JPMC **Strategic** Communication

Reference

What do we mean by Strategic?

In business, we spend a lot of time, energy and money developing strategies and communicating them to our colleagues, leaders and direct reports. When they miss the mark, it represents an expense in resources and a strike against our professional credibility.

There are two factors that often stand in the way of effectively communicating a strategy:

- Our understanding of the situation
- Lack of clarity in delivering a recommendation

Understanding the Situation

As far as we are concerned, listening is the secret to success. The ability to truly listen and understand a situation, improves outcomes, reduces errors and leads to a fuller understanding of present conditions.

Listening is also a skill that strengthens and deepens personal and business relationships. Our discipline for listening begins with the start of the conversation and builds to a full confirmation of mutual understanding.

Clear Delivery of a Recommendation

Great communicators engage and reward an audience's attention. Their strategies succeed on the strength of their thinking and the clarity of their delivery.

Successful delivery is measured in action by the audience. Whether they're working on a proposal, debating or sharing it with others. A well-delivered strategy won't always be implemented, but it will make an impact.

Understanding the Situation

Steps for a Strategic Dialogue

Planning and Preparation

You know you must plan for a successful call. You need to prepare by finding out basic information about the customer, the company, and the industry. But you should also plan how you will conduct your strategic discussions.

The Strategic Communication Process

When you plan your discussions and use the Communication Process, you create a road map for your strategic communication success.

The steps of the process support accurate communication and help you build long-term, collaborative business relationships.

Step 1: Open the dialogue

Step 2: Uncover needs

Step 3: Offer your solution

Step 4: Handle objections

Step 5: Resolve the issues

Step 6: Close and document next steps

Think of these steps as a way to uncovering valuable information. For best results, use these steps in order.

Follow-up

The last critical step in any strategic dialogue is follow-up. Follow-up can cover everything from paperwork to the actual execution of the strategy. When done appropriately, it fosters future opportunities for cooperation.

Support the Socratic Approach

What is the Socratic Approach?

"A method of teaching or discussion, as used by Socrates, in which one asks a series of easily answered questions that inevitably lead the answerer to a logical conclusion."

—Webster's Unabridged Dictionary

Socratic Consulting is a discipline that:

- Uses the power of active listening and probing to thoroughly understand a customer's needs
- Fosters relationships that allow the c and the customer to work together to find the ideal solution

Why does the Socratic Approach work?

Why should you use the **Socratic Approach** to consulting? Because it builds long-term relationships and helps you overcome many of the common obstacles associated with consulting—including the top problem.

Simply put, consultants talk too much when promoting a strategy, and much of what they say isn't necessarily tied to the client's needs, wants, and concerns.

The client and what the client needs—not the recommendation—should be the focus of the strategic consultation. The consultant should question and listen to deepen that focus until there is a clear picture of the entire situation. A consultant can propose the right solution only when they truly understand—and can clearly state— a client's needs. The Socratic Approach guarantees that this will happen.

How to use the Socratic Approach

As you move through the Communication Process, you must see the situation from the client's viewpoint. Your job is to understand that perspective completely.

Meet clients where they are. Then you can help them see the possibilities of where they can go.

This might take a few minutes or many weeks. But when you've demonstrated that you understand a client or colleague's needs and values first, you will have created life-long cooperation.

Create productive discussions with your client: prepare, listen, question, and respond to what you uncover.

Although all these skills are necessary for a successful consultation, the most critical are listening and probing. They are the skills that let you gather client information and understand the issues and needs.

Socratic Approach: Concepts to Remember	
Socratic Consulting is a **discipline**	It takes **awareness** and **practice** to do it well. To listen, question, and *not* talk, you must **completely focus on your client.**
Start with the client's interests first	Before you can think about a solution, you must listen and thoroughly understand your colleague's situation.
The more you know, the more you can **collaborate on an ideal solution**	Socrates taught, **not by telling** his students, **but by asking** them questions **and listening** to them. By engaging your client in a Socratic dialogue, you uncover your client's buying needs, requirements, and rationale.
Take the time up-front to get to know and engage your client	By building relationships and demonstrating that you understood, you can actually **speed up the consulting process**, both in the current transaction and when doing business in the future.

The Socratic Opener

Start Socratically—Invite Your Colleague or Client to Speak

Open your dialogue Socratically to encourage your counterpart to share information. You are letting them drive the discussion. You are the navigator; the client is the driver. Your goal is to understand their situation, to guide them towards a solution.

Opening Socratically will do several things:

- Set a positive tone for the conversation
- Show the counterpart that you are prepared to meet her needs by listening to the issues
- Create a structure for the conversation
- Help establish a comfortable environment for both of you

Plan and Practice Your Socratic Opener

The Socratic opener is an invitation to talk. You're face-to-face, how do you open the dialogue?

Each time you prepare an opener, practice aloud until you can comfortably deliver all three parts of the opener in language and phrases that sound like you and that fit the situation and the client.

We recommend using a Socratic Opener with these components:

Preparation: You, the consultant, are prepared

Invitation: The counterpart is invited to share thoughts first

Benefits: The benefits will address what is important to the counterpart

Example 1

Preparation	*I'm ready to discuss _________ but you may want to talk about other subjects as well...*
Invitation	*...If you could begin with what's most important to you...*
Benefits	*...We can address that first.*

Example 2

Preparation	*I'm prepared to talk about _________ which we discussed on the phone...*
Invitation	*...but first, I'd like to know a bit more about where you're coming from...*
Benefits	*...that way, we can focus on what's important to you.*

Example 3

Preparation	*I have come prepared to talk about _______ but I know your point of view is what matters most...*
Invitation	*...if you could give me the picture as you see it,...*
Benefits	*... our meeting can address what's important to you.*

Active Listening

Confirm Your Understanding

For the first part of your dialogue, you should let the client lead you to a full understanding of the situation and needs. So, you need to listen well. But how do you do that?

In a consulting meeting, active listening is more than merely paying attention. To listen actively is to work, mentally and verbally, to ensure your counterpart's meaning is understood.

First, you need to understand what happens when you listen. Listening is actually a process — a series of physical and cognitive steps that have to be completed well.

Good listening, however, requires more work than just taking in sounds. Your goal is to understand your counterparts and clients—even when they are not being clear or do not offer you enough information. Good listening requires that you focus, process, question, verify, and take notes on what you hear.

That assurance must come from the counterpart. To be sure you have understood, you should play back what you have heard. Playbacks are naturally led into with phrases like:

- *If I understand you correctly...*
- *Let me see if I have this...*
- *As I understand it...*
- *I hear you saying...*
- *So, what you're saying is...*
- *In other words, what you're telling me is...*

There are three reasons for playback:

- Demonstrate that you're truly attentive
- Trigger more information
- Confirm understanding of what has been said

Playbacks synthesize details or conclude discussions of important topics before the dialogue continues.

What are the benefits of Playbacks?

- Counterparts realize you take them seriously
- You are seen as an attentive listener
- Playback through rephrasing is proof of listening
- Unlike parroting back the same words, rephrasing requires that the listener grasp the concept
- When counterparts hear their own concepts played back, they know you've listened

Active Listening

What happens when you play back facts? Your counterpart will often respond to the playback in one of these three ways:

- **Corrects/Modifies:** No/Yes, but...
- **Adds information:** Yes, and...
- **Confirms:** Yes

Examples

If the consultants's playback is not accurate, clients will correct or modify it. They welcome the opportunity to make sure their thoughts are understood.

Client

We've had serious delays because of issues with our current suppliers. It costs us a lot every time it happens.

Consultant

(Plays back) *If I understand you correctly, your production costs increased because of late deliveries from your suppliers.*

Client

(Corrects) *Not late deliveries. They don't supply exactly what we ask. They assure us we're getting, the equivalent, but it doesn't always work out that way. By the time we get what we want from the supplier, we are behind schedule.*

Here's a playback that induces the counterpart to add valuable information:

Consultant

What are our long range growth plans?

Client

We are currently in production at only one site. We'd like to service our customers from facilities that are closer to their locations.

Consultant

(Plays back) *So, I hear you saying you are interested in opening some new plants.*

Client

(Adds information) *Yes, as many as five new plants over the next two years. But our main concern is choosing the right equipment.*

If the playback elicits simple agreement — a *Yes, that's right!* or silence, the client has nothing to add at the moment:

Client	Consultant
Our volume was up 20% in the last year, but we still have only 100,000 square feet of warehouse space.	(Plays back) *In other words, you're running out of space.*
Client	
(Agrees) *That's right.*	

The client's simple agreement is a cue for the consultant to continue. Note how the consultant led into the playback in the examples:

- *If I understand you correctly...*
- *So, I hear you saying...*
- *In other words...*

Non-Verbal Signs of Attention

Welcome Signs: When you enter your client's office, smile and shake hands. Don't sit until you're invited to — you're in their space, it's a sign of respect.

Visual Signs of Attention: Make sure your client sees that you're paying attention. Create eye contact, sit comfortably, lean forward flexibly, and nod to signal your understanding.

Oral Signs of Attention: Offer verbal cues to indicate to your client that you're listening.

Taking Notes

Taking notes is an integral part of your consulting success. It ensures that you have a record of what was said and can follow up appropriately. Some tips:

- Look down – Take quick notes without making eye contact, re-establish it quickly
- Use verbal cues (*uh-huh*, *I understand*, *good*) to encourage your client to speak
- Pay attention to the exact words a client uses to describe a need – It will help for future quoting, which will confirm your understanding
- Keep notes brief

Listening Leads to Listening

If you listen with patience and discipline, the client will be more likely to listen to you. By modeling positive, collaborative communication, you foster it. And THAT builds great business relationships.

Remember, as long as you're gathering valuable information, you are moving the consultation forward by pinpointing the customer's needs. The only way to consult intelligently is to listen actively.

Play Back Facts and Feelings

So far you have worked to be quiet and listen. But good listening also involves interaction. It involves playback and probing.

Playback, also known as paraphrasing, is one of the most important communication skills—and one of the least used. It allows you to make sure that you heard accurately and interpreted correctly. It also verifies that the speaker actually said what he meant.

Also, paraphrasing shows the other person that you really were listening and that you care enough to get it right.

Remember, playing back does not mean you are agreeing with something. It simply shows that you have accurately heard what was said.

Play back facts

Paraphrase what was said to ensure accurate interpretation. Use your words to check the meaning.

Play back feelings

People talk to each other for five reasons:

- To connect or socialize
- To vent or share feelings
- To share information
- To persuade
- To entertain

People's feelings often drive what they say and how they act. It's important to pay attention not only to *what* they are saying, but *how* they are saying it.

If a counterpart displays a strong emotion—positive or negative—acknowledge those emotions. State that you recognize that he is excited, happy, frustrated, upset, concerned, etc. Expressing emotions is one of the reasons people communicate, so acknowledge any emotions you hear.

You are building the relationship by demonstrating that you are listening to your counterpart as a person, not just to the facts he is giving you.

The benefits of playback

When you play back, one of three things will happen, and all are good:

- If you play back what the client has said, the client may correct or modify your playback: *"No, that's not it."* Or, *"Yes, but..."*
- The client may add information: *"Yes, and..."*
- Or, the client may confirm the accuracy of your playback: *"Yes"*

In each case, productive dialogue advances. And as the dialogue advances, so does the relationship.

Playing Back

Facts

- Use a lead-in statement
- Then, re-cap what was said.

Lead-ins for playing back facts:

- *"If I understand you correctly..."*
- *"Let's see if I have this..."*
- *"I hear you saying that..."*
- *"In other words..."*

Feelings

Use lead-in statements to acknowledge any strong emotions that surface.

Lead-ins for playing back feelings:

- *"You sound..."*
- *"You look..."*
- *"You seem..."*
- *"I can see that..."*
- *"I get the feeling that you're..."*

Remember:

Don't "parrot" the same words, use your own. Verbatim repetition can be annoying and doesn't check meaning. When counterparts hear their concepts played back, they know you've really listened.

Numbers, names, dates, and "quotes" are important to focus on when listening. Let your counterparts know you've heard the facts accurately by playing them back.

If you hear complaints or disagreements, don't argue or try to discuss them at this point. Focus on listening and understanding the speaker.

When you play back, you are not agreeing. It simply shows that you heard what was said.

Verify

After playing back, use a yes/no question to verify that your playback is accurate.

A speaker only knows you've understood when you demonstrate it. Saying "*I understand*" doesn't prove that you do. That's why playback is so important. Clarify and confirm to guarantee understanding. If you don't, you're making assumptions that can create misunderstandings.

Examples:

- "Is that right?"
- "Did I get it?"
- "Is that what you meant?"
- "Do I have that accurately?"

Socratic Probes

There are five tools for probing: Closed, Sub-decision, Qualifying, Open and Socratic Probes.

Closed Probes

Closed probes target information you need to make a proposal or close a consultation

- *How much?*
- *How many?*
- *How often?*
- *Who?*
- *Where?*
- *When?*
- *What kind?*
- Questions answered by *Yes* or *No*

Open Probes

These probes invite counterparts to speak at length. The most commonly used probes of this kind are: What...? Why...? How...?

Though questions beginning with these words can be productive, the consultant has to find the words to complete the question. Not so with Socratic Probes.

Socratic Probes

Socratic Probes, such as *Tell me more*, are easy to remember and apply to most situations.

Here are five very productive Socratic Probes:

- *Tell me more...*
- *What else should I know... ?*
- *Why do you say that... ?*
- Echo
- *For example?*

These probes are difficult to answer with a word or two, they:

- Invite explanation
- Lead the counterpart to stop and think
- Help clients reach deeper into their experiences
- Encourage clients to share vital information that might not be revealed through closed questions

Client	Consultant
Our present system is inadequate for tracing lost deliveries.	*Please, tell me more about that*

Client

(Elaborates) *We can trace a package if we lose it on one of our own carriers. But if they're not available, we put it into any air cargo space available. So, if that carrier makes a routing error, it's difficult to assure a customer—who is already upset—that we are on top of the situation. We have no idea where the package is. So we get into a really tough spot.*

In response to *Tell me more*, the client supplies key facts about a business problem and communicates a sense of urgency about solving it. This information ultimately can lead to greater understanding and a successful close.

You can also select a particular point by **echoing** a word or phrase.

Client	Consultant
I don't have time to start over with a bank officer.	*Start over?*

Client

In the past, several bank managers handling our company's business were moved to other functions. I don't want to repeat that experience with your bank I'm looking for continuity.

The echo is a probing device often used in ordinary conversation. Don't overlook its usefulness as a probe in the consultations situation. Another selector of key facts is the phrase For example? With Just two words you induce the speaker to be more specific about a point just mentioned. Therefore, For example? is effective when you receive general information from a client and you want more.

Surfacing Motivators

A consulting dialogue is influenced by human feelings. Though the discussion of needs revolves solely around the many facts that describe the needs, a current of feeling runs through the dialogue.

The client has varying degrees of emotional response to the needs. They may have a strong, positive desire to satisfy the needs, or may simply dislike having to cope with an unresolved problem. Either way, the needs are connected to feelings.

These feelings drive the consultation. Needs can remain at a low level of priority until a client feels strongly enough about the needs to do something.

In any business discussion, feelings often remain unspoken. Just the facts, please. If the discussion is between a consultant and a client, they may be more reticent than usual. The client may not know you very well.

If you are a familiar face or a current supplier, the counterpart may not want to appear eager to buy. At least during the initial part of the dialogue, the counterpart's feelings are hidden from you, the consultant.

Probing Feelings

To surface motivators, use one of these motivator probes:

- *How does this affect you?*
- *Why is this important right now?*
- *I sense frustration*
- *What bothers you most about this?*
- *I sense this means a lot to you*

In response to these probes, you may get emotional statements:

- *I've been stuck with this for so long now...*
- *How much longer can they just sit on this...*
- *Our backs are up against the wall...*
- *If I could get senior management to see...*
- *I've been trying to get this done...*
- *There's a lot riding on this...*
- *What kills me about this is...*
- *It drives me crazy that...*

Recognizing these personal motivators is relatively easy, but how you react to them is more difficult. Your general inclination may be to ignore them instead of acknowledging them.

As you listen, read the signals — both the verbal (what is said) and non-verbal (how it is said: facial expression, body language, tone of voice).

Acknowledge any signals you pick up. Use statements like:

- *"I can see how important _______ is to you."*
- *"It seems that _______ will really affect you individually."*
- *"That sounds like a critical issue for you."*
- *"It looks like you're under some pressure to_____."*

Choose your phrases carefully based on the situation and on the signals that you pick up. Keep the conversation “real.”

Sometimes the counterpart's concern shows in a tense facial expression. The counterpart leans forward to introduce a key point. Sometimes you can hear agitation or urgency in the tone of voice.

If the counterpart begins to express feelings that are behind the need. Encourage further discussion. Stay with those feelings. You are partner to a valuable revelation.

Show that you are tuned into feelings by saying, *I sense concern* or *I sense frustration*.

Sometimes the counterpart's motivation may be spread through several layers of feeling. One of those lavers may be personal. For example, Bill may be in over his head and fear for his job. You may be the person to help him to dry ground. Bill is unlikely to share this with you, an outsider, at the outset of his meeting with you. Instead, he will hide this strong motivator. He wants to assess whether or not you can help him.

Another counterpart, Florence, has had little opportunity to display her problem-solving ability. You, as an alert supplier of a fresh and new product/service, can make this counterpart a star in her organization. Call it burning ambition or smoldering, frustration, Florence's feeling is real.

Bill and Florence are motivated by personal, individual needs needs that are distinct from the needs of their companies.

Summary

If the relationship of trust has indeed been building throughout the dialogue, the counterpart is likely to reveal the hidden motivator. And once the counterpart has shared that concern — anxiety, worry, frustration, disappointment, desire - you are an ally! The counterpart's confidence in you becomes even greater.

This positive element in your relationship with the counterpart makes you unique among your competitors.

The counterpart's confidence ultimately may be the strongest factor in the decision to buy.

It can be the tiebreaker when there is product parity.

Clearly Delivering a Recommendation

Eye-Brain Control

Eye-Brain Control is the core of this program, and is central to all public speaking experiences.

This is a simple skill that you can employ with audiences of all sizes, in all sorts of venues. Begin your presentation by scanning the room. Breathe in, focus on a pair of eyes, then:

- Share a thought with one pair of eyes in the audience
- Pause
- Find a new pair of eyes
- Share a thought with a new pair of eyes (repeat throughout the presentation)

Remember to move your gaze to different parts of the room. This allows you to connect with all parts of the audience and gives you better, more natural pauses.

Eye-Brain Control works on two tracks:

1. Reduces nervousness and non-words
2. Improves and personalizes your relationship with the audience

Pausing

"The right word may be effective, but no word was ever as effective as a rightly timed pause"

-Mark Twain

Just like good punctuation is essential to writing, good pauses make great presentations. Short pauses between thoughts, improve and facilitate the experience of speakers and audiences:

- You gain fluidity, thinking time and reduce non-words
- Your audience has an easier time receiving new knowledge

We Recommend

- Locking your eyes on one person before speaking
- Completing a thought with each person
- Pausing and taking a breath before moving to another person

Avoid

- Scanning the room
- Looking at the ceiling, floor, or walls for your thoughts
- Trying to look at every face in a large audience

Benefits

- You control your nervousness
- You connect with individuals in the audience
- You think more clearly
- Your rate of speech stays under control
- You use fewer *non-words* — maybe none

Nervousness and Non-Words

Nervousness is a natural part of every presentation. Besides causing many of us to dread delivering presentations, it has side effects that interfere with our thinking and our communication.

Eye-Brain Control is the first of two tools that manage the boost of adrenaline we call nervous energy.

Trying to speak to many people at once overwhelms our senses. Our eyes constantly try to reassess their situation and impair our thinking, to the point that we look to the floor or the ceiling for our words.

Non-words are more than meaningless sounds. They interfere with the flow of our message and reveal a lack of confidence and conviction. Practicing Eye-Brain Control consistently will eliminate them from your presentations.

Eye-Brain Control Questions

Should I avoid people who are not looking at me?

No. When people are looking at us, we feel it. Our eyes are practically magnetic. If an audience member is distracted, they will usually feel your gaze. If they don't look up; complete your thought and find a new pair of eyes.

Will it make my audience uncomfortable?

No. The time a thought requires is an average of 5 seconds. Audiences will respond positively if you share a thought, pause, and find a new pair of eyes, with a conversational facial expression.

Will it work with larger audiences?

Absolutely! When you speak to large audiences concentrate on the rows whose eyes you can easily see. Apply the skill with those audience members. Members in the back will feel like they're being viewed.

If audiences are harder to see, divide them into sections and alternate from one section to the other.

Projecting Vocal Energy

Imagine the overall volume of your voice on a scale of I to 10.

Your Volume Level	Your Voice Sounds	You Come Across
9-10	forced/strident	overbearing
7-8	dynamic	confident
5-6	monotonous	boring
3-4	weak	lacking conviction
1-2	inaudible	timid/confused

Benefits of Projecting Vocal Energy

- You hold attention because your voice is stimulating
- Inflection and tone will clarify the meaning of your content
- Projecting confidence makes you more memorable

We Recommend

- Using inflection to add meaning to your words
- Pausing to breathe, so you can project your voice
- Increasing your volume to a level 8

Avoid

- Speaking at the same volume level as in a one-to-one conversation
- Speaking in a monotone
- Thinking that everyone will strain to listen to you

Releasing Visual Energy

When you are in front of a group your audience is receiving and processing your message by seeing your body language, reading the tone of your voice and listening to your words – in that order.

Channeling nervous energy into gestures, stance and hands helps presenter use this resource productively.

Project visual energy. Your gestures will mirror your message and the audience will receive it consistently. Use your hands to show an increase in profits, a decrease in expenses or to paint a picture. Just be sure to let them flow naturally in unplanned gestures.

After emphasizing a point, let your hands return to your sides. they'll be ready when you need them.

Walking can be done in a limited way. Be sure that it has a purpose, that you're not walking across information on screen and that it is not limiting your ability to gesture with your hands.

We Recommend

- Balancing your stance
- Gesturing with your hands above the waist
- Letting your hands fall to your sides after using them

Avoid

- Moving around or pacing without purpose
- Locking your hands — in front, in back, or in your pockets
- Holding objects — a pen, papers, or your glasses

Organization - Using Action Formats

What is my Objective? Who is my Audience?

Before you stand in front of an audience, before you even open Powerpoint, you need to define your purpose and outcome. This process sounds simple, but requires discipline. Filter your information and choose your data based on what you want to achieve, and who will help you get there.

Recommendation	Proposal	Development
Speaker's Objective: To solve a problem	**Speaker's Objective:** Generate new business or renew existing business	**Speaker's Objective:** Develop opportunity for competitive advantage
1. Grabber	1. Grabber	1. Grabber
2. Current Situation	2. Need	2. Opportunity
3. Negative Effects	3. Negative Effects	3. Consequences of inaction
4. Recommendation	4. Proposal	4. Development
5. Benefits to Audience	5. Benefits to Audience	5. Benefits to Audience
6. Evidence	6. Evidence	6. Evidence
7. Summary (2+4+5)	7. Summary (2+4+5)	7. Summary (2+4+5)
8. Next Steps/Call to Action	8. Next Steps/Call to Action	8. Next Steps/Call to Action

Strategy	Improvement
Speaker's Objective: Share a strategy to achieve a goal	**Speaker's Objective:** Improve a process, strategy or situation
1. Grabber	1. Grabber
2. Goal	2. Evaluation
3. Obstacles	3. Consequences of inaction
4. Strategy	4. Improvement
5. Benefits to Audience	5. Benefits to Audience
6. Evidence	6. Evidence
7. Summary (2+4+5)	7. Summary (2+4+5)
8. Next Steps/Call to Action	8. Next Steps/Call to Action

Other Formats

Aristotle's Outline for Persuasive Presentations

1. Deliver a story or statement that arouses the audience's interest
2. Pose a problem or question that has to be solved or answered
3. Offer a solution to the problem you raised
4. Describe specific benefits for adopting the course of action set forth in your solution
5. State a call to action

Carmine Gallo's "Steve Jobs' Nine Elements of Great Presentations"

1. Headline (Max. 140 characters)
2. Passion Statement (Sense of Purpose)
3. Three Key Messages (Road map, rule of threes)
4. Metaphors and Analogies
5. Demonstrations
6. Partners
7. Customer Evidence and Third-Party Endorsements
8. Video Clips
9. Flip Charts, Props, and Show-and-Tell

LanguageLink's Ultimate Elevator Pitch

1. What do you do?
2. What problem do you solve?
3. How are you different?
4. Why should I care?

Grabber

Your opening statements are critical to getting—and keeping—your audience's attention. The audience needs to understand quickly what your presentation is about and what's in it for them. You also want to keep them from tuning out at your first sentence.

When planning your opening, think about what's important to your audience and what will make an impact on them. You have analyzed your audience—now use that information as you open your presentation.

Look for something that will grab your audience's attention like an interesting idea, a startling fact, a rhetorical question, a quotation or anecdote that relates to the topic. The key to starting with any of these is to make it relevant to the audience.

Starting your presentation with a story immediately connects you with your audience. It allows your audience to see you as a person, not just a presenter. It can set the stage for the content of your presentation, shaping the way your audience thinks about it and making them more receptive to it. Remember Snoopy writing on his dog house and beginning with, “It was a dark and stormy night.”? Your opening should make your audience wonder what's next and want to find out.

Here's one opening: “This presentation is about leadership skills.” Bland, isn't it? You may lose the audience's attention entirely.

Here are some examples of effective “grabbers.” They are interesting—even provocative—openers.

- *Would you follow you?*
- *Are leaders born or can they be developed?*
- *77% of our employees don't consider their boss a good leader*

Persuading With Evidence

Here are eight kinds of evidence to persuade various audiences:

- Personal Experience
- Example
- Analogy
- Statistics
- Facts
- Expert Opinion
- Exhibit
- Demonstration

Personal Experience

A first-person testimony about a situation or an event. You were there. What you saw, heard, or did supports the point you are making. For most listeners a personal experience is the most interesting form of evidence.

Use a personal experience when your audience:

- Views you as an authority on the subject
- Can easily relate to your story
- Appreciates the human dimension in a talk

Example

A specific situation with key factors similar your premise. You can draw upon events or data immediate to your function or location. You may also tap general sources of industry or business news. Examples are persuasive to the degree your audience sees them as paralleling your own case.

Use an example when your audience:

- Has a keen awareness of quality, standards, and competition
- Values industry knowledge
- Experiences a situation close to that of the example

Analogy

A point of similarity between two unlike things. For example, the *tip-of-the-iceberg* analogy conveys a warning about seeing only a small portion of something and missing the significance of the whole. A good analogy allows you to focus your audience's attention through clarifying parallels.

Use an analogy when your audience:

- Uses intuition or imagination on the job
- Has just heard a wealth of abstract information
- Is unpersuaded by numbers alone

Statistics

Numerical facts arranged for analysis and interpretation. Graphs help your audience appreciate relationships between numbers.

Use statistics when your audience:

- Considers numbers essential for credibility
- Has a confused or erroneous understanding of the numbers
- Would find your statistics interesting or surprising

Facts

Facts are items of information. Individual facts carry more weight with the audience when you explicitly connect them.

Use facts when your audience:

- Prefers short facts to long explanations
- Likes many items of evidence at a fast pace

Expert Opinion

A statement by an authority. You must explain the expert's credentials if they are not known to your audience. For best effect, keep quotes brief.

Use an expert opinion when your audience:

- Would be persuaded by the expert
- Doesn't know you and needs other sources
- Routinely seeks consultation with experts

Exhibit

Demonstration by showing a physical object or model. Examples of this are a product sample or a graph showing performance, or a set of photographs.

Use an exhibit when your audience:

- Can physically approach the exhibit
- Would find strong sensory appeal (form, color, sound, texture, etc.) in the exhibit
- Needs to see to believe

Demonstration

A series of actions that show an operation or procedure, or reinforce a key point. The audience may perform the actions or observe a video.

Use a demonstration when your audience:

- Needs to experience the procedure to understand it
- Is willing to take part

The Tieback – Explicitly connect evidence to the idea it supports.

Too often, evidence loses its intended impact. One reason for this is that the speaker fails to make a connection between the evidence and the idea being supported by the evidence. The evidence just floats away in the current of information.

Tieback is a rhetorical device 'in which the speaker, after presenting a piece of evidence, explicitly ties the evidence back to the idea it supports.

Tiebacks usually start like this:

- *...and that's why I'm suggesting you move ahead with the building of a new conference center immediately.*
- *...therefore I'm recommending the inclusion of service contracts for your palletizing units as part of our total consulting package.*
- *...and that's one more reason why that management consulting system we've recommended will help achieve your growth objectives for the coming decade.*

Visualization - 1 Idea / Visual

Creating Effective Visuals

Your goal is to create visuals that reinforce, support, and illustrate your ideas. Don't use visuals just to have something on the screen. Visuals should enable you to be a more dynamic presenter.

Always ask yourself what the visual will show – not what it will say

Keep it simple – One major idea per visual. If you can't put a title on it, you have more than one idea per visual

Information to support, reinforce, and illustrate your presentation can be shown as:

- **Words** in bullet points
- **Numbers** in charts and graphs
- **Ideas** in pictures and diagrams

Bullets

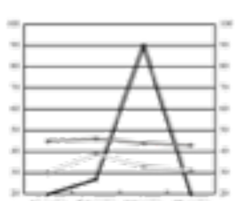
A visual with a list of words can group ideas together efficiently. Color and bold lettering increase the impact on the audience. Upper and lower-case type is easier to read.

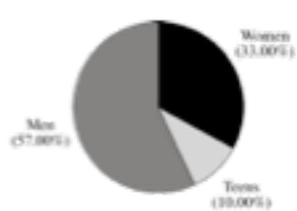
- **Follow the 4-by-4 rule**: no more than four bullets no more than four words to a bullet
- **Write key phrases** — enough for presenter to remember and audience to follow

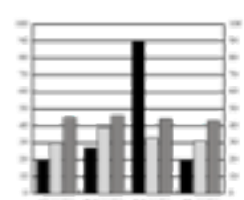
Charts and Graphs

Numbers and statistical data are difficult for the audience to absorb if shown in numerical tables or listed with text. A chart or graph makes numbers more meaningful by showing them spatially and in relationships. Charts and graphs make abstract quantities take on a visual shape.

- Keep graphs and charts simple – Show only necessary numbers
- Label the horizontal and vertical axes and trend lines
- Make labels legible to all







Pictures

Today's audiences are accustomed to televised images, to four-color pictorial ads in magazines, to computer graphics. Your audience will remember ideas and concepts represented as pictures. By showing a picture, you determine the exact image formed in the listeners' minds.

- **Keep it simple**: one idea per visual
- Use only necessary words
- Make a picture a unified concept, not a queue card with many symbols

Presenting With Visuals

Positioning Yourself

Positioning is nonverbal communication. By the way you handle the equipment and move around it, you say something about your confidence as a presenter, about the value of the information, and about your awareness of the audience.

Don't let the equipment put you in second place. The equipment is there to make visuals available; the visuals are there to make your thoughts available. Nothing should get in the way of your primary role as the source of information.

- Face the audience with the screen to your left
- The visuals are an extension of you, the presenter
- Handle the projection yourself with a remote control
- Avoid using a pointer – Design strategies to direct audience where to look
- Dim the lights around the screen only to the degree that is necessary
- Keep as much light as possible in the screen area
- Try not to let the audience remain in darkness – See people eye-to-eye.

With Video

Video differs radically from other media, since you create an enveloping audiovisual environment for the audience. While the video is running, you as presenter or facilitator disappear from audience view.

Position yourself next to the monitor.

Have the controls with you near the monitor, when you stop the playback to comment, the audience will look at you because you are in the same focal area as the screen

To comment, pause action.

Clear the Visual

Every new visual is news to the audience. This will shift their attention away from the presenter. On the first instant your visual appears on the screen, the audience is physically compelled to look. In the next instant, each audience member will try to satisfy curiosity.

Satisfy audience curiosity. Clear away the news! First help them see what there is to see. Tell them what you mean.

Bullet Points: Read off the words and phrases from top to bottom. Then return to the First point and explain its meaning. Elaborate, if you wish. You will hold audience attention on that point because they've seen and heard the rest.

Line Charts: Begin by identifying the title, the horizontal and vertical axes, and the trend lines. By doing so you satisfy curiosity.

Diagrams, Drawings, Photos: Give an overview of the graphic elements contained in the diagram or picture. This shows the distillation ratio of chemical X as it is pumped through various cooling agents.

Remember:

- Careful presenters don't assume everybody knows how the visual works
- Courteous presenters help the audience understand
- We recommend clearing the news from the visual
- Don’t assume the audience is familiar with the information in your visual, or does not require explanation

Touch-Turn-Talk

In the exchange of information, time is of the essence:

- Time for you to think, for the audience to think
- Time to see your listeners and to read their reactions
- Time to breathe

To buy time when using visuals, pause. Use a procedure that generates a pause whenever you need it. We suggest you use a process called Touch-Turn-Talk.

Touch: Look at the visual in silence and think. Absorb the information. Point to the part of the visual where you want the audience to look.

Turn: Turn silently and find a person's eyes.

Talk: Speak to one pair of eyes at a time.

You can look back to the visual as often as you need to, but pause to think each time. The greatest benefit of this technique is that it allows you to pause. Pausing:

- Gives you time to think
- Regulates your rate of speech
- Gives the audience time to think
- Allows you to breathe properly
- Helps you come across as authoritative and poised

Handling Questions

Structuring Q&A Interaction

Suppose your presentation is strong. You researched it. You organized it. You put together a great set of graphics. You knit it all together with strong delivery skills. Then, when taking questions, you misunderstand a question, you get rattled, individuals interrupt you, you lose confidence and look shaken, you get short-tempered with people – You lose.

Structure the interaction with a procedure that fosters communication, control, and courtesy.

Step 1. **Raise your hand to ask, Any questions? or Next question?**

Benefits:

- Signals through body language that others should raise a hand to be recognized.(Communication)
- By raising your hand assertively and projecting your voice, you show you're in charge. (Control)

Step 2. **Select a questioner.**

This keeps several people from talking at once. (Control)

If you gesture, don't point. Use an open palm. (Courtesy) You are taking the initiative in selecting the questioner. Your energy shows you are in charge. (Control)

Step 3. **Look directly at the questioner and listen for the issue**

You make sure you have grasped the question. (Communication)

As you listen, don't focus your mind on the words the questioner selects. Instead, ask yourself, What's the issue? What's the point here?

Many speakers start thinking of the answer when they should be listening. (Courtesy) If you begin answering a question that you think was asked but wasn't asked, you will be interrupted and corrected.

If you're not sure of the question, now is the time to clarify it. (Communication) Don't say that the question us unclear. It may be clear to everyone but you. Probe to reach an understanding. (Courtesy)

Step 4. **Break visually when the question is finished. Meet new eyes.**

Benefits:

- Avoids a one-on-one conversation. (Control)
- Signals that your answer is relevant to all in audience. (Communication)
- If you are self-conscious about looking away from the questioner, remember this. You already listened carefully to the questioner as the question was asked. Others in the audience expect your attention as well. (Courtesy)

Step 5. Restate or rephrase the question.

Restate if the question is simple and straightforward.

Rephrase to simplify a long or complicated question. Rephrase to put a negative or hostile question into neutral words.

Benefits

- Ensures that everyone hears the question. (Courtesy)
- Gives you a few moments to **think** of the answer. Often, you have several approaches to answering. A few added seconds can help you choose the best approach. (Control)
- **Simplifies the question**. Rephrasing to simplify helps refocus the discussion for others. (Communication) Many questioners ramble.
- **Neutralizes the question**. Neutralizing the question is verbal self-defense.(Control) Why should you allow the questioner to position the issue under their agenda?
- Never change the issue in the rephrasing. The questioner will recognize this as a dishonest tactic immediately, as will others in the audience.

Step 6. Look back to the questioner and answer. Tie back your answer to your objective.

Benefits

By looking back to the questioner for at least part of your answer, you can check their understanding. (Communication)

Your tieback reinforces the main point of your presentation. (Communication) Be alert for the opportunity to turn even a hostile question to your advantage!

The tieback prevents a question that is marginal to your presentation from leading everybody to another subject. (Control)

Structuring the Q&A Interaction

When taking questions during a presentation, refer to your visuals to stay on track.

Raising your hand does not apply, but Steps 2-5 give structure the Q&A interaction to avoid a greater disruption. You need to select, listen for the issue, break visually, and rephrase.

Modify Step 6, the answer, by connecting your answer to the visual on the screen or the next visual you have. Once you have answered, look back at your visuals and continue with the presentation:

- *That ties in with what you see here...*
- *A fact related to this is illustrated by the data here...*
- *My next visual touches on this point*
- *Let's finish with this visual so we can move ahead*

By returning to your presentation, you eliminate Steps 7 and 8. Your return to your visual provides further communication, puts you back in control, and is courteous to all those who expect you to get on with your presentation.

Rephrasing to the Issue

Every question is about an issue. It's your job as presenter to listen and find the issue behind the question, comment or attack.

Issue	Basic question
Motivation:	*Why are you doing it?*
Importance:	*Why are you doing* X *before* Y?
Feasibility:	*Can you do it?*
Authorization:	*Are you allowed to do it?*
Cost:	*Can you afford to do it?*
Timing:	*When will you do it?*
Ability:	*Are you competent enough to do it?*
Personnel:	*Who will you get to do it?*
Quantity:	*How much of it will you do?*
Quality:	*Will you do it right?*
Method:	*How will you go about doing it?*
Alternatives:	*Couldn't you do something else?*

Identifying the issue is an analytical skill. Rephrasing to the issue is a verbal skill. Avoid repetitive rephrasing: *The question is...*, or *The question has been raised...* – Start rephrasing with an appropriate lead-in:

Lead-in	Rephrased question
What...	*What about the new legislation?*
Why...	*Why would I survey the field engineers?*
How...	*How can we improve quality and hold to our budget?*
When...	*When will our study reach Phase 2?*
How many/much...	*How many employees will take the retirement package?*
How often...	*How often would this equipment require repairing?*
Are we...	*Are we taking the necessary steps to maintain quality?*
Did we...	*Did we include material costs in our retraining projections?*
Can we...	*Can we do this and still meet the deadline?*
Would I...	*Would I try to enlist resources outside this department?*
Should you...	*Should you inform your district managers right away?*
Is this...	*Is this the right time to introduce these changes?*

Contact

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