

CHAPTER ONE

Preparation Precedes Success



Before you run a marathon, you have to find your shoes.

Susan Jones

Luck is a matter of preparation meeting opportunity.

Oprah Winfrey

Good presenting looks easy. Audiences walk into organized rooms, tasks flow smoothly, and activities fit time slots perfectly. It is amazing how much effort goes into making it look effortless.

CLEAR COMMUNICATION: EXCEEDING EXPECTATIONS

Any presentation begins long before it starts: really, with the initial client contact. Clients who invite your services ask predictable questions: What are your fees? Availability? But before you agree to perform any service, *you* must ask questions—smart questions. What is the purpose of the session? The motive or goal of the client enlisting your services? What should attendees gain? Who will make up the

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audience? Are facilities conducive to the session purpose? It's all crucial information:

- To ascertain that you are capable and willing to meet the needs of the audience and client
- To tailor your program to those needs.

If you're uncertain about exact expectations for a session, ask *more* questions and then clearly define what you would do to meet the goal. If it isn't enough to serve the client's purposes, bow out rather than disappoint. I always love the requests to work with staff to bring systemic change to the workplace and then be allotted a 2-hour session in which to do it. Nope, I don't think so. Honesty is the only way to go.

If you can do it, are willing to do it, and say you'll do it—the work of this first contact is still not complete. Make, as well, a verbal contract clearly stating what you'll provide—promising only that which you're certain you can deliver, at the highest quality with value added (a little more than expected—a bonus). A good rule of thumb is that for each day of presenting, there are two days of preparation and follow-up. Some of it is planning, some of it is handout preparation, and some is follow-up and reporting. Above all, don't promise what you *can't* provide—because the inevitable poor evaluations will later haunt you.

QUESTIONS AND ANSWERS

Minimizing the Chance for Misunderstanding

Q: How do I ensure that clients fully understand what to expect from me, since busy people forget phone conversations and the detail of verbal contracts?

A: Create an event file for each presentation. Routinely follow up conversations and verbal contracts with two communications to your contact: (1) A mailed or e-mailed hard copy contract that summarizes the service to be provided, event date and time, site, equipment needs, room set-up requests, and agreed arrangement for handouts and material supplies. Spell out your fees, expenses, and a payment timeline. (2) An e-mail summary of your understanding of session expectations, along with special requests or guidelines given to you. Print a reference

copy of all communications for your event file. When preparing the presentation, reference and honor notes and requests—and if there’s confusion, call or e-mail to clarify expectations.

Q: My clients are often busy people who expect me to remember every detail of conversations, but are hard to reach when I need them. Any suggestions?

A: Request names, numbers, and addresses of clients and any assistant involved in the project, so you can contact them and call them by name. It’s often easier to reach secretaries for answers than the hiring client—and most assistants can handle issues or gain access to the person who can. Take notes on each conversation, date the note, and place it in the event file. Keep the file within arm’s reach for speedy reference during follow-up calls about the upcoming job. Folks like to think they are your only audience and enjoy the personal touch when you reference a request, a comment, or an earlier action. Follow up with a brief e-mail summary of each conversation with the assistant, copying the hiring client.

Q: I have several projects going at a time. If someone calls, I don’t think fast enough to be on top of a project. How can I avoid fumbling?

A: Keep all current project files boldly labeled and within arms reach, with dated conversation notes clipped to the inside cover. Your script is then at your fingertips. If you’re unable to locate files and are not 100% certain of an answer, don’t fumble. Ask to call back within minutes (“I have a client in my office” or “I’m on the other line”) and do so, with information in hand.

Q: I am really conscientious about filling presentation requests. How do I avoid disappointment by failing to deliver what was envisioned for a session?

A: Never rely solely on memory to discuss or prepare presentations. You may think you know what the client wants (“I’ve done this dozens of times before”), but as added insurance 2–3 days prior to a presentation, check to be sure session needs have not changed. Also, a check midpoint during a presentation can ensure that you are delivering what is needed. The latter allows you to tweak as you go and really impresses a client!

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Tailoring Programs: One Size Does Not Fit All

Q: Why do I need to tailor a program to an audience? My program is standardized.

A: Canned, prepackaged programs sooner or later lose their freshness, and audiences feel like something has been done *to* them, rather than *with* them. No two audiences are alike, and no single audience is the same twice. Even if you have an established program with defined content, *some* tailoring is in order—because *this* audience is more enthusiastic than the norm or more resistant. Each workplace climate uniquely impacts the receptivity of the content, and the level of sophistication differs from groups you’ve encountered before. Personal tailoring, even through embedded comments such as, “I know you are in the midst of budget cuts” or “with a 17% retention rate at Main Street School” establishes a connection. Any personal tailoring increases the likelihood of receptivity toward the presenter—on an emotional as well as intellectual level. Know your audience. Don’t tap dance to entertain teenagers.

Preparing Handouts

Q: What about handouts—do I need them, and do they really matter?

A: Unless you are doing a short keynote address with the purpose of motivating or entertaining, you should have handouts. In all cases, form should follow function. Using PowerPoint or overhead transparencies with content? Audiences love thumbnails of the slides and space for note taking. It makes personal revisitation of information much easier and is especially appreciated by linear thinkers. In any case, order handouts to match the sequence of your presentation topics. Place any related articles, additional resources, or references at the end of the handouts (books, Web sites, articles). Don’t forget to include your own contact numbers. This becomes value added and is appreciated by audiences.

Q: I get negative comments about my handouts. I include so much information! What more can I do?

A: “Stuff” is not enough. Again, be sure handouts mirror topic content, properly sequenced, so they don’t appear disorganized or random. It’s not enough for your presentation to hit the standard of excellence:

so too must your handouts. Just as mustard on your shirt, uncombed hair, and runs in hosiery raise eyebrows about your professionalism, so do below-par handouts. Sure to draw complaints are

Handouts that are handwritten (even if they are neat)

Poor quality copies of others' work

Text with spelling or punctuation errors

Use of trite, childish drawings (unless they are actually children's work)

No excuses for sloppiness or shlock work! Spell check is great, but doesn't replace good old-fashioned editing. In this age, anyone can produce professional quality handouts, *and should*. If you are unable to do it, find someone who can (or better yet, can teach *you* how!)

Q: Should handouts include full summaries of all material shared in the presentation or contain only skeletal outlines?

A: Take it off your plate. Make *participants* take notes—it helps them plant memory more efficiently, and it personalizes information. Individuals are more engaged when filling in note space under topic headings, discovering the three bulleted points, or filling in the blanks. They are more apt to *listen* for “the two reasons” if they're not already printed in front of them. Note-taking involves learners in content, as they go beyond listening to summarize and record ideas. Hint: Pause to allow folks to check their neighbor's notes for accuracy, as it's a great way to inspire small group discussion that doubles as a rehearsal. And skillful questioning inspires consideration of professional applications!

Q: Might it just be better to provide topic headings on otherwise blank sheets for note taking?

A: Participants enjoy receiving background articles or related topic resources, and they *want* copies of important information. When it is too voluminous or cumbersome for them to record themselves, provide it to them, either as an on-the-spot handout or by request via mail, e-mail, or phone. Anything I have to give legally and professionally is theirs (value added).

Organizing for Relaxed Delivery

Q: Even though I organize all pertinent information and sequence and write the presentation word for word as I want to deliver it, I'm still not relaxed. Nothing flows. What am I doing wrong?

A: Don't try to memorize a presentation word for word—to do so causes you to focus on recall of rigid, rote memory rather than the logical flow of concepts. Make communication of ideas the driving force during delivery rather than the replication of a memorized unit.

Plan and practice your presentation conceptually and logically. Identify the theme (what is my message?) and goal of the session (what do I want participants to leave with?). Then, identify and master key points, sequenced to transport the audience from the starting block to the finish line. Determine all explanations, tasks, and rehearsals necessary to ensure audience understanding of the key points, and then visualize the performance and rehearse until you have the sequence down pat. Be sure the mental outline flows logically toward the session goal. If you use written notes, work mainly off the sequenced key points—so as activities unfold and fundamentals are shared, the delivery is conversational and natural, not scripted.

Q: Aren't presenters and trainers really just performers?

A: Performing and presenting are fundamentally different. A performer is the focal point—a stand-alone entity, a spectacle to be observed. A presenter functions by connecting and interacting, either mentally or physically, with the audience. The presenter communicates with—not for—the audience.

DO'S AND DON'TS

- **Do** tailor every presentation to fit the audience and its unique needs
- **Do** promise only what you can deliver
- **Do** spend time on handouts—they matter!
- **Do** include handouts that reflect the content and sequence of the session
- **Do** provide copies of important overheads or slides
- **Do** make folks write, providing space for note taking
- **Don't** deliver a session from a script: connect, don't perform