

## Oral Presentations: An Evidence-based Checklist

The following checklist relates to making persuasive oral presentations for problem solving. Many of the guidelines draw upon the principles in *Persuasive Advertising*. [The principles are denoted in brackets].

### Structuring the talk

- \_\_\_ 1. *Use only strong arguments*. Avoid weak arguments as it adds complexity and because people tend to take an average of the strength of the arguments, [7.1.1]
- \_\_\_ 2. *Focus on positive arguments*. Instead of showing what is wrong, show how you would improve upon the situation. [7.1.2]
- \_\_\_ 3. *Use indirect conclusions for “new” conclusions*. Build the case so that the audience can infer the conclusions on their own when a conclusion is new or challenging. Do not force conclusions on them. But if the evidence is not obvious, or the audience already agrees, provide explicit conclusions.
- \_\_\_ 4. *Use two-sided arguments*. Put the favorable arguments first. Describe risks and limitations and explain how they can be handled.
- \_\_\_ 5. *Use a single theme – or two – to tie the talk together*. [7.9.1]
- \_\_\_ 6. *Agenda*. Make an agenda for the talk. If appropriate, send the agenda to the client before the talk.

### Preparing for the talk

- \_\_\_ 7. *Rehearsal*. If the talk is important, ask one or more people to act as if they were the clients and present your talk to them.
- \_\_\_ 8. *Dress*. Dress to show respect for the client. An added advantage is that a formal dress adds credibility. [5.6.2]
- \_\_\_ 9.  *Casting*. If working in a group, select a spokesperson who sounds credible and who is similar to the client (e.g., in accent and manner). Ask the others to sit among the clients. [ 5.6.1, 5.6.2, 5.6.3]
- \_\_\_ 10. *Handouts*. Where appropriate, provide handouts such as an agenda and space for comments. Avoid detailed handouts as they can distract.
- \_\_\_ 11. *Slack*. Include slack time. For example, if you have 20 minutes available, plan the talk for 15 minutes. Make some parts of the talk optional, and do not show these on the agenda.

### Presenting the talk

#### Organization

- \_\_\_ 12. *Purpose*. Describe the objectives of this talk and what actions steps will be considered.
- \_\_\_ 13. *Introduction*. Present the most important things first. [9.1, 10.1] Focus on action-oriented recommendations and benefits. [6.17.1, 6.17.2, 6.17.3] Attention is at its peak here. Do not distract with stories or jokes. [8.8.2]
- \_\_\_ 14. *Agenda*. Present an outline of the presentation so your audience will know where you are headed. Show timing, such as “the last ten minutes will be available for questions.” [9.4.1]
- \_\_\_ 15. *Structure*. Build the presentation around the recommendations.
- \_\_\_ 16. *Show support for each recommendation*. [6.3.1, 6.3.2]

## Visuals

\_\_\_\_ 17. *Visual aids*. Visual aids (e.g., Power Point) can help people follow certain aspects of a talk. This is especially valuable when showing design, presenting lists, and summarizing data. However, for complex material, audio-visual is difficult to comprehend. The material must be organized so that the different communication modes reinforce one another. For example, you do not want people reading ahead of you, so either roll out each point as you discuss it on a slide, or use many simple slides.

\_\_\_\_ 18. *Use key words as bullet points*. Keep the visuals simple so that the oral presentation keeps pace with the written information. [9.4.1] This helps to retain attention and gives you a reason for being there -- to explain each point.

\_\_\_\_ 19. *Keep overheads simple*. Eliminate anything that does not contain information [7.9.2]. This means no wallpaper. If something on a slide is not absolutely necessary, remove it.

\_\_\_\_ 20. *Use high contrast for text*. Make it easy for viewers by using high contrast between the text and the background. Use black on white. Do not write on illustrations or on wallpaper. Do not use colored fonts [9.5.2]

\_\_\_\_ 21. *Use sans serif font to enhance legibility*. [9.5.1]

\_\_\_\_ 22. *Use color only when it has a meaning*. For example, "We recommend that you make the product available in the following colors." [7.11.1] When you do use color, explain the meanings in words because some people are colorblind. In addition, people may make B&W copies of the slides.

\_\_\_\_ 23. *Use exhibit titles only if conclusions are not obvious*. Provide an informative title for exhibits if the conclusions from the data are not immediately obvious or if the conclusion is already widely accepted by your audience [5.9.1, 5.9.2].

\_\_\_\_ 24. *Contingency plan*. If you use PowerPoint, plan the talk so you do not lose time setting up. Fortunately, audio is as effective as audio-visual for much material. Have a hard copy of your slides for yourself.

## Speaking

\_\_\_\_ 25. *Use one speaker*. It is easier to manage the presentation if you have only one speaker. If you need a second speaker, the lead speaker should be responsible for timing and questions.

\_\_\_\_ 26. *Accept clarification questions*. Restrict questions to clarification during the first part of the presentation. In your introduction, ask the client (audience) if that is acceptable, stating that this is how you have scheduled the timing for your talk.

\_\_\_\_ 27. *Post serious questions*. This will help to ensure that you complete your talk and the talk will look coherent. If questions other than clarification ones arise during the presentation, summarize them (and perhaps write them so all can see). Say that you will address them later in the talk or after the talk.

\_\_\_\_ 28. *Use a moderate pace*. Talk at a moderate pace if you have excellent content. [10.4.2] If the arguments are weak, speak at a faster pace, as this will give people less chance for developing counter arguments. In addition, fast talkers are regarded as more competent, truthful, fluent, energetic, enthusiastic, and persuasive. In effect, by talking fast, you move the attention from the content to yourself. You can speak up to 30% faster than the normal pace and still be understood as long for material that is already known by the audience. [10.4.2]

\_\_\_\_ 29. *Use a quiet, reasonable tone*. However, the speaker should show energy and interest and use forceful language. [7.5.1]

\_\_\_\_ 30. *Pause before key points*. Pauses of two seconds are recommended to create some interest in what follows. [10.4.3]

\_\_\_\_ 31. *Pause after key points*. Pauses allow people to reflect on what was said. [10.4.3]

\_\_\_\_ 32. *Check for understanding.* Ask if the audience needs clarification. This also helps to seek their involvement. [5.11.5]

\_\_\_\_ 33. *“Ask” questions that you will answer.* To gain attention, raise a question before you make a key point. Do this occasionally and only if you have a good answer. [6.12.1]

\_\_\_\_ 34. *Make eye contact.* This raises interest and increases trust. Talk to people in the audience who are good at listening. If you are being filmed, look right at the camera. [10.1.3]

\_\_\_\_ 35. *Avoid humor.* If you have strong arguments, be careful about humor. Humor is seldom appropriate for a high-involvement process as it detracts from thinking about the arguments. It may also steal the spotlight from the recommendations. However, gentle humor that is relevant to the message may help to reinforce the point. [8.8.2]

\_\_\_\_ 36. *Repeat key points by changing the way you make each point.* Space the repetition. As this is a high-involvement situation, avoid excessive repetition. [6.13.3]

### **Ending the Meeting**

\_\_\_\_ 37. *Orient the questions.* Provide guidelines for the questions. In particular, orient them around the proposed action steps. Say, for example, “What do you need to know about recommendation #2 before taking action?”

\_\_\_\_ 38. *Listen.* When people ask questions, the key thing is to listen and to understand. You want to increase the amount of time they spend talking by reducing the time you talk. Normally, it is the custom to make suggestions in the form of questions, so in most cases you do not need to provide an answer on the spot. “Thank you” is often sufficient. If people really need an answer, they will let you know. If the issue is complex and you are uncertain, rephrase it to ensure that you understand.

\_\_\_\_ 39. *Do not solve problems during the session.* If you are not sure how to answer something, do not make things up on the spot. Check to make sure that you understand the question and tell them you will get back to them.

\_\_\_\_ 40. *Summarize.* After all of the questions have been asked, summarize them and say that you plan to do address them and get back to the client.

\_\_\_\_ 41. *Go for the close.* Go back to your recommendations and try to gain agreement on action steps. [6.17.1, 6.17.2, 6.17.3]

\_\_\_\_ 42. *Use the “rejection and retreat” approach.* If a recommendation is not accepted, raise the possibility of taking a smaller action step.

\_\_\_\_ 43. *Leave a written report (or promise one).* The written report should be in prose. A week from now, the overheads will not be intelligible to others.

### **After the Talk**

\_\_\_\_ 44. *Send a summary of action steps.* Send a summary of the key issues and of the action steps agreed on as a result of the talk. Describe who will do what by when.

\_\_\_\_ 45. *Inform the client about progress.* Follow-up with the results of your action steps. If you made changes as a result of the meeting, tell the client about them.

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