How to deliver a recommendation

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Overview

Like it or not, every business analyst (and usually most project managers and developers) will have to stand up in front of a group and present. The group might be your business clients, the project stakeholders or just your fellow team members but for many people, one of two things will happen:

- It will frighten the life out of them
- They'll umm and ah their way through, sending the audience to sleep

Why is this so? As a business analyst we're not expected to be great orators or motivational speakers. We're simply presenting information and seeking agreement or at least understanding.

Well you don't have to be an eloquent speaker to deliver a successful presentation but you do have to organise your presentation so that it's relevant and meaningful to your audience. How you structure your presentation is what's important – eloquence can come through practice but it's not essential for success.

In this extract from our *Requirements Gathering & Specification* workshop we'll look at simple but effective methods for planning a presentation - how to make sure you cover all the necessary facts but don't swamp your audience in unnecessary detail.

What does your audience want?

It's likely that every person in your audience has been through the same things as you – so rest assured they're not expecting the performance of a lifetime. They do however have time pressures and deadlines of their own so are attending your presentation as it's the quickest and most efficient way of getting what they want.

They're listening to you because they want or need to hear what you have to say. But to work out what you plan to say you have to put yourself in their shoes – what are their priorities, what do they want to get out of the presentation? You'll get the answer to this by completing this sentence:

After my presentation I want my audience to be able to.....

For business analysts, possible answers could be:

- *Understand the benefits of the proposed solution*
- *Approve a change in the requirements gathering schedule*
- *Confirm my understanding of their requirements*

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Whatever the answer might be, it's given you the purpose and title of your presentation. Note that it's ok for your audience to give something to you – as in the third example above.

What do you want?

As you may have gathered it's important to consider your own objectives for the presentation. What do you want it to achieve? You can modify the audience question and ask yourself:

After my presentation I want to be able to.....

Remember it's more than just delivering information otherwise a written report might be a more effective method. Both parties (you and the audience) need to get something out of the presentation.

Presentation – is it a dirty word?

With any presentation, the word itself is working against us from the start. Most dictionary definitions describe it as a one-way activity and that's how most audiences see it: *you talk, they listen.*

Try to avoid the word altogether when sending out your invitations. You're after a two-way dialogue, not one-way communication. Dialogue is at the heart of a good "presentation" and it's why we attend: *we all talk and we all listen.* Audiences want to hear what you have to say, to get clarification on things they don't understand and to challenge things they don't agree with (more on this later).

What we're really doing is having a workshop, it's just that the focal point is someone – you – facilitating it and using information to keep the wheels turning.

Now that we've decided it's the wrong word, what's the next step with planning our *information delivery and discussion session* (ok, let's call it presentation for short).

Timing

Of course the length of your presentation will be influenced by how much information needs to be covered and the availability or constraints of your audience. However, for better or worse, the universal unit of work is usually the 1 hour time block and remarkably, it works quite well. Most of us can psyche ourselves up to be in a particular frame of mind for this period of time. This is particularly true when delivering information – we can only take in so much before we have to reflect and think through what's being said before we can process and absorb it.

This doesn't mean you have to pad out our presentation to take an hour. If you can take less time, do so. However you (or your team) shouldn't be scheduling a presentation at all if there's nothing meaningful to discuss or if an outcome can be achieved just as effectively by an email or other means.

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Presentation structure – the 4 P's

This structure fits many presentations (and written business reports).

- **P**resent position
- **P**roblems
- **P**ossibilities
- **P**roposal

The 4 P's structure is also your agenda for the presentation and allows you to tell your story using a logical sequence – steps which are easy to follow. Think of what you want to cover in each step, for example:

The 4 P's method for presenting information	
Present position	What is going on now? Describe *briefly* your understanding of the current situation, with key quantitative information where necessary.
Problems	Describe the business problems, as you understand them. Describe them from the viewpoint of your audience. The effect on the business is what's important. *Causes*, rather than *symptoms* are required. Some quantitative data may be relevant. These are the business problems that your solution will be solving, *not* the problems that may be inherent in the project. Where new objectives have been agreed, state them here. Keep it brief.
Possibilities	Now you outline the options available that may solve or partially solve the problems. Don't exaggerate the benefits and don't underestimate the costs, risks or difficulties of a solution.
Proposal	This is where you make your recommendation and it should take up most of the time available. It should come from the heart – you have to believe in what you say. If you don't, no-one else will believe it either. Describe what the *new* problems will be – those inherent in your recommendation and how these can be overcome or mitigated. If you can't think of any, think again!

You may want to extend the headings, for example the proposal section will usually be the largest and may contain sub-headings such as *Costs and Benefits, Implementation Plan, etc*.

There's no exact science as to how long spend on each section however most of your audience will be familiar with the present position and problems. You are just re-capping them to set the scene. It's the possibilities and proposal which are of most interest to them.

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When it comes to deciding how much time to spend on each "P" consider the following as a guide:

Present Position	5%
Problem	5%
Possibilities	20%
Proposal	60%
Summary	10%

Allow enough time at the end to summarise and agree the next steps. This is really important – how often do you see people leaving a meeting early so they can get to their next one on time. Not having an agreed plan for what the next steps are can undo all the work you've put in.

Plan for questions

This is where we have to remember that our presentation is really an *information delivery and discussion session* and it's unlikely that your idea of the business requirements is going to be universally accepted without discussion. There will be the inevitable objections. Some of these will be minor, some major, some may necessitate a re-working of the proposal. Therefore the manner in which you deliver the presentation will have a large effect on your audience.

- If you come across as hesitant, unsure, lacking confidence then you will invite more questions or criticism. Your proposal is less likely to obtain agreement. In these circumstances there is a risk that speakers become defensive, and a presentation can quickly become a battlefield.
- There is often someone in the audience with something to lose and they may lead the charge. Management may be enthusiastic for a solution to their problems but at presentations they tend to be cautious. If there's a strong counter-opinion then that could sway the audience.
- You need to take positive steps to ensure that the audience is in agreement with you. Otherwise there is a risk that at the end you will find major objectors. Some of your audience may have been sitting there thinking negative thoughts but not saying much.

So, how do you deal with this?

A discussion without questions is a presentation!

There's something wrong if nobody asks questions during your presentation. Part of your objective is to encourage questions. You don't want people coming back to you at a later stage saying they didn't have time to raise any.

Have your own set of questions prepared, both to get buy in, and to get agreement at critical points. For example – *do we all agree that the current problem is having this impact on the business?* – ensures that everyone is agreed on the importance of the problem.

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Once questions start to flow they can often open up the floodgates – suddenly everyone want to ask one and they can be negative as well as constructive. Here are some common scenarios and how to deal with them:

During your introduction - make it clear what the objectives of the presentation are (e.g. to agree the priority of requirements). Emphasise that the requirements originate from the audience, you are now presenting your interpretation of their needs. You are there to obtain 'buy-in' from the audience, not to impose your ideas. This sort of introduction shows you are open to suggestions and not defensive.

Inviting questions - in your introduction say that anyone may raise questions at any time, not just at Question Time. Be seen to be pleased to accept questions – even if you really feel a little nervous.

Clarify questions - repeat the question back to the audience. This makes sure that you've got it right, it ensures that the audience heard the question, and it gives you time to think of the answer!

No table-tennis - avoid playing 'ping-pong' with questioners. If you handle an objection and the questioner continues with *Yes, but*……. then you have the potential for a game where questions and answers go back and forth. It becomes a game that you'll lose. In this situation, instead of answering the next question, you ask for any others. Write them up on a whiteboard – this emphasises the importance that you're giving to the questions – and the questioner. Ask the questioner if that is all – you need to obtain agreement that if these questions can be answered to his/her satisfaction then all will be well.

Answer all questions - now you answer the questions as well as you can. Keep it brief and to the point. Don't ramble. You've had extra time to think about the answers and this will help you. You may need assistance from your team, you may use the audience, you may need to take time and come back to them. Be aware that you can get away with the latter techniques only once or twice before you begin to lose your credibility with the audience. At the completion of your answers, check back with the questioner *Have I answered all of your points?* You're looking for a positive response here!

Give credit - give credit to the audience *Thank you for making that point I'd quite overlooked it*. The solution being proposed must be perceived as one that is jointly-owned.

Confirm - refer to the audience for confirmation *Do we all agree that this is the key requirement?* Nodding heads lets you know that you're on the right track and warms the audience. You need to maintain positive feelings so preferably ask this sort of question when you're sure of a positive response! Similarly you can check before changing topics *If we're all happy that we've now dealt with all of those points then shall we move on?* If there is contention on a point, maybe someone who wants to nitpick, you may need to refer to the senior manager present for agreement to move on.

Summary - how to finish

Ever felt let down when you see a movie with no ending? Your presentation doesn't have to end in a technicolour fireball but everyone should know that a clear end point has been reached. Summarise what's been agreed, what's outstanding and what the next steps are.

After the presentation, issue a document to the attendees summarising the issues, their resolution, any outstanding points and the action plan. This is most important. You may wish to record that all attendees received the document, just in case someone down the

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track decides to refute some vital piece of information. The final agreement (e.g. the Requirements Specification) will of course need to be signed off by the key players.

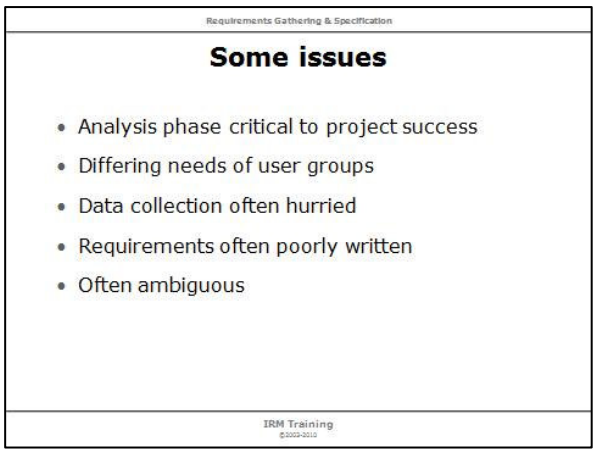
Death by slideshow

The omnipresent slideshow is much maligned – maybe a little bit unkindly. The reality is that it's not difficult to use, everyone's got it and it works well as a focus for a room full of people.

Where we often fall down is in trying to squeeze too much information onto each slide. The result is a mass of information that the audience tries to read – they end up not listening to you. The other mistake is using advanced features – fancy transitions, fades, video clips – just because you can. The danger here is you're creating noise, a distraction for your audience.

There are many books and websites devoted to slideshow production, you could happily spend days browsing through them – if you had the time. As a training company, IRM can live or die by the quality of our slides and although we don't claim to know everything, here are our top five tips for slide design:

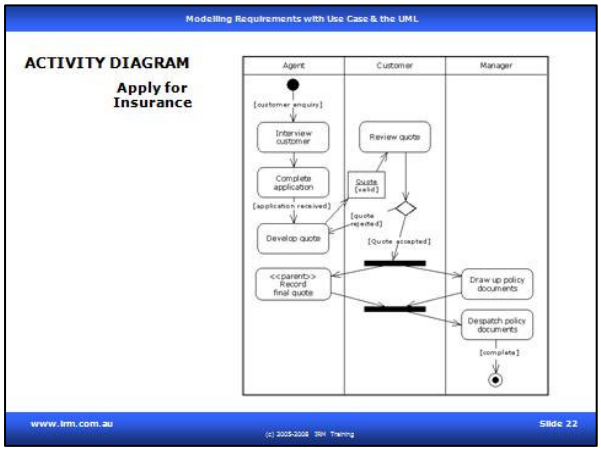
1. **Font:** we like Verdana and Calibri (this paper is written using Calibri). Verdana is a bit chunky but has presence, Calibri is slim and lets you get more text on one line without appearing squashed. Both fonts are sans-serif (no squiggly bits) and although serif fonts (e.g. Times New Roman) are supposed to be easier to read we can't help feeling that they make the slide look busy and a little dated.
2. **Font size:** 32 point bold for slide headings, 28 point (not bolded) for body text. You want people at the back of the room to be able to read it.
3. **Brevity:** probably the single, most important tip. You don't have to write whole sentences or be grammatically correct. Your audience should be able to understand each point just by scanning it. You'll be filling out the details as you talk. Take a look at the following example which lists common issues during the requirements gathering process:



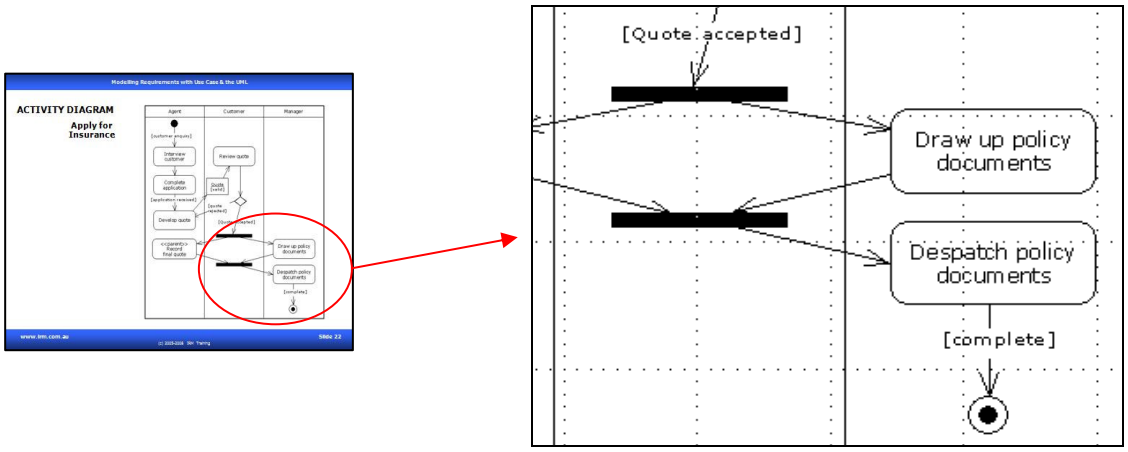
You could easily write each point as a full sentence (e.g. *The analysis phase is critical to project success*.) but by dropping two words we've lost none of the meaning, kept our preferred font size (remember the people at the back of the room) and also maximised the amount of white space on the slide. The more white space, the more the brain subconsciously recognises there is less work to do to read what's on the slide.

Also note the size of this picture. It's the same size as when printing 4 slides to a page (as a PowerPoint handout). Even at this reduced size, the content is still easy to read.

4. **Graphs and diagrams:** these are nearly always necessary at some point – after all the topics we're covering are usually complex and involve supporting data. However highly detailed graphs and diagrams serve no purpose at all except to distract the audience whilst they spend several minutes absorbing them. When using graphs, look for the message or trend - can you get this across with a simplified diagram rather than including all the detail? If it's important to cover the detail then use a simple diagram on your slide and put the details on a handout. People can absorb complex information easier when it's in front of them rather than on a wall at the other side of the room.
   The same applies to diagrams, for example a model of the business process. There's quite a lot to take in from the following diagram.



Consider using just a portion of the picture to illustrate your point. The full details can be in a handout. The Snipping Tool in Windows 7 (and Vista) is great for this and justifies an upgrade for this reason alone.



5. **Balance:** this is where you look at the whole slide from a visual perspective. Our brains absorb information much more intuitively if we do it subconsciously – that is when we recognise words rather than read them. Go for a slide layout where all the information can be absorbed *in one go* rather than reading it line by line. For example when doing a bullet point list (see

point 3 above) do everything you can to avoid any point spilling over onto two lines. Our brains can *scan* one line but we have to *read* two lines.

How did you go?

We're not after comments such as *what a great presentation* or *what a great speaker.* Similarly we're not after inspirational presentations where the audience walks away with a new mindset, a new purpose in their everyday lives. This is best left to the motivational speakers and "presentation gurus".

What we do want is for our audience to either accept our recommendations, or give us enough critical feedback to make us question our own assumptions and go back to the drawing board.

At the end of the day, we are doing a job of work – presenting our recommendations based on our skills, knowledge and understanding. If we need to revisit our assumptions and revise our recommendations then that's all part of the process.

Show me a business manager who knows what they want from day one – and can articulate it without any help, assistance and guidance – and I'll show you a world that doesn't need business analysts.

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