



# Focus on Your Key Messages

**Situation today:** You sit down to make PowerPoint slides or write your speech. When done, you go back over the presentation, trying to put it into some meaningful order. Before you realize it, you've worked for hours, reorganized the content, tried to cut it down (and discovered it grew instead)! Next, you review it with people who will be at the session, and even ask your boss to look over the outline. These people all say, "Shorten it!" or "It's over our heads!" Worse yet, they spend time trying to figure out the structure of your talk and what information should be included or excluded, instead of helping you check the content for accuracy and key messages.

**Key problems:** Many people are creating haphazard, disorganized presentations of data slides. People spend hours redoing presentations—time they really don't have. The key content of the subject is sometimes not even mentioned. The presentation is not convincing to the audience.

**Key opportunities:** Save hours of time. Motivate your audience to listen. Look and sound professional. Gain credibility.

**Solution:** Do not make a slide until you organize your information. Here is how to go about organizing your talk.

*First*, create your presentation overview. This overview targets the key information that your audience will be interested in hearing and establishes the criteria by which you will exclude or include content. When given to your boss or

others, the overview enables everyone to suggest how to put together the content before you spend time creating your talk. It is much easier for someone to critique and change the one-page overview than to have to review twenty slides in order to understand the talk.

*Second*, choose a format or outline with which to organize the content in the most effective manner for the audience to follow. Later in this chapter we will cover several different types of organizational structures that you will be able to use to achieve your particular purpose.

*Third*, write up an executive summary that really targets the overview of your entire talk before creating any slides or a written speech.

*Fourth*, plan to tell several stories so that the presentation becomes more memorable for the audience.

**Story:** In one of my classes, Clive, the manager of his company's intranet, brought a presentation about his company's new intranet site for us to discuss. His team had spent hours putting together a presentation they planned to give to hundreds of people in the company. The objective of the talk was to motivate people to look at and use the information on the new site. However, when we looked at the slides, it appeared that the presentation was almost exclusively about how they created the intranet site. They used a lot of jargon and included information no non-technical person would have cared about. Moreover, the presentation contained slide after slide of text with seven to nine phrases (almost sentences) on each slide. The key message derived from this talk seemed to be "Look how difficult this was to do, and since we worked so hard, we suggest you go look at it." After Clive prepared a presentation overview and made a one-slide executive summary, he redid the slides to focus on his audience. Specifically, he explained three benefits that people using this new site could gain. He removed the confusing jargon. When he practiced giving the talk, he sounded excited and enthusiastic. Without having done the necessary preparation, he never would have realized how his presentation actually discouraged people from wanting to go look at the company's new intranet site.

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**Chapter Motto:** *If you take more time preparing  
before creating all your slides, your success will  
come easier.*

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## FOCUS ON YOUR KEY MESSAGES

- Fill Out the Presentation Overview
- Choose or Create a Format
- Create an Executive Summary
- Write Your Opening and Closing
- Identify and Plot Stories to Tell
- Plan Your Notes
- Decide on Your Handouts

There are seven steps to focusing on your key messages. This step-by-step process will guide you from filling out a presentation overview to deciding on your handouts. The Presentation Overview forces you to plan your messages and to think about how you want your audience to respond during your talk. When you use a format to lay out your content, you will save hours of time attempting to reorganize the content after the slides are created. The executive summary is just that, a one-slide summary for people who don't have the time or desire to listen to the details. By writing out your opening and closing, you will be much more relaxed as you start the talk and sound much more confident when you conclude. Stories will add spice and variety to your talk. You may need some notes for your talk, and this section tells you how to use them. Finally, by being clear about the use of your handouts, you can create a presentation that provides the audience materials they may actually find useful to look at during or after the talk.

## FILL OUT THE PRESENTATION OVERVIEW

As noted in the opening solution, the first task you should do when preparing a presentation is to create an overview. Exhibit 1.1 provides a specific outline you can use.

Following are descriptions of each of the sections of the Presentation Overview.

**Title:** There are titles and then there are *titles*. Think about one that will engage your audience and get their attention.

**Objective:** You should have only one clear, concise objective for a presentation. You may have other underlying objectives you wish to accomplish, but you



## Exhibit 1.1 The Presentation Overview

FOCUS	EXPLANATION OF FOCUS
Title	Title of the presentation.
Objective	One-sentence objective.
Theme	Underlying theme or storyline that will weave through the presentation.
<i>Three Key Messages</i>	List the three key messages you want to get across and either the type of story or data that will go with each message.
Audience Reaction	Write down what you want your audience to . . . Say after your talk: Do after your talk: Feel after your talk:
<i>Two Stories</i>	List two stories you can tell to make your messages connect emotionally to the audience.
How to Ask for What You Want	What will you say or do to obtain a “yes” on your recommendation?
Best Way to Reach Your Objectives	Will you only use PowerPoint? Will you talk and maybe show several images but not make PowerPoint the whole talk? Will you hand out a document and go through it?

need to specify one overall objective before you start making the presentation. This objective answers these two questions:

- What does my audience want from my speech?
- What do I want from my audience?

By analyzing the answers to these questions, you can write down the objective of your talk. Some objectives might be:

- Sell them my product today
- Convince the vice president to give me resources for a project

- Show that I am in charge and in control of the project
- Increase my credibility by presenting the analysis in a logical, focused manner.

**Theme:** There is an overall mood that goes through a talk. Here are some theme ideas:

- *“Stay tuned into the company; check out the intranet.”* This can be highlighted throughout the talk with certain types of images.
- *“We deliver what we promise.”* Many kinds of examples can be given about how customers have been provided the products they requested.
- *“We’re ahead of the changes coming to the industry.”* This presentation could show examples of how a company adapted with new products as the industry evolved, illustrating for potential investors that the company is always on the cutting edge in developing new and successful products.

**Three key messages:** I know you sometimes have a difficult time deciphering the key messages in other people’s presentations. The presenter may have started with an agenda, but that usually does not include the key messages of the talk. Motivate your audience to listen. Make it easy for them to follow your talk. Start with your key messages. Here’s one example of an opening:

“In considering what you want to achieve with your presentations, there are three key points. You want to look and sound credible and confident. You want to gain commitment. And you want to do all this in the least amount of time possible. This talk will tell you how to do these three things.”

These key messages will then be repeated throughout the talk.

**Audience reaction:** You are usually giving a talk to achieve some type of reaction from your audience. Now is the time to specifically write it down. For example, you could write, “I want the chief information technology officer to say that the product we are proposing is up-to-date. I want her to call us for a demo of our product. I want her to feel excited about seeing what we have to offer.”

**Two stories:** Why tell a story? My clients say, “I don’t have time to tell stories. I have so much information.” Consider this: Most of us remember stories long after the information has left our consciousness. We like to go home and

tell someone, “I heard an interesting story today about. . . .” There are wonderful books about how to tell a story. These are listed in the Resources section of this book.

**How to ask for what you want:** Usually a presentation is used to obtain some type of approval. Don’t leave that to chance. Decide now on the words you will use and when you will ask for what you want. Plan every move, stage every prop, prepare every syllable; this is the most important moment in your talk. Think of how carefully a young man prepares before asking someone to marry him. The talk should revolve around this. Find that perfect moment to “pop the question.”

**Best way to reach your objective:** Some of you reading this book go fishing. When you go fishing you usually want to catch a fish. You select the bait you are going to use depending on what you want to catch. Well, why don’t you do the same when you give a talk?

- Who is your audience?
- What do they like?
- What will make them bite?
- What will make them ignore your offer?
- What will make them want to fight once they become interested?

If you want your audience to make an engineering decision based on what you will present, you probably need to show comparison charts, tables, and images so that your audience can make a decision. This information frequently needs to be in the form of handouts. Why? The charts, tables, and images may contain so many details that are impossible to read on the screen. Showing PowerPoint slides with text on them may not be the best way to reach your objective.

In summary, the reason you fill out the Presentation Overview is so that you have an overview of your talk before you create slides and/or other visuals such as storyboards. The more focused you are, the easier it will be for you to create the most appropriate visuals in order to achieve your objective. Exhibit 1.2 is an example of a Presentation Overview filled out by Terry Williams for the Bluefields project. See how much you can learn about the project from just this overview.

## Exhibit 1.2

### Bluefields Presentation Overview

FOCUS	EXPLANATION OF FOCUS
Title	<i>Bluefields: Achieve a Sustainable Community by 2020</i>
Objective	To secure the commitment—in cash and kind—of key influential individuals on which the Bluefields’ campaign will be based.
Theme	Establish Bluefields as the model of sustainable development efforts in the Caribbean.
<i>Three Key Messages</i>	<ol style="list-style-type: none"> <li>1. <b>Jobs for All:</b> Target people’s entrepreneurial instincts to create gainful employment opportunities.</li> <li>2. <b>Food Security for All:</b> Develop and launch a Farmers and Fishers General Stores business concept that can be franchised to community-owned and operated enterprises.</li> <li>3. <b>Education for All:</b> Improve local schools’ infrastructure and create adult education infrastructure</li> </ol>
Audience Reaction	<p>Say after your talk: “This is a great plan.”</p> <p>Do after your talk: Commit to help in cash or kind.</p> <p>Feel after your talk: Excited enough about the possibilities that they want to participate.</p>
<i>Two Stories</i>	<ol style="list-style-type: none"> <li>1. My own evolution of thinking that convinced me that the approach of focusing on people’s entrepreneurial tendencies is the right one.</li> <li>2. How one of the current leaders came to us unable to read or write. Nearly twenty years later he’s running the fisherman’s co-op as well as his own business, employing five community members.</li> </ol>
How to Ask for What You Want	We can’t do this alone: How can you help us?
Best Way to Reach Your Objective	Use PowerPoint some, but not all the time. Tell stories without showing slides.

In the next section, we'll look at two specific presentation situations: presenting technical information and presenting at a meeting.

## **Preparing Technical Information**

Tan is an expert in water filtration, having studied it for years. He has been asked by a salesperson, Jim, to give a talk to one of Jim's potential customers. However, Jim and Tan have not discussed what the objective of the talk is to be. Tan starts to prepare his speech and makes fancy graphs and charts to show the filtration system. He has worked on this system for years and prides himself on being a technical expert. He actually builds a water filtration system on the screen and includes all the small technical details he personally considers important. The slides look impressive!

One would think, from looking at all Tan's slides, that the objective is to share all the nitty-gritty details of the water filtration system. Unfortunately, that is not the objective Jim has in mind. Jim's objective for Tan's speech is to sell the benefits of water filtration. Naturally, a little bit of technical information that supports the benefits would be convincing. Jim wanted Tan to emphasize the key messages about saving money, ease of use, and up-to-date technology. Tan would have made a very different presentation if he had spent some time discussing the objective and messages with Jim. This type of situation happens all the time between salespeople and technical experts. It is solvable when they agree on the objective and the presentation is then created around that objective. Much of the drill-down technical information can be placed on a notes page so that the speaker has it to refer to, if necessary, and the attendees can read it in the handouts.

Sharing too much technical information also occurs when salespeople are brought in from the field to learn about new products. They are usually told all the technical information about the product, with very little emphasis on benefits for the customer. Since they have been told this information, naturally, they expect that this is the information that they are expected to present to their customers! Your true objective—whether it is a product update, new software release, or brand extension—is to prepare those salespeople to sell it, not build it. Your presentation should model what you want these salespeople to tell their customers. Do not tell them every bit of product knowledge that exists. They should be given the presentation that they are expected to give to



their customers. Then other slides can be added to give them more technical knowledge.

Preparing for a Meeting

For those of you who have ten minutes before a meeting and have been told you need to give a brief talk, here is a quick, two-sentence presentation overview. To do this, finish the two sentences shown in Exhibit 1.3.

Now, you have the beginnings of the organization for your talk. You can use this information as criteria for what needs to be included and what is extraneous. As you create and organize your presentation and make decisions regarding the content of your talk, ask yourself:

- Will this content help me explain my message?
- Will this content or image encourage the audience to do what I would like them to do after the talk?
- Will this content help me reach my objective?

Exhibit 1.3  
Mini-Talk Meeting Overview

FIRST SENTENCE	SECOND SENTENCE
During my talk I plan to [a verb and noun] so that [a noun and verb].	By the end of my speech, my audience will . . .
<b>Example 1</b> <i>During my talk</i> I plan to present my company’s new product so that my audience decides to buy it.	<i>By the end of my speech, the audience will</i> be convinced that there are three reasons why my product will help run their company intranet.
<b>Example 2</b> <i>During my talk</i> I will motivate my manager so that she sees the absolute necessity of hiring three more people.	<i>By the end of my speech, my manager will</i> have the information and presentation visuals necessary to convince her boss to let her hire three more people. She will be able to tell her boss how the department can achieve its goals on time with the addition of these three new hires.



## CHOOSE OR CREATE A FORMAT

Now that you have written up your overview and the key messages of your talk, you want to put your content in some logical sequence. Don't create the slides in a stream-of-consciousness manner and then try to organize them. That is backwards. Plus, it is a lot of extra work. Most importantly, your audience will know what you did. A systematic flow is invaluable for audience comprehension. If you skip from one unrelated point to another, the audience will wonder in frustration, "How does this fit together?" And, a warning: when some audiences become frustrated they start interrogating you. Sophisticated technology loses its value when the presentation slide content is not organized in a logical sequence with just the right amount of detail.

In his book, *Blink*, Malcolm Gladwell tells about a research project to discover the most accurate way for emergency room doctors to determine whether someone has had, or is about to have, a heart attack. Lee Goldman, a cardiologist, developed a decision tree of three urgent risk factors. He wanted to see whether this decision-tree way of determining heart attacks was more effective than the doctors asking many questions to gather as much information as possible about the person's health before making a decision. For two years Cook County Hospital used Goldman's algorithm. "It was a whopping 70 percent better than the old method of recognizing the patients who weren't actually having a heart attack" (Gladwell, 2005, p. 135). The lesson was that sometimes having too much information resulted in a decision that was not as good as one made with less information focused on the most important issues. What is important is not the quantity of information but the quality. This same advice applies to so many presentations in the world today. Your job as a presenter is to figure out what is the most useful information needed to achieve your presentation's goal. So, how does one go about determining what is the right information to include in order to make the most accurate decision? One way to help you in making that decision is to use an organizational format.

A format is an invaluable tool in helping you organize your presentation. For my work, I have co-authored twenty-six professionally designed presentation "shells" for PowerPoint. Each shell offers a detailed outline, numerous tips for creating effective content, and carefully chosen sophisticated visual elements. I created them because people were losing their productivity. In this book, two of these formats are included in this chapter and on the accompanying CD for your use.



## SURVEY

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**Excessive Preparation Time:** When asked how much time is spent deciding what to put in presentations, 58 percent of the professionals surveyed said they spend more than three hours for each thirty-minute talk. In reality, most presenters start with a blank screen when they sit down to create a presentation. Some use a canned template, but it rarely meets their specific needs. In fact, 61 percent of those surveyed sometime or always redo their company presentations.

Sixty-two percent of our respondents said they could save between one and three hours if they did not have to redo the company presentations. More than 90 percent of the people surveyed said scenario-specific presentation outlines would help them save time; 43 percent said they could save between one to three hours if they had outlines for organizing a talk.

Unless you have several formats, such as are provided on the CD, you are wasting a tremendous amount of time whenever you create a presentation. How do I know this? I have individual clients and participants in my classes who use these formats and I see how much quicker they can put together talks. And I have clients who make their own formats. When they have a presentation to give, all they have to do is open the format and insert their information. They may add other slides, but the logical structure of the talk is already created.

Formats, or outlines, need to be created for the specific type of presentations given most frequently. Companies need formats that help their employees organize and craft the content. Here are several formats many companies could use:

- Product launch
- Company overview
- Product sales
- Strategy recommendation
- Project update
- Technical update

These formats need to be created and tested by the people who will be using them. Many companies take my formats and customize them for specific situations. These formats will help you organize your information so that you have more time to plan your stories and anecdotes. You can use them to write a white paper, to give a PowerPoint talk, or to write a speech not using slides.

Following are examples of formats for selling a product, service, or idea and convincing an audience that a problem exists. Both examples can be found (in color) on the accompanying CD.

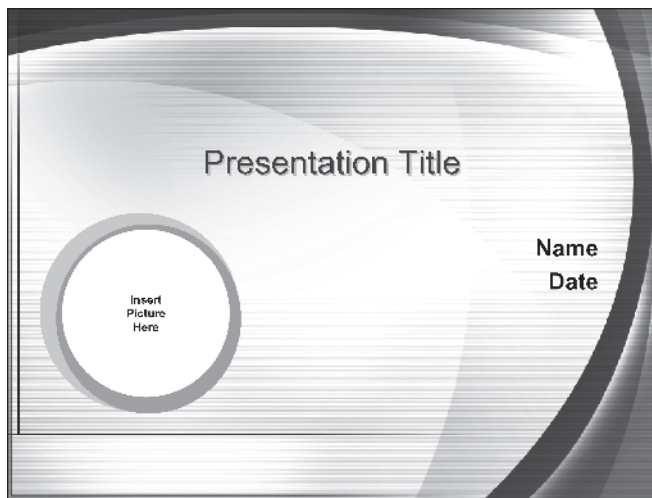
### **Sell a Product, Idea, or Service**

The selling format forces you to think about the benefits of your product or service for your audience and not just information about the product. Following are some of the slides for the selling format. This will give you an idea of how to organize your thoughts. Notice that there is a question slide that encourages the audience to speak. Notice also that there is a slide after the question period that encourages the presenter to give a second conclusion after the last question. See Figures 1.1 through 1.13.



**Figure 1.1**  
**Presentation Title**

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## Figure 1.2

### Executive Summary

This is the whole summary of your presentation in one slide.

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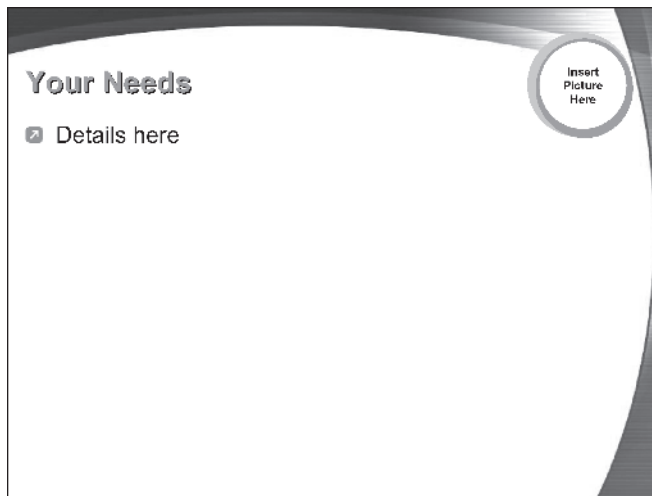


## Figure 1.3

### Your Needs

Here is where you talk about the needs of your audience. You do this before you talk about your company and its products. You want to be sure you are accurate in your assessment of your audience because you are only going to talk about the information that relates to their needs.

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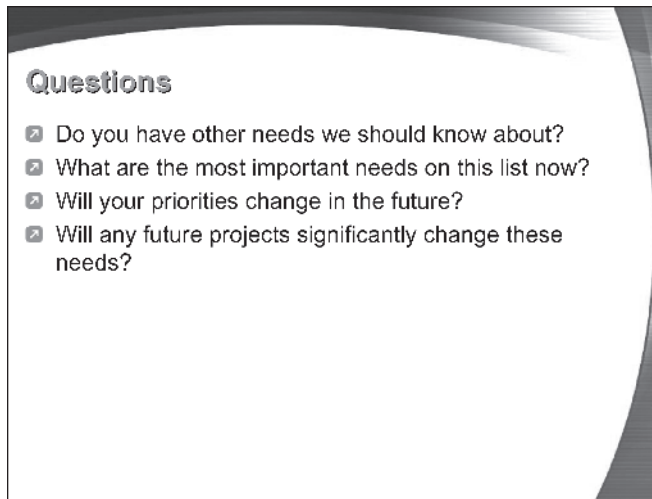


## Figure 1.4

### Questions to Ask the Audience

Now you ask your audience questions to listen to their other concerns you may not have mentioned or to hear them elaborate on their interests in your product or service.

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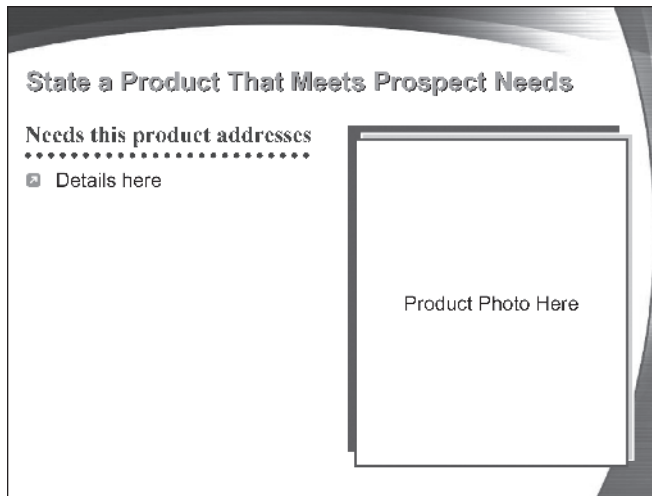


## Figure 1.5

### State a Product That Meets Prospect Needs

After you have heard their interests, you are better able to talk about the specifics of what they desire.

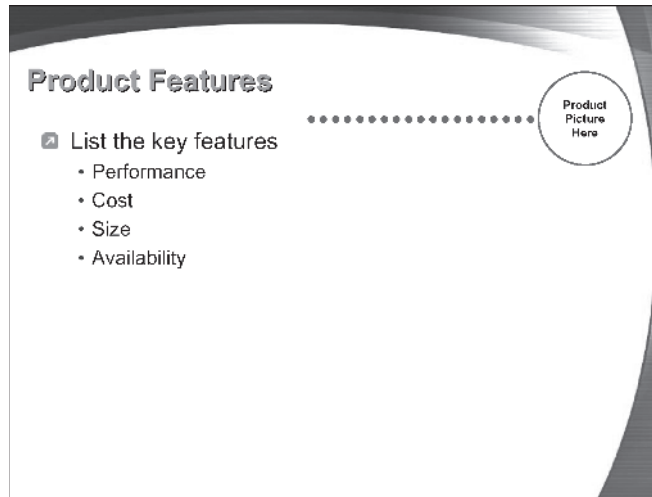
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## Figure 1.6

### Product Features

As you show this, you can speak about some of the features. This slide may be optional to show depending on the audience.



## Figure 1.7

### List the Key Benefits of the Product Here

As you have already heard them talk about their reasons for wanting to speak with you, you can now discuss only the benefits that will interest them.



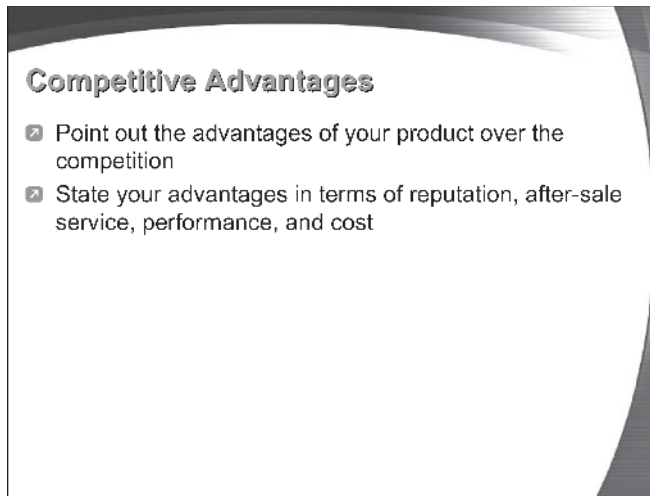


## Figure 1.8

### Competitive Advantages

This is to frame their decision-making process so they will consider certain advantages when deciding whether to purchase from your company. Generally, never say the competition's name out loud. A company that publishes competitive strength ratings is [www.wratings.com](http://www.wratings.com).

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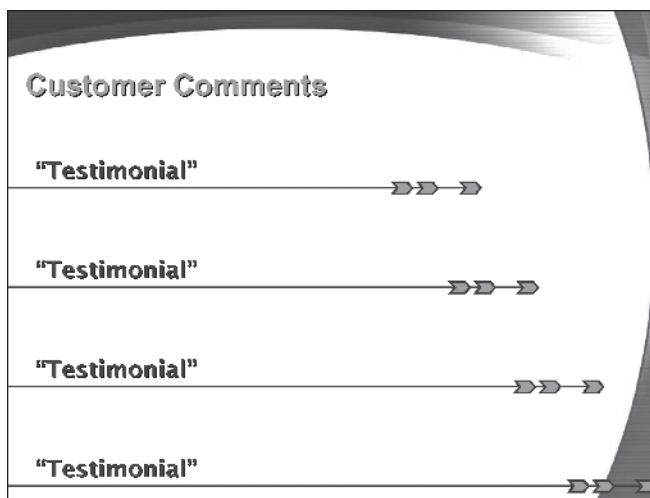


## Figure 1.9

### Customer Comments

Here you demonstrate that you do have people who like your product. Make the testimonials short. Sometimes companies include the logos of their clients, but you need to obtain permission from your clients before using their logos.

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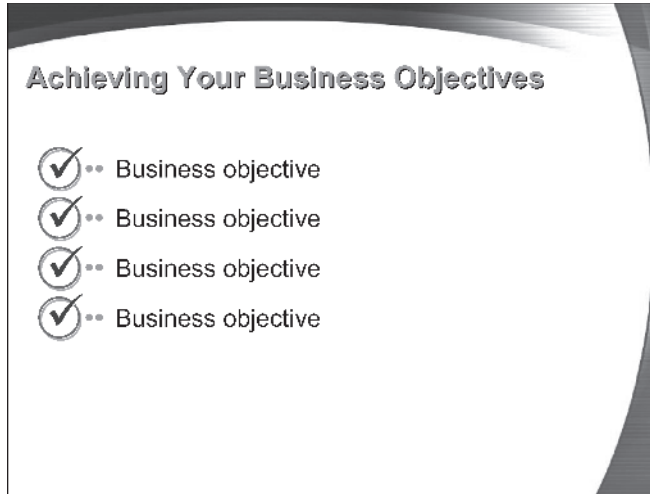


**Figure 1.10**

### **Achieving Your Business Objectives**

Now you are again talking about your audience's business objectives. You are demonstrating that you know about their business and have thought about their objectives.

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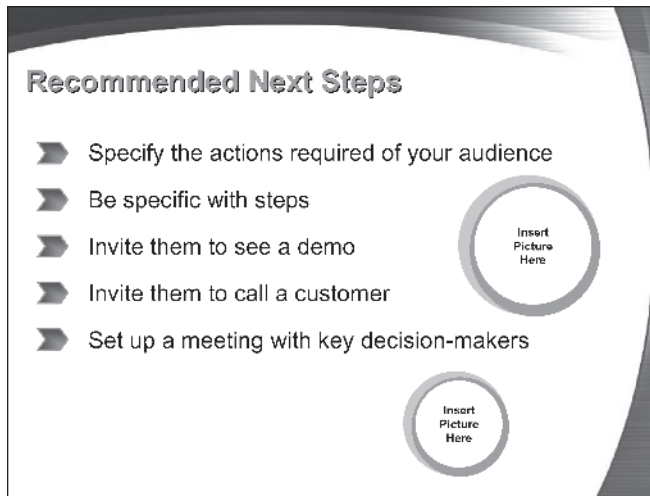


**Figure 1.11**

### **Recommended Next Steps**

You've spent time with the potential customer to discover what type of match exists between your product and their needs. Don't leave without some next steps.

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**Figure 1.12**

### **Your Questions and Comments**

Notice I just don't put the word "questions" on this slide. People should be encouraged to make comments as well as ask questions. You want to know a potential prospect's views on what you have said.

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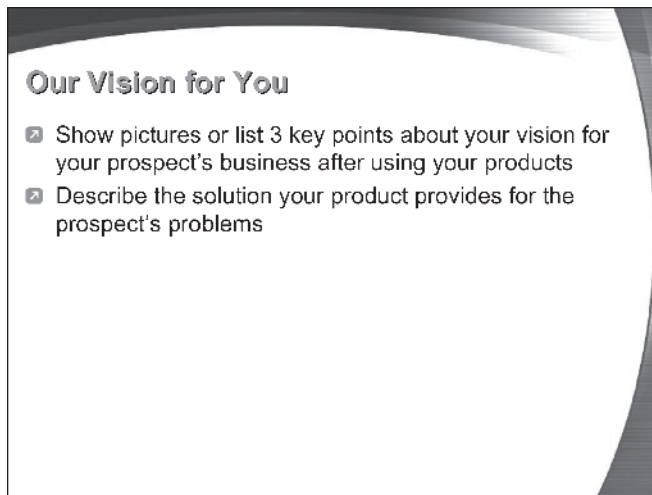


**Figure 1.13**

### **Our Vision for You**

This is the slide you show after the question period. You are wrapping up the meeting the way you choose. You don't want your presentation to be the victim of the last question or comment. You set the tone and energy as you end the session.

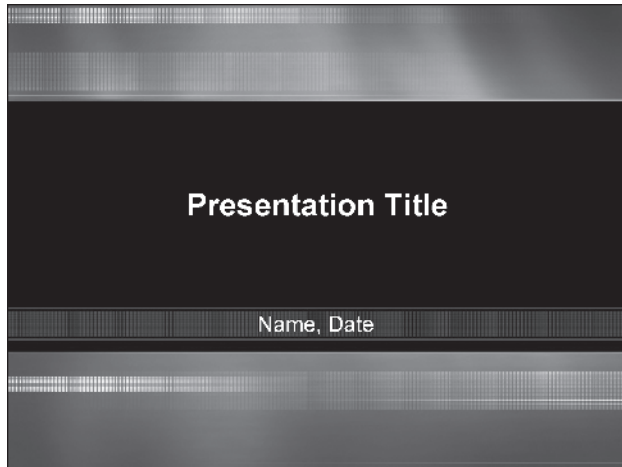
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## Convince People of a Problem

This format helps you explain the overarching problem you want to fix. You are laying out all the other problems that stem from this one overarching problem. It shows you how to discuss the situation in a convincing, detailed manner so you can obtain agreement on some solutions. See Figures 1.14 through 1.26.

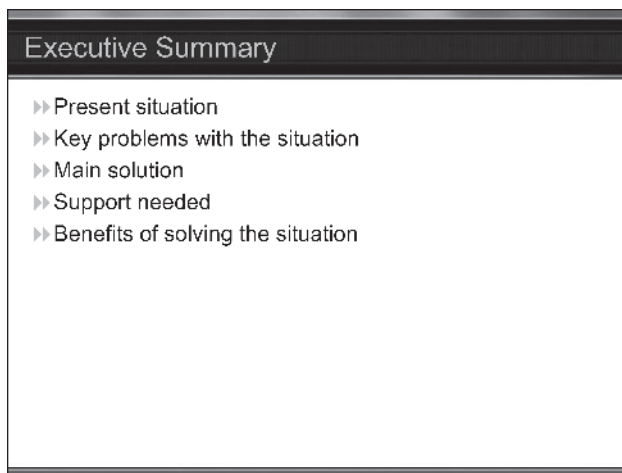
**Figure 1.14**  
**Presentation Title**



**Figure 1.15**  
**Executive Summary**



Here again you have the overall key points of your total presentation. As you will read over and over in this book, people do not always want to listen to a lot of data. They just want the key points, at least, before you explain the details.





### Figure 1.16

#### Present Situation

You are now explaining the situation today. You are doing this to share information as well as gain agreement that this is how your audience sees the situation.

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Present Situation

» Describe how we operate today to set the purpose of the presentation



### Figure 1.17

#### Problems with the Present Situation

Now you are listing some of the key problems with this situation. Don't list as many as you can think of. Your job is to sort out the critical few from the many and to tell your readers about those few.

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Problems with the Present Situation

☒ Problem

☒ Problem

☒ Problem

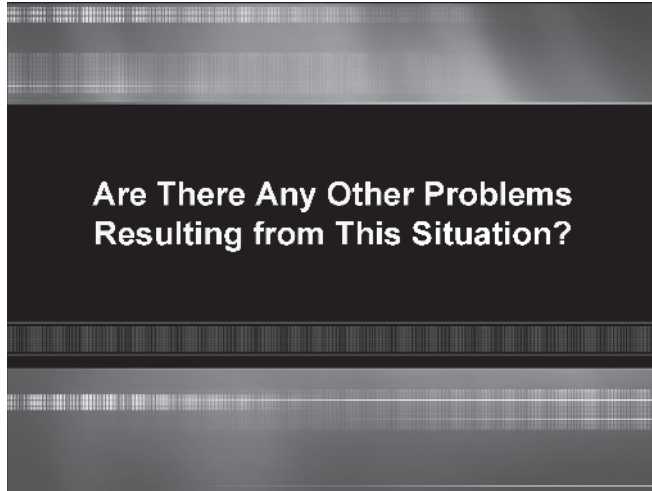
☒ Problem

**Figure 1.18**

**Are There Any Other Problems**

You are asking your audience how they see the situation. This should encourage people to start talking, which is what you want.

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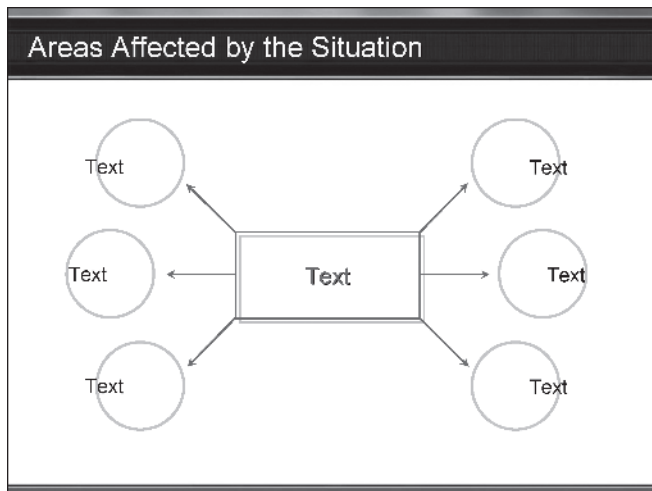


**Figure 1.19**

**Areas Affected by the Situation**

You may elect to use this slide in lieu of the slide in Figure 1.17. You are broadening the problem into certain areas and will talk about those areas.

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**Figure 1.20**

### Why Solve the Problems

Some people may say, “Well, it has always been like this. This isn’t a problem.” This slide helps them see the advantages of changing the way things have always been done.

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Why Solve the Problems?	
Advantages	Who Benefits
<ul style="list-style-type: none"><li>▶ Time</li><li>▶ Sales</li><li>▶ Accuracy</li><li>▶ Customer satisfaction</li><li>▶ Productivity</li><li>▶ Cost</li><li>▶ Meeting business objectives</li><li>▶ Less frustration</li></ul>	<ul style="list-style-type: none"><li>▶ Customers</li><li>▶ Which company functions</li></ul>



**Figure 1.21**

### Ideas to Solve the Problems

You are offering choices on how to solve the problems. You may believe there is one best choice, but in certain situations your audience may want an opportunity to discuss these various choices. They want time to reach their own conclusions.

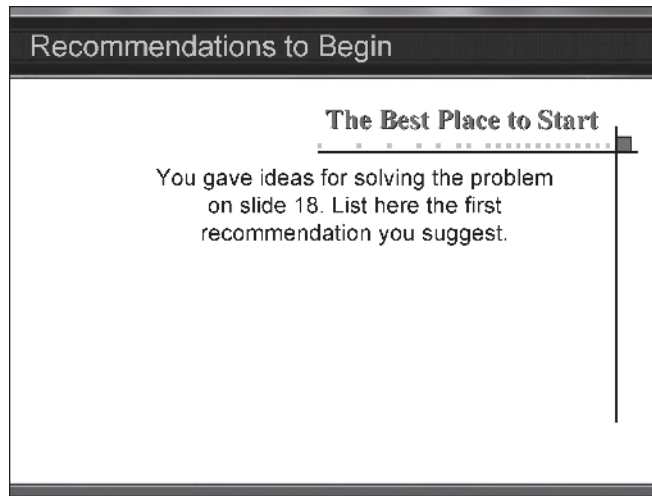
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Ideas to Solve the Problems	
<b>Idea 1</b>	<ul style="list-style-type: none"><li>▶ Advantage</li><li>▶ Disadvantage</li></ul>
<b>Idea 2</b>	<ul style="list-style-type: none"><li>▶ Advantage</li><li>▶ Disadvantage</li></ul>
<b>Idea 3</b>	<ul style="list-style-type: none"><li>▶ Advantage</li><li>▶ Disadvantage</li></ul>

## Figure 1.22

### Recommendations to Begin

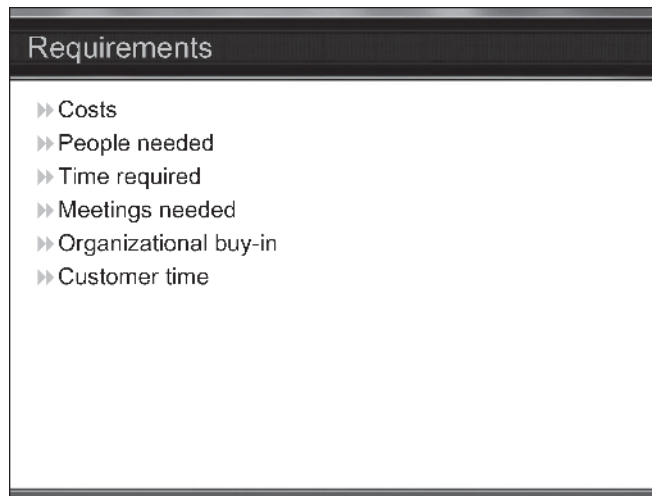
This illustrates that you know how to start making the changes.



## Figure 1.23

### Requirements

This shows you know what resources will be needed.





**Figure 1.24**  
**Next Steps**

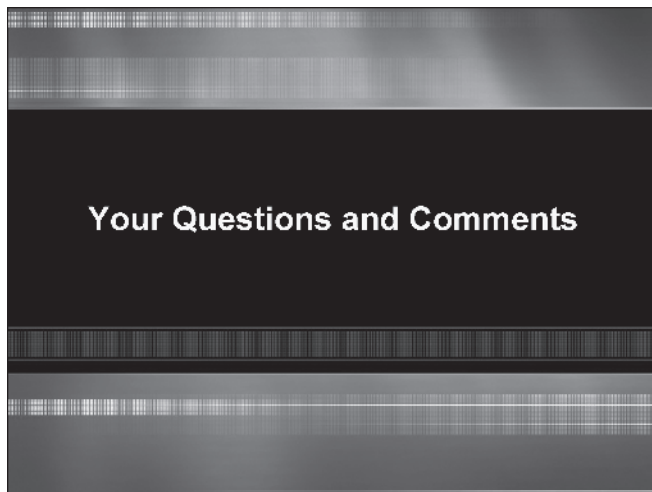
Now you are getting more specific so that the resources can be agreed on. You may decide this is the right time to present this or that the next steps are for a separate presentation.

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Next Steps	
Step	Who Is Responsible
List a step here	List who is responsible
List a step here	List who is responsible
List a step here	List who is responsible



**Figure 1.25**  
**Your Questions and Comments**





## Figure 1.26

### Key Benefits in a Year

You end after the questions and comments with a vision of what can be different in the future.



### Key Benefits in a Year

▶▶ List 3 key points you want your audience to remember about who will benefit when the overarching problem is solved

## CREATE AN EXECUTIVE SUMMARY

At this point, you want to sit down and make your slides. You just can't stand it any more. You think this is way too much preparation, but it is not. You still have a few more things to do! First and foremost, you need to create an executive summary. The executive summary will be given at the opening of your talk to provide the overview of your talk or at the end to close.

**Presenting to executives:** In most situations when speaking to the president, vice president, or executives in a company, you should provide an executive summary when you start your talk. They want to know the bottom line first.



Executives spend their days sorting through information. Before a presentation, they hope that you have sorted through and chosen the best information to give to them so they can either make a decision, agree with the decision you have proposed, or suggest what else is needed before a decision can be made. You do them and yourself no favor when you start by presenting slide after slide of information. You will have the executives on your side if you first give them an executive summary of your talk. Once they understand the decision that needs to be made, the answer you have selected, and its benefits, then they are ready to listen to more of the details. If you have put together a good executive summary, you may frequently discover that they may have heard enough.

Another reason to start with an executive summary is that it helps you to sound interesting and intelligent as you begin. No one is going to appear brilliant when going over the agenda for the talk. You need to start in such a way that you sound in charge, confident, and in control of your information. Remember, the executive summary is not the agenda. It is a summary of the talk—including only the most salient points.

Using an executive summary is not limited to when you are presenting to executives. You can also use one in the following situations.

**Technical and non-technical audience:** An executive summary can be used to give non-technical people an overview when you are speaking to a combined technical and non-technical audience. Start with a summary that everyone can understand. You want your non-technical audience to grasp the overall messages of your talk before you get into the details and technical jargon. It will give them a basis or context from which to understand the remainder of the talk, and it will make them feel like experts themselves.

**Many functions:** An executive summary can be used to get everyone on board with your talk when you are speaking to people from different functional areas. This situation might occur for a management update, a problem-solving talk, or a cross-functional team meeting. Make sure your executive summary has something for all members of your audience. For example, the finance people will want to know the cost ramifications of whatever you are suggesting. Tell them right at the beginning of your talk.

**Selling:** Let's consider that you will be speaking to the people making the purchasing decisions as well as those who will install your product. First, give an

executive summary to your decision makers. They really don't care to hear about the installation process. You can talk about that later. Perhaps they will even leave at that point.

**Research:** When presenting a project update of your research, a one-slide executive summary may provide just enough information to your audience. If not, you can use other images or tables for illustrating such points as past and future projections and expected or unexpected results.

The best way to explain an executive summary is by illustration. Figures 1.27 through 1.30 are examples of executive summary slides. All of these slides can be found on the accompanying CD, and you can edit them as necessary to fit your particular situation.

**Figure 1.27**  
**The Business Overview**



This is a way to provide an overview of your business in one slide. You must be able to do this in a way that allows your audience to understand the essence of your business. This is your “elevator pitch” (an explanation short enough that you could give it to someone during an elevator ride).

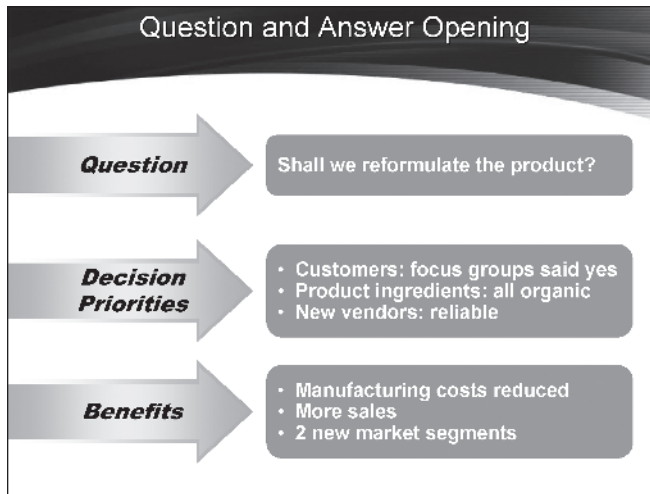
The Business Overview	
Goal	Lead by offering the best Internet access possible
Focus	Large corporations and home users
Competitive Edge	Customer service, price, and value-add
Future	Increase enrollments and shorten installation time



### Figure 1.28

#### Question and Answer Opening

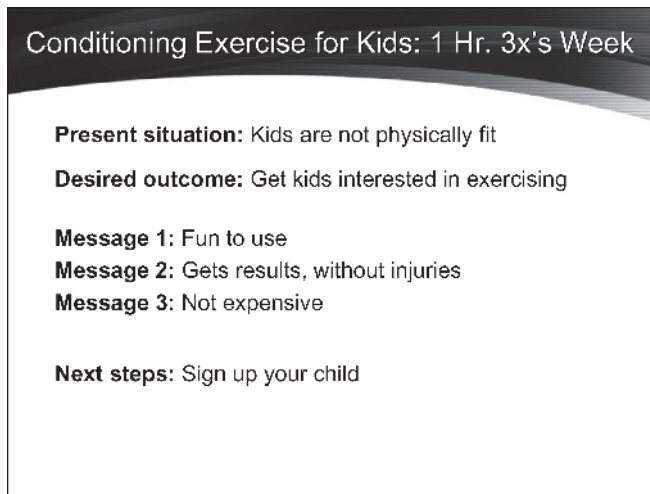
You can also do an executive summary in question form.



### Figure 1.29

#### Conditioning Exercise for Kids

Here is a summary of a program being offered. This is done using the strategy recommendation format.



**Figure 1.30**

### **Resellers Are Not Getting Higher Incentives**

Here is an example of selling an idea to upper management. The issue is in the title and then you learn why this is happening and what can be done. The person who put this together said she didn't need many slides after organizing this summary.



**Resellers Are Not Getting Higher Incentives**

- ❖ **Why**
  - Don't receive information at the right time
  - Don't have time to check status of sales numbers
  - Don't know how close they are to a higher % incentive
- ❖ **Solution**
  - Send them a monthly spreadsheet with their information
- ❖ **Benefits for them...**
  - Higher incentives
  - More motivated
  - Purchase and sell more of our products

**Everyone is more satisfied: They sell and we sell!**

## **WRITE YOUR OPENING AND CLOSING**

Your executive summary is done. You can now write the opening and closing. You will then have the structure of your talk and an even better sense of what to leave in or take out. Some of you will say, “But I can’t write them yet. I don’t know how this talk is going to turn out.” I say to you, “OK, wait. But be careful. You may wait so long you do not have time to truly think about your opening and closing. You miss two important opportunities to capture your audience.”

### **Opening Ideas**

First, what are some opening ideas? Here are some options depending on your audience and the purpose of your talk.

1. You immediately start with a story that ties into your content.
2. You start with your executive summary. This is excellent to do when you are presenting to an audience that is overworked, a bit impatient, and wants the point quickly.

3. You say a few words before discussing your executive summary. For example, “This year’s company conference is focused on our relationship with the customer. We are taking our ‘account relationships’ to a new level. You are about to hear my executive summary of our vision for this coming year.”
4. You tell the audience the benefits of listening to your talk. For example: “There are three benefits you will take away from our talk today. You will know how to access our new company intranet. You will see all the fabulous courses that you can take for free and how in two clicks you can sign up for them. You will see short resumes of all our employees so you can get to know some of your colleagues better.”
5. You speak to the audience’s interests. For example: “As salespeople in this field I am sure that you want to learn the best way in which to deal with rejections, how to keep yourself motivated, and how to make your calls and schedule appointments in ways that enable you to save time. You will leave with all that information today.”
6. You give them a “wake-up” message. Here are two examples: “Company X is the best company I have seen in years in this area. I know we should invest in it” or “After this training, your work will never be the same. Your telephone calls will be shorter and you will schedule more sales leads. Your work life will be easier, more fun, and much more productive.”

## Closing Ideas

When you have finished your talk, how can you close? Here we are really talking about two closes. One close is at the end of your talk before you take questions. The other is after the questions. After you have answered the questions, let’s assume the last one was a bit hostile and your answer did not provide the best way to end your talk. You ask, “Are there more questions?” No one responds. Don’t then just say thank you and sit down. You want to close again so you set the tone and message that you want your audience to remember. The ideas below can be used for either of these closes.

1. Go over the executive summary.
2. Tell a vision story. “Just imagine when . . .” You tell a vision about what will happen in the future when your recommendation is carried out. You are

describing a mini-movie of what the future could be. You are getting your audience excited by the vision you create.

3. Give someone a piece of paper and ask him or her to sign it. If your presentation is for a project approval, hand people a project approval form and get them to approve it so there is no ambiguity at all about what you have all agreed to.

## IDENTIFY AND PLOT STORIES TO TELL

**Getting your key points told again:** John is sitting down to lunch with a colleague, Harvey, and begins to tell him a story he just heard in a presentation. He remembers all of it. He even remembers the punch line and the point of the story. That afternoon, Harvey tells the story to two people during a meeting. Obviously, the presenter's story emotionally captured her audience. The story has been told to three people during the day, maybe more. The presenter is getting her message disseminated via her excellent story.



You are almost set, but you want some way to really capture your audience and give them something they can tell others. You need to add some stories and examples. Ahead of time choose and practice the stories you will use in your presentation; otherwise you may run out of time and really miss an incredible opportunity to motivate and engage your audience. Yes, you did list a couple of ideas for stories in the Presentation Overview, but that is not enough. Before you create one slide, really work on your stories. You will probably discover that with your executive summary and your stories, you may need many fewer slides to share your key messages and reach your objective. Stories are a wonderful way for you to connect with your audience. Stories are also a way for your audience to take your message to many others. The more your stories emotionally engage your audience, the better chance someone in your audience will relate the story to a colleague that day or the next day. Don't miss out on this opportunity to spread your message.

The stories should engage the audience's interest so that they want to hear the whole presentation. Most importantly, they should emotionally connect with the audience. Many people make decisions based on emotion and then rationalize that decision with the facts. Executives often talk about making a decision from the gut.

Stories need to be told with emotion and finesse. Don't just tell them as you would when talking about numbers. Following are two examples: One is a presentation just dealing with data and the other is a presentation based on a story that contains some data. Now there is nothing wrong with presenting data that is all information, but unless the audience is already familiar with the subject matter (in this coming example, the physical exercises), stating what the exercises are called means nothing to them. When comparing the two, note how the story scenario follows a certain order—that is, the story develops through plot points to an ending.

## **Data Presentation**

A kettlebell is a cast iron weight that is shaped somewhat like a basketball but with a handle. Kettlebells come in many weight sizes. The Russians have been using them for over one hundred years. When weightlifting with kettlebells, the exercises include kettlebell snatch, kettlebell squat, and kettlebell swing. You can make amazing strength gains and get in excellent physical condition by using kettlebells.

## **Story Scenario**

*Before:* Joe came to a class at the gym. He was one hundred pounds overweight. He hadn't exercised in years. He couldn't jump rope because he was too heavy. He had a lot of trouble feeling which muscles to use in the different exercises. He became discouraged when he couldn't do what the other people were doing.

*Plot point:* One day, about two weeks after he began to come to class, a student took him aside and said, "You know Joe, I used to look like you. Stop complaining. You will look like me sooner if you just do the exercises and not spend time making excuses."

*After:* After that conversation, Joe started to change his attitude. I remember the day he lifted a twenty-pound kettlebell over his head and walked around the room. His face was beaming. Then there was the day he swung a forty-pound kettlebell thirty times. He was ecstatic. Imagine this—he reached the point where



he could jump rope for five minutes at a time. After that day, he bought himself a jump rope and a kettlebell to use at home. So what is this kettlebell that kept Joe going?

The speaker would then go on to present data about kettlebells, having first piqued the audience's interest with a story.

Notice that in the story scenario of the kettlebells, there is a plot point that changes the character or the scene in some manner. This plot point wakes up the audience and captures their attention. You can change your way of storytelling just by making sure you emphasize the plot points.

What are plot points? They are the pivotal moments in a television or film script. In a film, Plot Point One usually occurs twenty to thirty minutes into the film and starts the major action of the movie. Something unexpected occurs to the hero and galvanizes him or her toward a goal. Plot Point Two occurs about seventy minutes into the film when it appears that the hero is beaten. At this point an event occurs that causes everything to change with the hero. The hero's goal becomes reachable. These plot points keep re-engaging the audience so their eyes stayed glued to the screen. In your case as a presenter, those using their BlackBerries start to pay attention.

Sally Iles at Massachusetts General Hospital's Leadership Academy in Boston, Massachusetts, spearheaded an effort to streamline the process for scheduling flu shots. The story chart in Exhibit 1.4 illustrates what happened. You can use it to give you ideas and help you on your way. Even if you did one story in your talk this way, you would be way ahead of most presenters in business today.

The example in Exhibit 1.4 is one way to organize your story. You can also start with the results. This is the "start with the end" way to approach telling a story. If the result is surprising to your audience, you have captured their attention and they want to hear how you achieved the result. Then you go back and share what happened to get to this result.

## POWERPOINT TIP

Don't show your PowerPoint slides during the whole talk. Anything, even when done well, gets boring and puts us to sleep after a while. Plan part of a talk without showing PowerPoint.



### Exhibit 1.4 The Flu Shot Success Story

Opening	Is it possible to make the yearly “fitting five hundred flu shot appointments in an already packed schedule” a pleasant experience for patients and our staff of doctors and assistants?
What Happened Before	First round of flu shots: 6.1 flu shots administered per hour of staff time
Plot Points	<p>Some changes we made:</p> <p>Front desk prepared forms the night before</p> <p>Clinical staff does part of check-in such as asking patients about allergies by pointing to the posted question written in five languages</p> <p>RN periodically delivers batches of forms to front desk</p> <p>Desk puts in form information when not busy</p>
What Happened After	Third round of flu shots: 30.2 flu shots administered per hour of staff time
Closing and Tie Back to Presentation’s Message	Twenty small changes in process design increased productivity five-fold. The cumulative impact of all these little changes significantly improved the overall efficiency and quality of life within the practice.

### Creating Your Plot

Several years ago I had the privilege of helping a friend who was trying to meet a Hollywood producer to have one of her stories made into a movie. She has had many fabulous life experiences that made for wonderful storytelling moments. She could make her audiences cry or laugh. Each story had its own plot, drama, and outcome. At the time, I read several books about writing a screenplay, and many of the authors discussed the importance of a clear plotline throughout the whole movie. Robert McKee’s (1997) *Story* is a fascinating book about writing movie scripts, in which he discusses all the different types of movie plots. I’m not suggesting you make your presentation into a movie, but I am suggesting that you consider the idea of turning your stories into plots. For our purposes,

a plot can be compared to the theme you listed in your Presentation Overview. Following are some business plots you might consider.

1. **Growth plot:** This signifies how your company grew its business during the last few years. Each product has its own growth curve, issues that made it easy or difficult to increase profits, and a path for the future. For example, a company's plot may be: we are constantly reinventing our business as the market changes.
2. **Failure plot:** A researcher explains how a particular test failed.
3. **From-failure-to-success plot:** A researcher explains how a failed test led him to try something else that produced the desired results.
4. **Consequences plot:** Rather than just share information on how to do certain processes, the speaker creates stories. He presents a positive-consequence story of using the correct process as well as a negative-consequence story.
5. **Visionary plot:** Help your audience envision the future you are creating with words, images, and emotional-impact examples. This can be a positive or negative vision.

There are many ways one can develop business plots. Let's say you want to recommend a specific strategy to a group of people that involves your sharing certain data. If you can create a plot within which to weave the data, rather than just read the data from the screen, your story will capture your audience's attention and make it easier for them to listen. Plus, if appropriate, it will be easier for you to smile with sincerity.

Next, be sure the story is related to your topic and makes a point. And, just to be sure, start with a transitional sentence that clarifies the connection between your topic and the story you are about to tell. Make it your own story. Chances are, if you steal a story from another speaker and claim it as your own, someone in your audience may have heard it. That will be very embarrassing! Make sure your story includes these elements:

1. A visual image, either on the screen or a vivid description
2. Feelings, shown through body language and the tone of your voice
3. Auditory interest (for example, giving both sides of a dialogue can make the story come alive).

Most importantly, practice telling the story to several people before you tell it to a live audience. And finally, keep it short. Make most of your business stories one to three minutes. That's enough to engage the audience and make your point. If needed, use a transition sentence after the story to tie it back to your presentation's message. Here is one example of a story using transitional elements:

“I was making a software product presentation to an important prospect. ‘Familiar and easy to use’ was a key phrase point on a slide. I asked the prospect several questions. Audiences like to be asked about their own experiences. First, I questioned, ‘Do any of you ever travel?’ Most said, ‘Yes.’ Then I asked, ‘Do you ever rent a car?’ ‘Of course,’ they said. I told them that when I rent a car I can always count on knowing exactly how to start the car and drive it. The gas pedal, ignition, steering wheel, and brake are always in the same place. I am familiar with the user interface. It doesn’t matter what kind of car I get, all the user interfaces are basically the same. Our product is designed the same way. Users will not have to learn a new way to surf the Web. The toolbar looks exactly like what they are familiar with in Windows. Since they will be able to use our product without any training or fear of something new, this is a huge advantage in getting them to start and then continue to use it.”

When you are telling a story and talking about what someone else said, don’t talk about it. Make the dialogue come alive. For example, you can say:

“Jose said this, ‘I can’t do that project. I never did it before.’ I told him, ‘Yes, you can. I’ll coach you.’ Six months later with the project complete, here is what he said, ‘I can’t believe it. I really did that project. I’m ready to do another one.’ What started out as a negative, with coaching, ended as a big plus.”

The above dialogue is a much better way to capture the words stated and to change the pace of your talk.

Even when you tell a story, you may sometimes need to summarize its major point or points in order to tie the story to your objective. You may say something like, “What this story points out is . . .” or “This story once again reminds us about how important our clients are to us.”

Another way to summarize the objective of a story is to use a formula. The following is a “formula” from Nick Miller, president of Clarity Advantage Company. In his sales consulting, Nick reminds salespeople to focus on what is important to the client and says: “Nick Miller, president of Clarity Advantage, helps companies generate more sales, faster, more efficiently.”

As with any formula, you may choose to say the words a bit differently. Here are some examples of how formulas are used.

- Formula 1: Your goal is . . . : “Your goal is to increase your market share.” “Your goal is to revitalize your mature business.”
- Formula 2: We are going to provide you with . . . : “We are going to provide you with an ad in *Woman’s Day* magazine.” “We will provide trends analysis of your marketplace.”
- Formula 3: This will enable you to . . . : “This will enable you to send people to your website.” “This analysis will enable you to decide which areas to expand into.”
- Formula 4: You will gain . . . : “You will gain more sales.” “You will be able to gain more customers.”

### **Use a Mini Mini-Story to Tell Your Audience About Yourself**

You may be delivering a scientific paper, explaining to the salespeople how the new system will change the way they place orders, or reporting on a project that no one really understands. When you stand up in front of an audience with people who have no idea who you are, you need to let them in on you as a person. Tell them a “secret” about yourself so they feel connected to you. Of course, share an appropriate secret that does not embarrass you or your audience. Decide whether to tell this mini mini-story as soon as you start talking, or perhaps after you present your executive summary.

How are you, as a person, different? Find something interesting about yourself that you can share, and relate it to your topic. For example, a presenter with twin sons could say, “You think it’s hard to balance the company business, well, you haven’t had twins. My twins are now ten years old and they have taught me a lot about setting priorities” or “Now that I am in charge of business operations, I can put to good use all that I’ve learned by having twins. Now that’s an operation to manage!” One or two sentences say a lot about who you are and make you more human to your audience.

Here is how a scuba diver worked her passion into her presentation on a problematic new project plan that needed some hard work to resolve:

“I’m a scuba diver by passion. What’s really interesting in scuba diving is that the water can be very rough on the surface, but once I’ve gone down even forty feet, it becomes clear and the scenery is gorgeous. From my experience, just as in diving, we have some treacherous waters to navigate here before we can move forward in implementing this plan, but I guarantee you, it will be worth it once we get past the difficult areas.”

This tells your audience something about yourself, indicates where you think you are now in the plan, and expresses the confidence that it is totally possible to reach a satisfactory conclusion.

### **Put Your Audience in the Stories**

How do you get your audience to emotionally connect to your presentation? This is very important when your objective is to persuade them. You may want them to use a particular process in the research lab, donate money for a cause, or increase funding for a certain project.

One way to influence your audience is to explain the situation through their eyes. Here are some ideas:

**Computer system:** I see that many of you are feeling pressured with all the work you have to do. I have seen how you have to constantly redo the project forms. You have called me with questions, and I sense your aggravation. I wish I could wave a wand and have all those forms go away. Unfortunately, due to regulations, we have to fill them out. Today, I want to show you how much easier it will be when you use this computer system. But rather than explain it myself, let me ask Joe in our audience to help me. Joe, is that OK? So, Joe, I am going to take you through this process as if you were doing it right now. At any point, please stop me and tell me to slow down or ask questions. First Joe, you open this screen. You’ll see with one click you are on the screen with the key form. . . .

**Preserving the land:** Everyone, imagine you are sitting on the hill here above this beautiful valley. The day is warm, as you see here in this photo. The sun is shining down on you. You feel peaceful and it is very quiet. You hear the birds singing and feel a slight breeze on your back. You say to yourself, “How lovely it is to be looking over this gorgeous highland meadow with luscious trees and

flowers.” This experience I am describing is one we want to preserve for all of us and our children for many years. That’s why I’m here to explain what we need to do in order to protect this incredible spot.

## PLAN YOUR NOTES

Finally, you may think that you are now ready to create your slides! Yes, you are, but as you create them consider what is needed for your own particular notes. Also, what will you give to your audience? Will you give them paper handouts? Will you send them an electronic file of your presentation? Will you provide them with all the information you presented or just with a summary of the major points? When you have this in mind, you will create the type of slides you need . . . and not have to redo them.

First, decide on the type of notes you need. If you are giving a formal speech, you may want them written out. But if you do write out your talk, start every sentence on the left side of the page. That way, there is less chance that you will lose your place. And, of course, make your notes big enough to easily read.

There is technology available for you to see your notes on your laptop and have your actual slides projected on the screen at the same time. I never suggest my clients use it. With effective slides, you should not need more notes. With notes to see on the screen, you will be even less likely to make eye contact with your audience. When you want to use paper notes, here are some tips.

Imagine this: You had your slides all set for your presentation but wanted some extra notes to remind you of a particular point. You jotted your thoughts down on a piece of paper and planned to use those notes when you got to a certain point in your speech. When you came to that point, you looked at your notes but couldn’t read them. Your handwriting was too small and somewhat illegible. Because you couldn’t stop, find your glasses, read the notes, and then speak, you continued without them. *But*, at that point, you were a little flustered and upset with yourself. Maybe the audience noticed or maybe they didn’t—but you felt uneasy for the rest of your speech.

**Rule number one:** Make sure any notes you plan to use when speaking in front of a group are readable. “Readable” means you are able to read the notes when standing with the paper on a desk in front of you. You can see each word with a quick downward glance. Print your notes; don’t write them by hand. Use at least twenty-four-point type size.



## POWERPOINT TIP

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To use speaker notes go to *View>Note Pages*. You can just type in your notes in the space below the slide. If you want to make the text bigger go to *View>Master>Notes Pages*. You can increase the size of the text for your notes.

2007: *View>Notes Pages*. To change the size of the text on the notes pages go to *View>Notes Master*.

Now that your notes are literally readable, make sure they are concise and make sense to you. Don't use complete sentences. You just want some phrases that remind you of what you want to say.

**Rule number two:** Do not write out your whole speech in speaker notes. Here's one presenter's comments about rule number two: "The only way I use speaker notes is when I am creating my speech and I have an idea or story I think of. I put that in speaker notes. Then I go back and look at them and remember them. I never read from the speaker notes pages. But that's because I know my subject."

You cannot possibly use speaker notes for every slide. Have as few extra notes as possible. You should spend most of your time connecting to your audience, not reading your notes. And always end your sentences looking at someone, not at your notes. Here's what you can put in your speaker notes:

- Opening sentence to make the slide's point
- Information you need in case you are asked certain questions
- Transition sentence to the next slide

If you write speaker notes for others, here are some ideas to include:

- **Speaker to do.** What the speaker can do at this point in the presentation, such as ask questions, show the products, etc.
- **Audience interaction.** How to involve the audience, for example, ask them to discuss in pairs the information just covered
- **Personalize.** What the presenter needs to add to customize the presentation to a specific audience



## **Ideas from Other Presenters**

Below are ideas from other presenters. You will find them useful as you consider how to enhance your presentations.

- I make up speaker notes if someone else is giving my talk. Many times someone else presents the slides. I want it to be clear what the message is behind the slide. Frequently, I know the presenter is reading the slides for the first time the night before the talk. I make the notes concise, and I limit the number. I write them in order of the points on the slide.
- If I am the one who is actually going to click through the slides for the presenter, I get a copy of the speaker notes in order to follow along.
- I like to print the outline view of the presentation and have it handy when speaking. That way, if I am interrupted for any reason, I can quickly find my way back (or move to any other slide) by finding the number of the slide in the outline.
- I use very few notes if I am doing a PowerPoint presentation. I like them for my openings and closings. Since I never show a PowerPoint slide to open or close my talk, I will take a piece of paper and put three points on it for my opening. I put that paper near me to use when presenting. If I need to see my points, I can look down. I do the same thing for the closing. The key is that I can glance down and see the words without bending over. And no one really notices that I am looking. In reality, I rarely look, but I like to know that my notes are available if I want them.

## **DECIDE ON YOUR HANDOUTS**

The question today is: Are you giving out paper handouts or are you sending an electronic file after your talk? First, let's assume that you are providing a paper handout. Think about when you want to give it out. If you hand it out ahead of time, you take away the element of surprise. Wherever possible, it is preferable to distribute handouts after the presentation. This keeps the audience's attention focused on you. But if they are the type of audience that likes to take notes about the slides, then give them the handout before your speech.

Whether the handout is paper or electronic, think about how much information your audience really wants and needs. Will your audience really look through the information at some future time? Do they only need specific key

data and recommendations? I challenge you to do an anonymous survey and ask your audience what level of detail they want to have for future reference. Then you will really know what is important for you to spend your time creating as some type of handout.

Whether you hand out your slides in paper or send electronically, create a table of contents at the beginning of the talk. This way someone can easily find certain information. Salespeople tell me they receive a PowerPoint file for a new product with sixty slides and are told to find the answers in it. Who wants to look through sixty slides? Or, if on paper, who wants to page through a binder with hundreds of PowerPoint slides? If your handout is sent as a PowerPoint presentation, link each item in your table of contents to the appropriate slide. All the reader has to do is click the information and the slide comes up. To really help your reader navigate through the slides, set up a hyperlink on every slide that goes back to the table of contents. Put this hyperlink on the Slide Masters.

## **CONCLUSION**

This first chapter encourages you to not start a presentation by sitting down and creating PowerPoint slides. This chapter starts with the motto: If you take more time preparing before creating all your slides, your success will come easier. You now have the foundation of a talk that has all the pieces of success: organization, executive summary brevity, focus, interest, audience-focused opening and motivational closing with next steps. The next chapter will provide you with some specific ideas for connecting with an audience. You will also learn what particular types of audiences appreciate and expect during a presentation.

Use the Presentation Checklist in Exhibit 1.5 to ensure that you have focused on your key messages.

## Exhibit 1.5

### Presentation Checklist



	Yes	Not Necessary or Appropriate
1. I have filled out the Presentation Overview and asked several people to go over it with me to be sure I have the most appropriate focus.		
2. I have a format for organizing my information. I've shown it to two people and they agree this is the best structure to logically use to make my points.		
3. My Executive Summary is done and people really understand it.		
4. I add value to what is on the screen and tell the audience information not on the slide.		
5. I practiced my stories with my colleagues and they agree these will be interesting to hear and useful for making my points.		
6. I have some notes for certain slides. I made them 24-point size so I can look down quickly and see my points.		
7. I know what is expected for hand-outs and have made them.		

