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T: 01788 572 200
F: 0560 3414 068
E: enquiries@catllp.com***

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Presenting as a Team to Our Customers

by
Tony Atkins, Managing Partner of Commercial Advantage Training

Experienced successful presenters recognise the importance of working at maintaining a high level of delivery. They find it useful to remind themselves, and their team, of the following five foundation principles for success.

1. Planning

Planning is generally recognised as being vital. It should involve the whole team. The following are particularly important areas to consider.

1.1. Content. We need to identify the:

- Key messages.
- A, B and C priority ratings for each point to be made. "A" being must cover; "B" being should cover and "C" being nice to cover.
- Benefits for the audience and major on them.

1.2. Delivery. We need to be sure of:

- Who will be the lead presenter.
- Who will cover what points and, ideally, when.
- The intended timings for the presentation and its various parts.
- How the team members will seat themselves, ensuring that everyone can see and be seen.

1.3. Handling of questions. We should consider the benefits of:

- The lead presenter fielding questions and then inviting the appropriate person to respond, or to lead the team's response.
- Using the recognised Four-R approach:
 - Redirect to the appropriate speaker.
 - Refocus onto the proposal.
 - Relate answers to the desired outcomes.

- Refine to specifics.

1.4. Desired outcomes. To aid success we need to define and maintain focus on the:

- Best possible outcome.
- Lesser outcomes that will lead to real success.
- Minimum outcomes to keep the opportunity alive, or enable us to take advantage of/generate other opportunities in future.

1.5. Rehearsal. We need to recognise this will help:

- Identify areas of overlap.
- Reinforce mutual understanding.
- Show potential points for disagreement.
- Test intended timings.
- Make the presentation go more smoothly.
- Provide added confidence to the whole team.

Should a full rehearsal just not be possible, a talk-through together will prove worthwhile. For people who are serious about success this should be an absolute minimum.

It is easy to fail to plan - anyone can do it. It is just not professional to plan to fail. That requires stupidity or arrogance - or, an unhealthy mix of both!

2. Working as One Team

Our aim is to give one complete team delivery and not a series of linked presentations. Working together - seemingly without effort - helps to relax both our audience and our team.

Considering four specific areas will help us to successfully deliver a presentation that is seen as being one complete entity.

2.1. We all need to use affirmative, supportive body language when a member of our team is speaking. This includes:

- Maintaining a mix of eye contact with our audience and looking at our presenter.
- Using slight head nods and occasional soft confirming noises as key points are made.
- Maintaining an upright body shape.
- Always looking interested. We must resist the temptation to see what is happening outside.

- Resisting the need to study our notes to ensure we are ready for our contribution - having prepared we will be!
- 2.2. We should not contradict each other. If necessary we can:
- Add to the information given by a colleague by building on the point made in a supportive way.
 - Use an appropriate opportunity later in the presentation to "clarify" a point not made correctly.
- 2.3. We can use team members to help the presenter. They may:
- Be better able to judge how the presentation is being received.
 - Be able to spot when an adjustment to the planned delivery is required, including when to stop.
 - Have a good reinforcement comment to contribute.
- 2.4. Ensure that everyone can easily see the audience. If seated around a table, we need to avoid:
- Blocking-off a team member if we are seated between our audience and a team member. We may need to sit a little away from the table.
 - The "us and them" syndrome by sitting as one team directly opposite our audience.

3. As the Presenter

Working in a team can be more difficult than presenting alone. Everyone in the team has to understand each other. They have to work as one in an often unknown and changing situation.

As the presenter this can provide us with additional challenges.

- 3.1. We need to be flexible. Throughout we need to:
- Look at our audience, observe how we are being received and adjust the delivery accordingly.
 - Remember using situational humour can help, but jokes are high risk.
 - Be responsive to contributions and prompts by our team.
 - Comply with any hints from our lead presenter to stop or adjust our delivery.
- 3.2. We obviously need to know our own content. We must be aware of:
- Areas or potential areas of overlap with other presenters. We must not stray into their main points without very good reason.
 - The A, B and C ratings for our points. We can use this rating to adjust our delivery to accommodate any unexpected levels of contribution from our audience, or any change in anticipated available time.
- 3.3. We need to include our team members. Remember to:

- Use "we" and eye contact to keep our team involved.
- Refer, by name, to team members when:
 - Giving advance notice of a part of the presentation to be covered by them later.
 - Reinforcing a point made by a previous speaker.
 - Needing to repeat a point previously touched on, but not covered completely.

3.4. We must stop when we:

- Have covered all of our points, even if it is quicker than anticipated. We should never pad-out to fill time.
- Recognise our audience have heard enough, or show signs of wishing to move on.
- Detect our lead presenter wishes to move on, or change the original plan.

4. Summarising the Meeting

Clearly, at the end of the meeting there needs to be a mutual understanding of what has been agreed. The lead presenter normally ensures that this is achieved.

4.1. In summarising, lead presenters should:

- Reinforce the accepted key messages.
- Confirm the agreed actions to move forward.
- Show real enthusiasm for the progress made and the future business relationship.
- As appropriate, thank the audience for a very useful/enjoyable meeting and for their contribution/hospitality.

5. Reviewing Performance

Reviewing performance is vital for developing both the overall skills of our organisation and the particular skills of the individuals involved.

It is considered best to review soon after the presentation, provided enough time has elapsed to enable people to be objective.

If we review immediately after the presentation, our passion may not have subsided. If the presentation went well, people may not be open to identifying opportunities to improve. Equally, if the presentation went badly, people may not be able to contribute openly and respond positively to any identified improvement opportunities.

5.1. To gain maximum benefits, the review should:

- Include all team members.

- Be supportive to everyone.
- Recognise effort and achievement.
- Be specific and focus on behaviour/actions and outcomes.
- Start with the most pleasing aspects and what went well.
- Identify any concerns or opportunities to improve.
- Encourage full contribution from all team members.
- Be considered a fundamental part of presenting as a team.

Note

Tony Atkins will welcome the opportunity to discuss any views or comments prompted by this article. He can be contacted on his direct line number 01788 572 200, or by email at tony.atkins@catllp.com

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