Presenting to Customers
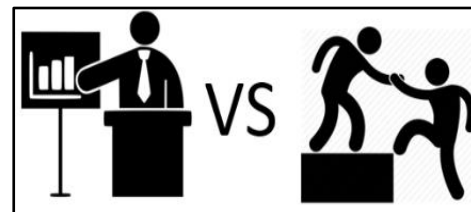# - VS -
Training Customers

NEOWIT – January 14, 2021

Contents

Presenting VS Training

Presenting	Training
• Conveying information – new product, results of upgrade, product features available …	• Sharing how to do an activity – testing, validation, creating a model …
• Persuading customer to act – support theory, new process, purchase/use a product …	• Expecting the customer to do in the future
• Presenter seen as a knowledge resource **(leader)**	• Presenter seen as a knowledge resource **(leader)**
• Documentation in power point	• Documentation in word, power point, excel – includes steps and screen images
• Demonstration of a product / feature	• Discussion, demonstration and exercise of a product / feature

Presentation / Training Styles

Style	What It Is	When to Use
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	Elevator pitches, networking events, and impromptu meetings are all

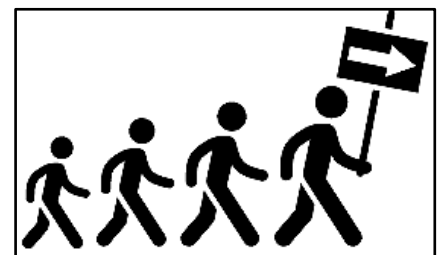| Style	What It Is	When to Use
	strong stories to illustrate each point. This style works best for those who have a short presentation time and are extremely familiar with their talking points.	scenarios in which to use a freeform style of speaking. You'll appear less rehearsed and more conversational than if you were to pause in the middle of a happy hour to pull up your presentation on a tablet.
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 (i.e., your product was recently updated and you're not familiar with the finer points), try instructor-style presenting.
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. For example, this style would work well if you were speaking to a group of executives who need to be sold on the idea of what your company does rather than the details of how you do it.
Storytelling	In this style, the speaker relies on anecdotes and examples to connect with their audience. Stories bring your learning points to life, and the TED's Commandments never let you down: Let your emotions out and tell your story in an honest way.	Avoid this style if you're in the discovery phase of the sales process. You want to keep the conversation about your prospect instead of circling every point or question back to you or a similar client. 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	In this style, presenters 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.	Use this style of presenting early in the sales process as you're learning about your prospect's pain points, challenges, and goals. 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
Lessig	The Lessig Style was created by Lawrence Lessig, a professor of law and leadership at Harvard Law School. This presentation style requires the presenter to pass through each	This method of presentation is great for large crowds -- and it allows the speaker to use a balance of text and image to convey their message. The

Style	What It Is	When to Use
	slide within 15 seconds. When text is used in a slide, it's typically synchronized with the presenter's spoken words.	rapid pace and rhythm of the slide progression keeps audiences focused, engaged, and less likely to snooze.
Takahaski	This method features large, bold text on minimal slides. It was devised by Masayoshi Takahashi, who found himself creating slides without access to a presentation design tool or PowerPoint. The main word is the focal point of the slide, and phrases, used sparingly, are short and concise.	If you find yourself in Takahashi's shoes -- without presentation design software -- this method is for you. This style works well for short presentations that pack a memorable punch.

https://blog.hubspot.com/sales/types-of-presentation-styles
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Leadership Qualities

| Leaders Have / Use These Traits	
I lend helping hand to others.	I use "WE".
I encourage others.	I fix problems 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 others.	I recognize others.
I show kindness.	I expect the best of myself.

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Training Tips

1. 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.
2. 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 …
   a. If anyone has a name that is commonly abbreviated (William to Bill) – ask the individual what they prefer to be called.
3. Provide documentation especially when covering several features.
4. Include exercises that are useful to the learners.
5. 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.
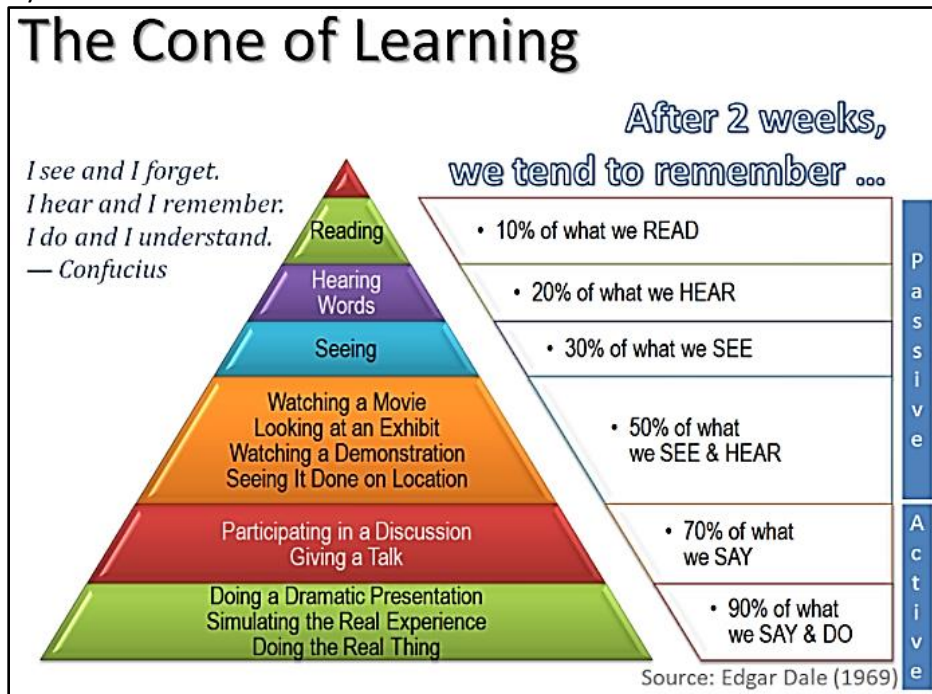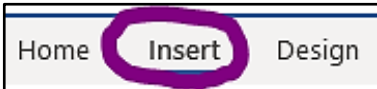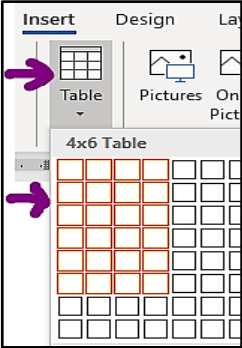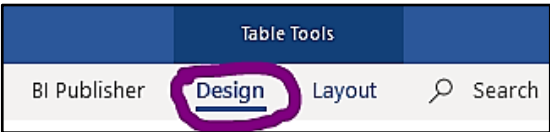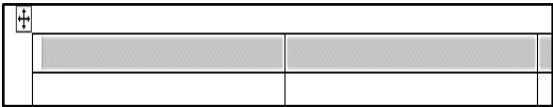

Instructional Documentation Best Practices

- 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
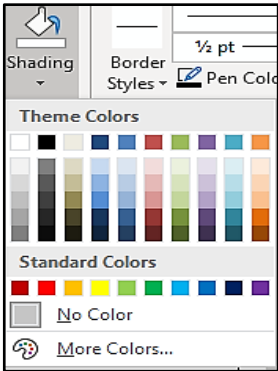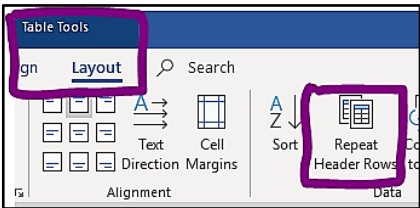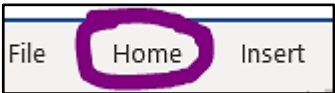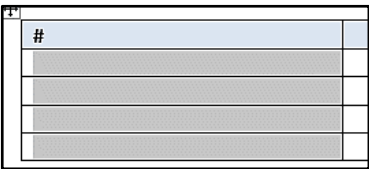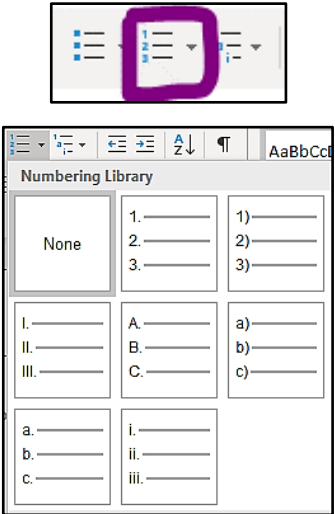- use 1 or 2 easy to read fonts

- use color, bold, italics to highlight or call attention to a warning or heading
  - When choosing color, remember color blindness affects 1 in 12 men (8%) and 1 in 200 women in the world. https://www.colourblindawareness.org/colour-blindness/
  - Common type is red green – making green look more red with difficulty distinguishing between red and green.
  - Less common is blue yellow – hard to tell the difference between blue and green & between yellow and red
  - Uncommon is complete color blindness where individual doesn't see colors at all.
- 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:

  Caution, Recommendation, Stop, Tip, Warning,
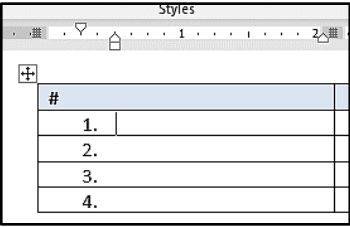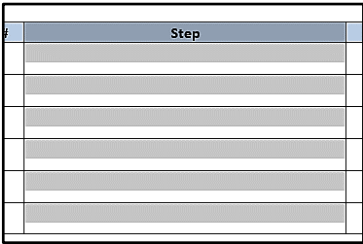
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How to Create a Numbered Table in Word

#	Step	Image
1.	Open word document – existing or new.	
2.	Click on **Insert** in the menu bar.	
3.	Click on **Table** icon. **Highlight** the cells to choose the number of columns and rows for your table.	
4.	Click on **Table Tools - Design** in the menu bar.	
5.	Click on the top line of the table to highlight it.	

#	Step	Image
6.	Use **Shading** to choose a background color.	
7.	**Type** column headings – apply **bold** formatting if desired.	
8.	Click on **Table Tools – Layout** in the menu bar. Click **Repeat Header Rows**, if desired.	
9.	Click on **Home** in the menu bar.	
10.	**Highlight** the 1st column below the column headings.	
11.	Click on **Autonumbering** in the menu bar.	

#	Step	Image
12.	Adjust the margins for the automatic tab settings.	
13.	Adjust the column width as desired. The table is now ready for instructions.	

- Format all the images the same – using **Picture Tools – Format**
- Corrections allows you to darken, brighten the image.
- Picture Border allows you to add a border – style and width of line.
- I prefer to (1) format my images centered in the column and (2) include a blank line above and below the image which I set to a font size of 6.

Numbered Table Template

#	Step	Image
1.		
2.		
3.		
4.		
5.		
6.		

Do you have questions or comments?
Please email me – bgiguere@dealertire.com.