

## Meetings

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The average chapter member spends more time attending chapter meetings than any other aspect of participation in AFE. Members attend chapter business meetings, committee meetings, professional meetings, and informal meetings (often luncheon) among themselves. It is difficult to think of any chapter activity that doesn't include some sort of meeting. The group interaction, and member-to-member contact that meetings bring is a valued member benefit. Meetings help chapters fulfill the "high-touch" needs.

The chapter is most visible when it is meeting. Business meetings and professional meetings are usually held in public facilities where AFE is in full view of its prospective members and the community. Meetings create awareness of the association and the chapter.

Since meetings play such a major part in the chapter's existence, their success or failure can well determine the success or failure of the chapter. Poorly planned and organized meetings create a negative image of the chapter. Members become disenchanted with the chapter and the prospective members view AFE as a disorganized organization that isn't worth their time and effort.

This section deals with two basic types of chapter meetings — business meetings and professional meetings. The guidelines presented will help to ensure that your chapter's meetings will be well-planned and organized. This will provide the maximum benefit to the members...and will go a long way toward locking-in those prospects to membership.

### Business Meetings

Chapter business meetings provide members with the necessary opportunities to meet as a group to conduct chapter business. During these meetings, members receive current status reports on chapter finances, programs and projects, and progress on goal attainment. They handle administrative matters here, discuss future goals and directions of the chapter, and similar topics.

Although many chapters find it unnecessary to schedule a business meeting every month, each business meeting must be conducted in a professional manner. Meetings which are well-organized and efficiently conducted make it possible for the chapter to complete its business as quickly and smoothly as possible.

When business meetings are allowed to get out of hand, the chaos which results makes it impossible to accomplish anything. Poorly planned and organized meetings can be a major reason why attendance at meetings declines. Few members want to attend a meeting just to listen to other members argue and bicker among themselves. If business meetings continue to be disorganized and unproductive, the programs of the chapter will suffer. Successful chapter programs require a coordinated effort among the chapter members. Since much of this coordination often occurs during the business meetings, chapter programs will never get off the ground if business meetings are chaotic.

The chapter president serves as the chairman of all chapter business meetings and is responsible for seeing that the business of the chapter is conducted in a timely, efficient manner.

**1. Key Role of the Chapter President.** As the chief elected officer of the chapter, the president chairs all business meetings of the chapter. This obviously means a great deal more than carrying the gavel to the meeting! For example, the chapter president must:

- Ensure that every chapter member receives proper notice of all regular and special meetings of the chapters.
- Prepare and/or approve the meeting agenda.
- Approve distribution of the minutes of the meeting.
- Call the meeting to order promptly, at the date, time and place specified in the notice of the meeting.
- Have a working knowledge of parliamentary procedures. (See Guide to Parliamentary Procedures located in the Meetings Appendix.)
- Be ready, at all times, to rule on questions of propriety which may arise during the meeting.
- Recognize members during the business meeting (which entitles them to speak).
- See that all members have an opportunity to present pertinent views and information, yet make sure that members are not subjected to irrelevant statements, comments or suggestions.
- Control the discussion on all motions that are germane, properly presented and seconded.
- Cause these motions to be put to a vote, conduct that vote, and announce (specify) both the result of the vote and the consequence (the resultant action) directed by that vote.
- In general, preserve the decorum of the meeting and see to its productive accomplishment.

Although the president must exercise control over the meeting, members should not be interrupted while they are speaking (even though the president, for example, may know more about the matter being discussed than they do). Effective presidents do not

get overly excited or lose their tempers. Even the most troublesome member should be treated in a professional manner. In general, the president does not participate in the debate on motions and should maintain a neutral position on all matters which come before the chapter for discussion. As chairman of the meeting, the president usually does not vote on motions unless required to break a tie.

The president should always have close at hand for easy reference: a copy of the AFE national bylaws; the chapter's bylaws; a copy of the current Robert's Rules of Order; and any reports or files which will help make the meeting run more efficiently.

**2. Establishing a Quorum.** A quorum is the number of members required to be present during a business meeting in order to transact official chapter business. In many cases, a majority of the members of the chapter is required for a quorum. In other cases, it may be slightly less than half, depending on the total number of members in the chapter, average meeting attendance, etc. The number of members needed to establish a quorum should be specified in the chapter bylaws.

If a quorum is not present, no business can be legally transacted. The president should announce that the meeting is not in session because of the lack of a quorum and should indicate a definite time for reconvening. The members who are present may operate as a committee until such time that a quorum is established.

**3. Meeting Minutes.** The minutes of the meeting constitute the official record of chapter business transacted. It is a good idea to include the minutes of the last chapter business meeting in the regular chapter newsletter or bulletin. If space does not allow the publishing of complete minutes in the newsletter, they should be summarized there and issued separately (which would still mean the two items could be in the same mailing). Issuing these by mail helps all members keep apprised of the business transacted, especially those who, for some reason, were unable to attend that chapter meeting.

If for some reason the minutes of the last meeting were not mailed, one of the first orders of the business at the next chapter meeting should be the reading of those minutes, which is done by the chapter secretary. The president should ask for any additions or corrections to the minutes. If none are suggested, the minutes may be approved as distributed previously by mail (or read).

If the chapter members find the minutes to be in error, the president should request an appropriate motion to amend the minutes. When all additions or corrections to the minutes have been completed, the

president should announce that the minutes stand approved as corrected.

**4. Officer and Committee Reports.** The meeting agenda should include an opportunity for each chapter officer and all committee chairmen to present status reports. These reports are important because they enable every chapter member to stay up-to-date on the various programs and projects which have been undertaken by the chapter. Officer and committee reports should be submitted in writing and should be presented to the chapter secretary immediately after the verbal report is completed.

If a report is too long and complex to be read or summarized verbally, copies should be prepared in advance and distributed to every member in attendance at the meeting. The chapter's annual operating plan, annual budget, and schedule of activities are three examples of reports which should be presented to the chapter members in writing.

**5. Reports from Special Task Groups.** When a special task committee makes its final report, the committee has completed its work. Unless the chapter president has a reason for reappointing the committee, it is automatically disbanded and ceases to exist. If the committee is submitting an interim report, the committee will continue to operate until its work is completed. If the interim report recommends action, each recommendation must be presented to the chapter for discussion and vote.

**6. Adopting Reports.** The terms "adopt," "accept," etc., as applied to motions are generally used interchangeably. Adoption of a report has the effect of endorsing the opinions, actions, recommendations, or resolutions submitted by a committee, task force, etc.

**7. Handling Discussion.** After it has been moved and seconded to adopt a report or recommendation, chapter members usually will want an opportunity to discuss the pros and cons of the motion. Although such discussion is a basic right of the chapter members, the president must carefully control the discussion to ensure that everyone has an equal opportunity to express pertinent views.

The supporters of each side of an issue should have an equal opportunity to express their views. If it appears that a large number of members wish to express opinions, the president may want to limit the amount of time that each member may speak. If a member's comments are nothing more than a restatement of previous comments, the president should gently interrupt the speaker and ask if he has new facts or suggestions to present.

Once all members have had the opportunity to express their opinions, or when the time limit for

discussion has expired, the president should restate the motion under consideration and call for a vote.

**8. Robert's Rules of Order.** Chapter leaders — and many individuals, generally — often misunderstand the real function of a good parliamentary practice. Used properly, parliamentary procedure is one of the most effective means by which individuals can take orderly action as a group.

One can give full consideration to any matter of common interest, encourage common sense minority discussion on each question, then act according to the will of the majority — all with a minimum waste of time. Good parliamentary procedure enables the chapter to conduct its business more efficiently and is not intended to inject unnecessary formality or to prevent the free expression of opinion.

One of the most widely recognized guides to parliamentary procedure is Robert's Rules of Order. Each chapter president should have access to a copy of this handbook and should develop a working knowledge of the basic rules of parliamentary procedure.

The revised editions of Robert's Rules of Order cover all aspects of parliamentary procedure from very simple motions to complex questions or protocol. Since many people find it difficult to fully understand Robert's Rules, many organizations have developed simplified guidelines to parliamentary procedure. These simplified guides make it easy for the novice to understand the basic rules of parliamentary procedure and will enable the chapter president to handle most situations which occur during business meetings.

#### **Professional Meetings**

There is no chapter function as important or as effective as professional programming. ("Professional" chapter programs are designed to improve the capability of members...their professional development. These are often planned presentations, which are considered the "educational" part of the chapter meeting, as opposed to strict chapter business.) Good programming will enhance the image of your chapter, help attract new members, and encourage existing members to continue their participation in the chapter. Strong programs are also a big step toward achieving the primary mission and objectives of AFE.

The strength or weakness of chapter professional programs will also have a definite impact on your membership recruiting and retention efforts. When chapter professional programs are weak, prospective members will see no reason to join the chapter, the new members quickly become disillusioned, and everyone will think twice about renewing their membership.

**1. Topic Selection.** With all the importance placed on effective professional programming, many chapters wonder why the association does not select programs for its local chapters. The answer is simple. Your chapter members are in the best position to determine what local professional activities will best meet their localized needs. A topic which is interesting to chapter members in New York may hold no appeal for AFE members in Texas. It is up to you to determine what is right for your chapter.

**2. The Program Committee.** The program committee should be formally organized as a standing chapter committee. The composition of the committee should be specified in the chapter's bylaws, so that there is never a question about who is responsible for the chapter's programs.

In some chapters, the program committee chairman is an elected office. Other chapters include the position of program committee chairman among the responsibilities of the vice president. If your chapter appoints its committee chairmen, rather than including those related responsibilities among the duties of elected officers, you may wish to consider the advantages of staggering their terms. This helps to ensure that a seasoned program committee chairman will be in office when new officers assume their duties.

Once the program committee chairman is selected and the committee members are designated, the committee begins its program planning for the coming year...in conjunction with the specifications of the chapter's operating plan. The chairman of the programming committee should work closely with the chairman of the membership committee, since these two groups must work together to "sell" prospective members on the benefits of joining AFE.

When selecting members for the program committee, be sure to get representation from a good cross-section of the chapter. Members from different industries and institutions will help to assure that the varying interests of all chapter members are represented. Senior members of the chapter, who have experienced many years of chapter programs, should be balanced with newer members who can provide fresh ideas and suggestions. The number of members on the committee depends on the size of your chapter. A minimum of three members for small chapters and six to eight members for larger chapters is recommended. All committees should be large enough to be representative, but small enough to be effective.

**3. Identifying Topics to Serve Member Needs.** Most chapters use an annual membership survey to determine which topics are of greatest interest to the members. These surveys provide specific program

suggestions; but most often they help the program committee to effectively identify trends, fields of interest, and problem areas members are experiencing. For example, if the survey indicates that there is a reasonably common need for some particular type of information in the field of material handling, the program committee could schedule one or more specific programs in that area.

**4. Selecting the Meeting Time and Place.** The membership survey is an effective means of selecting a convenient time and place for the regular monthly meetings and will help to determine member interest in special meetings such as banquets, panel discussions, etc.

Although it is impossible to select one date, time and location which will be "best" for each chapter member, the survey research will show the optimum times — when the greatest number of chapter members can be in attendance. When a favorable day of the month, starting time and location have been selected, changes in the schedule should not be made without a very good reason. Once the members get in the habit of thinking that "the second Tuesday of each month is AFE time" they normally will attend meetings more regularly.

Many chapters have found that luncheon meetings are becoming more popular with chapter members. Mid-day meetings offer several advantages including lower meal prices, less conflict with family activities, and a more business-like atmosphere. If members find a noon meeting more convenient, attendance tends to increase significantly.

A growing number of chapters find that holding the regular chapter meeting—and/or an "educational-type" (seminar, etc.) — in the corporate facilities of a member produces good results. (For the regular chapter meeting, the member's employer can often be persuaded to pick up the meal tab!) Or if there is an engineers club, bankers club, businessman's club, etc. — or similar facility — in your community, the chapter may want to consider using it. These facilities are usually well-designed for chapter meetings and have the audio/visual equipment required by your speakers. Most facilities also offer food service, and some even free publicity for the meeting. Currently, however, most chapters tend to hold meetings in private dining rooms at local restaurants or hotel facilities. But this may be changing, due to cost, accessibility, quality atmosphere (desired), scheduling, and a host of other reasons.

No matter what facility is selected for these "professional" meetings (which include regular chapter meetings), it must be decided whether to meet at one location throughout the year or conduct meetings at different locations throughout the city. A

single location simplifies the problems faced by the program committee, since the procedures for making reservations and required arrangements are quickly established and then repeated month after month. Moving meetings from place to place may prove to be more convenient and interesting to the chapter members and guests.

The final decision on where to hold chapter meetings should be based on the information collected during the annual chapter survey. After all, these meetings are for the benefit of the members, so give them what they want!

**5. Provide Ample Notice of Meetings.** Even if the chapter members are provided with a printed schedule of programs planned for the year (which is often a function of the program committee), it is still important to regularly notify members of upcoming chapter activities. Many chapters use a chapter newsletter (or bulletin) which is mailed to each chapter member either semi-monthly, monthly, or bimonthly. This way, chapter news and program announcements can be distributed to chapter members in a timely manner.

Notices of upcoming meetings should be timed to arrive approximately 8-12 days before the meeting date. Much earlier arrival makes it possible for the member to forget about the meeting. Notices which arrive less than seven days before the meeting are usually received too late to avoid conflicts. The best approach is to have the printed announcement arrive 10+ days before the meeting, then follow-up by phone to each member, about 3-5 days before the meeting. Nothing works better than personal contact. Use a phone committee (the larger the better.. just so it's manageable). These members on the phone committee will be there too!

If the chapter has scheduled a dinner meeting where reservations are required, the reservation procedure should be clearly indicated in every meeting announcement. Many chapters list several phone numbers of members to call when making reservations. Other chapters include a postage paid return card with the meeting announcement. Make good use of your telephone committee. Again, this personal touch proves that the chapter is interested in its members. It generates attendance at meetings. A telephone call also makes it possible for the chapter to provide notice of last minute details or changes in the program schedule.

**6. Advance Planning is the Key to Success.** The most difficult — but most effective — method of program planning is to prepare the entire year's schedule of programs well before the beginning of the year. Some program details, particularly the names of technical speakers planned later in the year,

may not be available. However, the schedule should be blocked out with specific topics for each meeting.

Planning well in advance has many advantages. The chapter membership committee knows exactly what to "sell" to prospective members. A printed schedule of professional programs can be included in your chapter directory and other promotional literature. The printed program also proves to your members and prospective members that yours is an aggressive chapter which is capable of delivering the membership benefits which it promises.

Advance planning also makes it easier for your chapter members to plan their schedules in a way that will enable them to attend each monthly meeting of the chapter. Good speakers are usually booked many months in advance, so early planning can also help ensure that the speaker you want will be available.

**7. Balancing the Program Schedule.** Advance planning also gives an opportunity to effectively balance the chapter's professional programs by scheduling meetings with a variety of formats on many interesting subjects. When chapters plan programs no more than one month in advance, it is too easy to fall into a pattern of plant tours and technical speakers with no variety in the monthly routine. By planning a full year's program in advance, the committee has more opportunity to include movies, debates, panel discussions, etc. Remember: the best overall learning experience is usually provided through a variety of program formats.

**8. Helping Speakers Help You.** Every courtesy should be extended to the speakers who participate in the chapter's professional programs. An invitation to speak, extended well in advance, should be confirmed in writing. Approximately 30 days prior to the meeting, the program committee chairman should again call the speaker to reconfirm the engagement and determine what audio/visual equipment (if any) will be required. Detailed information about the time of the meeting, normal meeting procedures, question-and-answer sessions, the length of the presentation, meals, transportation, and expenses, should also be covered at this time.

Most of the speakers who address chapter meetings are not professional platform-type speakers who do that for a living. Since making a presentation before a group can be a traumatic experience, your speakers will probably appreciate any guidance or assistance which you can provide to help them prepare their presentations.

A final telephone call should be placed to the speaker a day or two prior to the date of the presentation. It is important to offer to provide local transportation to the speaker and invite him to the lunch or dinner

prior to the presentation. Naturally, the speaker's meals and refreshments should be provided by the chapter. A clearly printed name tag should be prepared in advance and should be available to the speaker upon arrival. All requested audio/visual equipment should be in place, and tested, well before the meeting begins. Every assistance should be provided to help the speaker make the presentation as successful as possible.

At the conclusion of the presentation, the program committee chairman and/or chapter president should thank the speaker for participation in the chapter's professional program. A certificate of appreciation (available from AFE Headquarters) should be framed and presented to the speaker at the conclusion of the presentation. A follow-up letter expressing the chapter's appreciation should be sent to the speaker on the day following the presentation. This is often done over the signature of the president, with an indicated "cc:" to the program committee chairman.

**9. Evaluate the Program.** The professional program is never complete until a comprehensive evaluation of its strengths and weaknesses has been performed. The evaluation will help the program committee to pinpoint weaknesses in the presentation, which can be corrected in future programs.

One of the best ways to evaluate a professional program is to ask each chapter member to complete a brief program evaluation form at the end of each meeting. A typical form would ask the member to evaluate the following:

- Speaker's knowledge of his subject
- Overall quality of the presentation
- Appropriateness of the topic
- Degree presentation was properly targeted to the audience
- The speaker's ability to express ideas and transmit information
- The use of visual aids

The evaluation form should also indicate if the chapter members would like to hear additional presentations on this topic area, or if there are other related topics which should be considered for future professional meetings. Get the members to suggest speakers for those topics.

Then the chapter program committee should maintain a speakers file which includes the evaluations of all previous programs. An up-to-date speaker file can relieve much of the drudgery of program planning and will help to ensure that every chapter professional program is a success.

# Meetings Appendix

## GUIDE TO PARLIAMENTARY PROCEDURES

### Handling of a Main Motion — Six Steps

1. Member makes a motion using the phrase "I move" (or "I offer").
  - Must have recognition by the chair
2. Another member (without recognition) seconds the motion.
3. Chair restates the motion (the question). "It has been moved and seconded that we..."
4. Debate on the question:
  - Maker of motion has right to debate first.
  - Debate cannot be closed by chair, but assembly can order debate closed with 2/3 vote.
5. Putting the question to a vote:
  - Chair calls for both affirmative and negative vote.
  - Normally taken by voice or show of hands.
6. Chair announces result (four steps announced in one sentence):
  - Report of vote (which side has it).
  - Declaration that motion is adopted or rejected.
  - The effect of the vote or putting it into effect.
  - Chair announces the next item of business.

### Amending a Motion

1. To insert or to add (words or paragraph).
2. To strike out (words or paragraph).
3. A combination of these two processes:
  - To strike out and insert.
  - To substitute a paragraph or entire text.
4. Rules on Amendments:
  - Must be seconded.
  - Is debatable (if motion to be amended is debatable).
  - Only two amendments pending at one time.
  - Majority vote to adopt.
  - Vote may be reconsidered.
  - Primary amendment must be germane to original motion; secondary amendment must be germane to primary amendment.
  - Member's vote on an amendment does not obligate him/her to vote any particular way on the motion. A new subject may not be introduced under the pretext of an amendment.

### Ranking Motions

1. **Privileged Motions:** Deal with special matters of immediate importance; they do not relate to the pending business.

**Fix the Time at Which To Adjourn:** To provide for a continuation of the present meeting in order that business not finished at time of adjournment may be conducted.

**Adjourn:** To close the meeting.

**Recess:** To take a short intermission in the assembly's proceedings after which business is immediately resumed at the exact point where interrupted.

**Raise a Question of Privilege:** To obtain immediate attention to the rights and privileges of the assembly or any of its members.

**Call for the Orders of the Day:** A somewhat "formal" means of approving the agenda.

2. **Subsidiary Motions:** These assist the group in treating — or disposing of — a main motion and other types of motions.

**Postpone Indefinitely:** To reject the main motion pending without taking a direct vote on it.

**Amend:** To modify or change a main motion before it is adopted or rejected.

**Commit or Refer:** To delay action and give opportunity for more consideration by a committee.

**Postpone Definitely:** To delay action on the pending motion(s) to a later time or meeting.

**Limit or Extend Limits of Debate:** To limit or extend the time given for debate.

**Previous Question:** To stop debate and amendment and immediately take the vote on pending motion.

**Lay on the Table:** To lay aside the pending motion temporarily when something more urgent arises.

### Non-ranking Motions

**Take from the Table:** To resume consideration of a main motion that has been laid on the table.

**Ratify:** To make legal some action taken in the absence of a quorum or by an officer or committee in an emergency.

**Other Non-ranking Motions:** Reconsider and Rescind.

### Reconsider

1. The motion to reconsider the vote gives a group the opportunity to consider a subject a second time. It permits correction of hasty, ill-advised, or erroneous action, taking into account new information or a changed situation. Rules:

- A. Must be made by a member who voted on the prevailing side.
- B. Must be made on the same day or next calendar day after vote was taken (legal holidays and recesses not counted).
- C. Does not require recognition, but may not interrupt a speaker.
- D. Requires a second. (Any member may second.)
- E. Debatable if motion to which it applies is debatable.
- F. Cannot be amended.
- G. Requires majority vote regardless of the vote required for adoption of the motion to which it applies.
- H. Cannot itself be reconsidered.

2. Important Points To Remember:

- It cannot be made by anyone who was absent when the vote was taken or who failed to vote when the vote was taken.
- The making of the motion suspends for a limited time all action under the vote it is proposed to reconsider. (Until close of the next regular business meeting, if not called up sooner.)
- Cannot be applied to the affirmative vote in nature of contract when party to contract has been notified.

**Rescind: Amend Something Previously Adopted**

1. The motion to Rescind is used to annul or repeal some action of the assembly previously taken.

Rules:

- Requires recognition.
- Requires a second.
- Is debatable.
- Is amendable.
- Requires 2/3 vote unless previous notice is given.
- The negative vote only may be reconsidered.

2. Important Points To Remember:

- The motion is not in order if the motion to reconsider is in order.
- The motion may be made regardless of the time that has elapsed.
- Notice that the motion being made may be given while another question is pending (may not interrupt a speaker). The motion can be made when there is nothing else before the assembly.
- The motion is not in order if action has been taken that cannot be undone, or if a contract has been signed. When the other party has been notified, such as an election, expulsion from office or from membership, the action cannot be rescinded.

The unexecuted part of an order can be rescinded or amended.

## DEVELOPING PRESENTATIONS THAT WIN!

### Overview

It's a fact: 80% of the real impact of a presentation results from the way the material is presented; only 20% from the information itself. There are many other applications of the "80-20" rule: 80% of the sales are made by 20% of the salesmen; 20% of the products account for 80% of total sales; roughly 20% of the members are really involved and aspire to leadership, 80% do not; and 20% of the total effort of an association — or chapter — accounts for 80% of the positive results.

A prime reason members join — and stay as members — is to learn through idea-exchange of management and technical information. Members expect this need to be met. This may be 80% of the reason for belonging. The quality of the presentations made at chapter meetings (including special seminars, etc.) is an important factor in making the learning experience really meaningful. That's what the following information is about: helping speakers develop presentations that win! Share this information with speakers, well in advance of the presentation. Chapter leaders will also find valuable insights here for personal use — on the job and elsewhere — in addition to direct use with speakers.

### 10 Principles of Effective Presentations

- Grab the audience's attention immediately. Use a story, a question or a dramatic statement with some impressive statistic. They may be there physically but not mentally until you bring them there.
- Remember, each presentation is a performance. You have an audience and are the performer. Use a few theatrics to maintain interest. Your audience wants to learn...to hear what you have to say. But they also want to be entertained.
- Let your audience know what your objective is. Repeat key points. Summarize towards the end. Tell them what they are going to hear, let them hear it, and then tell them what they heard.
- NEVER read your presentation. It is not a recital. Chances are, your audience doesn't know as much about your field as you do...that's why you are there. Instead, outline carefully, using key words. Fill in the space with facts, anecdotes, etc. KEEP IT FRESH AND FRIENDLY!
- Be aware of changes in society that might date your material. Be current, and use current events to apply your concepts.

- Always critique your most recent presentation to make it that much better the next time. Tape your presentation if necessary. Eliminate timeworn expressions, grammatical errors, irritating speech patterns, regional accents/slang, etc.
- Believe in what you are saying! Enthusiasm is the key. Make your subject matter so interesting that even the most reluctant listener will remember what you have said and why it is important.
- Your audience has a specific reason for being there, so tailor your speech/presentation specifically to them. Consider occupation, education, age, sex, region of the country, etc. Even the time of day can have a bearing on the most effective way to present your material.
- You can never rehearse enough. You must be so familiar with your subject matter and plan of presentation that it rolls off your tongue. This enables you to concentrate on the friendliness of your attitude and ease of presentation.
- Pace your presentation so that it flows smoothly and evenly. Every visual aid should be in place, in working order, ready to be smoothly integrated into your talk. Nothing derails the train of thought faster than a struggle with the overhead or slide projector, flip charts that don't flip, or a search for the missing marker.

#### Preparation: Key To Success

##### 1. Pre-think Your Presentation:

- Know your outline backward and forward, inside and out. Make a mental picture for yourself of exactly how you want your facts and ideas to flow.
- Mentally walk through your outline a few times. Are you comfortable with the sequence of concepts? If not, change it now, and run through it again. Don't wait until you have an audience in front of you to rearrange your thoughts!
- Test yourself with a list of key words. Does each word recall exactly the idea or thought you want your audience to learn and remember?

##### 2. Prepare Your Notes:

Notes for delivery are a very personal thing. Generally speaking, the best technique is the one that works best FOR YOU. The points below are simply a guideline upon which you can build your own system.

- Your notes are an abbreviated form of your subject matter. This can take the form of an outline, a diagram, or simply a list of words or

concepts you wish to emphasize. Make them as brief as possible. Get comfortable with them.

- Remember: your notes are for your reference — to keep you on track — and are not for reading.
- Notes can be prepared in many different formats...from a very detailed outline to something as simple as index cards (use white stock, 4 x 6 or 5 x 7).
- Whatever the format, notes should be typed for easy reference. Have most (or all) of the copy typed in ALL CAPS. Underscore only where necessary (permits easier reference).
- Use separate color highlighters for those points you particularly want to emphasize, to help you even better organize your thoughts.
- Include cues for yourself to use gestures or illustrations. Be sure to note at which point in your presentation you wish to use other visual aids.
- Keep an example in your notes of anything you will create while speaking (a drawing or outline, for example). No matter how well you think you know your material, be sure you spell everything you intend to write, or display, correctly in that example.

##### 3. Having an Outline:

- Bolsters your confidence
- Gives the proper emphasis
- Builds a motivated learning climb
- Targets precision, accuracy
- Assures completeness
- Permits the most effective use of aids
- Allows time for questions

##### 4. It Pays to Rehearse:

When you are rehearsing your presentation, tape record it. Play it back and listen carefully to what you have said. Then use the following checklist to evaluate yourself before the "cold light of dawn" occurs before the audience!

#### Rehearsal Checklist

##### 1. Objective:

- Is there a clear, central idea? What is it?
- Is it sufficiently stressed?
- Does it run through the whole presentation?
- Is everything said and done relevant to it?

##### 2. Introduction:

- Does it get the audience's attention?
- Does it say what the presentation contains?
- Does it relate to the audience's background and needs?

### 3. Structure:

- Is there evidence of a single, main structure?
- Is it integrated, unified and easy to follow?
- Is it supported with appropriate detail?
- Are the details concrete, clear and specific?

### 4. Content:

- Is the information valid and accurate?
- Do you display a full grasp of the subject?
- Do you seem to have a reserve — to know more than you are telling?

### 5. Delivery:

- Are your verbal skills fine-tuned?
- Accurate? Clear? Complete? Appropriate?
- Do you seem poised and relaxed?
- Is your voice clear, well-modulated and relaxed?
- Did you speak loudly enough?
- Did you mentally establish and maintain eye contact with your audience?

### 6. Conclusion:

- Does it tie the presentation together?
- Does it force attention on the presentation as a whole? Does it relate back to the objective?
- Does it tell the audience what to do next?

### 7. Visual Aids:

- Are they clear, easy to use and understandable?
- Does each clearly support or reinforce its related idea? Is there a single motif — unified and harmonious?
- Are they on long enough so the audience comprehends and retains the information?

### 8. Audience Awareness:

- Do you understand and empathize with them?
- Do you speak from their point of view?
- Do you use their language?

### 9. Attitude:

- Is there appropriate enthusiasm and sincerity?
- Do you seem convinced?
- Do you seem "real"? Ego-centric?
- Do you suffer from stage fright?

#### A Winning Presentation

Professional platform speakers — those who make a living at this business — carefully rehearse every presentation. In fact, they often do this several times before each actual delivery. They know that in the eyes of the audience 80% of the value of a presentation is how it's delivered...and only 20% on the information itself.

Expert delivery is achieved only through rehearsal...rehearsing as many times as needed to fine tune to perfection. The audience will appreciate your

effort, and you'll appreciate their reaction to your presentation once you've given it. Everybody wins!

**1. Cohesiveness Creates Strength.** Here are some specific techniques to build internal unity and effectiveness. This will strengthen the integrity of your presentation.

**A. Key on structural singularity.** No matter how many separate elements may comprise your presentation, it must have a singular, main structure. Your listener must know the path to follow it. This is not only rational, but it also reflects a psychological need for order and pattern. The human mind takes the path of least resistance. Create that path for your audience; they'll more easily grasp your thoughts.

**B. Maintain your objective.** Keep in mind the REASON the audience is gathered together at that place and time. Allow nothing to sway you from it. Otherwise, your presentation becomes little more than a collection of concepts and statements that are meaningless without a connecting reason for their existence.

Sticking to your objective also helps if you stumble or become distracted. You can recover easily because your train of thought has only been stalled, not derailed. By concentrating on your objective, a continuous thread runs through the entire presentation.

**C. Be consistent.** Attitude, behavior, environment, language, mood, gesture, even attire must remain relatively consistent (but not boring!). This maintains the consistency of the subject matter. Should you dramatically change — out of "character" — your tone of voice, your listener may remember the change more than the information it was meant to emphasize. Consistency through the entire presentation is essential to properly reinforce the underlying concept, the detailed points, and to make the presentation itself a really memorable, valuable learning experience.

**D. Link your thoughts.** Your "sub-ideas" must be related in an obvious manner. Connective phrases such as "because," "in addition to," "therefore," "since," "in view of," "thus," or "considering that" link ideas through coordination, subordination, or other relationships. They keep parts of a presentation from becoming disjointed and integrate them into a whole. These terms also help the listener relate what is being said to what has been presented before. The listener knows that the new fact has a direct bearing on what has gone before.

**E. Restate the points.** Periodically restating things — the main point and/or conclusions — is a catalyst, emphasizing the underlying element of the presentation. This results in positive reinforcement of the concept and its relationship to the listener.

**F. Solicit a response.** Audience participation/reinforcement keeps them involved and on track. This could be a rhetorical question (“Are you with me?” “Now don’t you think that...?”) or phrase (“I’m sure you’ll agree that...”) which brings the audience into the discussion. This is also known as “cumulative affirmation.”

Ask generalized, objective questions to which any listener might answer “yes.” Reinforce questions by giving the listener the expected answer. For the average speaker, direct questions are the best way to determine how well the presentation is proceeding. This must always be done with finesse, without insulting the audience’s intelligence.

**G. Summarize key points.** This is a never-fail method of giving total unity and cohesiveness to your presentation. A final tallying of thoughts and concepts, applied once again to the main theme of the presentation, ties it into a neat, comfortable package for the listener.

**2. Deliver Your Presentation With Style.** An extemporaneous (relaxed) delivery is one in which everything is pre-thought, and planned in detail, but not committed to memory. This type of presentation is effectively made from a carefully prepared outline, written or memorized. It may be more art than science, but memorable presentations — and the delivery — come about through practice.

An artful delivery seems almost casual. That’s because the speaker is well-prepared, and the delivery is carried with style and grace. A relaxed delivery is always preferable to a memorized or recited speech for the following reasons:

**Extemporaneous Delivery**

A. An audience has more confidence in a speaker who displays his/her confidence by doing away with the crutch of a manuscript.

B. Is more convincing and believable — open to new and ever-changing possibilities.

C. Enables you to remain flexible to the audience and its reaction to the material you are presenting.

D. Forces you to think, and this thinking allows overlooked concepts to emerge. It also allows new ideas and concepts to come from the

audience and helps them to feel more involved with the presentation.

**Memorized/Recited Manuscript**

A. Memorization is a crutch that will destroy the spontaneity of a well-structured presentation.

B. It conveys a rigid attitude, not open to change or progress. Too formal. Stuffy. No style.

C. It allows for little or no flexibility in your attitude or that of your audience. It says “Like it or not, here are the facts.”

D. Constricts audience participation by conveying a “know it all” attitude on the part of the speaker.

Remember, a memorized presentation — or even worse, one that’s read aloud — has these additional disadvantages:

- It casts suspicion on your ability and knowledge. It restricts movement and performance at the platform.
- Manuscripts are boring — your audience does not want to be read to — and you risk insulting their intelligence.
- It will cause you continual worry about what you may be forgetting; this distraction will hinder your eye contact with the audience.
- Time devoted to memorization could be better spent creatively.

**3. The Only Things You Should Memorize Are:**

- Your opening statement.
- Your closing statement.
- Specific or direct quotations.
- Critical facts and figures contingent in your presentation.

**4. Points to Ponder.** While it is true you are not addressing your audience just to entertain them, neither are you there to put them to sleep! A presentation without animation from the speaker is lifeless, no matter how fascinating the subject matter may be. Consider the following points before you reach the lectern, but don’t worry about them while you are speaking. Once you have employed a natural, unaffected manner of speaking, it should (and will) come naturally.

- Trust your impulse. The most convincing and natural gestures are those most natural to you.
- Concentrate on the idea you are selling. The gestures should be secondary, for emphasis only.
- Remember your audience. Their age, background, and reason for attendance are just some of the factors that should edit (and embellish) your gestures and emphasis.

- Make your gestures magnify; emphasize your point so that your audience will remember what you said.
- Keep in your own "character." If you are normally a reserved person, excess exuberance will be difficult to maintain throughout the presentation. Don't over push it. Your material will seem stilted and insincere, and so will you. However, the vast majority of good speakers appear extroverted to the audience (even though the speaker may really be somewhat introverted). Maintain balance.
- Rehearsal will help eliminate unnecessary or irrelevant gestures. Nervous mannerisms (jingling pocket change, buttoning and unbuttoning your jacket, clicking your pen, etc.) should be avoided. Complete concentration on your subject matter will eliminate this.
- Don't repeat the same gesture too often. No matter how effective it may be, it will lose its effectiveness if overused.
- Keep gestures and movements confined to the upper portion of the body. Don't make your audience shift its attention.
- Just as visual aids must remain in view long enough to register, so should your gestures. If you are pointing something out on a chart or graph, remain at that point until you are sure your audience has seen and understands what you are indicating.
- Be extremely conscious of your posture. Do not lean on the lectern; you (and your presentation) will seem to be off balance. Place your weight evenly on both feet, with your shoulders back and knees relaxed.
- Breathe deeply while you're speaking. This both helps you relax, and makes your voice more resonant. Speak from your diaphragm (deeply), not from your throat. Maintain good breath support.

### Using A/V Successfully

**1. Why Audio-Visual Aids Are Important.** We live in a highly visual age. In fact, one recent study (by 3M) showed that a presentation is 65% more believable when even simple visuals are used. Research shows we learn more — and more effectively — through visual stimuli.

A well-prepared, smooth visually aided presentation is a job to behold. A talk jammed up with non-functional equipment, poor rehearsal and ill-fitting materials is a nightmare. Remember Murphy's Law — "Whatever can go wrong will go wrong." When using any type of visual effect, rehearsal is the key. Avoid our friend Murphy and you'll have a top-notch presentation that will be remembered for what was said, not for what went wrong.

**2. An Aid Is a Reinforcement Technique.** Remember, a visual aid is supportive, not primary.

The idea must always precede the aid that supports it. As an idea support, a visual will:

- Define or identify the concept
- Clarify an idea
- Prove a fact
- Strengthen or reinforce material
- Generate a mood
- Save time
- Increase attention
- Increase retention

Too frequently, the "aid" portion of a presentation is separated from the "text" and becomes an entity unto itself. It's easy to find a great set of slides or a dramatic graph and prepare a presentation around it. Your talk then becomes centered around the one concept illustrated, not the topic as whole. The way to avoid this is by including the "aid" ideas in the preparation of your outline. Begin with the concept or idea you want to convey, then design your aid so that it best illustrates what you are saying.

### 3. Mediums for Successful Visual Aids.

- Slides
- Film/Video
- Flip charts
- Overhead projection
- Chalkboards
- Handouts
- Displays and models
- Demonstrations

The most commonly used (and easily bungled) visual aid is the slide projector. Those tricky little slides, so easy to misfile, are not that difficult to use, and can add a great deal to your presentation if you get them under control. The key word here is **PLANNING**.

As the presenter, you should be intimately familiar with every slide you use. Each slide is there to emphasize points you are making, but cannot be so distracting as to take the listener's attention away from what you are saying.

### 4. Basic Guidelines for Visual Aids.

**A. Appropriateness.** It takes more than graphic design to impart an image. Remember what your audience wants to learn, and use that as your point of emphasis. A column of progressively growing figures is more visually dramatic if used as the basis for a chart or graph. Yes, pictures do speak louder than words.

**B. Visibility.** Will everyone in the audience clearly see what you are presenting? As part of your rehearsal, set up your visual the way it will be presented to the audience. Look at it from every possible distance and angle. Check for contrast, sharp and vivid style, and size and shape of figures and illustrations. If available, power point presentations are very useful and visual.

**C. Unity and Consistency.** Continuity can rarely be maintained by a major switch in design or format. Any abrupt change in language, pace or mood can distract the audience. It will draw attention to the change itself and away from the concept being presented. However, if your presentation has several main parts, the visually emphasized information of each part can be neatly unified through the use of the same color (letters and/or background) on those visuals. Then the whole presentation can be unified by using one standard element through (e.g., a small logo). Keep the same typeface (type style) to build unity.

#### 5. Preparing On-The-Spot Visuals.

The secret to smooth running, created-on-the-spot visual aids is to know exactly what you want to create before you pick up the chalk or marker. This is easily accomplished by having in your notes a complete sketch or outline of what you will draw or write. Using the following points, you will be able to convey your thoughts and concepts more clearly:

A. Begin with a clean, blank surface.

B. Write or print legibly. Use figures large enough for everyone to see. On chalkboards, flip charts, displays, etc.— anything that's not projected — letters should be at least 4" high for maximum visibility. Again, type size on prepared visuals (for projection) should be least 18 points (3/16").

C. Don't crowd your board with too much detail — use generalized drawings and key words or concepts.

D. Do not stand with your back to the audience while you write, or block anyone's view. In fact, NEVER turn your back to the audience. Also, don't talk to the screen, overhead projector, chart or chalkboard while you write. (The same goes for using prepared visuals.)

E. Complete your writing or drawing quickly, but don't apologize for your lack of artistic talent.

#### 6. Handling Detailed Materials.

When handling detailed or statistical material, consider these three points:

- Visibility. Many small details are often too difficult to see.
- Duration. How much of the material will be read or observed while in view? How long will the visual be "exposed" to the audience?
- Retention. How much of the material will be remembered after it is removed from view?

Although detailed material is often necessary, especially in technically oriented fields, there are a number of ways in which it can be made more effective. For example:

- Be sure to expose the audience to material long enough for full comprehension.
- Try covering parts of the information and gradually exposing it, or use overlays to gradually build a complete illustration.
- If possible, divide the visual into more than one panel.
- Use blank space, wide margins, and borders to define concepts.
- Break information into finite categories and use definitive titles or headings.
- Use highly contrasting colors for definition and eye appeal.

#### Conclusion

An effective presentation begins with careful planning. This involves knowing your subject, your audience, and the exact objectives of your presentation.

Next comes the comprehensive process of preparation. The importance of preparation and rehearsal cannot be over-emphasized. Carefully prepared notes, organized in a cohesive manner, will make you feel more comfortable with your material. This comfort will allow you to concentrate on the manner and style of your presentation. The winning combination of confidence and style will make you the winner, and your positive attitude will be passed along to your audience.

An effective delivery, you will recall, is the single most important element in a truly great presentation. To be effective, it must usually be well-supported by visual aids to drive home the points and make them stick.

But there is more to it than that. The goal of every presentation is to impart a behavioral change in the actions of the audience as a result of your presentation. This is more than a goal, however...it is how the results are measured.

In effect, then, your presentation must be geared to creating a positive change. To do this, excellence in planning the presentation, organizing the material and executing (the delivery) are required. ("Winging it" is unprofessional and may wind up to be embarrassing!) Armed with the points we've mentioned, you'll be able to create that "change climate." Your audience will come away with more — and better — information than they dreamed possible. Then everybody's a winner!