Requirements for Oral Case Presentations

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[updated: Friday, September 28, 2012]

Course: *BUS 302*
Title: *The Gateway Experience* (3 units)

"Making a presentation is a moral act as well as an intellectual activity."
---*Edward Tufte (1942-)*

Introduction

The purpose of this document is to enumerate the requirements for all oral case presentations in this course, except as indicated differently by the instructor in class. The BUS 302 Course Pack contains a presentation evaluation form for use in the scoring of the oral presentation. This document expands upon that evaluation form in each of the evaluation criteria. Students will lose points for not following the instructions below.

If this document is unclear, please contact the instructor.

Electronic Submission

Each presented case must be submitted electronically via email to the instructor. The subject line of the email must begin with "[CSUN Bus302 <classnumber>]" where <classnumber> is the appropriate, 5-digit class # (without the chevrons). The rest of the subject line must contain both an abbreviation of the specific case (such as "Spa case") and the team number (such as "Team 1"). The body of the email may contain a brief paragraph regarding the submission as necessary. The attachment to the email must consist of a single file and that file must be the same document that will be submitted in printed form. The file format is to be MS-Powerpoint (.ppt). Users of Office 2007 or higher should convert their document to .ppt format before submission. The electronic submission is to be received in the instructor's Email InBox no later than 1 hour before the printed copy is to be submitted (that is, no later than 1 hour before the beginning of class). For cases other than NorthWestern State University, the email must also contain one additional attachment—a single Excel (.xls) workbook file containing the mathematical calculations used in the written case document. Users of Office 2007 or higher should convert their workbook file to .xls before submission. Strong teams incorporate this deliverable requirement into their planning structures.

Print-based Submission

Each presented case must be submitted in printed form. The printed version of the presentation is to be submitted immediately at the beginning of class. The beginning of class should be interpreted to mean no later than 1 minute after the class starts. Again, strong teams incorporate this deliverable requirement into their planning structures.

Section I. Introduction

1.1 Introduced group/self

For some business presentations, everyone will know everyone else. For other business presentations, however, it is possible that nobody in the audience knows any of the presenters. In Bus302, the presenting team should assume the latter. The presenters need to identify each presenter and state her/his name clearly and succinctly. This task should be done in conjunction with the opening presentation slide. If a specific individual will address a specific issue, make a note of that fact at this point in the presentation.

1.2 Outlined Presentation

Even though the audience hired the presenting team to analyze the case, the presenting team should answer “why are we here?” In other words, articulate a verbal cover letter.

1.3 Set ground rules before starting

The presenting team may have some preferences that need to be clear to the audience. For example, the presenting team may ask the audience to hold their questions until the end. The presenting team could also encourage clarification questions during the presentation, but hold other questions to the end. Other ground rules might be something such as “if you cannot hear me, would you please raise your hand and I will speak up.”

1.4 Made effort to connect with audience

Communication is defined by the *receiver* of the message, not by the *sender* of the message. A colorful opening slide, a humorous anecdote from an online video, or a reference from today’s Wall Street Journal can help to set an amicable environment. The person who speaks first makes the first and most memorable impression. Remember, each member of the audience most likely has 1), dozens of other tasks that need to be completed that day and 2), significant resources (usually money) riding on your case recommendations. Start your presentation off on the right foot—make each person in the audience know that she or he made the right decision by coming to hear this presentation today. Yes, this takes a bit of theatre—for business students, there is a bit of Shakespeare in each of your presentations. Use your limited time wisely and strive to ensure full communication with your audience at all times.

Section II. Platform Skills

2.1 Was relaxed and comfortable

Public speaking can be uncomfortable for some individuals. This is just something that business students will need to get over. The best way to do that is to practice and practice often. Another problem is that if the presenting team doesn’t look relaxed and comfortable, the audience won't be relaxed and comfortable. And that means that the audience is not listening to the presentation.

2.2 Dress and manner was professional

The presenting team should dress and act professionally. The reason most formal business attire is dark blue (or similar) is that professionals strive to always keep the emphasis on the merits of the details of the presentation. There are enough accessorizing options to keep both male and female professionals from being "dull" or homogeneous. Remember that the presenting team already has the *current* contract, or "engagement" as it is referred to in the consulting trade. Part of the job of the presenting team is marketing for the *next* contract or engagement. The same is true even for internal presentations by internal staff. Never miss a chance to be fabulous.

2.3 Not tied to podium

The current presenter should stand next to the screen and not behind the podium. In general, standing to left side of the screen (from the perspective of the audience) makes more sense, because it is somewhat easier to point to the specific bullet points on the screen. Moving around is usually a good thing—it gives the presenter a chance to connect to the audience in different ways and is also a good way to break up a presentation that might otherwise appear to be monotonous.

2.4 Projected voice and spoke clearly

This is the single largest problem with Bus 302 presentations. There are two central issues at hand. The first issue is that the members in the audience should never have to strain to hear anything that was said or have anything repeated. While it is the task of an audience member to be a perfect listener, it is the task of the presenter to be a perfect presenter, including compensating for any gaps in the ability of the audience to listen perfectly—in other words, the accountability for the presentation content falls to the presenter in the short-run (even if it falls to the listener in the long-run). The second issue is that senior executives in a firm (or maybe even the instructor may be older than any of the presenters. Older people have a difficult time hearing, don't wear hearing aids, and won't necessarily speak up when they are missing words (often out of courtesy to the speaker; occasionally out of fear of revealing their individual disability and associated public embarrassment). Each member of the presenting team must speak more loudly than she or he otherwise would in a typical small room or classroom environment.

2.5 Used pauses to underscore points

The presenting team knows the material well. Often, one or more members of the presenting team are the "experts" on the subject. But the audience members may not be the experts on any given topic or may need help following a particular chain of logic (especially if the finding on a topic disagrees with something she or he holds to be true intrinsically). Going from assumptions to facts to issues to laws to alternatives to optimal choices to recommendations to consequences in one long sentence is a grand mistake. Active listeners in the audience need time to consolidate parts of the presentation and critically reflect upon the presenters in real time. Use pauses between key ideas and transitions, and always between slides on a project presentation.

2.6 Did not use filler words

Try to avoid the use of words such as "um," "ah," "uh," "like," and similar "filler words." A quick silent pause is better than a trite or sophomoric "filler word." This is easy to say and hard to do. At groups such as Toastmasters that help individuals improve their ability for public speaking, there is somebody elected at the beginning of the evening that is tasked with counting the number of "um's" each presenter used. This activity is important because it can be hard for the presenter to know the number of "um's" herself or himself.

2.7 Made good user of non-verbal cues (eye contact, gestures, voice inflection)

Oddly, in some presentations, the audience might forget most of *what* you said, but the audience is unlikely to forget *how* you said it. In a small room such as the gateway rooms, try to make eye contact with every individual in the room no less frequently than every ten seconds. Among other things, eye contact is a mandatory pathway to achieving credibility and understanding.

Knowing how to use one's hands during a presentation is a fine art. Flagrant waving is not appropriate, but gentle movement aligned with the shifting emphases in the verbal part of the presentation is a learned attribute of a skilled presented and professional. Also, presenters should keep their hands out of their pockets, keep their hair out of their eyes, and restrain from fidgeting (including with ones shoes).

Finally, subtle changes in voice tone, intonation, inflection are important, because those changes strongly impact how the audience "hears" your presentation. The audience might not fully understand the theory and practice of those communication dynamics; however, it is the responsibility of the presenter to have mastered precisely those dynamics.

2.8 Kept audience involved, checked for understanding

This will come naturally over time with good eye contact, but most student professionals don't have good eye contact at the junior level yet. If there is a particularly difficult part of the presentation (e.g., two or three slides with variables and statistics and conclusions), it is fine to just stop and ask, "Does this make sense to everyone?" Or just pause, and let the audience re-read the slides at their own pace. Again, with good eye contact, a skilled presenter will know if the audience is absorbing and comprehending the key elements of the presentation.

Section III. Visual Aids

3.1 All major points covered are on overhead

The oral presentation needs to cover all of the same points that would typically be on a formal report. Depending on how the presentation is structured, there is less time and space with slides, but more time for deeper understanding. This deeper understanding comes from the idea that the audience can read and listen at the same time and also from the idea that the presenter has deliberately and conscientiously selected the most relevant, material details in the case). Also, skilled presenters are constantly checking for understanding; therefore, the presenter can spend less time on the details that are relatively clear and concomitantly, spend more time on the details that are relatively opaque.

3.2 Appropriate for nature of presentation

Each presentation slide should be absolutely necessary. Everything else can just be part of the oral presentation by the presenters as deemed informative.

3.3 Content crisp, brief and uncluttered

Use plenty of white space. Do not cram too much information on one slide—simply use more slides. Handling transitions between slides with less information on each slide is easier for the audience than trying to fish specific text out of a dense slide. Use a sans-serif font, such as Arial or Verdana, for display or presentation purposes. Resist the urge to write in long and complete sentences on the slide (except as used relatively consistently in a slide heading). Use complete sentences in the verbal part of the presentation; not on the slides themselves.

3.4 Readable font size/colors (no eye charts)

Be very careful in the selection of font size and color. In the gateway rooms, there should not be any font smaller than 18 point. The only exception might be for a large, numeric table copied-and-pasted from, say, Excel. Recall also that as people get older with age, focal acuity becomes more difficult (especially for those at the back of the room—which is where the instructor will be located). Be also careful about selections of color. There needs to be enough color contrast (on both the screen and any printouts) to be entirely readable. These recommendations aren't difficult to follow; they just require acknowledgement of the differences between individuals, practice in different presentation contexts, and tenacious attention to detail.

Section IV. Communication

In my nearly twenty-five years of professional and management work (including consulting at the executive level), I have never once seen anyone use note cards. For Bus302, each individual only needs to speak for a few minutes or several minutes at most. Furthermore, the formal presentation includes a presentation displayed on the screen. My observation is that students simply don't spend enough time studying the case in detail and practicing speaking their individual parts of the presentation. Do not use note cards; at least do not use note cards anyone in the audience can see.

4.2 Provided clear explanation of materials

This requirement is no different than the requirement of clarity for written work. Probably the most difficult problem is to "not present as you speak." This is a formal, professional presentation (at least for the cases)—not a Super Bowl party.

4.3 Explained flow charts and data tables

A well-designed figure, table, diagram, or equation should be mostly self-explanatory. But most presenters, even skilled presenters, are not good enough at that task. After displaying a chart, give the audience a chance to scan the image (again, a presenter will know this task has been done by scanning the eyes in the audience), review the "outside" of the figure (the titles and the axes), and then proceed to the "inside" of the figure (the actual data). If the presenter feels that it is unclear to a fraction of the audience, the presenter should go over the chart again. This cannot be done for each chart in the presentation, but can be done for the first chart, especially the first chart in a series of charts on a similar topic.

4.4 Presentation was well-organized

Structure the oral presentation in the same general sequence as the written report. The only difference is that some teams emphasize the recommendations early in the presentation. A case is not a mystery novel—one shouldn't have to "wait to the end to find out 'who did it'."

Section V. Handling of Q&A

5.1 Listened to questions carefully

When the presenters have to listen to the audience, the presenters suddenly find out how difficult communication actually is in practice. And this is just with a small room, with most everyone being familiar with everyone else, and with a case everyone has read and analyzed in detail. It gets harder after BUS 302, harder still in BUS 497, and inexorably difficult in professional life. Another difficulty occurs at the executive level. Presenters must prepare to anticipate any question on any dimension of the case—even seasoned presenters have difficulty knowing what a senior executive may might at the end of the presentation. The strongest presenters prepare a set of "back-pocket" slides; that is, slides after the "end" of the regular presentation that can be used to help anticipate and address an "off-the-wall" question by an executive.

5.2 Responded directly to question asked

Answer the question; don't just repeat what was already said in the presentation. In general, the audience member remembers what she or he heard in the presentation. That audience member wants their specific question answered (to the best of the presenter's ability) directly. In addition, eye contact should be directed at the individual who asked the question; however, the presenter should still make eye contact with everyone else in the room every 30 seconds or so.

5.3 Answered questions without defensiveness

Each of the cases involves a significant decision and a good deal of money. Everyone in the room is constantly striving for economic returns and organizational impact. Personalities are interesting, but not compelling. Professionals, managers, and executives evaluate positive returns and impact based on the merits and quality of the presentation. The presenting team should not take anything personally. If a presenter doesn't know an answer to a question, then the presenter can simply say something such as "That is a good question, I can look it and get back to you shortly."

The same holds for audience members. If a presenter doesn't appear to know the answer or even know why the question is relevant, don't pursue the topic in public. Often, professionals "agree-to-disagree" informally and agree to investigate the matter later. This could a formal working arrangement or it could as simple as one person inviting the other person out to a working lunch. Humility is better than bravado in a public presentation (even if you are *right*).