

Checklist for Making Oral Presentations

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The following checklist relates to making persuasive oral presentations. Many of the guidelines draw upon research studies reported in my forthcoming book, *Advertising and the Science of Persuasion* (forthcoming 2005). Some of them were surprising to me.

The content for a talk should draw upon a written report. Suggestions for the written report are provided at “Checklist for Writing a Management Report” on the Educational Materials page at <http://jscottarmstrong.com>. The basic assumption is that you have good content. If not, you *should violate* many of these guidelines. For more on this, you might find the [Dr. Fox study](#) of interest. In that study, academics and practitioners gave high ratings to a talk that was designed to have no content.

Management presentations are complex. It is therefore wise to use this checklist each time. Practice helps, but, like flying a plane, you can benefit from using a checklist before making important presentations.

Before the talk

- ___ 1. *Agenda*. Make an agenda for the talk. If you are working in a group, ask at least two group members to independently do this, then reach agreement on it. You might want to send the agenda to the client before the talk.
- ___ 2. *Rehearsal*. If the talk is important, ask someone to act as if they were the client, then present your talk to them.
- ___ 3. *Costumes*. Dress to show you respect the client. This has the added advantage in that a high-status spokesperson is more credible; you can enhance status by formal dress and by wearing glasses (or harm credibility with sunglasses).
- ___ 4. *Casting*. If working in a group, select one speaker who is similar to the client (e.g., in accent and manner). Pick someone who is good at listening. If you have weak content, pick a presenter who is attractive (in the eyes of the audience); attractiveness is not needed for strong content.
- ___ 5. *Handouts*. Do not hand out material to read when you begin the talk. This may cause listeners to get out of step with the speaker.

During the talk

Organization:

- ___ 6. *Introduction*. Present the most important things first. These should be action-oriented recommendations. Tell them what they should do and how they will benefit.
- ___ 7. *Purpose*. Describe the purpose of this talk.
- ___ 8. *Agenda*. Present an outline of the presentation so your audience will know where you are headed. Show timing, such as “the last 10 minutes will be available for questions.” If possible, keep the agenda visible during the presentation.

- ___ 9. *Structure*. Build the presentation around the recommendations. Show the connection between your recommendations and your analysis. Try this format:
- [recommendation x] – supporting information
 - [recommendation y] – supporting information
- ___ 10. *Slack*. Include slack time. If you have 20 minutes available, plan the talk for 15. Make some parts of the talk optional, and do not show these on the agenda.

Visuals:

- ___ 11. *Show support for each recommendation*.
- ___ 12. *Visual aids*. PowerPoint presentations, transparencies, or flip charts can help people follow the talk. This is especially important to show organization, present lists, and summarize data.
- ___ 13. *Key words on bullet points*. This helps to retain attention and gives you a reason for being there (anyone can read, so you do not want to read to them).
- ___ 14. *Simple overheads*. Omit anything that is not vital. Tufte says that you should not use any “ink” that does not contain information. This means no wallpaper, for one thing. Unfortunately, PowerPoint often leads people to include irrelevant things. This is a conditional principle. If you have nothing important to say, you should use lots of bells and whistles.
- ___ 15. *Color*. Only use color when the color has a meaning. For example, “We recommend that you make the product available in the following colors.” When you do use color, also explain in words because some people are colorblind. In addition, people may make B&W copies of the transparencies.
- ___ 16. *Page & exhibit titles*. Provide an informative title for exhibits if the conclusions from the data are not immediately obvious. It is best to organize the information so that the audience can infer the conclusion.
- ___ 17. *Contingency plan*. If you use PowerPoint, plan the talk so you do not lose time setting up. This might mean using some overhead transparencies as back-up, for example.

Speaking:

- ___ 18. *One speaker*. It is easier to manage the presentation if you have only one speaker. If you need a second speaker, the lead speaker should be responsible for timing and questions. Do not speak unless invited to by the lead speaker.
- ___ 19. *Clarification questions*. Restrict questions to clarification during the first part of the presentation. In your introduction, ask the client (audience) if that is okay by them.
- ___ 20. *Serious questions*. If questions other than clarification ones arise during the presentation, write them so all can see, and say that you will address them later.
- ___ 21. *Indirect conclusions*. Try to build your case so that the audience can see the conclusions on their own. Do not force the conclusions on them. (Also, you should have presented the key conclusions at the start of the talk.) But if the evidence is not obvious, provide explicit conclusions.
- ___ 22. *Pace*. Talk at a moderate pace if you have excellent content. If your arguments are weak, speak at a faster pace as this will give people less chance for developing counter arguments. In addition, fast talkers are regarded as more competent, truthful, fluent, energetic, enthusiastic, and persuasive. In effect, by talking fast, you move the attention from the content to yourself. You can speak up to 30% faster than the normal pace and still be understood.

- ___ 23. *Tone*. Use a quiet, reasonable tone for the content. However, the speaker should show some energy and interest.
- ___ 24. *Pause before key points*. Pauses of two seconds are recommended to create some interest in what follows.
- ___ 25. *Pause after key points*. Pauses allow people to reflect on what was said.
- ___ 26. *Check for understanding*. Ask if the audience needs clarification.
- ___ 27. *Ask questions*. To gain attention, raise questions before making a key point. Do this only if you have good answers to the questions. If you ask a rhetorical question, do not answer it.
- ___ 28. *Don't read your notes*.
- ___ 29. *Make eye contact with people in the audience*. This raises interest and increases trust.
- ___ 30. *Avoid humor*. If you have strong arguments, avoid humor. Humor is seldom appropriate for a high-involvement process as it detracts from cognitive processing of the arguments. It also steals the spotlight from the recommendations. If you have weak arguments, give a hilarious talk.
- ___ 31. *Repetition*. As this is a high-involvement situation, avoid excessive repetition, especially repetition that is closely spaced.

Ending the Meeting:

- ___ 32. *Orient questions*. Don't just ask for questions. Say, for example, "What do you need to know about recommendation 2 before taking action?"
- ___ 33. *Listen*. When people ask questions, the key thing is to listen and to understand. You want to increase the amount of time they spend talking by reducing the time you talk. Thus, you should use [non-directive interviewing](#). Normally, it is the custom to make suggestions in the form of questions, so this guideline is hard to follow. If they really need an answer, they will let you know.
- ___ 34. *Do not think on your feet*. If you do not know something, check to make sure that you understand the question, then tell them you will get back to them.
- ___ 35. After all of the questions have been addressed, summarize what you heard and how you plan to do address it.
- ___ 36. The close. Go back to your recommendations and try to gain agreement on action steps.
- ___ 37. Use the "rejection and retreat" approach. If a recommendation is not accepted, raise the possibility of a smaller action step.
- ___ 38. Leave a written report (or promise one). A week from now, the overheads will not be intelligible to others.

After the Talk

- ___ 39. *Summary of action steps*. Send a summary of the key issues and of the action steps agreed on as a result of the talk. Describe who will do what by when.
- ___ 40. *Show progress*. Follow-up with the results of your action steps.
- ___ 41. Send a written report. If you made changes as a result of the meeting, tell the client about the changes.