

Paper 221-2008

## Effective Presentations for SAS® Training and More

Christopher J. Bost, MDRC, New York, NY

### ABSTRACT

This paper describes a five-step process for effective presentations: 1) assessing needs; 2) identifying key concepts and skills; 3) preparing materials; 4) practicing the presentation; and 5) delivering the presentation. This process is useful for people who develop SAS® training classes and who make technical presentations.

### INTRODUCTION

Professionals are required to make presentations. Training in presentation skills, however, is rarely provided. Best practices can be identified to facilitate the development of effective presentations. The following sections describe a five-step process, from assessing needs through delivering the presentation. Practical tips for each step are supplied.

### STEP 1: ASSESSING NEEDS



*“Sorry, Pop, but your message is no longer relevant to the younger audience.”*

© The New Yorker Collection 2003 Lee Lorenz from cartoonbank.com. All Rights Reserved.

The first step in developing an effective presentation is assessing needs. This step includes three components:

1. confirming that a presentation is needed
2. defining the objective of the presentation
3. analyzing the needs of the target audience

### CONFIRM THE PRESENTATION IS NEEDED

Make certain a presentation is necessary. In some cases, a meeting, memo, or e-mail might be all that is required. Presentations consume significant resources and should be made only when they add significant value. Select the format that will offer the greatest return on investment.

Tip: Complete the following sentence: “A presentation is needed to \_\_\_\_\_.”

### DEFINE THE OBJECTIVE OF THE PRESENTATION

A presentation should address a specific business need. Identify that need before starting work on a presentation. Specify the objective of the presentation and how it addresses the business need. All presentation content will be designed to meet the stated objective.

Tip: Complete the following sentence: “A presentation on \_\_\_\_\_ will \_\_\_\_\_.”

### ANALYZE THE TARGET AUDIENCE

A presentation should be geared toward a specific audience. Analyze the audience so that you can customize the content (Step 2) and format (Step 3) of the presentation to meet their needs.

Tip: Answer the following questions about your audience:

- How much knowledge does your audience have?
- How much interest does your audience have?
- What does your audience expect from the presentation?

When analyzing the audience, also be mindful of different learning styles. People use three senses—seeing, hearing, and touching—to learn, but everyone has a dominant learning style. *Visual* people learn by seeing things (e.g., PowerPoint slides). *Auditory* people learn by hearing things (e.g., lectures). *Kinesthetic* people learn by doing things (e.g., activities).

Programmers, for example, are frequently visual or kinesthetic learners. If you know the predominant learning style of your audience, you can plan accordingly. Learning styles vary, however, so it is generally recommended to offer a variety of visual, auditory, and kinesthetic information to engage your audience (Kushner, 2004).

Ideally, you will be able to survey audience members in advance about their knowledge, interest, and expectations. This is rarely possible; one option is to talk to people who are similar to audience members. In the absence of clear information, plan for an audience with mixed levels of knowledge and different learning styles.

## STEP 2: IDENTIFYING KEY CONCEPTS AND SKILLS



*"I know so much that I don't know where to begin."*

© The New Yorker Collection 1987 James Stevenson from cartoonbank.com. All Rights Reserved.

The second step in developing an effective presentation is identifying key concepts (and skills, for training presentations). This step includes three components:

1. determining what the audience needs to know
2. consulting Subject Matter Experts (SMEs)
3. creating an outline of the presentation

## DETERMINE WHAT THE AUDIENCE NEEDS TO KNOW

A presentation should give attendees information they truly need. Include only essential information. The presentation should be as focused and concise as possible.

Tip: Answer the following questions about content:

- Is it *nice to know* or something attendees *need to know*?
- Does the information belong in a *paper* or a *presentation*?
- How much context does the audience need to follow along?

When in doubt, leave it out. A presentation should not cover absolutely everything. Save background information, supplementary details, and the like for a paper or appendix that attendees can read before or after the presentation.

Note that audience members with different levels of knowledge need to know different things. Ideally, you would offer two presentations, one introductory and one more advanced, to the different audiences. This is rarely possible. Compile information that the different audiences need to know.

## CONSULT SUBJECT MATTER EXPERTS

A presentation should contain authoritative information. Ask Subject Matter Experts (SMEs, pronounced "smeeze") for ideas. A SME is an internal or external authority on a particular subject who complements your own knowledge, experience, and research.

Tip: Guidelines for working with SMEs include:

- Schedule time with a SME well in advance; they tend to be busy and in demand.
- When you meet, listen more than talk. Ask some questions, but take more notes.
- Thank SMEs (e.g., in writing or via e-mail; acknowledge them in your presentation).

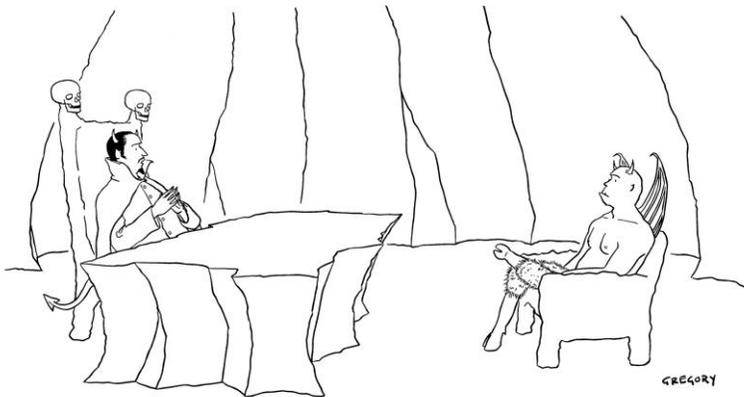
Remember that you do not have to be the expert on everything. Utilize all resources available. In fact, you should consult a Subject Matter Expert even if you are a SME. (Just be careful about how much prior knowledge you can assume the audience has.)

## OUTLINE THE PRESENTATION

A presentation should be well-organized. After identifying your main points, create an outline with items in logical order. The outline provides structure for the whole presentation and helps streamline content development.

Tip: Use software tools to create an outline. In Microsoft® Word, open a new document, click the View menu, and select Outline. In Microsoft PowerPoint, open a new presentation and click on the Outline tab (next to the Slides tab).

## STEP 3: PREPARING MATERIALS



*"I need someone well versed in the art of torture—do you know PowerPoint?"*

© The New Yorker Collection 2003 Alex Gregory from cartoonbank.com. All Rights Reserved.

The third step in developing an effective presentation is preparing materials (e.g., PowerPoint slides, handouts, and exercises). This step includes three components:

1. designing for adult learners
2. making things interactive
3. working with PowerPoint

## DESIGN FOR ADULT LEARNERS

A presentation is usually aimed at adults. Incorporate adult learning preferences into your presentation. Above all else, adults want information that is relevant and practical. They like to know what they can expect from the presentation. They want to be treated as peers. Adults also like to be able to exchange personal experience (Kushner, 2004).

Tips: Some suggestions for presenting to adults are:

- Make sure that content is useful on the job.
- Describe the outline of the presentation and any activities at the start.
- Offer clear, nonjudgmental feedback.
- Facilitate a discussion instead of lecturing.

## MAKE THINGS INTERACTIVE

A presentation should be interactive. Attendees retain the least amount of information from handouts and lectures. People remember only 10 percent of what they read and 20 percent of what they hear. On the other hand, people remember 30 percent of what they see, 50 percent of what they see and hear, 80 percent of what they say, and 90 percent of what they say and do (Bowman, 1997).

Tips: Ways to make things more interactive include:

- Ask questions.
- Provide multiple opportunities for discussion.
- Include small-group activities.

Increase retention by spending less time on lecturing and more time allowing people to discuss and practice applying new knowledge. Handouts can be resources, but they are not the most effective presentation and training materials.

### USE POWERPOINT EFFECTIVELY

A presentation frequently includes the use of PowerPoint. Use PowerPoint consciously to enhance your presentation. When it is not needed or used less effectively, PowerPoint will diminish your presentation.

Tips: Some recommendations for effective PowerPoint presentations include:

- Make sure each slide has one main point.
- Use a maximum of five bullets on one slide.
- Leave lots of white space.
- Include a picture or diagram, especially if it allows you to eliminate text.
- Use special effects sparingly.
- Number all slides (except the title slide) so the audience and presenter can refer to slides by number.
- Print handouts with three PowerPoint slides per page; this format includes lined space for taking notes.

Use slides to promote interaction (e.g., to explain a group activity) rather than for passive reading and listening.

Apply design principles when preparing visuals. *The Non-Designer's Design Book* (Williams, 2004) is an excellent introduction to the basics (proximity, alignment, repetition, and contrast). It also covers how to combine different fonts effectively.

### STEP 4: PRACTICING THE PRESENTATION



*"Oops! Wrong plug."*

The fourth step in developing an effective presentation is practicing the presentation. This step includes two components:

1. previewing the presentation with the target audience
2. simulating the actual presentation environment

© The New Yorker Collection 1990 Warren Miller from cartoonbank.com. All Rights Reserved.

### PREVIEW WITH THE TARGET AUDIENCE

Previews are essential for fine-tuning content, format, and delivery. Preview your presentation with people who will attend, if possible, or with people who represent your target audience.

Tips: Some recommendations for previews include:

- Select people who will respectfully challenge you and give constructive criticism.
- Invite people with different levels of knowledge where possible and appropriate.
- Script complicated sections. Optionally, use the Notes feature in PowerPoint.
- Provide only as much detail as needed. Watch out for jargon and embellishing.
- Take notes and incorporate feedback into your presentation as soon as possible.

Feedback might be idiosyncratic or even contradictory. Make changes only where they add value. Remember Bill Cosby's definition of success: "I don't know the key to success, but the key to failure is trying to please everybody."

Conduct the preview far enough in advance to permit a second preview if the presentation has significant changes or additions.

## REHEARSE UNDER REALISTIC CONDITIONS

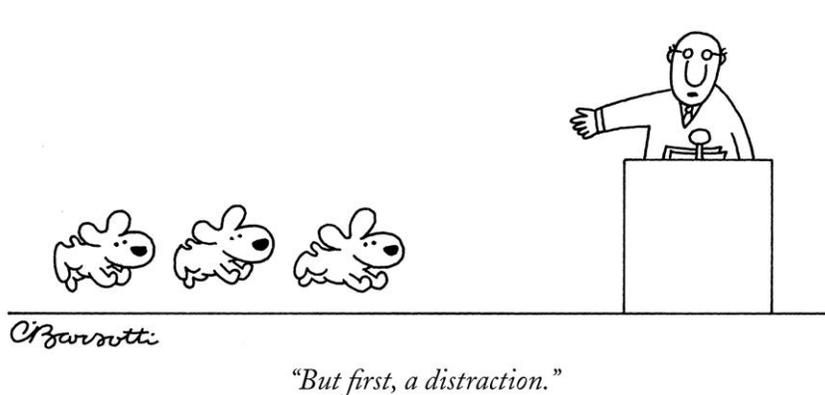
Practice your presentation under “real life” conditions. The goal is to become familiar and comfortable with the physical, technological, and situational demands of presenting to a live audience.

Tips: Some ways to create a realistic environment are:

- Rehearse in the actual meeting room if possible, or a similar space.
- Use a laptop, projector, and any other equipment you will use when presenting (e.g., microphone).
- Face your audience.
- Time yourself.
- Rehearse the entire presentation, including questions and answers.

Do not make any substantive changes within 48 hours of the actual presentation. Never introduce something in your actual presentation that you have not practiced.

## STEP 5: DELIVERING THE PRESENTATION



The fifth step in developing an effective presentation is actually giving the presentation. This step includes three components:

1. introducing the presentation
2. linking ideas with transitions
3. concluding the presentation

© The New Yorker Collection 2002 Charles Barsotti from cartoonbank.com. All Rights Reserved.

Before doing a presentation, eliminate any logistical problems. For example: always arrive early; bring copies of any materials; and check all equipment. Murphy’s Law (“Whatever can go wrong will go wrong, and at the worst possible time.”) always seems to apply to presentations!

## INTRODUCE THE PRESENTATION

A presentation needs an introduction. Always start by stating the purpose of the presentation. The introduction should also orient the audience to what will be covered.

Tip: Answer the question, “What’s in it for me?” (i.e., for the audience members) at the beginning of the presentation. This is usually referred to as “WIIFM” (pronounced “whiff ‘em”). Remember that relevance is paramount to adult learners.

You can start by introducing yourself—briefly. Mention your qualifications only where relevant and necessary to establish credibility with your audience. It can be far more useful to ask your audience about *their* backgrounds. Involve your audience from the beginning (Bowman, 2001).

State up front that audience members have different levels of knowledge where applicable. For example, note that the first half of the presentation will be more introductory (e.g., a review for some attendees), while the second half of the presentation will be more advanced (e.g., optional for some attendees). This will help manage expectations.

## USE TRANSITIONS

A presentation requires transitions between sections. Use transitions to reorient the audience to what was just covered and what is coming next. Transitions logically link topics and help structure the presentation.

Tips: Two simple transitions are:

- Numbering items (e.g., “The second step in the process is...”).
- Transitional phrases (e.g., “Turning now to...”; “Next up is...”).

Also use internal summaries and pause for questions to break up the presentation. Before changing topics, review what was just covered and ask if there are any questions. Do not change the order or content of your presentation, however, based on a question!

If someone asks a question about a topic you plan to cover later, acknowledge it but then stick to your outline (e.g., “Great question. We are going to cover that in just a few minutes.”). If someone asks a question about something you did not plan to cover or that would require an in-depth explanation, acknowledge it and agree to follow-up later (e.g., “That might be beyond the scope of this presentation. Why don’t we talk afterwards?”).

## CONCLUDE THE PRESENTATION

A presentation needs an ending. Conclude the presentation by summing up the main points. Remember that it is the last chance to make an impression on the audience.

Tips: Some guidelines for conclusions are:

- End by repeating the most important point of your whole presentation (i.e., the *one* thing they should remember).
- Direct the audience to resources and additional information (especially for training presentations).
- Include contact information where appropriate.
- Save time for any final questions.

Stick around after your presentation for “one-on-one” conversations and to receive valuable feedback.

Note that a presentation is a performance of sorts. Vary your voice (pitch, tone, and pacing) to engage the audience. Watch your body stance and move around the room if possible (but watch out for cords!). Make eye contact to connect with audience members (Bieche, 2005). Remember that enthusiasm is contagious.

These guidelines will help you prepare and deliver presentations that meet the needs of your audience. Even seasoned presenters, however, occasionally flub a line. The best way to handle it is to simply start the sentence again. Do not call attention to it, and do not apologize. No presentation is perfect; just own it and move on. It will quickly be forgotten by all, including you.

## CONCLUSIONS



*“Never, ever, think outside the box.”*

This paper described a five-step process for effective presentations. Best practices were highlighted, and tips were supplied for each step.

The key elements are to consider your audience, to consult Subject Matter Experts, to make things interactive, to preview the presentation, and to connect with people as you present.

Try out this approach for your own presentations, but feel free to “think outside the box” and see what works for you.

**REFERENCES**

- Biech, Elaine. 2005. *Training for Dummies*. Indianapolis, IN: Wiley Publishing, Inc.
- Bowman, Sharon. 1997. *Presenting with Pizzazz*. Glenbrook, NV: Bowperson Publishing Co.
- Bowman, Sharon. 2001. *Preventing Death by Lecture!* Glenbrook, NV: Bowperson Publishing Co.
- Kushner, Malcolm. 2004. *Presentations for Dummies*. Indianapolis, IN: Wiley Publishing, Inc.
- Williams, Robin. 2004. *The Non-Designer's Design Book, Second Edition*. Berkeley, CA: Peachpit Press.

**CONTACT INFORMATION**

Questions, comments, and suggestions are welcome and encouraged.

Christopher J. Bost  
MDRC  
16 East 34<sup>th</sup> Street, 19<sup>th</sup> Floor  
New York, NY 10016  
Work Phone: (212) 340-8613  
Fax: (212) 684-0832  
E-mail: [christopher.bost@mdrc.org](mailto:christopher.bost@mdrc.org)  
Web: [www.mdrc.org](http://www.mdrc.org)

SAS and all other SAS Institute Inc. product or service names are registered trademarks or trademarks of SAS Institute Inc. in the USA and other countries. ® indicates USA registration.

Other brand and product names are trademarks of their respective companies.