Delivering Winning Presentations

For me personally, give me any opportunity to speak to any audience at any time, I'm there! With only a couple of exclusions on location, but other than that, I'm powering up my laptop, thinking through the talking points about both the concepts and the realities that are core to my values about business and readying my various PowerPoint templates. Arming myself, if you will, as I prepare for yet another opportunity to present, engage and excite an audience! I just love presenting!

Over a career spanning from large corporations to tiny startups while spending two decades teaching at MIT and at Tufts, where I was the Director of the Entrepreneurship Center and I continue to be a Professor of Marketing, by now I've given many thousands of speeches, investor pitches, classroom discussions and customer presentations, most of which have been centered around some level of using PowerPoint or any of its equivalents as a backdrop. Which also means that I've made every possible mistake, *more than once or twice*, which brings me to why I wrote this guide, which is simply because you should not have to go through that same learning process that I did. Too painful, too teeth-gritting and way too much a waste of time.

Let's start with a couple of data points:

Most importantly, you must focus in your presentations on both sides of the table-so to speak. There's your side, which is that part of the room or the screen where you or a small team of your co-presenters are attempting to get across your discussion points, your value propositions or your business ideas. All of that side of the table is critically important, of course, to you…but, not necessarily to "them" on the other side of the table or watching the screen from the perspective of "the audience".

- To a large degree, there will be some people in that audience be it a 200 person breakfast meeting or 10 students in a classroom, or two bored venture capitalists in a 30 minute pitch or one prospective customer decision maker who may not care at all about anything you have to say.

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- You also have no idea of gauging the "the distraction meter" of the audience. What's the level of unexpected time or personal pressure that's already brewing in the frontal lobe of your audience, who although they had made the time available to be there at that point in time, now have some other issue which arose in the meantime, and, right now, while you're talking, they're thinking only one thought… *"How do I get out of here quickly"?*

Of course, then there's the other consideration, which is the hard data about the walkaway result of the time that you will spend in front of that audience of either 2,000, 200, 20 or 2, and that research states that…

- People typically retain only 20% of what they hear.
- 30% of what they see.
- 50% of what they hear and see.
- 70% of what they say…and…
- 90% of what they say and do.

So, If you really want to inspire your audience with five out of every ten words that you say, you must get those individuals saying and doing it themselves, which means that the most critical phrase in understanding what you absolutely must do when presenting is to **"Actively Engage".**
Actively engage your audience of 2,000, 200, 20 or just 2, and you will leave them with both "signing up" and wanting more. What I also know is that the total opposite of **"Actively Engage"** is "Passive Lecturing" which too often results directly due to too often-maligned medium of Microsoft's PowerPoint application.

First, let's do a bit of a history lesson of PowerPoint through the few paragraphs of its Wikipedia definition where we find the following:

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Microsoft PowerPoint is a presentation program,[7] created by Robert Gaskins and Dennis Austin[7] at a software company named Forethought, Inc.[7] It was released on April 20, 1987,[8] initially for Macintosh computers only.[7] Microsoft acquired PowerPoint for $14 million three months after it appeared.[9] This was Microsoft's first significant acquisition,[10] and Microsoft set up a new business unit for PowerPoint in Silicon Valley where Forethought had been located.[10] Microsoft PowerPoint is one of many programs run by the company Microsoft and can be identified by its trademark orange, and P initial on the logo. It offers users many ways to display information from simple presentations to complex multimedia presentations.

PowerPoint became a component of the Microsoft Office suite, first offered in 1989 for Macintosh[11] and in 1990 for Windows,[12] which bundled several Microsoft apps. Beginning with PowerPoint 4.0 (1994), PowerPoint was integrated into Microsoft Office development, and adopted shared common components and a converged user interface.[13]

PowerPoint's market share was very small at first, prior to introducing a version for Microsoft Windows, but grew rapidly with the growth of Windows and of Office.[14](pp402–404) Since the late 1990s, PowerPoint's worldwide market share of presentation software has been estimated at 95 percent.[15]

PowerPoint was originally designed to provide visuals for group presentations within business organizations, but has come to be very widely used in many other communication situations, both in business and beyond.[16] The impact of this much wider use of PowerPoint has been experienced as a powerful change throughout society,[17] with strong reactions including advice that it should be used less,[18] should be used differently,[19] or should be used better.[20]

Today, 35 million PowerPoint presentations are given each day by an estimated 500 million users worldwide. I find it amazing and interesting that only 40 words comprise the average PowerPoint slide length.

In spite of its detractors, who are largely unknowing bloggers trying to grab interesting headlines, PowerPoint is installed in well over one billion computers and is still the primary go-to medium of business people, students, lawyers and every other professional attempting to draw attention and focus to their points-of-view.

When I was the Director of the Tufts Entrepreneurship Center, one of my best professors, who is also a CEO of a highly respected software company, always prided himself on his statement that he never allowed PowerPoint to be used in his company. Having said that, he usually did not follow that statement up with the explanation that his company' primary product was a presentation medium that often achieved the same result as *"something like"* PowerPoint.

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Bottom line: PowerPoint is still the undisputed leader in presentation software, and it's unlikely that it's going away or that Microsoft will make a mistake by not continuing to invest and enhance its features!

So, PowerPoint it is, but PowerPoint is just "a thing"; it's just a software medium. Through the process of this book, my intent is to make you the absolute best presenter with or without PowerPoint since the real magic to your success as a presenter is all about you, what you have to say and how you say it. You will find by following these 10 Rules that are outlined here that these requirements will apply to you everywhere whether you're standing in front of a prospective customer, you're leading a national or regional kickoff sales meeting, you're pitching to two venture capitalists, or you're making a major presentation to a room of 200…or 2,000.

The same requirements, the same rules and the same recommendations will apply everywhere, which is what this ebook is all about, so let's jump right into the deepest end of the pool, and first, let's start by thinking about you!

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Rule #1: Do not present, but *actively engage*! Do not present, but share!

If you want to get to the 90% level of retention, focus on the true meaning of *sharing* your ideas with the people in front of you!

Success in this process of creating truly remarkable presentations is not about *"giving"* ideas. It's not about *"educating"*. And, it certainly is not about *"delivering"* a lecture or even "making" a speech. Success and getting to the "Oh, wow!" factor in terms of remarkableness in what you have to say is all about active engagement and the personal sharing of your experience, your knowledge and your recommendations with the people in your audience, in your training session or the prospective customer sitting across from you at their desk.

What you are doing here is telling a story about the value that you, your ideas, your product and your services will provide the people who are actively listening to you for those five or 60 minutes. And the way that you are going to do this is by being personal and human and most importantly sharing with everyone in your audience everything from broad concepts to specific recommendations that provide a definitive value to each person. In order to that, you need stop thinking about "an audience" *just listening* and move to *actively engaging* with real live people just like you.

Start with a Personal Story. Show You're Authentic!

Immediately break down barriers between you and your audience by telling a short and specifically relevant personal story about yourself. You will quickly get people to listen simply for the reason that everyone likes stories and especially short stories. Your job is to quickly tie that story into the subject that you are there to talk about.

A personal example for me, since I'm a professor of entrepreneurship, rather than launch into *"The 10 Best Success Factors to Becoming a Successful Entrepreneur",* I'll start with the fact that my father was an entrepreneur leading a jazz band in the 40's, that my grandfather left rural Vermont in 1908 locating in Somerville, Massachusetts where he opened a jewelry store (actually half a store), and then end that storyline with the fact that my great-grandfather, Horace, headed west in 1860 to seek his fortune on the frontier of the new state of California. With that story settling in as the foundation, I will then move on to what I'm going to talk about since I can use that baseline story to talk about entrepreneurship, sales or marketing.

By the way, when you are beginning your presentation do not waste time going through your own background, or worse, show a slide about who you are and what you've done. By the time you're in front of a prospective customer or an audience of 200, they already know about who you are, what you've done and to some degree what you have to say by looking at your Linked In.

If they've already made the decision to spend time listening to you, then immediately start by focusing on engaging them. What I used to do is to spend five boring minutes going down what I had done in really tiny type that no one could read anyhow. Today, I merely make a comment like… *"you've probably already taken a quick look at my Linked In and been totally bored by it. The bottom line of what it says is that I've had a ton of experience in this topic."*

- **Talk About the *"Active Engagement"* Thing**.

  Identify with your audience right up front letting them know that if they have questions, if they want to know more, if they want to disagree or they are in "violent agreement" with what you're sharing, they should be an active partner with you and ask, comment, declare or otherwise voice what they're thinking or would like to say. In my presentations, whether that's in front of 35 students, five senior decision makers or 200 breakfast attendees, I want to create an actual discussion, so I always begin with telling everyone that I expect them to ask questions and interrupt me.

  The result of this process is that if the presentation then becomes a "You & Them" discussion, you'll achieve a minimum of a 25% retention five days later. This is a huge number and provides you with a blinking green light to move to the next step-whatever that is-with that group of people.

- **Let Them Know Where You're Starting, Where You Are and Where You're Going.**

  Like any good story, and especially a story that has a definitive starting and ending point defined by the clock, it's critical to maintain a process of active engagement, and one of the simplest methods is to say…

- "Here's where I'm taking you over the next 45 minutes"
- "Here's where we are now"… (maybe you note that 10 or 15 minutes in)
- Repeat that same identification of content and time in another 10 or 15 minutes
- "Here's where we're going during the remaining 10 minutes"
- And then you summarize the three most important items want them to remember.

What you are doing here is being both an architect and a construction worker. You're painting a general outline of what you are going to discuss and the value that it will provide them. That's the architect part.

Then, as the construction person, you're laying down the planks, one by one, of what will become the complete structure that you want to provide to your audience.

This tactic will ensure that you will never confuse or lose your listener as to where you are or for them to think *"what the heck is he talking about now?"*

This tactic also allows you to quickly do "a check-in" such as in *"Does that make sense to you?"*

These type of very short questions make certain that you will maintain a strong level of active engagement between you and your audience.

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Rule #2: Be A Human Person. Be Authentic!

As a rule, you need to remember when you walk out on to that stage, you stand in front of that senior management team of a prospective customer to give your opening or closing presentation, or you're in front of a class of college seniors just one course short of graduation (always a challenging semester), that you're a person…*a very real person*…and so are they.

As a result, you should always speak in human terms. You're not "a lecturer", and they are not "an audience", plus if you think, speak and act in human terms, you will find that achieving Rule #1 by creating an environment of active engagement will also be that much easier.

In the quantitative and analytical world of Marketing, we use the term of "personas" when we're figuring out who are customers are and who our prospects should be. In fact, when we go through this persona creation process which requires detailed research and surveys, we always anoint them with names like "Charlie CFO", "Sarah Sales" and "Pamela President" so that we can more easily define their skills, their experiences, their backgrounds and their attributes which constitute their separate personalities. The other reason for working through this process is that we always want to think of our personas in human terms since we then can more specifically define the value that we plan to deliver while figuring out how the means through which we will market and sell to them. In order to this and do it well with more authenticity, we think of them as people and not inanimate blocks of black text. To carry that one step further, we often will have pictures and even full-size cardboard cutouts of our personas in our office building.

You need to do the same with every interface that you do with your persona whether that's one person or 200. Understand and research the people with whom you will be discussing ideas before you meet them and not only will you *feel* more self-assured, but using the following tactics, so will they *feel* that they are much more attuned to what you have to say and the value that you will deliver to them as humans rather than as "an audience".

- **Do the Research!**

With smaller groups of one to twenty people, there's absolutely no excuse for not researching everyone on LinkedIn! Understand who they are, their backgrounds and their history, where they went to school, and what they studied and where they live and what they do today.

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With larger groups of 20 to 200 in a group who have come together to listen to what you have to say, someone has put that speaking opportunity together. They've marketed to specific groups of people about the value that they will receive by coming together and listening to you…*and they have the names and emails of those people*. Not only do they have names, but they know where those people work and most probably something about them. At least, they will most likely know a lot more about the people in the audience than you as the presenter on stage.

The organizers of the event will usually share that list of attendees with you, and what that list provides you is absolute gold! By reviewing who will be attending, you can identify names, and perhaps recognize people and companies that you know or have worked with before.

Take the time to do a 60-minute review of who's attending, talk to the event organizers and do a random LinkedIn review of about 20% of the attendees. You are not going to do an indepth analysis here. Just a 15 second representative look at a small number to get an impression of who the personas are sitting in the audience.

- At the very least, this process will make you feel more in sync with who's in front of you.
- At the best, you will recognize a few people and companies that you know.
- If that's the case, connect with them, thank them for attending and ask why they came?

- **Use First Names.**

An easy-to-do tactic which has significant emotional and connection impact is the ability to use first names when partnering with an audience. You can do this by using tent cards for 10 to 35 people if they are in a classroom of U-shaped setting. Have the participants write their own (first names-only) names in large letters allowing you the opportunity to easily see and call on them in a discussion of active engagement.

Drafting off this idea is another (must-do-anyhow) tactic, which is to get to where you will be speaking at least 30 minutes (60 if you can) beforehand. As you prep for the presentation, introduce yourself to anyone who comes into the room.

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Ask them in human terms about themselves and why they came to participate in the discussion. This process breaks down any barriers, it starts you talking and identifies a few people with whom you can carry on a quick dialog from the stage or in front of the whiteboard or screen as in… *"Carrie and I were quickly talking before we began this morning, and I learned…."*

- **Get There Early**

Last spring, I had a morning speech to deliver to approximately 800 people. The introductions began at 10:00AM; I was in the room at 7:00 AM. The first thing I always do is to check in with the audio-visual people to say hello and ask if it would be okay if I did a sound check and would they mind if I tried out my PowerPoint slides. At a non-busy time, an hour (for most events) or two (for major events) before the event, the AV and communications people will always be there. They are typically among "the forgottens", who rarely get thanked, but often get blamed, so I always go out of my way and take time to meet them and ask how their day is going.

I then make sure that I do the same thing with the administrative staff who will be at the event super early sorting out name badges and attending to the smallest of details with the event people at the location. For me, example of this ranged from TAs in my classrooms at MIT or Tufts or the highly capable staff at the Associated Industries of Massachusetts or the Association for Corporate Growth. They are always on the ground long before the event begins worrying about every detail while paying attention to both no-shows and walk-ins all at the same time.

These people are the warriors, the traffic cops and the detailers, and it's critical to your success to say hello, take a look at the attendance list and ask if there's anything you can do for them. It's all part of you being human with everyone plus by meeting and talking to the critical administrative staff an hour or so before the event, you'll get yourself in the rhythm of doing the same once the room starts filling up. When that occurs, by the way, walk right into the room, hand out, using your name and thanking that person for being there. This is also the time when you quickly ask and quickly listen to the answer to the question of… "So, why are you here?" I do this in class, at sales meetings and during events, both big and small. It always breaks down any barriers that may have been prematurely set in anticipation.

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- **Ask Big Questions!**

Right at the beginning, ask the people in the audience questions such as…

- What would you like to hear today in addition to the agenda you received?

- What do you want to make certain that we discuss today?

- What would define success leaving this meeting this morning?

- On the first day of a 13-week semester, I always ask "What's my job?"

What you're doing here is starting to break down any artificial barriers that may exist.

Personally, I also make sure that I write down on a pre-ordered sturdy easel that is well positioned to where I am standing, a few bullets in big, highly legible words that I hear which often keeps me on track during my discussion, and also allows me to refer back to that list at the end and ask… *"How did we do today?"*

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Rule #3: Feel the Room

If *"Practice, Practice & Practice Again & Again"* is one of the most important underling principles of your presentation success, then one of the means of stepping into your comfort zone with what you have to say after you've done all of the practicing is to become very comfortable in the room. Also, this is one of the reasons that you want to be early at the location, *feeling* the room and walking through your talk either in total or with the critical points you need to cover…and especially talking through the opening…*again*.

This rule of feeling the room applies everywhere-large audience speeches, small company gatherings, kickoff sales meetings, classroom discussions and even one-on-one customer or prospect meetings. You want to be totally comfortable in your own bubble of space, and there's no better way to do that than ensuring that there won't be any surprises.   I can't begin to remember how many times, I've had to rearrange all of the furniture, move or just get rid of lecterns or realize (even when we've given explicit instructions in writing) that there's no whiteboard or easel in the room as requested…and promised.

The good news is that typically all of this is correctable 45 minutes ahead of the start time. Having said that, when microphones fail and projectors don't project even at the most technically sophisticated companies, hotels and universities, there needs to be a workaround…since the show must go on.   This just happened to me at $100 million software company when everything electronic just failed completely…and I know that it will happen again somewhere during this upcoming …since it always does.

- Walk around the stage and the front of the room making sure that you're not blocking anything or being blocked by anything.

- Do the same by walking out where the audience will be located, or your prospective customers will sit making sure that there is nothing in the way or them distracting from seeing and hearing you.

- Check the sound, *of course*…always making sure that you inch up your own speaking voice by one click.

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- Check the slides…one more time. It wouldn't be the first time that the slide deck that was sent over the primary afternoon was an old deck even though the labeling was correct. This is also the same reason that you…

  …email the slides the day before
  …bring them with you on your laptop
  …and have them on a memory stick tucked safely away in your jacket.

Do I Stand or Walk Around?

The correct answer is that it's totally up to you and your style. I'm a roamer myself and love to walk around the stage and will often walk directly out into the audience. If you are going to do that, you need to make sure that your lavalier mike will allow that, and that by walking around, you are not going to block some segment of your audience or classroom.

If you decide to stand, and you're going to use a lectern, and you're using slides, then you need to take the time before you begin speaking and work out the logistics between a table somewhere in the room that holds the hardware and related cables, the projection screens and your remote clicker. Nothing screams "Amateur" more loudly than plugging in repeatedly, fumbling through interfaces while confusing the switches that you thought controlled the sound and you then find out that they dimmed the lights.

Very simply, there's zero excuses for not having all of this done and sorted through long before you get up to speak! In an event where there's an actual speech to be delivered, or in a classroom setting, this is relatively easy to prepare for. But, what about in a customer setting where you're the invited guest? The same rules apply although you typically will not have the freedom of coming into the building or the room one or two hours ahead of time. What you do have is the ability…more like, the requirement…of working directly with the administrator a week before the meeting to make sure that everything is carefully prepared and that there is an audio-visual techie person on hand when you do show up 30 minutes ahead of time.

Personally, I like standing with nothing in front of me so that there's no physical barrier between me and my audience. I position my laptop a few feet from me at a lower level, often using the seat of a chair, or if I'm in a room where the 10 or 20 person group is sitting around a U-shaped table (my favorite configuration), on the edge of a corner of the U.

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With that configuration, my laptop is close enough that I can quickly preview the next slide and yet far enough away that the focus is on me and not a piece of hardware …other than my always-present remote clicker.   Not surprisingly, I will always have two remotes-one in my hand and the other in my jacket or vest pocket so that when I misplace the one I was holding or drop it in a water glass, as I've done twice, I am ready to go.

Off to one side, I will always have a sturdy easel with a new full pad of paper so that I can note critical points or the answers, in bullet format, to the questions that I asked the audience right at the beginning about what they wanted to focus on.

- **Bring your Own Toys**

Coordinators change or get sick, emails are lost, instructions are misunderstood, and in general, 25% of the time "things" just go absurdly wrong. In order to reduce the potential problems, just a few tactical hints.

- Bring your own remote clickers…as in two, for the reasons above
- Bring your own 6-foot HDMI cord. Probably overkill…except when it isn't
- Bring your own projector. Total overkill…except when it isn't
- Bring your own multi-interface connection cable. Never overkill
- Bring your own brand-new extra wide Staples markers in black, blue and red

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Rule #4: This is All About You

Yes, I know that in outlining some of the prior rules, I've pushed you to think not about you, but about the individuals on "the other side of the table"-the personas if you will, since I always want you to think about those individuals as real people and not inanimate objects. Having said that, nothing happens without you, so this particular rule is all about you, your attitude, your style, your preparation and your absolute focus on being totally successful in your presentation.

Your Preparation is Absolutely Critical

Yes, we know about "Practice, Practice & Practice More", which is a very nice-to-hear cute comment, but what does it really mean, when it gets down to the actual process or preparation for your presentation?

Calendarize Your Timeline

The first thing that it means is to lay out a timeline for your presentation weeks ahead of time.

- Put in your calendar exactly when you need to present down to the day, the exact timing and the exact location. Leave nothing to chance. I did just once decades ago, and on that Sunday morning when and where I was supposed to be the kickoff speaker at a Boston hotel, I was skiing in Vermont. Totally, my fault. No excuses other than my being very careless and inconsiderate. Never happened again, but that one time cemented a fear in my head forever!

- Be specific everywhere including down to the office address complete with the room location and details of where you're going to park. No better time to do this than right at the beginning once you have committed to the presentation.

- Then back up your calendar from that date until the day with whatever timeline you have even if the date is three months away, or it's happening next week since everything will come down to the time that you have created in your schedule to prepare.

- As soon as you have confirmed that you will be presenting and have hung up the phone after speaking with the person who has asked you to present, take 30 minutes and write out exactly what you just heard while talking to them. Bullet down the primary objectives, the comments about the audience, and the details of the length of time you have to speak and whether this is a day-long training class or a one-hour sales kickoff.

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Take a second look at this outline that you've just written out at a couple of hours later shaping it into a professional response email and send it off to your contact validating what you and that person talked about in terms of the event's objectives and logistics.

This email is a simple outline, again in bullet format, first validating the expected objectives of the presentation and then detailing all the logistics from location to length of time to fees if this is a paid speech. Leave absolutely nothing out and, most importantly, ask the question at the end of the email *"Do I have this correct?"* and *"What might I have left out?"* and, *"Are there other objectives that you want to achieve?"*

Now, what you need is to receive a return email or text confirming…*or changing*…what you outlined in your initial email. Do not be satisfied with a quick phone call noting *"Yes, that's fine!"* Really push to get a confirming email or text to get full agreement!

Now, Plan Out a 4 Stage Time Schedule in your Calendar:

1. The date by which you will have completed a very rough draft.

    This draft might be in text or constructed in a PowerPoint depending on how you think and create. Personally, I can only create using PowerPoint since it gives me more structure, and it's how I think since in my head, I am always projecting myself to being in front of that specific group of people.

2. The date for a final rough to be completed. There will be many editions of this stage.

3. The date for the written text that will accompany the slides. Again, many iterations.

4. The date for the final slides and text.

    This last stage will have many edits up to the day before the presentation.

• Then within the framework of your calendar define time for talking through your presentation out loud first sitting in front of your computer, then standing, and then standing with your computer screen located ten feet away from you.

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- Then print out your slides (slides only, no text) and put them on the uncluttered passenger seat in your car so that you can talk through your presentation whenever you're stopped in traffic…which, for me living and working in Boston, is most of the time. Piece by piece, slide by slide, section by section, you'll start to adjust your thinking, your ideas and the tone of your voice.

- Four days out plan your first total run through of all your slides while standing up as if you were on stage or in front of your prospective customer or venture investor.

- Now repeat this process again and again right up to the evening before your presentation at which time, you will do absolutely nothing other than get a solid night's rest.

- Early the next morning, give the entire presentation to yourself flipping through the slide deck quickly reinforcing critical points

Then, and only then, are you ready to get to the location early and do one more final run through.

You Need to Feed your Head

Grace Slick's iconic advice back in the 60's in the song, "White Rabbit" was to commit to a complete and total involvement, which is exactly what you must do (without the drugs, of course) as you get down to the narrow end of the time and preparation funnel for your presentation. You need to adjust everything around you during that last 12 hours to delivering the absolute best and the most impactful presentation that that audience has ever heard.

What you want to synthesize in your head-in addition to the long and loud applause-is to visualize that every single person listening and engaging with you is tweeting along with a picture that they have just taken with their phone about the impact that you have just created in that room.

You entire focus on stage is to absolutely create "The Oh Wow! effect" and leave the room with people wanting more…*and not wondering when you will stop.*

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Just three of the many tactics that I use to feed my own head. These may or may not work for you, but the essential part of this very critical tactic is that you need to be totally focused with every cell in your body as you take the stage or walk into a board room of 10 people you have never met before.

1. If you are into sports of any kind, picture yourself at the winner's circle getting the gold medal for what you have just achieved. At best, I'm a "D" level squash player and happen to belong to one of the best and most historic squash clubs in America, so I've had the opportunity to watch many awards being given. Not to me, of course, but, in my head, I picture myself on the podium winning the gold just as I walk into the room where I'm going to be presenting.

2. I love music, and one of my addictions still today are the Rolling Stones. In reality, except for their most recent tour because I was sick, I have never missed one of their U.S. tours. Truly addicted! As a result, in prep on that morning of my presentations, I crank up the volume to "Brown Sugar" and "Sympathy" as I drive or walk to the location.

3. As I enter the final steps into the presentation room, I am saying quietly, but out loud, the words, *"this will be an amazing presentation"* ten times. I learned this tactic from Larry Bird when he was a legendary player at the Celtics, and I naively asked him what he did differently than other players. His immediate response was two-fold.

    First, he commented that he was on the practice court more than any other player on the team and would often stay on the parquet one to two hours after the official practice had ended just shooting those three pointers for which he was famously known.

    Second, he taught me about wiring his brain by repeating out loud a phrase about winning as he entered the arena. I adapted his advice with my own mantra and have used it successfully thousands of times since then.

    What happens with this or any other phrase you use about winning is that you are harmonizing and knitting together the neurons in your brain with everything that you are then doing…the energy of your walk, the power and pitch of your voice, the bright smile on your face…right up to the first words that you speak.

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As Grace Slick told us "Feed your head!", but not with anything but the correct words and energy, which, of course, brings us to the area of food, drinks and stimulants.

- No alcohol the day and night before your presentation!   Simple rule!
- No "big food" the night before! At best, it will slow you down!
- A light and healthy breakfast and no lunch the day of your presentation
- If you are speaking at a dinner, you simply do not eat anything.
- Lots of water or juice to keep you hydrated and fluid
- As to caffeine, "it depends" on how you run your daily life. Just do the same.

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Rule #5: You on Stage

So, here you are!

It's just you and the audience…maybe it's one prospective customer almost ready to close a deal, and maybe it's the convention hall at the local Marriott with 500 salespeople waiting for you to kickoff this year's January sales meeting.

There are weeks or even months of prep behind you, and at a point, it all comes down to this 30 or 60 minutes of being on stage, or in a board room, or in a university lecture hall or possibly right at the first 10 minutes of a two day boot camp, but whatever it is, it's now all about you being here.

In preparation for this, outlined below are several very tactical real-life recommendations as to what works... *and what does not.* Take these non-prioritized ideas, sort through them and work them into your own short set of rules and your top five commandments of presentation success.

Why five? Because neither your nor I can remember ten things, and three, which has been statistically proven to be the most memorable number is, in this case, just not enough. So, pick five and hammer, shape and sharpen them into your "My 5 Best Presentation Commandments" and you will always be ready to deliver your winning presentation!

- Be yourself. Don't try to be Steve Jobs because you're, but you are you!
- Be BOLD! People came to learn, be entertained and to change something.
- Be REMARKABLE by challenging, by provoking, and by actively engaging with everyone.
- Dress comfortably and in sync *to some degree* with the audience.
- Chest front to the audience always! No looking at the slides behind you…ever!
- Nothing in your hands. No water bottles. No note cards. Nothing! Just you!
- Always use your hands and your expressions to personally connect to the audience!
- Never, ever put your hands in your pockets! No crossing your arms across your chest!
- Assume your normal voice volume is 1.0; raise it to 1.5 for this presentation.
- No jokes unless you're a professional comedian, and since you are not…no jokes!
- No swearing! It's unprofessional and will clearly offend someone.
- Use people's names. Ask them what their name is and maybe a bit about themselves

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- Tell people what you want to do, where you are and where you're going.
- Always be thinking about the time and what you agreed to with the audience.
- Speak for 10 minutes, ask a question or for an opinion or another point of view.
- Have fun…*just not too much*. Never lose sight of the objectives or the format.
- Make sure that you're gender neutral… he/she/person
- You can be self-deprecating, but only to a point since, in fact, you're the expert!
- At a point…summarize and conclude by decisively stating "here's the next steps".
- Bring those "next steps" down to a tactical level.
- Let them know…*again and again*…how they can connect and follow up with you.
- Have your email and phone number everywhere. Welcome people to connect with you!
- Move between the mediums: PPT, easel and paper, whiteboard and nothing at all.
- I usually do not wear a name badge, but if I need to, I always bring my own badge.
- Watch the audience for "the rivet factor". Are they paying attention?
- If not or some are looking at their phone, you've lost them. Ask why?
- Summarize three points as takeaways at the end. Bullet list them on the easel.
- Recite "the OST", the "One Simple Thing", you want them to actively engage in.
- At the end, as you thank them, start the applause yourself.

Rule #6. What to do with Those PowerPoints

So, we're going back to where we started this process and talk about PowerPoints again, but it's now time to get down to the details of what to do and how to do it with a few critical points to use when you are constructing your own PowerPoint slides.

In general, your Powerpoint slides should serve as a backdrop for you and what you have to say. They provide visual emphasis on critical points that you want to get across in your presentation and the discussions that evolve as a result. As a result, a very important guideline in the construction of your slides should be "less is more". Less words, less images, less graphs, and less colors.

Uniformity Allows for Easy Viewing.

- <u>Fonts:</u>   Pick one or two at the most. I like Arial and Calibri, but that's just personal style, and I never mix the two. The basic rule here is that the font style (like Comic Sans, for example) should not distract from the idea.
- <u>Size:</u>   I use 28 in the title header and 24 and 20 in the text. Never less than 20
- <u>Indents:</u>   Keep it to one or two levels of indentation. Three is too many.
- <u>Bullets:</u>   One bullet/one idea/one line
- <u>Colors:</u>   Use complimentary colors. Get an art intern to help you here.
- <u>Design:</u>   You are designing these slides for your audience, not you.
- <u>Simple:</u>   One idea/one slide
- <u>Visuals:</u>   Use graphs and charts on the premise that a picture equals 1000 words.
- <u>Image:</u>   Use professional human images; never cartoons or ugly stick people.
- <u>White:</u>   The more white space, the better.
- <u>Tags:</u>   Your email and cell on each page, in 10-point font in the lower left.
- <u>Logo:</u>   Your logo discreetly in one location. Their logo in the lower right corner.
- <u>Pages:</u>   Page numbers on each page in the lower right corner in 11-point font
- <u>Videos:</u>   Only if professionally done. 20% of the time, they won't work.
- <u>Jokes:</u>   Never! You can be self-deprecating, but only to a point.
- <u>Excel:</u>   No, the font will be tiny, and you might say, *"I now you can't see this"*
            You get around this by handing out the slides beforehand with the spreadsheet.
- <u>Apologize</u>: Never apologize for a slide since if you do, it says you should not have shown it.
- <u>Screens:</u>   Never show a screenshot! They never project well. Direct people to a real site.
- <u>Animation:</u> Never!

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Thoughts on the Most Effective PowerPoint Deliveries

In most cases, the presentation, the speech, the lecture, or, more appropriately, the discussion will be delivered by you and you alone. Having said that, there are three critical times in your professional presenting career, when you need to decide as to whether the presentation should be you alone or with a very small number or your team.

- Meetings with potential venture and PE investors. We are going to go into much more depth in Rule #8 detailing presentations to these type of investors. As to the point here, we always recommend that the first face-to-face meeting be made with just one person, and that that person be the Founder CEO. Not co-founders. Not the scientific founder. Not co-CEOs. Just one person, the Founder CEO.

- Meetings with your board will always be with the CEO, of course. Our recommendation is that those meetings always include the CFO and the CSO in tandem attendance, unless there is a very specific reason (which is typically only going to be about someone being fired) for not having them there.

  Your head of finance and administration and your head of sales should always be your most trusted and most closely involved members of your team since it is only you and those two functions who will provide the execution of the business that counts the most.

- Meetings with prospective large customers which are either very close to the end of the sales funnel or you are actually at the closing meeting. First, please note that this recommendation principally applies to both large customers and large deals where you are always better served if there is more than one person.

  In these meetings, where there will be multiple presenters using the PowerPoint deck, all the basics above continue to be the rule, and additionally, a few new ones:

- Although there would be multiple presenters, one person needs to be clearly in charge. This is important at the opening for the introduction and at the closing for the critical summary of the value propositions and the required next steps, but also if something occurs during the presentation that there could be a point of confusion, and there's a need for additional clarity, then a clear leader needs to be able to resolve the issue.

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- Use a remote clicker passing it back and forth to the person presenting at that time. This person is then fully in charge of what is being said and which slides are being shown. There should not be any interruptions by any of the other team members unless there's a question directed to them. The emphasis here needs to be that each of the presenters are senior managers and can equally represent the company, and that the combination of all of everyone is a highly harmonize team which deserves an investment or the purchase of their products and services.

- While one manager is presenting, the other team members need to look actively involved and not absently looking around the room. No hands in one's pockets, which is always a sign of boredom or lack of interest, and no arms folded across the chest which telegraphs defiance. Just hands at the side or held in back.

- While one manager is presenting, the other person or two discreetly steps away after and off to the side passing the remote clicker to the next speaker.

Copies or No Copies?

You will hear every possible reason for doing or not doing this. My strong recommendation is to always right at the beginning pass out hard copies, in color, with one slide per page. This allows the person in the audience to make notes and write out questions that they want to ask after you have finished. This practice is ideal for venture presentations and presentations to a small team of prospective customers, but we've also used this very successful in our 25 to 50-person Sales Management Boot Camps and a couple of times in an audience of 100 plus.

I always make the presentation slides available a day or two before my 35 person classes at Tufts and 50 to 80 person MIT classes. I do not recommend that for speeches or for customer meetings since given the correct way that you will need to construct the slides, they cannot speak for you absent your voice.

In the investment world, we have often found that a potential or even an existing investor leaving the room will take the notes that they have made on their hard copy and physically pass those notes on to another person in the office when they leave noting *"let's see if we can get together on this at the end of the day or first thing tomorrow morning."*

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This is also the reason that you want your email address and phone number on each page since I've often seen a partner leave a meeting pulling the notes apart while giving the financials to someone in the office and the rest of the deck to someone else.

What to do When the Presentation Ends?

Following the meeting, depending on the audience, always send out digital copies of what you presented in a PDF format.

- For both prospective and existing customers, the slides need to go out at the end of the day that you presented with all the appropriate thank-you comments, the notes and a short list of action items. Focus, most importantly on the bulleted list of action items with the accompanying schedules that you voiced during your presentation.

- Do the same with internal company presentations and especially sales meeting presentations.

For presentations to an "outside" audience, I prefer to take a few different actions:

- First, I will send out the slides the next day but and not the day of. My thought process is that people took a chunk of time out of their day to come and participate, and they will not want to take even more time to review the slides and their ideas on the same day when they are back at the office or home. Having said that my experience has shown me that they will take time over the following two days and especially if one of those days falls on a Saturday morning.

- Second, I will always ask the company or the association that is sponsoring my discussion if they would post the slides on their site. Most will because it enhances their marketing for future events. I will also ask for a copy of the attendee list (some will provide this, most will not), so that I could send the slides out myself.

- Third, if I do send a slide deck out, I will use [Brainshark](#) to add voice to some of the most critical slides, not all of the slides, but just enough to make sure that I get the most important points across…plus by using Brainshark, I can also tell who looked at what slides and possibly do more follow up asking if they had more questions.

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Rule #7: Presenting to Potential Investors

I've been a founder or co-founder in nine companies. Three very successful, four I made a bit of money with, and the remaining three I got most of my money back…but lost a ton of time in the process. As an investor, I've made 54 investments including these nine. Made a fair amount of money in 10% to 15% of them, got my money back in most and, lost everything in those where today, I can objectively ask myself, *"What the heck was I thinking?".* In each of those cases, having gone through the autopsies in detail, I discovered that I had invested mostly on emotional grounds following in the footsteps, or, in those cases, the checkbooks of well-known investors and I did not take the time to do the homework myself.

Additionally, I've discovered that the majority of the weak or just plain bad investments in my career were due to either an inexperienced, first-time CEO, or just a person who turned out to be a bad manager and the board/primary investors didn't have the strength to make a change always believing that things might get better. In fact, *"things"* rarely just get better and poorly performing managers, and especially those who always believe that they're smarter than everyone else, always eventually fail. That's bad enough, but worse than anything else, as investors we wasted 12 to 18 months of time and cash during the process, and it's going to take another 12 to 18 months to recruit that new manager and have that person successfully onboarded. Two years plus wasted.

With that as background and seeing and delivering presentations from both sides of the table, let's work through what it takes to present to professional investors. This is not meant to be an essay or even an overview in venture or PE investing, which is, by itself, both a science and an art, with at least 50% of the actual decision making by investors totally out of your control. Those decision factors of that 50%, which you will never be privy to, involve the overall health of the fund and the partnership, where the current fund itself is in terms of its age and its performance and the under and overweighting of your market sector.

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Venture and PE fundraising require a long series of calls, meetings, conference calls, more meetings and multiple presentations along the way.   On average, it will take six months from the first introductory phone call to get a check wired into your account, and along that timeline which will rarely be a straight path, there will be multiple presentations ranging from short general overviews at the beginning to detailed go-to-market discussions after there is partnership approval to move the process into their approval funnel. And then, of course, full formal presentations to the partners…and, possibly, their co-investors at the same time.

In this world of venture capital and PE investing, there will be short introductory phone calls talking about the business while "walking through" your slide deck. At some stage, there will be a decision to either pass on your opportunity or move ahead at which time, most probably there will be the first face-to-face meeting typically only with you. That decision as to whether that meeting is just with you or with you and one or two others is both yours and the potential investor you will be meeting with. My recommendation is always that that first face-to-face is with just you, the primary manager, since what you're doing at that time is selling not only your idea, but much more importantly the financial value that you can bring to that investor.

Having made investments and raised a fair amount of capital as both an entrepreneur and as a venture partner, success has been marked by the strength, the experience, the flexibility and, most importantly, the ability of the CEO to hire people better than he or she is in their own respective skills. As a result, I want to personally understand the person one-on-one, listen to their values, their objectives and why they are doing this, and then be able to interpret that for myself, without the distractions of others in the room.

So, for me, what that means relative to the actual presentations are captured in the following recommendations.

- That critical first meeting should be with just the founder CEO. The person who will run the company and will be hiring the rest of the team. If there are really two co-founders, who will be co-CEOs, then fine, have the meeting with the two of you, but in my multi-decade career of being a venture capitalist, there has been only one case where two co-founders, Brian Halligan, the CEO, and Dharmesh Shah, the CTO, of Hubspot have ever been successful.

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- As the number and the depth of the meetings evolve with potential investors, there will be a point when its both appropriate and necessary to bring in other members of the management team both to demonstrate their skills and experience and also to define your abilities as the CEO to hire the best and build a rock-solid team. When that occurs, it's critical that the other presenters stand on their own feet, are equally experienced in their own skills and fully express their energy and zeal in the pursuit of the business...and of the team.

- Your presentation deck will go through series of 50% changes as you move through the process of presenting to potential investors. You will get both good and bad advice which will often find you at the local Starbucks quickly updating your slides as you move between investor meetings on a given day based to some degree on the last presentation you just finished and before your rush off to the next one in 45 minutes.

  In the real world, don't be concerned about the fact that the deck will change substantially, just make sure that you're getting advice from market-experienced professional investors in the market you are targeting and the entrepreneurs that they have invested in.

- Stay true to your beliefs of why you are doing this and the importance and the value of your suite of products and services to the personas of the buyers. This means that you and your team need to be drenched in market analysis, in-depth research and how you're going to penetrate that market in terms of marketing and sales at both strategic and detailed tactical levels.

  Of course, you're going to tell potential investors about the market need, its various pain points, your wonderful product and the accompanying financials, but most importantly you must be able to get across to people like me how you plan to create leads, deliver the sales that you're forecasting and retain the hard-won customers. Nothing else matters as far as I'm concerned for a couple of reasons:

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1. Nothing Happens Until Something is sold!

My close friend, Howard Anderson, a gifted entrepreneur, investor and professor at Brown, MIT and Dartmouth and probably a couple of other schools he's never told me about sums it up like this…

"There are only two things you need to know about business. The first is about Sales, and then there's a lot of other stuff which is not as important as Sales."

And, when you think about the simplicity…*and the cuteness*…of this comment, Howard's absolutely correct. Over my career of both good and bad investments, I've had only one where the product just never worked. Brilliant idea and deep science from a group of MIT professors and a highly experienced CEO also out of MIT, but the product just never, ever worked. Of all the other failures I've experienced, and there have more than a few, when the ashes were sifted, the primary reason for the failures was a lack of understanding and management weakness in both marketing and selling the product or service.

What you present as your go-to-market strategy and your Marketing and Sales execution tactics will most likely be wrong to some extent and most probably not fully worked through, which is fine. That's what an experienced investor will bring to this partnership in terms of capital, connections and management talent from the market…since they are only going to invest in markets that they fully understand and have deep experience in.

2. Your Sales & Marketing Expenses will be the Highest Percentage of Your Revenue

The very exciting thing about the brave new world of Sales and Marketing today is that these activities are highly measurable and metric focused and almost everything comes down to the science of Process-Tool-Technology-Math. For decades we believed that successful selling was all about relationship building, and while that's a very good attribute for a salesperson to have, what we now have learned is that exacting processes coupled with specific steps and tools and measured with metrics not only count, but they are absolutely essential to adding real value to the business of our customers.

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As the science of Sales and of Marketing processes and measurements has rapidly evolved especially during the past five years, leading business managers and correspondingly the venture and PE investors have become fluent in measuring the Cost of Customer Acquisition (CAC), Life Time Value (LTV) and both the expense and the time required to move a Marketing Qualified Lead (MQL) to a Sales Qualified Lead (SQL) against a ratio of Total Qualified Opportunities (TQOs)…plus a much longer list of other metrics necessary to much more accurately measure forecastability.

Through the study of metrics using AI-enhanced CRM technologies which today are available in every industry, we can also now measure the length of time it will take to move a rookie BDR to an associate salesperson, and the time it will take to move that person to become a successful and highly paid account executive. As a result, we now know when and how much online coaching and certification testing to apply to any salesperson, and any sales manager, in real time measurements.

As a result of the implementation of more and more Sales and Marketing technology platforms, the management of both venture and PE firms have become fluent in the science and study of the metrics, and they will require that same level of fluency within the management of all of their investments. Your presentation materials and a portion of your metrics then need to speak that same language with the same intensity and the same capacity to interpret and modify directions and tactics.

3. Your Financials Will Always be Wrong.

This statement mostly applies to venture investing from at the levels of seed and early stage up through Series A. In over 30 years of venture investing and in my work with my team in creating my own financials, I have never seen a financial plan that wasn't grossly overstated on the revenue line. In my first business planning class that I teach each year at MIT, I always show the financial plan of the well-known software company where I was a co-founder and am today a director. I also note that the company today is very successful, and then with a big pause, I note that the reality is that it took us 15 years to get to the numbers that we had projected to occur in 5 years. Plus, there were more unexpected speed bumps along the road until we got everything well-tuned.

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What your presentation should show in the financial section are the following:

- A short bullet listing of the primary assumptions underlying the plan

- A 3-year graphic showing the lines of revenue, gross profit, the expenses of Sales & Marketing shown together, Engineering expense, a net income and the cash flow requirement.   There will be plenty of time in later meetings to dig through your Excel sheets, all of which will ultimately be transferred to the investor's format.

What you need to be focused on during these initial presentations is providing a fluency of understanding and the interdependencies of the critical operating factors.

Rather than telling your potential investors how ultra-conservative your numbers are, be more focused on detailing the logic patterns of marketing, the sales models that your will be using and the exactness your Plan B for your product development plans. There will always be a Plan B and a Plan C!

And, not that you ever would of course, but never show (1) the conservative plan, (2) the best-case plan, and (3) the plan in between. You are just demonstrating how naïve and inexperienced you are, and, unless the potential investor is very interested in you and your plan, that person will be starting to look at their watch and how they can escape from the room.

By the Way, I Hate the Word "Pitch", *but that's just me being me.*

Just like the words "deal" in private equity, I take umbrage to the word "pitch" since in my mind it degrades the business of creating a business. It's an outdated word and would be laughed at today in the world of Sales. No self-respecting salesperson would ever use "pitch" in today's value-driven world of creating customer impact and customer value. This personal issue is not very critical since the "pitch" word is way overused in both venture and in PE investing. Worse, it's used at every university where entrepreneurship is taught…*which is at every university*…and even applauded around campus in "pitch contests" and copycatting "shark tanks", which, to me is the abomination of what entrepreneurship is really about, but it does sell well.

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It is what it is. I personally just substitute *"my business plan", "my business presentation"* and even *"our slide deck",* but just not the schlocky *"pitch"* word.

A Recommended Format

Like a very interesting, can't-put-it-down novel, there needs to be a natural *flow* of your slides during your presentation. Here's a recommended 10 slide outline for the first meeting with an investor whether that's a telephone or ideally a face-to-face presentation.

First, the order of the slides:
1. Title Slide
2. The Problem
3. Your Solution
4. Your Value Propositions and Differentiation
5. Your Business Model
6. Your Sales Strategy
7. Your Competition
8. Your Management Team
9. Your Financials
10. The current status of the business, the next 18 months and what you're looking for

There is no appendix; there are no resumes; there are no detailed Excel sheets or product structure diagrams with lots of arrows and confusing acronyms, and, absolutely, there is no discussion about valuations. Whatever you say about valuation at the beginning of your fundraising process will be totally wrong, and there is zero value to you in expressing any answer. The reason the question is asked by many investors is to cull out those CEOs who have some lofty…or worse, some inflexible…view of the value of their business. There's plenty of time moving through this process to assess, discuss and negotiate valuation…just not now at the very beginning of the process.

This first meeting is just that…a first meeting…and your only objective during that meeting is to get invited back for a second meeting. Nothing more; nothing less. Please do not overthink this!

Creating your slides will take careful thought about the words, the design and the use of graphs and images to reflect your intent without a lot of text.

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Slide 1-The Title Page

-Simple and to the point.

-If you're a startup, no lofty mission unless there really is one.

-As an established company, a short mission and/or tag line belongs here.

-Your email and cell number in 14-point font in the left-hand corner.

Slide 2-The Problem

-Define the why of why you're doing this.

-What's the need and define that nee by each personas

-What's the future of this need in terms of the market size and its trajectory?

Slide 3-Your Solution

-In very specific words and images, define your product and any adjacent services

-Define the status of the current stage of product development and a go-forward timeline.

-Identify two or three specific personas to whom you will market and sell

Slide 4-Your Value Propositions and Differentiation

-Creating impact Value Propositions is a science; therefore, put detailed thought into this.

-It is critical that you focus on the customer value you will drive and not just on the products.

-Be specific as to the personal and business drivers that your solution will affect

-Be specific as to how much impact your solution will have. 50%? 100%?

-Tie your Value Propositions to specific personas.

Slide 5-Your Business Model

-Define how you're going to make money.

-Is this a consumer solution?

-Is this a B2B model? Define what that is

-In either case, will you go to market direct or through distribution and what type?

-Do you plan to manufacture or develop this product or subcontract it to others?

-What are the follow-on extension products and new personas?

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Slide 6-Your Sales & Marketing Strategy

-Define your primary business directions for both Sales and Marketing.

-Direct sales, distribution, agent, and/or online? How will you balance those?

-Focus on the strategies but give enough detail as to tactics that define your expertise.

-What will be the balance of Inbound and Outbound marketing and the planned metrics.

-Define the technology platforms you will use to measure your results in real time.

Slide 7-The Competition

-Use a graphic here.

-Use a two-over-two quadrant with your product in the upper right corner.

Slide 8-Your Management Team

-Provide pictures of the current team with very short descriptors and LI links.

-State the primary functions to be hired with this funding event.

Slide 9-Your Financials

-Define the primary critical assumptions for the next 18 months

-Create three years of trend graphs

-Show the trends of Revenue, GM, Sales & Marketing expense, Engineering expense, EBITDA

-Do the same quarter by quarter for cash flow

Slide 10

-Here's our recent accomplishments!

-Here's our current status!

-Here's what our investment requirement is for the next 18 months.

-Here's is the timeline.

-Here's our primary objectives by quarter for the next 18 months.

This last slide becomes the backdrop slide projected behind you as you verbally summarize the three primary takeaways and the next actions steps that you want this person to leave with about you and your business.

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The "Other" Slides-The Boy Scout Model

Following the customary end-of-deck "Thank You!" slide with all of your contact information, you need to have 20 plus more slides that will address each of the questions that may be asked.

These may never be shown, but they are there for the specific process of not having you try to think on your feet when you are asked a complex question about your pricing strategy, or if there are geos in which you would change the sales distribution model, or if the investor were to give you 50% more money that you are currently asking for.

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Rule #8: Presenting to Prospects & Customers

First, it's most important as you think about the upcoming meeting with either prospective or current customers, what the appropriate medium is for your presentation. My own rule of thumb is…

- If it's a one-on-one or one-on-two meeting, I will not use any PowerPoints and, most probably will take notes conspicuously…and neatly…right in front of my customer or about-to-be customer using my nice leather and very professional-looking, leather notebook from Levenger.

  If this is a Discovery meeting right at the beginning of my sales cycle and at the top end of my sales funnel, then I will write down in bullet format the key answers to my Discovery questions. If, on the other hand, this is a meeting toward the end of my sales funnel, or an actual closing meeting, then I will do the same exercise bulleting down the key remaining issues that need to be addressed.

  At a point, when I am totally sure that all the questions have been asked and the issues have been addressed, I will openly refer to the notes I've made and ask of the person or team in the room if I have these items correct?

  In a top-of-funnel discovery meeting, I want to make sure that that's the case, since later that same day, I'm going to send a Validation email to the same person, just confirming what I heard and layout out what the next steps I and the team will take.

  In a closing meeting, I'm going to use that piece of paper to go down the list one-by-one and take away any of the objections that stand in the way of my closing the order.

  In both of these type of meetings a slide deck would be distracting at best. Without getting off track here and going into the depths and details of what a sales process is and how to sell to value, the point to make is that a PowerPoint or any formal presentation would most likely get in the way of what the objectives are. One top-of-the-funnel objective is to perfectly execute a Discovery meeting and to the other is to close the deal. In either case, a PowerPoint of any kind will most like create an artificial barrier between me and the prospect since what I am also selling is trust and proximity.

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- If this is a meeting with a small number of five to ten individuals, I will use a combination of a formal PowerPoint presentation and the more informal use of a whiteboard. I personally like "whiteboarding" a lot and will use it in the majority of my meetings of this size.

  I start by using a short introductory set of static slides to begin the discussion and then move to a whiteboard, always making sure that my notes are clearly printed and legible. At a point, I most likely will ask one of the decision makers in the room to help me understand a particular point as I physically pass the marking pen to that person for them to use alongside me so that they can participate both in the explanations and the discovery process and also in the beginning processes of "what-if" solutions. A very specific example of "active engagement".   Sometimes difficult to do depending on logistics, but a very impactful tool when done seamlessly.

  At that point, I have "active engagement" where there's active participation around the table with others joining in and contributing to the discussion. At the appropriate point, I will ask if there are any other ideas or items to be addressed and will then take a picture of the whiteboard and include it in proposal to either start or close the selling process.

  I also like the fact that whatever we have created on the whiteboard will typically remain there for a few days or sometimes weeks.

- If this is a meeting with a larger number of individuals who are team people involved in the buying process (an example would be a product demo), then I will definitely use a PowerPoint deck in order to keep everyone focused.

  In addition to the standard slides about the company and its products and services, my primary focus will always be on the value that we can bring the company and its customers.

  This "Linkage Chain" is my defining for the decision-making team the financial and marketing value that I can bring their company in increased revenue and profits while I am also directly enhancing the value that I can bring to their own customers. Given the complexity of and the potential for misunderstanding, I want to use a formal PowerPoint deck in this type of group in order to make sure that my thoughts are consistently organized. Following the customary end-of-deck "Thank You!" slide with my contact information, I will then have 20 plus potential backup slides that will address each of the questions that may be asked. I will bring those out only when asked questions.

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No matter what the medium-notebook, whiteboard or PPT deck, I will always be overt about my own sales process and the stage that I am currently in. If I am executing a top-of-funnel Discovery Meeting, then I will tell those individuals that I am there to listen and take notes, and that I will follow up within 24 hours validating what I heard. If I'm attempting to close the potential order, I am not only working very hard to move from objection handling to value creation, I will also explicitly ask point-by-point if that particular issue has been resolved...*until there are no more issues*...and only opportunities. Once I reach that point, it's time to close, and I will be using one of my three types of closing processes.

At the firm, we use a very specific sales enablement architecture of "Process-Tools-Technology-Math" through which we know we can improve the sales productivity of the average sales team by 25% in less than a year. We "know" this simply because we've done this hundreds of times over the last ten years, but, then again, the process itself is complex and requires lots of commitment, formal training and certification and the belief that if salespeople move through the rigor of the process, they will exit the other end in about six months with significantly improved personal results. It takes commitment, a lot of work and then strong belief during the first two and three months, until everything kicks in.

The point here is that we also know when certain "process tools" will work and when they won't. These tools will encompass such critical tools as the following, each of which can be monitored and measured through technology. If you are really interested in this stuff, just connect with me, and I will send you a separate ebook on Sales processes and productivity creation.

- Short PPT decks
- Longer PPT decks
- Demo PPT decks
- Professional videos
- Persona creation
- Value Propositions
- Closing scenarios and methods

The bottom line, this works and works all the time once there are personal individual and team commitments to work through the initial training, the consistent process improvements and the peer-to-peer evaluations from everyone on the team.

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Rule #9: Presenting to your Sales Team

Working with your sales team, at any level and at any time, should always be an experience balanced both in motivation on one hand and in personal coaching and skills training in order to consistently improve on the other.

I will leave the motivation process up to your own style since that ability will most often come down to your own beliefs, your personal history of being self-motivated and being motivated by others and your individual attributes which are the way you live both your personal and your work life. Plus, I do not want to stray too far afield from the original purpose of this book, which is meant to be how to significantly improve your presentation capabilities.

Just always keep in mind that the world of professional selling, while it can be very satisfying in terms of financial rewards and personal satisfaction, it also has a wide variety of ups and downs resulting from an equally wide variety of factors, both internal and external to your company and your products. The point here is that your ability to motivate both your team as a whole and then specific individuals is a critical requirement of being a manager of any kind and especially with everyone on the sales team. Sales can be a wonderful profession, but it will clearly have both high and low points, and motivation by one's peer, from your boss and especially as a result of your own discipline is often one of the only means you will move from on step up to the next.

The other category of presenting to your sales team, should always be centered around *"the way"* as in this is *"The [your company name goes here] Way We Sell".*

"The Way" becomes the formal process of how your company sells its products.

It's a process created with five to eight different steps, beginning with "Qualify" at the top end of the sales funnel and ending with "Close" at the bottom. Each step will contain a variety of highly developed tools all tightly integrated into your company's CRM.

"The Way" then becomes your company's sales process developed by the sales team based on best practices and measured in real time metrics coupled with specific coaching and highly planned training assists. It's *"the way we sell"*, and although there can be nuances and different colors applied to the process, there simply is no coloring outside the lines of your company's customized *"the way"* sales process.

No different than the following of the rules and formal processes of highly trained mechanics, surgeons, pilots and other professionally certified experts, bringing your sales team into the new and comfortable world of Process-Tools-Technology-Metrics based on peer-to-peer experiences will dramatically improve the performance results of your sales team. With improved performance, salespeople are better enabled to focus on spending more time with their customers focusing on selling the value of their products.

With *"the way"* defined as an operating baseline in everything to do with sales and customer effectiveness, then every presentation delivered to the sales team focuses on enabling that process. A critical part of that process training and peer-to-peer improvement will be based around how to deliver the most effective presentations.

Outlined below are a few tactical recommendations that have been proven to be highly effective both in their actual results and in the team building practice itself:

Although I started this practice at Tufts in my marketing class asking my juniors and senior to formally present their individual Value Propositions to the rest of the class as part of honing their own personal marketing plans in order to achieve their ability "to get high paying and rewarding jobs", which is one of the two mantras of the course, I quickly adapted the process to the salespeople in our companies where we were investors and among our clients, and it has worked extremely well.

In our marketing course, one student on a pre-defined scheduled over the entire semester will take 60 second to present their own personal Value Proposition. We do three of these each class with the students, including the presenter, commenting as to the high and comfortable points and to where there could be improvement. Classes are on Wednesday and by the end of that day, each of the students send to the three presenters their bulleted comments that most probably have voiced during the class discussion. This becomes part of our "The Marketing of Me" process during the semester, which adds personality to the team-based corporate projects everyone is working on over the semester.

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- Moving back to the Sales side of this process, each salesperson is given the opportunity to experience the material to be presented both as a presenter and as a prospect. They will very quickly see how they need to hone their delivery to better communicate with the audience.

- If only one rep is learning to deliver the slides, the peer audience that will be listening will typically consist of a balance between those salespeople with a good understanding of the customer, and those without. This allows feedback that focuses on clarity of delivery as well as accuracy of the content.

- We learn best in a group of peers, each sees something slightly different, which enables a balanced and broad review of the delivery. As long as the game rules are laid out objectively-and in an atmosphere that it encouraging and focused on the improvement of critical life and career skills-I have not found any hesitancy in either college juniors or seniors or in professional salespeople to work through this process. Quite the opposite!

- The most beneficial element of this or any coaching session is the opportunity to watch how others present, see what they do well and where they go wrong. As the process progresses in real time, the entire room's delivery will improve as one presenter builds on the quality, the slides, the rhythm and the messaging of the last.

- These sales presentations are to actually present as if this were to a prospect customer, or in the case of my students, their 50-minute final presentation to their semester-long host project company who grades 50% of their semester.

- From the standpoint of the "audience" for these peer-to-peer presentation, they are asked to individually write down short bullet statements which they will submit to the presenter at the end of the session and after they have commented verbally as a group. The purpose of them writing something down is that it keeps everyone focused on the exercise plus it provides the presenter with a series of written comments that they can take out away and consider as they prepare for their future presentations.

- The sales manager's job is to encourage objective comments from everyone in the audience. As a manager, I find that writing down the key words from the comments on a whiteboard or an easel pad is very effective in reinforcing the takeaways from the exercise.

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- Once everyone has moved through this process the first time, have everyone repeat it at a separate meeting scheduled reasonably close to that first meeting. At this second meeting, everyone should repeat what occurred the first time, the only difference being that if there are obvious errors or delivery problems, the manager, working as the team's facilitator, but not as "the boss" should constructively interrupt, noting the issue and suggesting an improvement.

- Once this peer-to-peer rhythm is established and everyone realizes the benefit, then we strongly recommend moving the process to a video experience with a dynamic active coaching platform such as Brainshark's Coaching, making the process much more efficient and equally transparent in encouraging participation and comments from the entire team.

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Rule #10. Embrace Change Everywhere

Whatever we know today about delivering presentations, about the world of Marketing and Sales to both prospects and existing customers and about device and presentation technology is already obsolete! Sure, PowerPoint has been around for decades, but it has morphed considerably and at an increasing velocity of new features all of which are highly integrated into other online digital tools and handheld apps.

Customers change in their processes to the same extent that we, as salespeople, as corporate managers or as entrepreneurs have changed. It used to be back in the "old days" five years ago, that we mostly focused on the features and benefits of our products and our accompanying services. And, course, feature/benefit selling still exists, but the focus of our presentations today, no matter what the medium is, needs to be about both the business and personal values that we provide the user and the end customer.

Today our presentations need to connect the dots with our words and images that extend way between our product features and clearly identify the value that we and our companies create for our customers. Today, through our presentations, we are not in the business of selling products, but creating high customer value in an environment of transparency and trust since if we cannot do that, we are merely talking about price. What that comes down in our presentations is that we need to always place ourselves not in front of our audience but as if we were sitting in their chairs, doing their work and working to provide positive impact for their customers and for their investments.

This first outline on delivering winning presentations is a work in process and something I have been thinking about for years.   Over this coming year of 2020, we will reissue this at least once and most probably twice before the end of the year. This will be a similar process to that which I undertook in creating Writing the Winning Business Plan, which also goes through an annual edit and rewrite each summer based on market changes and comments from its readers, which now number in the tens of thousands over 20 years. In that spirit, I would greatly appreciate your comments and edits on this first edition of Delivering Winning Presentations.

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