


Presenting to Customers VS Training Customers

Northeast Ohio Women in Technology - NEOWIT
January 14, 2021

1

<p>Presenting</p> <ul style="list-style-type: none"> ▶ Conveying information - new product, results of upgrade, product features available ... ▶ Persuading customer to act - support theory, new process, purchase/use a product ... ▶ Presenter seen as a knowledge resource (leader) ▶ Documentation in power point ▶ Demonstration of a product / feature 	<p>VS</p> 	<p>Training</p> <ul style="list-style-type: none"> ▶ Sharing how to do an activity - testing, validation, creating a model ... ▶ Expecting the customer to do in the future ▶ Presenter seen as a knowledge resource (leader) ▶ Documentation in word, power point, excel - includes steps and screen images ▶ Discussion, demonstration and exercise of a product / feature
--	--	---

2

Presentation / Training Styles

Visual	If you're a firm believer slides simply exist to complement your talking points, this style is for you. With this speaking style, you might need to work a little harder to get your audience engaged, but the dividends can be huge for strong public speakers, visionaries, and storytellers.	This style is helpful when speaking to a large audience with broad interests. It's also great for when you need to throw together slides quickly.
Freeform	This impromptu style of presenting doesn't require slides. Instead, the speaker relies on strong stories to illustrate each point. This style works best for those who have a short presentation time and are extremely familiar with their talking points.	Elevator pitches, networking events, and impromptu meetings are all scenarios in which to use a freeform style of speaking. You'll appear less rehearsed and more conversational than if you were to pause in the middle of a happy hour to pull up your presentation on a tablet.

3

Presentation / Training Styles

Instructor	This presentation style allows you to deliver complex messages using figures of speech, metaphors, and lots of content -- just like your teachers and professors of old. Your decks should be built in logical order to aid your presentation, and you should use high-impact visuals to support your ideas and keep the audience engaged.	You're not a comfortable presenter or are unfamiliar with your subject matter.
Coach	Energetic and charismatic speakers gravitate towards this style of presenting. It allows them to connect and engage with their audience using role play and listener interaction.	Use this presentation style when you're speaking at a conference or presenting to an audience who needs to be put at ease.

4


Presentation / Training Styles

Storytelling	Speaker relies on anecdotes and examples to connect with their audience. Stories bring your learning points to life: Let your emotions out and tell your story in an honest way.	This style is great for conference speaking, networking events, and sales presentations where you have adequate time to tell your stories without taking minutes away from questions.
Connector	Connect with their audience by showing how they're similar to their listeners. Connectors usually enjoy freeform Q&A and use gestures when they speak. They also highly encourage audience reaction and feedback to what they're saying.	This type of speaking sets your listener at ease, elicits feedback on how you're doing in real time, and is more of a dialogue than a one-sided presentation.

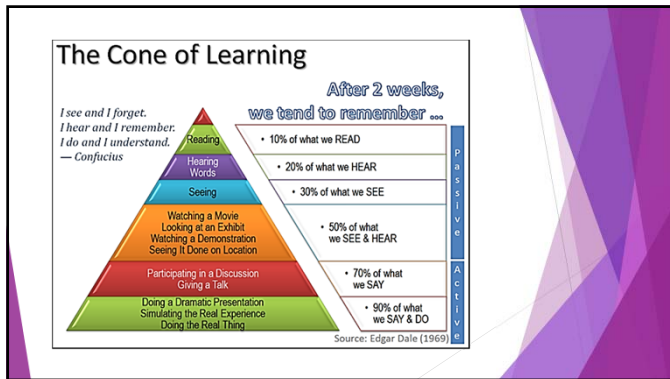
5

Leadership Qualities

▶ I lend helping hand to others.	▶ I use "WE".
▶ I encourage others.	▶ I fix problem collaboratively.
▶ I always listen (really listen).	▶ I develop others.
▶ I do the right thing.	▶ I share clear goals with others.
▶ I energize others.	▶ I am a good example.
▶ I admit my mistakes.	▶ I communicate clearly.
▶ I give advice, when asked.	▶ I support others.
▶ I provide direction.	▶ I encourage others.
▶ I earn the respect of others.	▶ I recognize other.
▶ I show kindness.	▶ I expect the best of myself.



6



7

Training Tips

- ▶ Introduce yourself, include your background for your learners (attendees). Providing your background or expertise will establish your expertise on the topic you are training. Include, when applicable, I was in this training ... we are all here to learn and share with the goal of improving our talents to add efficiency to days.
- ▶ Have your learners introduce themselves - name, department, company ... - to establish comfort among the learners. Everyone is there to learn the same information, decrease tension, everyone will have questions ...
 - ▶ If anyone has a name that is commonly abbreviated (William to Bill) - ask the individual what they prefer to be called.
- ▶ Provide documentation especially when covering several features.
- ▶ Include exercises that are useful to the learners.
- ▶ Space the exercises throughout the training - I prefer to discuss a topic, provide how the audience might use the feature, show the feature, then provide an exercise to be done at that time by the learners.

8

Instructional Documentation Best Practices

- ▶ use clear language - avoiding acronyms and technical terms unless defined
- ▶ includes screen images for each step - zoom in, highlight, use arrows or boxes to identify location in image
- ▶ number steps
- ▶ number pages of document (just in case printed copy is dropped)
- ▶ use header or footer to identify document
- ▶ use table of contents or links to jump to a topic within a document
- ▶ use 1 or 2 easy to read fonts
- ▶ use color, bold, italics to highlight or call attention to a warning or heading - consider color blindness when choosing colors
- ▶ use bold or italics consistently - such as the name of button or link customer should click on
- ▶ recommend providing documentation in pdf format to avoid accidental change - unless documentation is draft or working copy and customer is expected to update or amend
- ▶ use clear cropped images to call attention to comments.

9



10
