

A Geek's Guide to Presenting to Business People

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Leading Geeks
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A lot of people consider public speaking to be one of life's most stressful events. And for geeks, presenting to business people is especially terrifying. Business people — the phrase we geeks use to refer to everyone who isn't technical — often seem confusing and capricious to us. They often respond badly to the way we like to present things. So, it's not surprising that many geeks shy away from giving presentations to such unpredictable people.

But you can avoid it for only so long...if you want to get anything done. In fact, if you want to grow in your career, you're going to have to present to business people, and do it well. In the future, successful geeks will be the ones who can bridge the divide between technical and business groups. And presenting to business people is a critical part of working across these disparate cultures.

Luckily, it's not really that hard if you prepare properly. You don't need to be a charismatic speaker to be compelling and effective. You just need to be relevant and focused, and that happens as a result of your preparation, not your platform delivery.

If you invest in preparation, not only will you accomplish your goals, you'll find that giving presentations isn't difficult at all. You won't experience the sort of fear and trepidation that most people do. You'll feel empowered to get up in front of a room and to completely be yourself. And all it takes is for you to follow this simple five-step process:

1. **Clarify your goal**
2. **Get into their heads**
3. **Craft a transformation (write it)**
4. **Present, connect, and resonate**
5. **Conclude with a call to action**

In this article:

- **5 steps** to a great presentation
- **6 questions** to help you get into their heads
- **7 stages** of an emotional arc
- **5 tips** for making information easy to understand and remember
- **3 tools** for eliciting emotions
- **5 guidelines** for using stories
- **4 tips** for connecting with your audience

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1. Clarify your goal

As geeks, we organize our thinking around problems and solutions, and that's a powerful framework for presentations. Start out by thinking carefully about what problem this presentation is intended to solve. What do you want to be different after you give it from before? In other words, what will be transformed by this event?

Imagine that you've been asked to lead a team that will recommend a new CRM package to your company. You've assembled the team and the project sponsors have asked you to present your approach before investing a lot of time in execution. What do you want to be different after the meeting? Do you want them to give you their blessing to proceed? Do you want them to feel comfortable that you've got things under control? Do you want them to abandon the project completely?

If you can't clearly state what you want to accomplish, postpone the event until you can, or cancel it altogether. If someone asked you to present and it's not obvious what it will accomplish, go to them and get the answer. If they can't answer it, cancel the presentation. I'm serious. This is really fundamental. It's like developing code before you have any idea about what the requirements are.

If you can't clearly state what you want to accomplish, postpone or cancel.

That said, the most common purposes for presentations to business people are to:

- **Influence decisions** – You want a decision-maker to make a choice that you think is best, or at least for her to understand the tradeoffs.
- **Manage expectations and share status** – You want someone to be aware of what's going on with something. Usually it's a project you're working on.
- **Leverage opportunities** – You want someone to focus attention on something you consider important. Usually this involves sharing information about what's going on in the industry or with a project.
- **Leverage technology** – You want a user to be able to use some sort of technology effectively.

How you structure your material will depend on what you're trying to accomplish and who the audience is. And when you start with the problem you're trying to solve with the presentation, it will give you a lot of valuable insight about what to say and how to organize it.

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2. Get into their heads

It's time to turn your attention to the audience. Since you're thinking about the presentation as a transformational event, as somehow changing the current state of the situation into one in which your goals are met, you have to think about what they need in order to change. Understanding what they need requires answering three questions:

- What's their starting point?
- What do they really need to know?
- What they need to feel?

What's their starting point?

Begin by identifying obstacles. What about the current state of the audience prevents your goal from already being met? Here are some questions to ask yourself about your audience:

1. Are they missing information that you have?
2. Do they have priorities that are different from yours?
3. Are they attached to a particular course of action? Why?
4. Are they in some sort of political bind?
5. Are they resistant to making hard compromises?
6. Do they have some feelings about you personally, technology in general, or your department that's standing in the way?

It is useful to jot these notes down or sketch them out in some way. Then think about the state you want them to be in to fulfill your goals. Imagine what's different about them, about their knowledge, priorities, and attitudes. Identify the specific gaps that need to be addressed.

You will find some obstacles are opportunities in disguise. For example, if you are presenting to an egomaniacal blowhard, you can work in acknowledgement of his team's achievements as an easy way to warm him up.

While it's important to consider the audience from all angles, as you go through your notes, some things will clearly be more important to address than others. Focus on those.

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What do they really need to know?

Think about minimum information you need them to know to achieve your goal. This gives you a good sense of the maximum scope of the presentation. We geeks tend to cram everything we know into a presentation. It's a huge mistake.

I was recently at a conference where a very smart presenter gave a rather interesting talk about architecture. For his 30 minute talk, he had prepared at least 60 slides, each with at least 10 bullet points and a detailed (and too small to read) diagram. Of course, he only got through about 5 of those slides. Whatever his goal was, it wasn't

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accomplished. We left confused, frustrated and disappointed, and he probably did too.

With information, there is a law of diminishing returns. People only retain a very small amount from a presentation and the more information you put in, the less they retain. Think about the last two-day seminar you attended. What do you remember about what was said? I'll bet

you can only come up with a few high level bullet points and maybe a few details on one topic that really grabbed your attention.

You might not realize that for many business people, too many details get in the way of their understanding. They don't process information like we do. For us, details reveal truth, but for them, details cloud truth. They need a high level picture of things rather than a detailed sketch. Not only are too many details not helpful for them, they interfere with their ability to grasp the big picture. Business people have patience for some level of detail, but only after they get the gist and can see the point.

It might help you to draft your presentation with all relevant details, but winnow the content down to the conclusions indicated by the details. You might move the details to an appendix or a supporting document, just to satisfy your need to back up what might feel are broad sweeping statements. But I can assure you, those details are there to make you feel better, your audience doesn't need them.

Believe it or not, they are likely to trust your analysis. Extra details will probably diminish your credibility in the eyes of this audience.

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What do they need to feel?

If you want your presentation to be transformational, you need to think about the emotional experience of the transition by considering the feelings that will drive change forward and those that will block it. Getting a green light on a project calls for feelings of confidence, excitement and hope. Putting a halt to an ill-conceived project calls for feelings of danger, dread, and a glimmer of hope for an alternative course. Getting people to use a newly rolled out technology calls for feelings of hope, openness, and mastery.

Think about the experience of the transition

As geeks, we don't like to think about making people feel things. Feelings should be irrelevant at work. But they are not. In fact, for most people, especially business people, feelings are more potent than facts.

The writer Maya Angelou has observed "that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." As a keynote speaker, I've found this to be completely true. I've contacted people nearly a decade after a presentation. Despite the fact that they don't even recall the topic I spoke on, they greet me warmly remembering how much they enjoyed the experience.

So before you start to sequence your information, sequence the feelings that you want them to have. Start by predicting the feelings that they are bringing into the room, their initial state. Are they already angry, frustrated, excited or indifferent? And where do you want them to go from there? Most importantly, where do you want them to end up?

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Imagine that you are producing a silent movie. Imagine the sequence of facial expressions that you want them to have as they change from the people they were before your session to the people they will become afterward. This sequence, this emotional arc becomes the backbone of your presentation, the guide that drives its narrative structure.

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Example of an emotional arc

My partner and I recently designed a new keynote presentation called “They just don’t get it: 7 ways geeks and non-geeks can get along.” We didn’t start out by organizing the information. We started out by analyzing the experience we wanted the audience to have.

Here’s the sequence we worked out. For each of the seven stages, we considered:

- Thoughts – what the audience members are likely thinking about with respect to the topic and the presentation
- Questions – what questions or concerns are likely going through their heads
- Feelings – what are their dominant emotions

Emotional Arc for Audience of “They Just Don’t Get It”			
Stage	Thoughts	Questions	Feelings
1. Before it starts	Predicting possible outcomes	Will this be a good use of my time?	Slightly amused, dubious
2. Beginning	Assessing the to the problem and presenters	Is it relevant to me and my life?	Open
3. Early middle	Gaging the importance of problem	Does this really matter?	Evaluative
4. Middle	Sensing the possibility of solution	Could that really help?	Engaged Surprised Reflective
5. Late middle	Weighing the practicality of suggestions	Could I really do that?	Intrigued
6. End	Committing to taking action in future	Why not give it a try?	Determined
7. After it ends	Reflecting on having spent time well, gotten value	Who else should hear this?	Satisfied Entertained Hopeful Enlivened Evangelical

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3. Craft the audience transformation (write it)

The last part of preparing for the presentation is planning how you will facilitate the change in the audience and the situation. Some people call this writing the presentation, but if you think of it as a writing exercise, you'll probably go in the wrong direction. It's not about presenting information, but about facilitating change.

Your presentation has two key design criteria. Take this as seriously as if they were requirements for a technology product. The presentation must be designed to ensure that the audience will:

- Understand and retain the information
- Experience the sequence of emotions

5 tips for making information easy to understand and remember

Here are a few of my general rules of thumb for presentation organization and preparation.

1. Discover how they like to be communicated with. Every audience has different requirements for how they consume information. Presenting to marketers is different from presenting to finance people. They each have their own language and habits of thought that you need to respect. If you can, talk to someone who represents the audience and ask for some hints about how they consume information. Perhaps the best way to get at this information is to ask for examples of the most effective presentations they have experienced. Embedded in those stories are clues about what they need.

Put on your anthropologist hat and try to see it through their eyes.

You might find that you are appalled at what they consider to be effective communication. But it won't help you to judge them. It will help you to put on your anthropologist hat and try to see it through their eyes. If the slide with three words and a smiley face really works for them, use it!

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2. Don't write a reference guide. I've noticed that presentations are often organized around how the speaker thinks about the topic. For geeks, that usually means a well ordered, highly structured, perfectly categorized list of all relevant information. This approach is great ... if you're writing a reference book. Not so great if you want an audience to understand and retain what's important. It needs to be organized in a way that is easy to consume, not to refer to. There's a reason that people rarely read the Encyclopedia Britannica from front to back.

3. Use slides as headlines. PowerPoint is both a blessing and a curse for presenters. It can help the audience follow the flow of your presentation, but it can also draw their attention away from what you want to accomplish and confuse them. The biggest mistake presenters make is using bullets as reminders of what they want to talk about. You end up using the slides as a script, and the audience gets distracted by reading and evaluating the information on the slide instead of listening to you. If the audience can get everything from the presentation by reading the slides, then you've got too much on them. The slides should just be there to serve as a visual cue as to what's important about what you're talking about. Think of slides as a series of headlines. I rarely use more than 10 words on a slide.

4. Verbs are better than nouns. When you write your slides, you'll know that you're in the reference guide mode when you use nouns as headings. An overabundance of nouns as headings is not only boring, but also conveys a subtle pomposity, as if you are cataloging the way things are. Use verbs phrases or questions as headings. They are more active. Verbs tell people what is happening or what they should do and why they should care.

5. Don't use slides as handouts. I have never had a good experience handing out copies of the slides at the start of the presentation. I know, it seems like a good place for the audience to take personal notes, but what happens is that people read ahead. They don't realize it, but they are playing "the smartest-person-in-the-room game." They think, "Let me figure this out in the next five minutes and then spend the next 20 minutes thinking about questions that make me look good." Or they just look at their iPhone the rest of the time. If they pay attention to the handouts rather than to you, that's bad. So do them a favor and don't give them handouts. Keep them engaged with you, the topic, and your carefully crafted emotional arc. If they want the slides, hand them out at the end or email them later.

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3 tools for eliciting emotions

As you organize your material, go back to the emotional arc you laid out for the audience and plan how you will create that experience. For each of the emotions, you will need to plan for how you are going to craft the opportunity for the audience to feel them.

Of course, you can't predict with perfect accuracy what any individual's emotional response will be to your presentation, but you can take a good guess. By analyzing the audience, you can plot out their likely reactions to what you have to say and structure the presentation to deliver the experience you want. To plan for creating that experience, think about the things that generate opportunities for emotional experiences for audiences. The three most common, in order of relative evocative power, are:

- Facts
- Insights
- Stories

1. Facts. Although facts are cold things, people who receive them are not. They may be surprised by them. They may deny the truth of the facts. They may become defensive. They may be awestruck, confused, angry, or smugly self-satisfied. Their reaction depends on the perspective they bring to the presentation.

For example, in our "They Just Don't Get It" presentation, we want the audience to feel the gravity of the disconnect between technical and non-technical people. So, early in the presentation, we show some statistics about project failure rates. As you can imagine, most people aren't shocked by the percentage of projects that fail. They have personal experience with that. They do seem more shocked by the fact that each year, US businesses lose approximately \$80 Billion to failed IT projects.

Remember, facts are the weakest presentation tool for evoking emotions.

But remember, facts are the weakest presentation tool for evoking emotions. Also notice that we geeks tend to focus on facts and then wonder why no one seems affected by our presentations. Hmm.

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2. Insights. The next most effective presentation tool is insight. These happen when the audience has an “Aha moment.” They experience this not because they learn some new individual fact, but because they either understand the significance of a fact, its implications, or because they connect multiple facts together in ways they hadn't before.

A common way of offering insight is to reason through something with the audience. You propose a set of facts, and then walk them through an argument showing how they logically lead to a particular conclusion. Of course, we like this approach, because it's kind of like a mathematical proof.

To help the audience get the insight you are leading them to, you can use language cues. That way, they know to pay particular attention. You can say things like:

- “You might be surprised to know that...”
- “Here's an often overlooked aspect ...”
- “What really made my jaw drop was ...”
- “Contrary to conventional wisdom ...”
- “When you put all of this together ...”

The emotions people feel in response to insights are similar to their reactions to facts. You have to know what biases they bring to the presentation to predict what they will feel. But recognize that whatever emotions they experience, they probably won't be felt too deeply.

3. Stories. We're getting into considerably more powerful emotional territory with stories. Human beings are largely wired to think in narrative rather than in logic. Geeks often seem reluctant to use stories in their presentations, fearing that they may be perceived as time-wasting or manipulative.

Sometimes we avoid using stories because we think they are invalid as evidence. We geeks cringe when we see people misuse anecdotes as if they were proof, and harshly judge people who use them. We decide that they must be either idiots or manipulators. This unspoken judgment often gets in the way of our making use of this important rhetorical device.

Remember, the purpose of a story in a presentation is to illustrate points, synthesize ideas and engage emotions. Anecdotes don't offer objective proof, but they invite the audience to have a subjective emotional experience that can be very persuasive.

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3 Important uses of story

1. Stories trigger a different way of knowing. Stories give the audience an opportunity to identify with the characters and situations you describe. People imagine themselves in the narrative, empathizing with the characters, feeling what they might feel. For many business people, this subjective experience is what they need in order to have the sense that they understand. For them, all the facts in the world are meaningless until there is some feeling associated with them.

This fundamental difference could account for a large portion of the frustration we geeks have when we communicate with business people. Most technical people have a decided preference for an objective way of knowing, one in which what is known is verifiable by something exterior to you. It may seem mysterious, and even wrong, that

some people need to do a gut check before they can have the sense of “knowing.” I suggest to you, that even though this is different from your preferred approach, it is not wrong, and it’s important to make allowances for their preferred style. If they need to relate the facts to something in their own experience, make it easy for them to do so. You’re more likely to get the results you want.

If they need to relate the facts to their own experience, make it easy for them to do so.

2. Stories trigger memories. Audience members might recall a similar situation from their own past, briefly reliving whatever emotions were present for them in their own history. Your story might remind people of other stories and in recalling them, they feel whatever they felt the first time they heard them.

3. Stories show importance on human scale. Sometimes big scary numbers are motivating, but sometimes they can be overwhelming, or make it seem like it’s someone else’s problem. Think about how likely you are to help earthquake victims in Mexico versus the neighbor whose house just burnt down. You might be motivated to take action by this statement: “Employees in our organization spend 2000 hours a month filling out access request forms.” While someone else might be motivated by this one: “Last week, I spent three days trying to get my new employee access to the system. That’s three days I wasn’t doing my job and three days my employee was totally unproductive.” The audience can readily put themselves in that position of frustration and feel a greater sense of urgency to fix the problem.

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5 tips for using stories

Here are a few tips for good presentation story telling. Let's examine the same brief story told two different ways.

Tip	Instead of:	Try this:
Make it vivid. Use a <i>few</i> descriptive details to draw the audience into the world you create, to give the story a setting and make it emotionally engaging.	I was a project manager on a big financial system.	About 10 years ago, a large bank hired me to do project management during the development and testing phase of a loan management application.
Get to the point. Too many details obscure your point and disengage the audience.	The project sponsors decided that they would only fund 2 weeks of planning before putting the coding out to bid for development vendors. The bids came in with a wide range of prices and they chose the lowest bidder. So the development team started coding without thinking through the architecture.	I quickly realized that the project was doomed because they were coding without an architectural design.
Expose feelings. Don't just tell people what happened; tell them how the characters felt about what happened. A little information about feelings goes a long way toward drawing the audience into the characters' world.	During integration testing, they had to spend hundreds of thousands of dollars upgrading the server because nightly batch jobs took more than 24 hours to run.	Soon, the project sponsors were furious at the developers. Hundreds of thousands of dollars were being spent to upgrade the servers because nightly batch jobs took more than 24 hours to run.
Use dialog. Don't be afraid to act out a few lines. If they hear the characters' voices, they become more real.	Everyone blamed each other for the project failures.	Meanwhile, the developers would talk about the sponsors at lunch. "Serves them right for refusing to pay for a design cycle."
Make it relevant. Too many speakers drop a story into a presentation because it's a great story, but if it's not really related to the points you're making, drop it. If it does relate, tell the audience exactly how. Don't assume that they'll get the point.	They ran way over budget and the system never worked well.	So as you consider the time and cost for our design cycle, realize that it is a critical investment that really pays off.

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4. Present, connect and resonate

Perhaps the most powerful tool for creating an emotional experience is personal resonance. That happens when the audience feels, at a visceral level whatever it is that you are feeling. If you give your presentation with energy and enthusiasm, the audience will feel energized and enthusiastic. If you are distant and disinterested, they will be too.

Go back and watch an old video of Steve Jobs presenting a new product at an industry conference. He was a master of getting an audience to resonate with him. How does the audience seem to feel in response to his presentation? How do you feel while watching it? Think about how he created the excitement that was his trademark. Did he look disinterested and distant? Was he dryly cataloging product specifications? Nope. He got the audience to share his feelings.

"Now, hold it just one minute, I don't do feelings. That's why I write code!"

This is where you really put that emotional arc to work for you. At every point in your presentation, you know what you want the audience to feel. If you can feel it, they will feel it with you.

"Now, hold it just one minute," you might be saying. "I don't do feelings. That's why I write code!"

Don't worry. No one expects you to win an academy award for your presentation. You just need to be immersed in the emotional arc of your presentation, and to find ways – consistent with your personality – to bring this emotional arc to the foreground.

4 tips for connecting with your audience

1. Say it out loud. Give your audience verbal cues to what's happening emotionally

- "Here's the exciting part ..."
- "We've all been frustrated about this for some time ..."
- "I was astonished when I crunched the numbers ..."
- "I'm very proud of my team's work on this ..."

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2. Let it show. There's an important distinction here. It's great to *let* emotion show. It could be deadly to *try* to show emotions. Deliberately acting out emotions holds the very real risk of appearing insincere. What you think is a smile could come off as a grimace, or when you think you're embodying frustration, you might inadvertently mystify people with an outburst of outrage.

3. Diffuse nervous energy. "But," you ask, "what if all I feel is nervous? Is that really what I want people to resonate with?" Actually, yes. Everyone has experienced being nervous in front of an audience and they know exactly what you're feeling. If you just acknowledge it, people will be sympathetic. And, guess what, acknowledging it can make it go away. Now the audience is not to be feared, because you're all in the nervous boat together.

The most nervous I ever got was performing a five minute standup comedy routine at the Hollywood Improv. In the middle of my set, I completely forgot my jokes. After a long and uncomfortable pause, I pulled out my notes and made some comment about forgetting everything. Turns out it was the biggest laugh I got. They weren't laughing at me, but were genuinely sympathetic and enjoyed my honesty. (It's on YouTube, if you want to see my entire five minute comedy career.)

4. Pause and look. The most powerful way to truly embody the emotional arc of the presentation is to pause and look. When you reach a particularly important point in your presentation, look at your audience to see if they are getting what you hoped. If they are, revel in it for a split second and experience the moment of silent agreement. The first few times you do this, you might find it shocking and a bit uncomfortable. Just stay with it, it gets better the more you get used to it.

You may make a bigger impact on your organization (and your career) in those half-seconds than you do with months of flawless coding or meticulous analysis. If your business audience resonates with you, that personal bond is invaluable in achieving your goals.

In short, the key points in evoking resonance are:

- Be yourself
- Be present
- Be aware of the importance of the substance of your presentation
- Pause to look at your audience

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5. Conclude with a call to action

I've seen many well organized and performed presentations fail to meet their goals because they flop at the end. They just peter out when the speaker runs out of details to reference.

The conclusion is not the point at which you are relieved to be done. It's the moment when you turn the responsibility for the transformation you want over to the audience. They need to know exactly what you want them to do next.

If you've designed the emotional arc correctly, it's the moment when the audience feels most compelled to act. Don't let that moment go to waste. They will never be more committed to change than they are at the end of your presentation. If they don't know what to do with that determination, those feelings will dissipate and be forgotten before they get home for dinner.

Your last slide shouldn't be a generic one saying "And now there's time for your questions?" The last slide should have some specific call to action.

Think back to the common goals for presentations. Each one might have a different call to action. Here are a few examples.

Presentation goal	Possible call to action
Influence decisions	"I encourage you to select option A."
Manage expectations and share status	"Given that we are behind schedule, I would like you to write a prioritized list of the features from this phase, so that if we have to delay some, we'll know in advance which are likely to go."
Leverage opportunities	"Since it looks like we might be able to save a lot of money by moving our data center to the cloud, I think that we should assign Bob to evaluate the options and report back to us in two months with some estimates."
Leverage technology	"It's easy to forget what you've learned in this class today, so tomorrow, I'd like you to log into the test system and create three new contracts on your own."

Finish strong. If you don't, I guarantee you won't meet your goals.

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The best-kept secret

And finally, I'm going to tell you the best kept secret about presenting to business people.

The audience is rooting for you. They want you to succeed. They want to feel good about the time they are investing with you. They want you to contribute to making their lives better. If you remember this and follow the guidelines in this article, you are sure to become a compelling and engaging presenter.

And who knows? The audience you dread the most might even become your biggest champions. (Business people are strange that way.)

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About Leading Geeks

The Leading Geeks Company helps organizations unlock the value of technical people by overcoming the disconnect between technical and non-technical groups. That includes:

- Launching project teams on a path to success
- Redirecting troubled projects, with attention to repairing critical relationships
- Improving technical leadership, recognizing that leading geeks is different
- Transforming the tricky relationships between technology and business groups

Since 1999, we have empowered leaders to leverage technology and the people who provide it. Today, Paul Glen and Maria McManus, the founding partners, bring a unique perspective to improving collaboration across disparate organizational cultures. They leverage their decades of experience from opposite sides of the chasm to uncover overlooked ways of getting along, thereby enhancing organizational productivity.



Paul Glen is the award-winning author of Leading Geeks and long-time columnist for Computerworld. He has worked with geeks and the people who lead them for over 20 years. Contact paul@leadinggeeks.com.

Maria McManus, formerly VP of Product at iVillage and Director of User Experience at Disney, is dedicated to maximizing investments in technology through good geek/non-geek relationships.

