



## **BEST PRACTICE**

### **Written and Oral Communication**

An important aspect of supervision is the ability to communicate with other parties. An effective way to quickly improve the ability to communicate orally and in writing is to view every communication opportunity as making an oral proposal to another person. The oral proposal can be made orally, or it can be in a written document. The following discussion of making an oral proposal is much more elaborate than a supervisor would normally do in communicating assignments or information to a subordinate, but the concepts are applicable to all oral communications.

Making an oral presentation is a marketing opportunity. Your customer is ready and eager to hear your solution to their problem. Proper preparation and presentation will create the proper environment for the acceptance and the successful implementation of your proposed solution.

Some general guidelines to follow as you make this oral presentation are:

- Emphasize that you are presenting the best solution to the customer's problems.
- Emphasize that your project team is well equipped to implement this solution.
- Sell the corporate experience of your project staff and yourself.
- Sell your personal management capabilities.
- Sell the technical expertise of the project staff and yourself.
- Sell your enthusiasm to do this project effectively, efficiently, and economically.

There are three main parts to the presentation: preparing for the proposal, presenting the proposal, and closing the proposal.

#### **Preparing the Proposal**

Preparation is very important for any proposal or oral presentation. Follow these recommended steps when preparing your proposal.



1. Outline your proposal:
  - The problem to be solved – A concise description of the customer's problem that will be solved by the proposal.
  - System proposal solution constraints - Any constraints that might have an impact on the solution, such as time, people, or budget.
  - The proposed solution - The solution to the customer's problem.
  - Impact on people - How the system will affect people; the type of people needed to use the system.
  - Impact on cost - The cost versus benefits.
  - How to approve the project (i.e., close) - What is necessary for approval to proceed from this point?
2. Prepare visual aids for the presentation. The visual aids lend themselves to a more informal discussion, provide the opportunity to switch back and forth between the visual aids, and can be used to answer questions. Some guidelines on preparing visual aids are:
  - Lay out your presentation, identifying key points to be covered first, and then develop visual aids to support those points. Do not make the all-too-common mistake of sketching out or selecting illustrations first, then trying to decide what point they make.
  - Use one visual aid for each major point in your presentation.
  - Use pictorial illustrations wherever possible.
  - Limit the text on each to no more than 25 words.
  - Each visual aid must make one, and only one, point.
  - Leave the details to your oral discussion and not the visual aid.
  - Your presentation should expand on areas included on the visual aids.
3. Emphasize in your mind the three most important points you want to make in the presentation. Be sure they are well covered. Use the old philosophy of "tell them what you are going to tell them, tell them, and then tell them what you have told them." This should focus on the three most important points of your presentation.
4. Rehearse your presentation in front of your colleagues. If the proposal is worth making, it is worth rehearsing. You might want to rehearse several times to ensure that you can do it effectively. Urge your colleagues to ask questions to ensure that you can back up your facts.
5. Be sure you understand the alternatives that were considered for the solution. You should present one proposal only, but be prepared to



- address other solutions and why you did not accept them, as part of the questioning at the proposal meeting.
6. The presentation should not last more than one hour. If you are unable to cover the material in one hour, then take a break and continue again. The ability to concentrate for more than one hour is extremely limited.
  7. It is better to say too little than too much. Generally, the presentation flows better if you say too little and have the audience ask questions, than to say too much making them bored. More sales are lost from saying too much than from saying too little.

## **Presenting the Proposal**

If you are accustomed to speaking before a group, you know the ropes. On the other hand, if you have not had the opportunity to speak before groups of people in the past, the following hints might be useful:

- Start and finish your discussion on time.
- Make the contents of your discussion serve your customers' needs, not yours. Every word you say should be for their benefit, not yours.
- When preparing your briefing and when actually giving the presentation, think in broad concepts as opposed to specific details. By the time you give the presentation, you will be talking about something you know like the back of your hand. The details will come automatically.
- Be enthusiastic and act enthusiastically. Move around the front of the room. Maintain eye contact with your audience. Remember, enthusiasm is infectious.
- Use terms that your audience members will understand.
- Use terms that you understand. Do not use technical jargon just because your technical gurus used it in the proposal. Don't be afraid to admit that your technical people "handle those matters." Just make sure that one of them is in the room to answer the questions.
- Include examples to support all points covered. Remember, examples, not proof. Customers like to hear, "This specific problem can be solved using such-and-such a technique, as we discovered when implementing a similar system for so and so."



- Issue handouts summarizing your briefing, but only after you are done talking. Keep their attention on you, not on handouts, during your presentation.
- If you feel a bit nervous, have someone else prepare a short (10-15 minutes) discussion of some narrow aspect of the proposal (maintenance, a technical detail, installation of equipment, etc.). After you have talked a while, introduce the topic with, "Mr. Smith wrote this portion of the proposal and can explain the concepts much more eloquently than I." This will give you a breather to clear your throat, gather your wits, and dry your sweaty palms.
- Always have a cup of coffee or a glass of water by your side. If someone asks you a tough question take a sip of coffee or water while you collect your thoughts, then answer.
- It's not a sin to not know the answer to a question. Simply tell the questioner that you will get back to him or her later that day, or have someone else in the room answer. Many proposal evaluation teams include technical people who are not happy until they prove they know more than you do. Those people get their satisfaction either by catching you in an outright error, or by getting you to admit that they thought of a question that you could not answer. Guess which scenario they prefer.
- Finally, always end any briefing with impact. The last sentence you say is probably the most important.

## **Closing the Proposal**

An important part of making a proposal is the closing. The close is getting approval to proceed according to the proposal. You should have prepared and included as part of the proposal the documentation necessary to proceed.

The closing will normally occur at the end of the presentation. For example, at the conclusion of the presentation, you might state to the highest-ranking customer in attendance, "If you will sign this approval document, we can begin on the project tomorrow."

Be prepared for the close at any time during the presentation. For example, if you get a clue from the customer the project is wanted, you might ask, "Do you have enough information to make a decision on the project?" Again, many sales have been lost because of too much information, rather than too little.



Don't be concerned about objections to your proposal; these should be considered. Objections are usually opportunities to close. For example, if the customer objects to it taking 18 months, you might be able to counteroffer with having the first part of the project up and running in 12 months. You should have considered these objections in your preparation, and be prepared to counteroffer during the presentation.

The purpose of the proposal from the producer perspective is to get agreement for more work. Nothing else should be considered a desired conclusion to the proposal. Push hard for a closing or you may never get one.

## **References**

Guide – CSTE Common Body Of Knowledge, V6.1