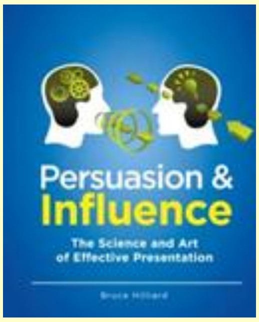
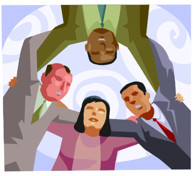
This handout is designed to be read in conjunction with the book, *Persuasion and Influence, the Science and Art of Effective Presentation*. Therefore, some aspects discussed here will not make sense unless you read the related Chapter in the book first. If you do not already possess a copy of the book, it can be purchased online at the following web site:

http://woodslaneonline.com.au/title.aspx?isbn=1921606665



Team Preparation



Although the book focusses more on individual development issues, you can also apply these proven approaches in situations where a team is developing a presentation or course. This section covers specific team development issues; because you need a slightly different approach, if you are going to efficiently create a presentation with a team.

Many variables will affect your selection of the best approach. However, the process illustrated at Figure 1 is a proven method that you can use to make sure that the presentation development milestones are met, and the team remains focussed on creating a truly persuasive message.

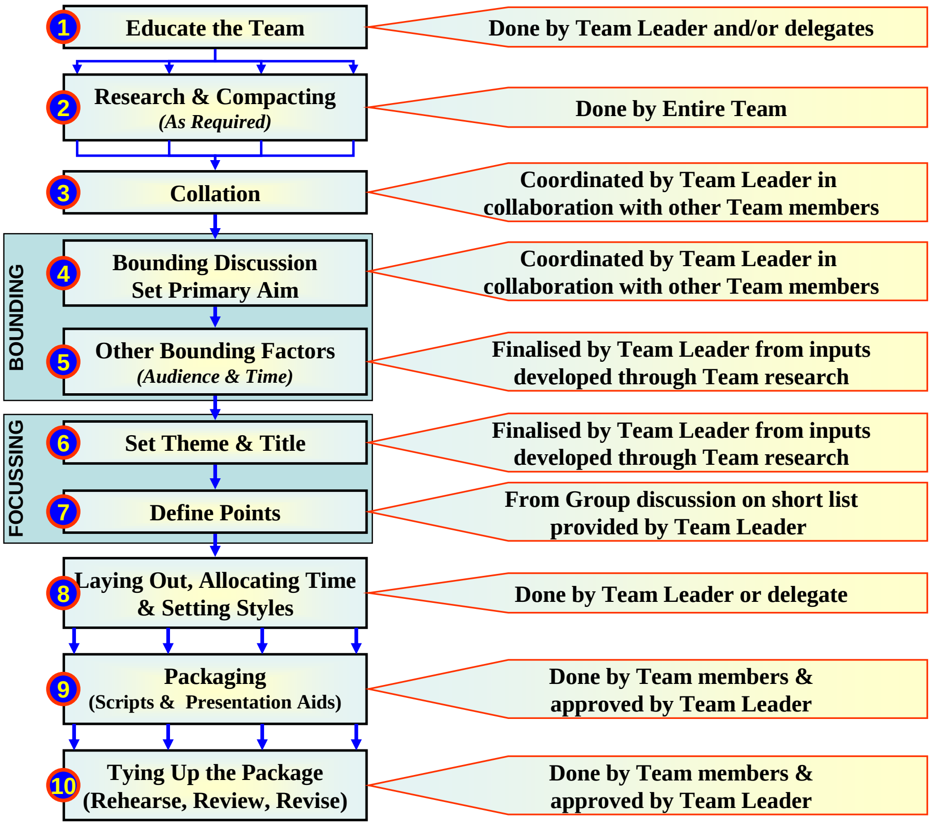


Figure 1: *Procedure for Team Coordination of Presentation Preparation*

The Steps in Effective Team Preparation

The recommended steps in this process are:

✓ ***Step 1 – Educate the Team.*** This is often the first and most important step, particularly if you are pulling your team together from scratch. The team leader should begin by using this opportunity to explain the situation and objectives to every member of the team. This approach allows everyone to develop a common understanding of the goals of the presentation. Additionally, the team leader should make sure that everyone understands the mandated procedures. Where necessary, the team members should also be taught the techniques described in this book, so they can support the efficient development of the message.

✓ ***Step 2 – Research and Compacting.*** Once the team has been educated, the Team Leader must delegate responsibilities for development as soon as practicable. This will allow every team member to clearly understand their roles, so they can begin to carry out appropriate research and compacting. Most importantly, the team must understand from the outset that they need to pool and share knowledge. For instance, if one member finds information that will be of use to someone else, they should pass it on quickly. Additionally, each member of the team must openly share ideas and information, to achieve the best results. To help in this endeavour the Team Leader should implement regular short progress meetings, so everyone can share information.

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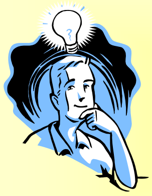
> 
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> When delegating the research responsibilities, make sure that you make best use of your team's current knowledge. This is not just a matter of what they know, but who they know as well.

✓ ***Step 3 – Collation.*** At specified milestones during the research period, each researcher should pass their compacted information to the Team Leader in written and/or graphical format. The Team Leader *(and appropriate delegates within the team)* should then collate this information and ask the responsible members of the team to fill in any gaps.

✓ ***Step 4 – Bounding Discussion and Setting the Primary Aim.*** The Team Leader should then host a short forum, for all team members. Use this forum to identify the Aims and Beliefs for the presentation[*].

✓ ***Step 5 – Identify Other Bounding Factors.*** After developing the Aims and Beliefs, the Team Leader and a core team should then quickly coordinate and finalise the bounding of the presentation[†]. The Team Leader must then promulgate the results of the bounding process to all members of the team, so everyone has a common understanding of the presentation boundaries.

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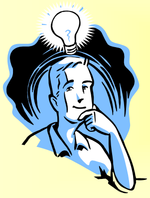
> 
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> Try to avoid doing this with a large group, because this process can become VERY time consuming, when large groups are involved.

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[*] You can optimise this approach by utilising the methodology detailed in Chapter 8.

[†] By applying the approach described in Chapters 8 to 10.

✓ ***Step 6 – Set the Theme and Title.*** After completing the bounding, the Team Leader *(and selected members of the Team)* should develop the Theme and Title[*]. The next action is to convene a short meeting *(generally no more than 45 minutes long)* with the entire team, to discuss these issues, and make sure that everyone in the group understands the theme, and knows how this should shape their content.

✓ ***Step 7 – Define Points.*** The Team Leader *(and appropriate delegates)* should then develop a preliminary list of the points that need to be made in close coordination with the people responsible for each section[†]. Once this short list of points is developed, it is worth meeting with the entire team, and working together to quickly validate the points and then create a rough layout for the presentation. Don't try to lay out the presentation in detail during this meeting, as you will often get bogged down. Simply aim to get agreement from the team on the broad structure[‡], and the dominant template that will be applicable[§].

✓ ***Step 8 – Laying Out, Allocating Timings & Setting Styles.*** The Team Leader *(and in many cases a small group of delegates)* should then create a detailed structure in a STUBB or TABLE[**]. Once this has been completed, the Team Leader must make sure that their entire team clearly understands:

- ➢ the layout of the presentation and the content required for each part;
- ➢ the amount of time that will be allocated to presenting each part, so they do not develop unwanted content; and
- ➢ an outline of the styles that should be used to deliver each aspect of the presentation, so the team can develop the right type of verbiage and presentation aids.

✓ ***Step 9 – Packaging***. Only after the structure of the presentation is agreed should members of the team begin working in earnest on their script and presentation aids. This helps to ensure that they don't waste time. The two packaging techniques should be handled by the team members as follows:

- ➢ ***Scripts.*** Develop the scripts to suit the needs of each presenter. You should therefore not mandate a single form of script for presenters who are developing their own content. However, if a team is developing different parts of the

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[*] You can optimise the outcomes from this work by using the methodology discussed in Chapter 11.

[†] The Team Leader can optimise this step by refining the points using the approach explained in Chapter 11.

[‡] You can speed up this process by utilising the structural elements described in Chapter 12.

[§] You can select the dominant template quickly by using the approach described in Chapter 13.

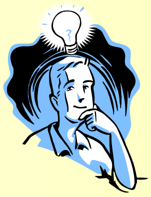
[**] The STUBB and TABLE are simply formats you can use to lay out your presentation content. These formats are discussed in the PracticalExercise.pdf file provided on the Seahorses website.

message for a single presenter, each team member should be given an appropriate script template[*]. This approach will help to ensure that the different parts of the script can be merged quickly and effectively.

- ***Presentation Aids.*** Presentation aids, such as PowerPoint® slides and handouts, should normally look as though the same person did them. The Team Leader should therefore make sure that presentation templates are provided to each team member, before they commence the drafting of the aids. These templates should use common fonts, colour schemes, and layouts. By following this approach, each member of the team will be producing a product that readily fits with the other material. Failure to provide these templates early in the process *(e.g. in some cases you will want to provide the templates during the team education process)* will often mean that much more work is required to make the presentation look professional.

HINT

This does not mean that the team should begin to develop presentation aids only at this stage. Ideally, your team should be developing outline graphics *(e.g. visual thinking models)* for presentation aids as a part of the compacting process.



HINT

Throughout the scripting and presentation aid development process there needs to be regular meetings between the Team Leader and other team members. These meetings should be used to make sure that each part of the presentation is giving the right message. This is particularly true if the presentation development is long and involved. The Team Leader should start by getting the team to show their dot points, graphics and outlines before they develop the detailed packaging. This will tend to save people from wasting time, because they went off on the wrong tangent.

✓ ***Step 10 – Tying Up the Package.*** You should implement effective Rehearsal, Review and Revision processes *(which are discussed in a separate handout)*. Each presenter in the team must be involved directly in these processes from an early stage.

Principles for Coordinating Team Preparation

Within this recommended process, you should apply the following overarching principles to ensure successful development of the presentation:

✓ ***Make Sure Everyone Knows what's Going On.*** Although it is important for the Team Leader to be driving the progress, it is essential that every member of the team share information, and let everyone know what is going on. You should therefore use the various short meetings to raise and discuss issues. Additionally, make sure that your team networks, so each member knows what everyone else is doing, and they exchange important information.

✓ ***Rehearse early and often.*** Everything will boil down to the actual presentation. If you are using different speakers, make sure that you begin the process of rehearsal as early as possible. This approach will quickly identify any problems, and allow them to

[*] Ideally these templates should conform to the requirements specified in Chapter 16.

be rectified before you are standing in front of the real audience. It is much better to make a hundred mistakes in rehearsal, than one mistake in front of the people you are trying to persuade.

- ✓ ***It will take more time.*** Experience shows that you can expect team preparation to take a lot more time than doing the preparation on your own. As discussed in the AllocatingTime.pdf document provided on the Seahorses website, you can expect it to take between 1.4 and 2.5 times as long. As a general rule of thumb, however, assume that it will take about 1.8 times longer *(in terms of person-hours)* to create a team-developed presentation.

- ✓ ***Recognise your limitations.*** Finally, don't be afraid to ask for additional help if your team can't achieve something within the required timeframe. You should therefore be willing to source the personnel you need to achieve the required outcomes, if the likely benefits outweigh the costs.

- ✓ ***Get approval before it is too late to make changes.*** In some cases, teams need to get approval, before they can deliver the presentation. Unfortunately, in some situations, the team does not complete the development of important presentations until just before they are due to be delivered, and therefore hold off getting approval until the last minute. This approach is NOT recommended, as it can lead to numerous problems. The following is an appropriate approach for managing the approval process, which has been used successfully in many situations:

  - ➢ ***After Step 5.*** If the presentation is very important, or possibly contentious, the team leader *(and appropriate team members)*, should brief the appropriate senior members of your organisation once the Bounding has been completed. This helps to ensure that the broad outline of the content is agreed, before your team invests a substantial amounts of time developing content that may not be approved or supported by the organisation.

  - ➢ ***After Step 8.*** A short meeting can be extremely useful once the points have been identified, and laid out within the template structure. In this situation, it is useful to explain the outline *(e.g. in a STUBB or TABLE)* to the approving authorities, and show them any key graphics that will be used to get the point across. This is often a critical briefing *(and it is often of more importance than the one after Step 5)*, because it helps to ensure that organisational leaders have the final say on the content, before the effort is applied to turn the content into the finished presentation. As such, it helps to ensure that organisational leaders feel properly empowered, and it helps to avoid the situation where the message developed by the team does not fully align with the organisation's requirements.

  - ➢ ***Step 10.*** Use the 3Rs approach (Rehearse, Review and Revise), which is described in another handout, to integrate final approval of the content. This way your team, and senior stakeholders, can apply any last fine-tuning to the content through an orderly process. Just as importantly, if you have invested the time in the preceding steps, your team will typically not need to make substantial changes at this late stage. This, of course, helps to ensure that the best quality presentation is delivered, and it can also save you from accruing more grey hairs.