a clear definition. Two examples illustrate how
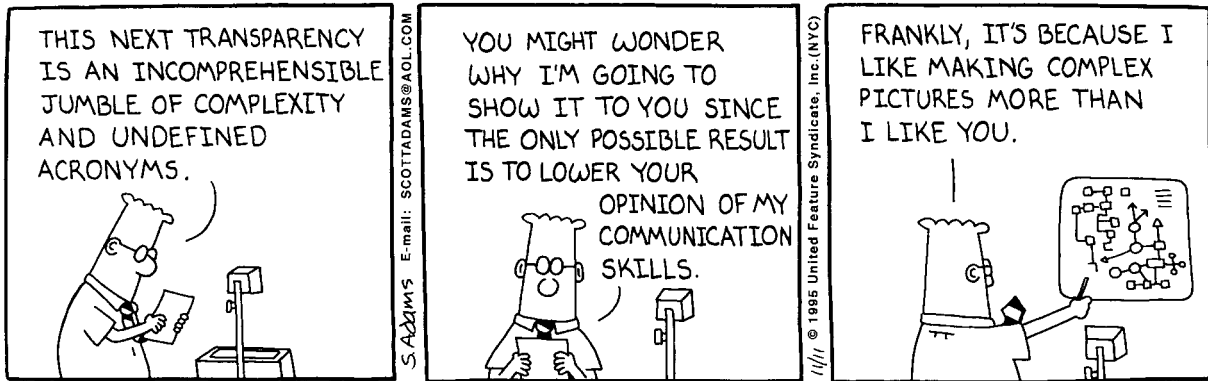
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comparisons and contrasts with familiar information help make new ideas more understandable:

Confusing: Money-market funds are mutual funds that buy corporate and government short-term investments. [In order to understand this definition, the audience needs to be familiar with money-market funds and with corporate and government short-term investments.]

More familiar: Money-market funds are like a collection of IOUs held by a middleman. The funds take cash from investors and lend it to corporations and the government, usually for between 30 and 90 days. These borrowers pay the fund interest on the loan, and that interest is passed along to the investors. [If the listeners understand IOUs and interest, they can follow this definition.]

Persuasive Presentations

Unlike purely informative presentations that don't advocate a position, persuasive presentations aim to change the way an audience thinks, feels, or acts. The most common types of persuasive presentations fall into two categories: proposals and sales presentations.

Salespeople are not the only persuaders in business. Consider these examples to see how common persuasion is on the job:

- Two partners are convinced that they have a winning idea for a new restaurant. They meet with a commercial loan officer from a local bank to seek financing for their project.

- Faced with a wave of injuries, the foreman of a construction crew convinces his team members that they need to observe safety practices more carefully.

- A local real-estate brokerage has merged with a nationwide chain. Ever since the news became public, rumors have swept the office about how the changes will affect pay, policies, and even job security. The owner has called a companywide meeting to reassure employees that the change will benefit them.
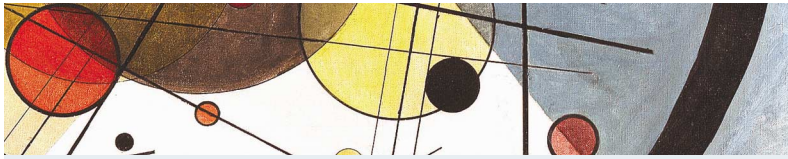
career tip

Poster Presentations

Most presentations have a clearly defined beginning and ending and are delivered to a fixed group of listeners. Poster sessions are different: They present work to conference attendees who are walking around an exhibit area, choosing the topics that interest them. The presenter usually stands next to the poster, allowing for passersby to engage in one-on-one discussions.

Unlike most presentations where visual aids support the words, in poster sessions a few words support the visuals. At their best, posters are visual representations of ideas, not just papers or slides tacked on a board. Clear titles allow the viewer to locate sections of interest: goals, methods, conclusions.

Some guidelines will help you conduct effective poster sessions:

- Prepare a brief (less than 1 minute) explanation of your topic that expands on the information your poster describes. You can deliver this explanation to listeners who ask general questions like "Tell me more about your work."

- Be prepared to speak louder than you usually would to a small audience. Posters are often displayed in noisy, crowded environments without good acoustics.

- Keep your enthusiasm high, remembering that each new person will be hearing your explanation for the first time.

- Be prepared to give interested listeners more information on your work. A handout with more details and/or a website or your e-mail address can let them follow up.

Adapted from Catherine Coffin, "Planning and Preparing an Effective Scientific Poster," in The Health Care Communication Group, Writing, Speaking, & Communication Skills for Health Professionals *(New Haven: Yale University Press, 2001), pp.118–32. See these pages for a poster presentation checklist and the logistics of developing a poster presentation. Additional resources and slides of effective posters are available at* **http://filebox.vt.edu/eng/mech/writing/workbooks/posters.html** *and at* **http://www.rpi.edu/web/writingcenter/presentation.html.**


- As part of a community-relations program, the electric company has started a community speakers' bureau. The bureau's director is speaking to a group of employees to recruit them as volunteers for the service.
- A group of employees has grown increasingly disgruntled with the boss's policy on vacation scheduling. They have chosen a three-person delegation to present their grievances.

At one time or another, everyone in an organization needs to influence the thinking or actions of others. When an issue is especially important, though, the persuasion frequently takes place in a presentation. Even when you have made your case in writing, a good presentation is often essential. Business consultant James Lukaszewski explains:

> *We live in a "tell me" world. The last time you presented a plan to your boss to accomplish something—you know—that beautiful 2-inch-thick, tabbed notebook with 150 pages, 31 tabs, and 5,000 well-chosen words? Was it actually read? Or did your boss simply put his hand on it, look you in the eye, and say, "Show me what's in here and tell me how it's going to help us achieve our objectives."*[11]

Ethical Persuasion

Since persuasion often conjures up images of unscrupulous hucksters peddling worthless products to gullible consumers, it is important to begin our discussion with a
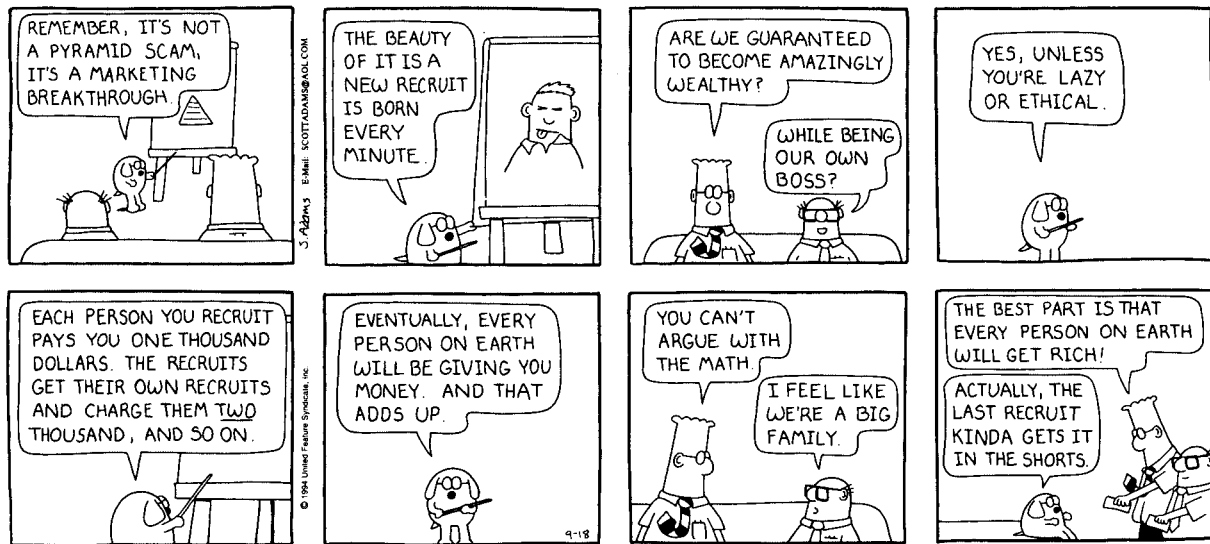
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definition of persuasion as an ethical and honorable form of communication. **Persuasion** is the act of motivating an audience, through communication, to voluntarily change a particular belief, attitude, or behavior.[12] This definition helps distinguish persuasion from other ways of influencing an audience.

To understand the nature of persuasion, imagine that the city council has announced its intention to turn a local athletic field and playground into a parking lot. The area's residents are understandably upset. Faced with this situation, the residents have four choices. First, they could accept the decision and do nothing to change it. This alternative is neither persuasive nor satisfying.

A second alternative would be to use *coercion*—forcing the council against its will to reverse its decision. The group could try to coerce a change by invading and disrupting a council meeting, demanding that the council promise to keep the park or face more demonstrations. Threatening to mount a recall campaign against any members who insist on supporting the parking lot would be another coercive approach. Although threats and force can change behavior, they usually aren't the best approach. The recipient of the threats can counterattack, leading to an escalating cycle of hostility. Threatened parties often dig in their heels and resist changing to save face or as a matter of principle, responding, "I'll be damned if I'll change just because you threaten me." Coercion also makes the instigator look bad.

A different approach to getting someone to change his or her mind involves *manipulation*—tricking the other party into thinking or acting in the desired way. A deceptive approach to the park-versus-parking-lot problem might be to present the council with a petition against the lot containing forged signatures that inflate the petition's size or to gain public sympathy by exaggerating the adverse effects of the project on certain groups—children, the elderly, and small-business owners, for example.

It is reassuring to know that, besides being ethical, honesty is also the best effective policy when it comes to changing the mind of an audience. Social judgment theory reveals that a "boomerang effect" often occurs when receivers learn that they have been the target of manipulative communication. Faced with this discovery,

ethical
challenge

Contrast an ethical persuasive approach to each of the following situations with coercive and manipulative alternatives:

1. A boss tries to get volunteers to work weekend hours.
2. A union representative encourages new employees to join the union.
3. An insurance agent tries to persuade a young couple to buy life and income protection policies.
4. The representative for a waste disposal company tries to persuade residents of a town that locating a regional recycling center nearby would be good for the community.
5. A sales representative needs one more sale to meet his monthly quota and knows that a competitor's product better meets this client's needs.

they will often change their attitudes in the direction opposite that advocated by a speaker.[13] In other cases, speakers are viewed as more credible when they openly admit that they are trying to persuade an audience.

A final way to achieve change is persuasion—communication that convinces the other person to act voluntarily in the desired way. The citizens' group could organize an appeal showing that the community sees keeping the park as more important than increasing the amount of available parking. It could describe the benefits of the park, bringing in local residents to testify about its importance to the community. What you'll learn in the following pages is how to make the best possible case for your position so that others will voluntarily choose to accept it.

Manipulation, persuasion, and coercion don't fall into three distinct categories. Rather, they blend into one another, like colors of the spectrum:

Coercion   Persuasion   Manipulation

Consider the example of the city park: Speakers could remind the council that unhappy voters might remember the decision to close the park and choose other candidates in the next election. Approaches like this seem to have a coercive element even if they give the other party a choice of whether to comply. The boundary between persuasion and manipulation is also fuzzy. If speakers compliment council members on their past concern for the environment and responsiveness to the voters before trying to persuade them to cancel the parking facility, are the speakers being persuasive or deceitful? If they stage an emotional but accurate series of pleas by children who will be forced to play in the street if the lot is built, are they being manipulative or merely smart?

The point where one method of gaining compliance stops and another begins will vary from situation to situation. Perhaps the best measures of whether a particular message is genuinely persuasive are (1) whether the recipient feels truly free to make a choice and (2) whether the originator would feel comfortable if he or she were the recipient of the message instead of its sender.
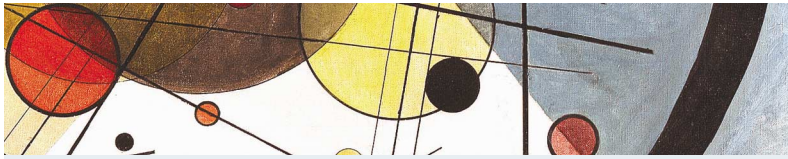
443

Proposals

In a **proposal** you advocate that your audience take specific action. Some proposals, like the city council appeal described above, are aimed at external audiences. Other proposals are focused on internal audiences. You might, for example, try to persuade management to support a ride-sharing program or reimburse employees for educational costs, or you might try to convince your boss to give you more staffing support or a raise in pay. (See the Career Tip on page 445 for advice on this subject.)

Whatever the topic and audience, the most straightforward approach for a proposal is the problem–solution approach described in Chapter 11. While the particulars will vary, each section of this two-part approach is likely to include information listed here:

1. *Introduce the problem*
    a. Demonstrate nature of problem in terms the audience will understand.
    b. Show undesirable consequences of the problem.
    c. Highlight ethical dimensions of the situation (current situation is *wrong*).
    d. Provide causal analysis of the situation (how did this develop?).

2. *Provide a solution (with supporting evidence)*
    a. Describe the positive consequences of your proposal.
    b. Show how your proposal will avoid bad consequences.
    c. Highlight the ethical reasons for your approach. Show why it's the right thing to do.
    d. Address the feasibility of your proposal. Show that it can be done: cost, time, motivation, etc. Include an operational timeline to strengthen the proposal.

Here, in outline form, is how the problem–solution plan would look in the body of a presentation proposing an employee wellness program:

I.   Health-related problems are hurting our company [*Problem*]
        A. Health costs are increasing
            1. Insurance premiums are increasing
            2. Out-of-pocket expenses for employees are growing
        B. Productivity is declining due to employee health problems
            1. Absenteeism is growing
            2. Workers who stay on the job are less productive
            3. Some employees are leaving us due to health problems

II.   A wellness program could reduce the impact of these problems [*Solution*]
        A. Elements of a program
            1. Nutrition education
            2. Exercise education
            3. Substance-abuse counseling
        B. Benefits
            1. Healthier employees
            2. More-productive employees
            3. Lower health costs (insurance and out of pocket)

career tip

How to Request a Raise

Asking for a raise is a kind of proposal, even though you typically will present your arguments informally to your boss. Here are tips that can increase your chances for success:

The best time to seek a raise

- When you or your department have been recognized for doing a good job.
- After you have volunteered to take on additional responsibilities (and have handled them successfully).
- If the organization can't easily replace you or do without your services.
- After you have contributed directly to the company's profitability and success (and you can demonstrate this connection).
- When the organization is in strong financial shape.
- When your relationship with your boss is good.

What to ask for

- Research the compensation range for jobs like yours in the industry. Check with professional associations in your field or Web-based salary surveys such as **www.jobstar.org.** Demonstrate that your request is reasonable by providing comparative figures.
- Consider asking for noncash benefits. For many people, pay isn't the only kind of compensation.

For example, you might also seek more vacation time, a more flexible schedule, discounts on company products, or use of a company vehicle.

Don'ts

- Don't get emotional. Losing your temper is unlikely to be persuasive, and it can damage your long-term relationship with your boss.
- Don't confuse effort with contribution. Working hard is admirable, but effort alone probably won't be enough to earn you a raise. Show your boss that the *results* you produce justify better compensation.
- Don't rely on longevity ("I've been here for 8 years") or personal need ("My rent just went up 20 percent"). It's better to demonstrate that you *deserve* a raise.

Evaluate your chances of a raise with the *Fortune* magazine quiz "Do You Deserve A Raise?" at **http://www.fortune.com/fortune/quizzes/careers/raise_quiz.html.**

Based on information in Anne Fisher, "How to Get the Raise You Deserve," Fortune 138 (September 7, 1998), p. 169; Robin Ryan, "How to Ask for a Raise—And Get It," Money 26 (December 1997), p. 28; and Jane Thomas, "How to Request a Raise," Women in Business 51 (January–February 1999), p. 23.

When circumstances warrant, you might consider organizing your proposal by using one of the other persuasive strategies in Chapter 11 (see pp. 347–352): criteria satisfaction, comparative advantages, or motivated sequence.

Sales Presentations

In a **sales presentation,** one party presents remarks aimed at persuading another to purchase a product or service. Unlike the communication in retail settings, sales presentations are planned in advance. Sales presentations range from platform speeches in front of large audiences to less formal sit-down talks with small groups of decision makers.

Whatever their size, sales presentations will adhere to the guidelines that follow.

Establish Client Relationships before Your Presentation   Whenever possible, establish relationships with your audience before you make your presentation. Getting to know the people you hope to persuade will give you valuable information on what they want, and suggest how you can satisfy their needs. Just as important, pre-existing relationships will make your listeners more comfortable with you.

Just before speaking, try to talk informally with the people to whom you'll present. This sort of conversation can help build rapport, and it can also give you ideas about how to fine tune your remarks to address what's on their minds.

Put Your Clients' Needs First   Your clients don't want to hear about you or what you have to offer. They want to hear how to solve their problems. Don't focus on your products, company, services or needs, but on the buyer's problems and concerns. What isn't working well for the client right now? What does he or she want to happen? Once you know what's missing, you can find out how your product or service can fill that need. As business expert and educator Robert Kiyosaki puts it, "True selling means being *passionate* about your company's product or service and *compassionate* with the wants, dreams, needs of your fellow human beings." He adds that "manipulation, deception, pressure, false sincerity, and phony smiles is *not* selling. *Selling is communication.* True selling is caring, listening, solving problems and serving your fellow human being."[14]

Listen to Your Clients   Unlike most other presentations, sales-oriented talks involve greater audience involvement. One study of salespeople found that the difference between top and average performers was the willingness to listen. The prospective buyers of top performers spoke between 30 and 70 percent of the time.[15] Rather than viewing questions and comments as interruptions, welcome them as a chance for you to learn what the client wants. Once you hear what's on your listeners' minds, you have the chance to speak directly to their concerns. Remain flexible: If you are interrupted, address the concerns. Then review your last points before moving on. Trainer Kevin Hogan captures this approach: "The great salespeople ask questions and have great listening skills. Poor salespeople get locked into script mode. They focus on the product they have to sell rather than the client who has a need."[16]

Emphasize Benefits, Not Features   **Features** are qualities of a product or service that make it desirable and distinguish it from the competition. Salespeople can get understandably excited about features, and they are often tempted to promote these features to prospective customers. But it really isn't features that will impress customers—it's the **benefits** that will flow from those features. So you must "sell the benefit, not the feature."[17]

Here is an example of the difference between some features and benefits of a Web-based customer service product. It's obviously important to describe the features, but the benefits are what will motivate customers to sign on.

Feature	Benefit
100% Web-based	You don't have to host the product on your server or maintain it.

"Knowledge base" gives customers answers to frequently asked questions (FAQs).

Your telephone support costs are substantially reduced.

Your support personnel are relieved from the drudgery of repeatedly answering the same questions.

Your staff can add new solutions with a single mouse click.

Fully customizable

Lets you create the content, look, and feel just right for your business.

Choose the Most Effective Organizational Plan

You can organize the body of a sales presentation in a number of ways. The first three were described in Chapter 11, so you may want to review that discussion of each.

Problem–solution   This simplest of all persuasive patterns can work for sales presentations, particularly when you need to make your listeners aware of a problem that they may not recognize. Once you persuade them that a problem exists, you show them how your product, service, or idea can resolve it.

Problem	Solution
Many employees are arriving late due to increasing congestion.	Offer flexible working hours.
Cost of travel is skyrocketing.	Increase capability to hold some meetings via videoconference.

Motivated sequence   As you read in Chapter 11, this approach has five steps: attention, need, visualization, satisfaction, and action. The need and satisfaction steps are similar to those in a problem–solution approach, but the visualization and action steps add a new element. The visualization step allows listeners to picture how your solution could work for them. An event planner proposing to organize a wedding or a business meeting might show clients photos of similar occasions she planned or describe in vivid detail the way she proposes to create a memorable occasion for this client. As its name implies, the action step calls for the listeners to go beyond just agreeing with the presenter to take a step toward adopting his or her plan. Salespeople sometimes call this step "closing," because it cements the deal.

Criteria satisfaction   In this two-step approach, you begin by listing the criteria that a customer would use to evaluate a decision. For example:

"When you look for a long-distance phone carrier, you want one that has low rates. You also want one that has a strong signal and allows you to make calls when you're away from home."

After establishing your criteria, you show how the product, service, or idea you are presenting will meet the criteria.

> "Let me show you how TeleCall offers you low rates from anywhere, with quality that meets or beats the big carriers."

It can be even more effective to invite the audience to supply the criteria. If you have researched your audience, you should know in advance what they are likely to want, and your appeal will be even more effective:

> "I'd like you to tell me, What are the things that you want in a long-distance phone carrier?"

Once your listeners have identified what will satisfy them, you can show how your product or service will meet their needs. Organize criteria in the order of importance to the client, not to you.

Comparative advantages   This approach works best when your listeners are already thinking about a competing proposal. Your job is to show them how the product or service that you are offering beats the competition.

> "After examining your options, we think you will find that ours offers the best combination of durability, price, and after-sale service. Let's do a quick comparison of our product and others on the market. . . ."

Use an Effective Closing Strategy   In closing, a presenter must be upbeat and optimistic. Clear and realistic goals from the outset help you determine how best to close. An effective close summarizes the primary benefits and the ways in which the benefits meet or exceed clients' needs. It then calls for action. The action might be any action that moves the sale along: agreement to a test or trial run, agreement to another meeting, agreement to attend a demonstration or arrange for your presentation to higher-level decision makers. Think long term. As consultant Hans Stennek states, "I've never been a believer in closing because my objective is not to close the sale but to open a relationship."[18]

Sample Sales Presentation

The following presentation (outlined in Figure 14–3) demonstrates most of the persuasive principles covered in this chapter as well as the general guidelines about speaking to an audience introduced in Chapters 10 through 13. The purpose and approach are based on a sound audience analysis. As you will see, the talk has a clear thesis and a clear, logical organizational structure. A variety of verbal and visual supports add interest, clarity, and proof.

The speaker's company, Ablex Technologies, manufactures sophisticated electronic components. One of its best customers is BioMedical Instruments (BMI), which produces a wide variety of sophisticated medical diagnostic instruments. The company's biggest contracts with BMI are for kidney-dialysis and blood-analyzer parts, which total almost $1 million per year.

Under a much smaller and older contract, Ablex also supplies BMI with parts for an x-ray unit. BMI doesn't make the unit anymore but is committed to furnishing current users with replacement parts until the machines drop out of use, and Ablex is obliged to supply BMI. Producing these x-ray parts is usually a problem: Orders are small and sporadic, leading to delays and headaches for everyone concerned. The speaker is presenting a plan that offers a better way to handle replenishment of the x-ray parts.

FIGURE 14–3
*Outline of Sample
Presentation*

Thesis
The proposed forecasting and purchasing agreement will allow both BMI
and Ablex to better supply x-ray parts in a timely, affordable, and
trouble-free manner.

Introduction
    I. Our basically positive relationship with BMI has only one
       problem: the x-ray parts.
   II. While a problem does exist, there is a solution
         A. The problem involves erratic orders for x-ray parts.
         B. Our solution has several benefits.

Body
    I. Supplying x-ray parts has been a continuing headache.
         A. Orders for x-ray parts are irregular and unpredictable.
            (line graph)
         B. These irregular orders make it tough to ship orders to
            BMI in a timely way. *(example)*
   II. Fortunately, there is a solution to the x-ray problem.
         A. Here's an outline of our plan.
         B. The plan has several advantages.
              1. Orders can be delivered more quickly.
                 (comparison chart)
              2. Order is more flexible. *(examples)*
              3. Time can be saved in ordering and follow-up.
                 (example)
              4. The unit cost is less than under current plan.
                 (column chart, comparison chart)

Conclusion: By now you can see that there's a solution to the x-ray
   problem.
       I. The plan has advantages for everyone involved.
      II. We look forward to putting it into action soon.

The audience is Mary Ann Hirsch, the buyer at BMI, and two production engineers. Although the purchasing director and the chief project engineer are not at the presentation, they will rely on the information gathered by their subordinates and, ultimately, will be the ones to approve or reject this idea—so in a way, they're part of the audience, too.

Introduction emphasizes the positive aspects of the relationship with the customer. Brief sketch of the problem establishes common ground. "We're in this together, and it's no good for either of us."

We've been involved in a long, positive relationship with BMI. The only troubles we've ever encountered have come from the x-ray parts. Even though they are only a small part of our business with you, they seem to involve the greatest headaches for you and us. The timing of these orders is impossible for you to predict, which makes it hard for us to get parts from our suppliers and deliver the product to you quickly. This leads to all sorts of problems: unhappy customers who have to wait for the equipment they ordered and time spent by people at both of our companies keeping in touch.

450   Part Five   *Making Effective Presentations*

Preview lists the main advantages of the plan that will be proposed.

We think there's a better way to handle the x-ray problem. It'll reduce frustration, cut costs, and let all of us spend our time on more productive parts of our jobs. But before we talk about this new plan, let me review why the present arrangement for handling x-ray orders is such a headache.

Transition leads to the "Problem" section of the presentation.

The main problem we face is irregular orders. A look at the order history for the last year shows that there's no pattern—and no way to predict when customers will order replacement parts for their x-ray units. [*The speaker shows Exhibit 1 here.*]

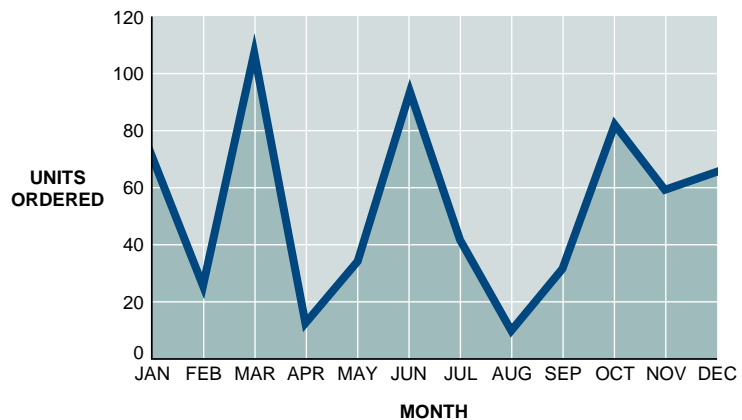*Visual exhibit clearly demonstrates the unpredictable nature of customer orders.*

EXHIBIT 1
X-Ray Ordering Pattern

Example shows the problems flowing from irregular orders.

This unpredictable pattern makes it tough for us to serve you quickly. We have to order parts from our suppliers, which often can take a long time. For instance, in the February 17 order, it took 6 weeks for our suppliers to get us the parts we needed to manufacture the x-ray components you needed. Once we had the parts, it took us the usual 4 weeks to assemble them. As you said at the time, this delay kept your customer waiting almost 3 months for the components needed to get their equipment up and running, and that's poison for customer relations.

Example highlights amount of time wasted.

Delays like this aren't just bad for your relationship with customers, they also waste time—yours and ours. Mary Ann, do you remember how many phone calls and letters it took to keep track of that February order? In fact, every year we spend more time on these x-ray orders that involve a few thousand dollars than we do on the dialysis and blood-analyzer parts that involve around a million dollars annually. That's just not a good use of time.

Transition leads to the second consequence of irregular orders: wasted time. "Solution" part of the presentation then introduced.

So we clearly have a situation that's bad for everybody. Fortunately, we believe there's a better way—better for you, us, and your customers. The plan involves your giving us an annual purchasing forecast for x-ray parts. Instead of waiting for your customers to place individual orders, you'd estimate the total sales likely to occur in a year. Then we would acquire enough parts from our suppliers to assemble those items so that we could have them ready quickly as your customers place orders.

Advantages of solution are previewed in the chart.

This simple plan has several advantages. They're summarized on this chart, but let me explain them in a little more detail. [*The speaker shows Exhibit 2 here.*]

- Quicker delivery
- Flexible ordering
- Fewer problems
- Lower cost

EXHIBIT 2
Advantages of Annual Forecasting for X-Ray Parts

Strongest advantage to listeners is introduced first to get positive impression early.

The first advantage is that advance purchasing will speed up delivery of your orders. Instead of waiting for our suppliers to ship parts, we can begin to assemble your order as soon as you send it. You can get an idea of the time savings by looking at how much time this plan would have saved on the order you placed in February. [*The speaker shows Exhibit 3.*]

Bar chart graphically demonstrates time saved.

WITH ANNUAL FORECASTING SYSTEM	PARTS FABRICATED	4 WEEKS
CURRENT SYSTEM	PARTS ON ORDER FROM SUPPLIER PARTS FABRICATED	10 WEEKS

17	24	3	10	17	24	31	7	14	21	28
	FEB.				MARCH			APRIL		

EXHIBIT 3
Annual Forecasting Speeds Delivery Time

Transition leads to the second advantage of the plan: flexibility. Hypothetical example helps audience visualize this advantage.

Besides being quick, the plan is flexible. If you wind up receiving more orders than you anticipated when you made your original forecast, you can update the plan every 6 months. That means we'll never run out of parts for the x-ray units. Suppose you projected 1,400 units in your original forecast. If you've already ordered 1,000 six months later, you could update your forecast at that point to 2,000 units and we'd have the parts on hand when you needed them.

Transition leads to anticipation of a possible listener objection: What if orders decrease? Credible authority is cited to support this point.

This semiannual revision of the forecast takes care of increases in orders, but you might be wondering about the opposite situation—what would happen if orders are less than you expected. The plan anticipates that possibility, too. We're willing to extend the date by which you're obliged to use your annual estimate of parts to 18 months. In other words, with this plan you'd have 18 months to use the parts you expected to use in 12. That's pretty safe, since Ted Forester [BMI's vice president of sales and marketing] predicts that the existing x-ray machines will be in use for at least the next 6 or 7 years before they're replaced with newer models.

Internal review reminds listeners of previously introduced advantages and leads to identification of a third benefit: less wasted time.

Flexibility and speed are two good advantages, but there are other benefits of the plan as well. It can save time for both you and us. You know how much

Chapter 14   *Types of Presentations*   453

time we spend on the phone every time there's a surprise x-ray order, and I imagine you have to deal with impatient customers, too. Talking about delays is certainly no fun, and with this annual purchasing plan it won't be necessary since we can guarantee delivery within 3 weeks of receiving your order. Think of the aggravation that will avoid!

Second most important advantage is introduced last, where it is likely to be remembered by listeners.

By now, you can see why we're excited about this plan. But there's one final benefit as well: The plan will save you money. When we order our parts in larger quantities, the unit price is less than the one we face with smaller orders. We're willing to pass long the savings to you, which means that you'll be paying less under this plan than you are now. Notice how ordering a year's supply of parts drops the unit price considerably. [*The speaker shows Exhibit 4.*]
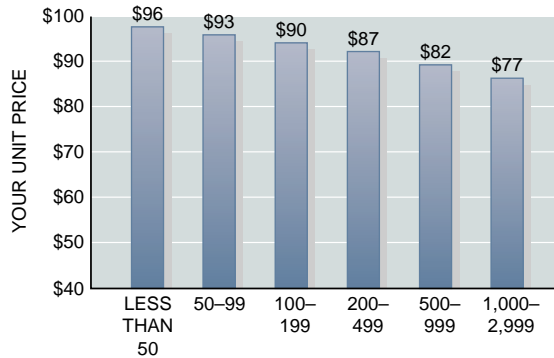
Chart visually highlights cost savings.

EXHIBIT 4
Annual Forecasting Reduces Unit Price

You can see that this plan is a real money saver. Compare the savings you could have realized on last year's order of 597 units if this plan had been in effect. [*The speaker shows Exhibit 5.*]

597 UNITS AT HIGHER UNIT PRICE	$55,506
597 UNITS AT VOLUME UNIT PRICE	45,969
FIRST YEAR SAVINGS	$ 9,537

EXHIBIT 5
One Year's Saving with Annual Forecasting Plan

454   Part Five   *Making Effective Presentations*

Conclusion reviews the plan's advantages and makes appeal to adopt it.

So that's the plan. It's simple. It's risk-free. It's convenient. It's flexible. And along with all these advantages, it can cut your costs. We're prepared to start working with you immediately to put this plan into action. If we start soon, we'll never have to deal with x-ray headaches again. Then we can put our energy into the larger, more satisfying projects that are more rewarding for both of us.

Special-Occasion Speaking

In business settings, there are many special speaking occasions and events, some of which you will quite likely be asked to participate in or be given a chance to volunteer for. You may be asked to give a welcome to guests touring your facility, introduce a speaker at a staff meeting or annual banquet, present an award to a retiring employee, or accept an award you've won. Perhaps you'll present a tribute to a member of a civic organization you belong to or bid farewell to a supervisor who was promoted out of your department. Keep in mind that every context is unique; you will want to adjust to the physical, social, chronological, and cultural context of each occasion. The following guidelines will help you feel confident and achieve your goals when delivering special-occasion remarks.

Welcoming a Guest or Group

When you are **welcoming** someone, your remarks often set the tone for the whole event. Warmth and sincerity in words and behavior are important. Whether you are welcoming a special guest for a 2-hour banquet or a group of permanent new employees, try to follow these guidelines:

- Say who you are (if the audience doesn't know) or on whose behalf you are speaking.
- Identify the person or people you are welcoming (unless you are welcoming the entire audience).
- Thank the guest or group for coming (if they had a choice).
- Tell why the occasion is especially important or significant.

As you deliver your remarks, be sure to speak to the person or group you are welcoming. If appropriate, turn to the audience and invite your listeners to participate in the welcome by clearly stating or showing them how you want them to behave. The example below illustrates how this technique can be used with the guidelines to produce effective welcoming remarks:

All of us at Sizetec USA welcome members of our Japanese plant's team to the ribbon cutting of our new facility. We are honored that you took time to travel so far to be with us today. We have a great deal to learn from one another, and your visit will help all of us make Sizetec an industry leader. This is an exciting day for us, and we

extend a warm welcome to you. [Turn to audience.] Please join me in a round of applause to welcome our Japanese guests.

Introducing Another Speaker

When handled well, your **introduction of another speaker** will help make his or her remarks a success. Here are some guidelines that will help you deliver an effective introduction. You may choose to switch the order of the information here, but you will almost always need to include it in some way, unless the audience is aware of it already.

- *Briefly preview the topic about which the person will speak.* If the speaker's topic is very familiar, you may only need to mention it. If the audience is unfamiliar with the topic, you may need to include more background information about the topic and explain why it is significant for the group.
- *Give the audience reasons to listen to the person you are introducing.* Share interesting and relevant parts of the speaker's background. Whenever possible, show how his or her remarks will have value for the audience.
- *Enhance the credibility of the person you are introducing.* Share information that will showcase his or her qualifications. Select the most interesting biographical information for your audience to describe the person you are introducing. It is best to give some general information and a few specifics, rather than rattling off long lists: "John has done training with many groups, including the Air Force, IBM, and Baxter Healthcare." Don't be vague ("John has done a lot of training for big groups") but don't burden the audience with too much time-consuming detail either ("John has done training for . . ." followed by a list of 20 companies).

A good introduction requires that you learn about the person you are introducing in advance. If you can, meet in person or interview the speaker over the phone. If possible, obtain a résumé or biographical information in writing ahead of time. The more you know, the better you can make your introduction.

Make sure all the information in your introduction is accurate. Check and practice the pronunciation of names, cities, and companies that you are unsure of. Ask the person how he or she would like to be referred to (title and last name, first and last name, or first name only).

As you plan your introduction, be sensitive to culture and gender differences. For example, members of many cultures prefer to be identified by formal titles (such as "director") that are not commonly used in the United States or Canada. Likewise, the humor that may be appreciated in the United States could easily offend listeners—or the persons being introduced—if they are from cultures with more formal styles of communication. Strive for consistency if you are introducing more than one person. A common faux pas is referring to men as "Mr." or "Dr." while calling women by their first names.

Notice how these points have been incorporated in this informative introduction:

For the last 9 months you've heard a great deal about how we will be expanding operations into Mexico. This is a big step for us, and I'm sure everybody has a lot of questions and maybe some concerns.

Today I'm pleased to introduce you to Mr. Dante Gutierrez, who will be managing our Mexican operations. Dante comes to us with a great amount of experience on both sides of the border. After founding and operating one of northern Mexico's

foremost import-export firms, Dante became executive director of Baja California's Asociación de la Industria, a leading business group. He has lived and worked in both Mexico and the U.S. His experience in manufacturing and cross-border trade will be a tremendous help as we expand our operation in Mexico and Central America.

Along with his professional credentials, you'll find that Dante is a great guy. He's friendly and helpful, and very approachable. I'm sure you will find that Dante is a terrific resource as we learn more about our new market and its customers.

Please join me in giving Mr. Gutierrez a warm welcome!

The following tips will help your introduction be a success:[19]

- Plan your remarks carefully in advance. Don't take an impromptu approach.
- Your introduction should *appear* spontaneous and natural, even if it is planned. Practice your delivery so you won't have to rely on notes.
- When making your introduction, look at the audience, not at the person being introduced.
- Keep the introduction short. You aren't the main attraction. In most cases a 1- or 2-minute introduction will be enough. If the audience already knows the person you are introducing, it can be even shorter.

Honoring a Person or Institution

When you are asked to give a speech of **tribute,** both chronological and topical approaches can be effective. You can follow the person's life or career chronologically and pay tribute to achievements and characteristics along the way, or you might choose some themes or traits from the person's life and organize around those topics. If you do choose to pay tribute along theme lines (bravery and commitment, for example), anecdotes and examples can illustrate your points.

Many of the guidelines for tributes parallel those for introductions: accuracy of names and details and sensitivity to culture, gender, and personal desires. Check your information with the person to whom tribute is being paid if possible or practical; if not, check with an extremely authoritative source. A sample tribute to an accountant who is leaving a firm is presented below. Of course, if the speaker had more time, each of the traits selected could be illustrated with more anecdotes that the audience would be familiar with.

Today is a day of celebration as we pay tribute to Joseph Begay. It is a privilege to speak for the management team here at Contrast Accounts and to honor Joe.

In thinking about Joe's accomplishments here, two words come to mind: commitment and community. Joseph is committed to doing a job well. He commands a tremendous measure of respect and esteem from colleagues in all of our departments. From Betty Murphy in Costs Analysis to Mike Burroughs in Media Relations, Joseph has earned our admiration for his commitment to quality work for our clients. Who else could have persuaded us to redo the entire Simpson account in less than 2 months? Who else could have enticed us with pizzas to get us to stay late and finish? Joe is committed to our clients and to our colleagues. The focal point of his work has been to help us all better understand the needs of members from various departments who populate our company. Joseph has helped us come together to look at specific ways we could meet the needs of diverse departments, and he has provided us with opportunities to give expression to our common frustrations and concerns which revolve around quality products for our clients.

Second only to his commitment is Joe's unique way of building community among us. It is because of Joe that over the past 6 years many of us first discovered our shared interests and commonalities across departments. The collective tasks he assigned to us created a bond and a basis for our common union. He showed us how to let our collective interests rise above our differences and then how to respect and work with our differences. I speak for many of us in saying I have increased admiration and regard for the wisdom and the work of our colleagues and for the intricate web of talents that contribute to Contrast Accounts' success. Through shared endeavors initiated by Joe we realized that we are not interchangeable parts but unique professionals with vision and expertise. Joe helped us all catch a glimpse of what community and connection can mean and how they can be achieved cross-departmentally.

I believe that because of Joe's commitment and creation of community, we are all richer, and Joe, I'd like to have you stand as we pay tribute to you and your endeavors here with a last round of applause.

Giving a Toast

Sooner or later you are likely to be asked to deliver a special type of tribute—a **toast.** Besides honoring the person to whom it refers, a well-crafted toast can boost your visibility and notability in any organization. Remember that toasts usually express appreciation and recognize accomplishments as well as hopes and wishes for the future. Here are some hints to help you choose the right words.

- Choose the time wisely. If it is up to you to choose the moment, be sure everyone is present. At a dinner, choose the moment when the group has just been seated or wait until just before dessert. At a stand-around cocktail party or outdoor barbecue, wait until most people have drinks.
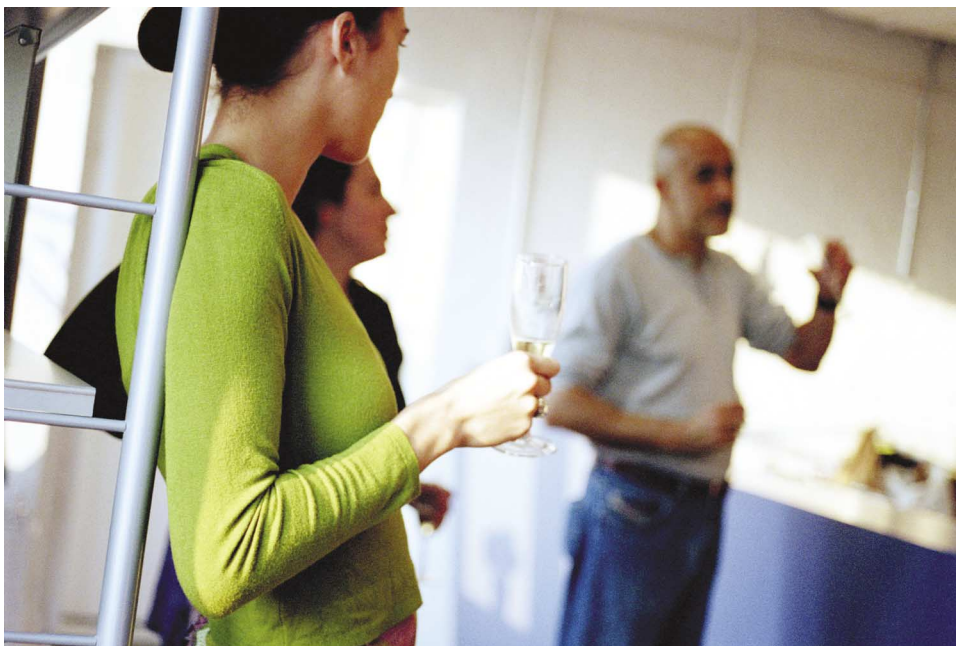
- Be prepared. Think ahead about the occasion, the attendees, and the person or people you are toasting. Delivering an impromptu toast can be risky. Use some inside information or little-known facts that compliment the person.
- Look spontaneous. Even though you have planned your remarks in advance, try to avoid reading notes or sounding memorized.
- Be brief. A 30- to 60-second toast is the norm; a 2-minute one is the maximum. If in doubt, say less, not more. End by raising your glass and gently clinking the glass of a person near you and saying, "Cheers," "Salud," or a similar expression.
- Be visible and audible. Be sure to stand. If it is an unorganized mill-around affair, look for an elevation: a hillside, a stair (not a chair) to stand on, the step to the stage, the back porch. Be certain you have everyone's attention before speaking and begin loudly enough to be effective.
- Be inclusive. Alternate your gaze between the audience and the person or people you are honoring.
- Be sober. Beware of your consumption of alcohol beforehand. You may pay the price for a slurred or inappropriate toast for a long time. The beverage need not be alcoholic; club soda and water are also used for toasts.
- Be appropriate. If you are debating whether a remark or story would be humorous or offensive, leave it out. If you think something is funny but aren't sure that the humor will be appreciated by the honoree and guests, leave it unsaid.
- Go to the Advanced Public Speaking Institute website at **http://www. public-speaking.org** and click on "Humor Techniques" or **violet.umf.maine. edu/~donaghue/toasts.html** for more suggestions for toasts.

Presenting an Award

Sometimes persons may know they are recipients of awards, and at other times your announcement may come as a surprise. Depending on the situation, you will choose whether to let the audience (and winner) know who is receiving the award at the beginning of the speech or save that information until the end. For an effective **award presentation,** follow these tips:

- If everyone knows who is receiving the award, mention the person's name early in your remarks. If the audience doesn't know who is receiving the award, you might want to build suspense by withholding his or her name until the end.
- State the name and nature of the award.
- State the criteria for selection.
- Relate the way (or ways) in which the recipient meets the criteria, using specific examples.
- Make the presentation.
- Be sure that the person receiving the award—not you, the presenter—is the center of attention and focus.

   As the example below illustrates, this approach can serve as a framework for creating interesting, enthusiastic presentations:

"Success isn't measured by where you are, but by how far you've come from where you've started." These words exemplify the spirit of the Most Improved Player award. Each year, players have the privilege and difficult task of voting for the player they believe is the most improved. The winner of this award must have demonstrated to her teammates spirit and commitment and must have shown improvement and refinement in skills. This is not an easy task. Always spurring others on and never giving up even when we were down 14–7 against the Bulldogs, this year's winner went from being unable to stop a goal to stopping six goals in our last championship game. So, Mary Lee, it is with gratitude and delight that I present to you from your teammates the Most Improved Player award.

Accepting an Award

When you accept an award, a few brief remarks are usually all that's necessary. Recalling the long-winded speeches at the annual Academy Awards ceremony will help you appreciate the sentiment behind Marlene Dietrich's advice to Mikhail Baryshnikov when she sent him to accept her award from the Council of Fashion Designers: "Take the thing, look at it, thank them, and go."[20] This approach is probably too extreme, but brevity is certainly an important element of most acceptances. So, too, is gratitude. The following plan can help you organize your sincere gratitude in an effective way:[21]

1. Express your sincere gratitude (and surprise, if appropriate).
2. Acknowledge and show appreciation to contributors.
3. Describe how the reward will make a difference.
4. Say thank you again.

The following thank-you remarks, given by the head of a volunteer committee that had staged a profitable fund-raiser, illustrate how this simple approach can be sincere, easy, and effective:

You have really surprised me today. When I said I'd help plan the auction, the last thing on my mind was an award. Raising scholarship money was our goal, and breaking last year's fund-raising record was the only reward I'd hoped for. Getting this special thank-you is more than I had ever expected, and I am deeply honored.

I'm also a little embarrassed to be singled out like this. We couldn't have broken that record without a tremendous amount of hard work by everybody. Chris and her committee rounded up an incredible bunch of auction items. Ben and his gang provided food and entertainment that we'll be talking about for years. Darnelle's publicity team brought in the donors. And Leo's talents as an auctioneer squeezed every last dollar out of those items. With wonderful people like this, how could we have gone wrong?

I'm going to put this plaque in my office, right above my desk. Whenever I'm feeling tired and discouraged about human nature, it will remind me how generous and hard working people can be for a good cause. It will also remind me how lucky I am to know you all and have worked with you.

So thanks again for this wonderful award. You're a great bunch of people, and I can hardly wait until we do it all again next year!

summary

Speakers in business and professional contexts frequently make informative, persuasive, and special-occasion presentations.

Informative presentations include briefings, reports (status, feasibility, and final), training sessions, and explanations. Briefings are very short and give the minimum information needed. Status reports begin with a review of the purpose, then give the state of the project, obstacles and efforts to overcome them, the next milestone, and concluding remarks about the future of the project. Final reports require introductions, background information, a description of events, results, and directions to get more information. A feasibility report includes an introduction, criteria, methodology, possible solutions, an evaluation of solutions, recommendations, and a conclusion. Training sessions necessitate careful planning by defining the training goal, scheduling the needed time and resources, choosing the best training method, and organizing all training elements. Effective trainers link information to the audience, create an overall picture, emphasize their organizational plan, and cover only the required information. Pragmatic explanations avoid jargon and carefully link the familiar to the unfamiliar.

Ethical persuasion used in proposals and sales presentations differs from manipulation and coercion. Proposals advocate a specific action and consist of two parts: the problem and the solution (with evidence). Sales presentations can be most successful when they establish client relationships, consider client needs first and foremost, welcome clients' participation, focus on benefits not features, choose the best organizational plan (problem–solution, motivated sequence, criteria satisfaction, comparative advantage), and use an effective closing.

Business contexts often require you to present various special-occasion presentations. These include giving speeches of welcome and introduction as well as toasts, honoring persons or institutions, and presenting and accepting awards. Effective business communicators are familiar with each of these basic presentations.

key terms

Test your understanding of these key terms by visiting the student CD-ROM and Online Learning Center website at www.mhhe.com/adler8.

award presentation   458
benefits   446
briefing   427
explanation   439
feasibility report   432
features   446
final report   430
persuasion   442
proposal   444

report   429
sales presentation   445
speech of introduction 455
status report   430
toast   457
training   434
tribute   456
welcoming remarks   454

activities

Go to the self-quizzes on the CD-ROM and the Online Learning Center at www.mhhe.com/adler8 to test your knowledge of chapter concepts.

1. Skill Builder

Construct an outline for the key points in each of these presentations:

a. A briefing for employees on new performance appraisal procedures.
b. A status report for your instructor on your work in this class so far this semester.
c. A feasibility report on a specific change you'd recommend for the university bookstore or cafeteria.
d. A final report to your classmates on a project you have completed on your own in another class: a service-learning project, team project, civic or community service project.

2. Skill Builder

Create an approach that will involve the audience in each of the following trainings. Use ideas from this chapter and the websites listed on page 435. Demonstrate your technique in class.

a. How to handle phone customer complaints nondefensively.
b. How to use digital photos to update your website.
c. How to use a particular campus system (computer or phone registration, student job placement) or fill out a widely used form (financial, graduation, or internship application).

3. Skill Builder

Define a specific training goal and a method to link the information to the audience for the following training sessions.

a. Listening skills for Student Service Employees.
b. A "Dress for Success" seminar for older persons returning to the workforce.
c. Training volunteer students to lead campus tours for visiting high school students.

d. Using APA style to cite sources in term papers for nontraditional students.
e. Understanding diversity in our state (or company) for all new employees.

4. Skill Builder

Choose a product or service that you are familiar with, or choose one of these: off-site archiving of computer files; cell phone pricing plan with unlimited long distance; deli delivery service for employees; company-supported memberships at a health club.

a. Identify an audience to whom you could sell this product.
b. Create a chart with two columns: features and benefits. List and differentiate between the features and benefits of the product.

5. Skill Builder

Prepare the following special-occasion speeches.

a. Welcome. Prepare a speech of welcome for a guest from the community who is visiting your class to better understand your college's opportunities.
b. Introduction. Create an introduction for a guest from a prominent community business who is invited to speak to your class about job interview strategies.
c. Speech to honor. Construct and present a speech (3 minutes) that honors one of your classmates or a person or institution in your community whom you believe deserves recognition.
d. Award. Create an award for a classmate (best team member, best speaker, most improved speaker) that reflects some achievement or activity during the semester.
e. Celebration dinner. Your work team has just met a very important project deadline and your work received rave reviews from your supervisor.

6. Skill Builder

What organizational plan would be best suited to the message in each of the following situations?

a. Showing a customer why leasing a car is a better choice than buying one.

b. Convincing a charitable foundation to grant money to your job-training program for disadvantaged teenagers.

c. Demonstrating the features of an expensive computer system.

d. Persuading the loan officer at a local bank to lend you money for your proposed business venture.

e. Encouraging local businesspeople to join a service club to which you belong.

resources

Antion, T. S. *Wake 'em Up: How to Use Humor and Other Professional Techniques to Create Alarmingly Good Business Presentations*. Landover Hills, MD: Anchor, 1996.

This book offers ways to make presentations more interesting and entertaining. It includes sections on room setups, appropriate humor (with many cautions about inappropriateness), sales presentations, copyright issues, audiovisuals, and international speaking.

Barnard, S., ed. *Writing, Speaking, and Communication Skills for Health Professionals*. Health Care Communication Group. New Haven, CT: Yale University Press, 2001.

While the information in Part 3 of this book is intended for health professionals, it is applicable to most professionals. It includes guidelines for the development and presentation of poster presentations and practical advice for short scientific presentations and longer keynote addresses.