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Management Presentation

Strategies for Structuring and Delivering Ideas

By Michael C. Giallourakis

As professional accountants you will from time to time be called upon to present a proposal, a budget, or a program orally to either an internal audience or to an external audience who has the power to accept or to reject the substance of the presentation. Your success or failure depends on your ability to effectively inform and persuade the audience to your point of view. Therefore, your presentation must be prepared and delivered with great care because of the high personal and professional stakes involved. The purpose of this article is to provide for the professional accountant a pragmatic and structured system for preparing and delivering a management presentation. The first step in preparing your presentation is to understand the nature of the presentational objective.

Presentational Objective

In developing an effective strategy for the presentation, it is important to formulate an objective for the presentation because the objective will focus your presentation. An example of a useful objective would be: What specific results do I expect from this presentation? Once you have decided on the objective, you can then begin developing an effective and appropriate message to obtain your objective. Another reason for requiring the objective is that of measuring results. By

having a clear objective, you will be able to judge whether or not your presentation was effective. In other words, the objective should make it easy for you to measure success or failure. Once you have identified your objective, the next step in preparing for your presentation is to analyze and adapt to your audience.

The Art of Audience Analysis

Audience analysis is a set of informational inputs concerning the nature of your audience which plays an important part in determining the best communicative strategy for accomplishing your presentation objective. Its purpose is "to discover audience needs, attitudes, values, and predispositions" so that your presentation will be seen as relevant to these. [Timm, 1980, p. 223] Another function of audience analysis is "to determine how much

A pragmatic and structured system for presenting proposals will aid the accountant in successfully informing and persuading others.

knowledge your audience knows about the subject or would like to know." [1980, p. 223] The objective of audience analysis for the presenter is to obtain a realistic assessment of the audience since it is impossible to know everything about the audience. Once you have constructed an image of your audience needs and attitudes you then can tailor your presentation to suit the audience's needs and attitudes. The Audience Analysis Audit [Morrisey, 1968, pp. 20-21] in Figure 1 suggests some questions that you might ask yourself as you prepare your presentation.

Now that you have completed your objective for the presentation and you have analyzed your audience, there is the third step to prepare for and that is the construction of a preliminary plan.

The Preliminary Plan

The development of the preliminary plan is your blueprint which will guide your audience through your presentation to the desired outcome. The preliminary plan, therefore, can help you with the placement of main ideas and with the supporting material necessary to avoid frustration and confusion, and to make sense out of a whole assortment of ideas, information, and objectives [Applbaum and ANATOL, 1982]. In a sense it will help you decide what kind of material you will need and how much you will need to accomplish your objective.

Main Ideas. If you are to be successful in your presentation you will, as the presenter, have to spell out the concepts or main ideas which you wish the audience to understand, accept, and follow through on. How do you do that? By stating your main ideas (one but no more than five) in the form of conclusions you want the audience to reach [Timm, 1980]. That is the objective of the preliminary plan.

Main Ideas-Support. Now that you have your one or five ideas started, it is necessary to determine what evidence is necessary to help the audience not only understand what you are presenting but to have them follow-through on a desired action. Each presenter has his own style for organizing material. The presenter should select an organizational format which will best fulfill his/her presentation objective. With that in mind, Figure 2 provides a guideline for

developing the preliminary plan and [Morrisey, 1968, pp. 24-25] Figure 3 presents a sample of a persuasive presentation. [Morrisey, 1968, p. 32]

Selecting Supporting Materials.

As you construct the presentation you begin seeking and identifying supporting material which will not only relate to the main idea(s) but which will clarify, amplify, and make the main idea(s) interesting.

The types of supporting materials generally used to develop the presentation will normally depend on the objective of your presentation. Generally, supporting materials are classified as:

- Statistics
- Examples
- Testimony
- Analogies
- Visual Aids

These types are not meant to be all inclusive. Any material which will help you to explain or to describe your main idea(s) should be used.

To help you determine whether or not you should use a given material as support [Appibaum and ANATOL, 1982, p. 152], the following checklist is provided:

- Does the material meet the audience's need?
- Does the material relate to the presentation objective?
- Does the material support the presentation's main points?
- Can the audience understand the material?
- Is the material timely?
- Is this the best available material?

Using supporting material effectively is a matter of blending presentation objective with outcome, so if the answer to any of the above questions is no, you must begin seeking other types of material for your presentation.

Organizing your Materials. Now that you have determined your presentational objective, analyzed the audience, developed a preliminary plan, and selected the supported material, you must now organize your presentation so that the audience may easily follow your development of the subject.

Most presentational messages are arranged into three basic organizational structures; the introduction, the body, and the conclusion.

FIGURE 1

Audience Analysis Audit

(Fill in the blanks or circle the terms most descriptive)

1. Identify the objectives in presenting your briefing to THIS audience. What do you want to happen as a result of it?

2. Specific analysis of members of this audience—
 - a. Their knowledge of the subject:
 High Level General Limited None Unknown
 - b. Their opinions about the subject and/or the speaker or organization represented:
 Very favorable Favorable Neutral
 Slightly hostile Very hostile
 - c. Their reasons for attending this briefing:

 - d. Advantages and disadvantages of briefing results to them as individuals:
 Advantages _____
 Disadvantages _____
3. General analysis of members of this audience—
 - a. Their occupational relationships to speaker or his organization:
 Customer Top Management Immediate Management
 Co-workers Subordinates Other Management
 Other workers Public
 - b. Length of relationship with company as customer or employee:
 New Less than two years More than two years
 Unknown
 - c. Their vocabulary understanding level:
 Technical Nontechnical Generally high
 Generally low Unknown
 - d. Open-mindedness (willingness to accept ideas to be presented):
 Eager Open Neutral
 Slightly resistant Strongly resistant
4. Information and techniques most likely to gain the attention of this audience:
 Highly technical information Statistical comparisons
 Cost figures Anecdotes Demonstrations Other
5. Information or techniques likely to get negative reactions from this audience:

The Introduction

The development of the introduction in any presentation is important because it sets the stage for the audience to decide whether or not to accept, reject or to even listen to the presentation. The development of the introduction should be short and

interesting. It should include "what" the presentation is about and a brief statement of "why" the presentation is important. In other words the introduction should be developed in such a manner as to obtain the attention of the audience and to prepare them for the presentation.

FIGURE 2

Guidelines for Preparing a Preliminary Plan

1. Identify specific objectives for the briefing, keeping in mind the following criteria:
 - a. They should answer the question, "Why am I giving this briefing?"
 - b. They should state the results desired from the briefing, in effect, completing the sentence, "I want the following things to happen as a result of this briefing:"
 - c. They should be designed to accomplish whatever hidden objectives you have for the briefing.

Note: If the body of knowledge to be presented must be identified in the objectives, use a sentence such as "I want to tell about . . . so that . . . will take place."

2. Identify the specific audience for whom you are designing this briefing and state in a one- or two-sentence summary pertinent information about their knowledge, attitudes, and so forth.
3. State the MAIN IDEAS OR CONCEPTS that the audience MUST get if the objectives of the briefing are to be met.
These should:
 - a. Be in conclusion form and preferably in complete sentences.
 - b. Definitely lead to the accomplishment of the specific objectives.
 - c. Be interesting in themselves or capable of being made so.
 - d. Be few in number, usually no more than five.
4. Identify under each main idea the types of factual information necessary so that this audience can understand these ideas. Avoid excessive detail.

This plan should be used as a guide:

1. For the briefer in selecting materials, keeping ideas channeled, and determining emphasis points.
2. For support personnel who may provide the backup data, prepare charts and other aids, and assist in the briefing itself.

The Body

Now that you have the attention of the audience, the stage is set for the body of your presentation. The body presents your main points in a logical sequence and helps to clarify points of view. In addition, it summarizes your arguments so that the audience will recall what was being presented.

Organizing Your Main Points. You have now arrived at the most important part of your presentation. The question you need to ask yourself now is "How can I arrange my presentation material to best achieve my objective?"

What types of arrangement patterns are available to you which can be useful in providing a clear, useful, and meaningful relationship among your main points? Described below are

several types of patterns of arrangement; they all help to structure the presentation's main points.

Problem Solving Pattern. If you are advocating a solution to a problem, you will want to use this type of pattern not only for its ability to logically lead an audience through the problem to a suitable solution but also to see how your audience finds the solution to resolve the problem.

Cause-effect Pattern. Using this type of pattern the presenter can arrange materials around the causal relationship and its effects. This type of pattern has two main elements. It has a descriptor of the factors which is the cause and it has a predictor of the effects. A presenter may want to use this type of pattern when

emphasizing the advantage or disadvantage of an idea.

Chronological Pattern. This type of pattern is used to organize the main points according to a logical time progression. For example, if you are invited to present the firm's history, you would use this pattern.

Topical Pattern. When your points in the presentation involve separate development to arrive at the whole topic, the topical pattern serves to unify them. For example, you might want to discuss a financial report by breaking the report into various units such as assets and liabilities, credits and debits, and so on.

In this section, you have been given a brief description of four organizing patterns for your main points. Which organizing pattern will accomplish your goal? That depends on which one will clarify the points best and which will focus on your presentation objective.

Preparing Your Conclusion

Most presentations need an ending. The conclusion provides a final message which should reinforce the presentational message and the purpose of the presenter. It should not contain any ideas or information.

At the Podium-Delivery

Now that all the planning and development of the presentation is completed, it is time to present yourself before the audience and deliver your presentation. Most of us understand and recognize the importance of delivery yet quite often feel fearful or uncomfortable standing there before an audience. Such feelings are normal. It becomes abnormal when you let those feelings of anxiety force you to become dysfunctional.

Since the effectiveness of your presentation depends upon your ability to deliver your message, it is important to understand the phenomenon known as "stage fright" or "speech tension" which may have an effect on the outcome of your presentation. The stage fright concept may be defined "as a fear of the situation." [Baker, 1981, p. 379]. In this section, information will be provided concerning the nature of stage fright, its causes, and suggestions for controlling it.

The Nature of Stage Fright

It is important to stress here that each person, even the most polished

presenter, has some amount of discomfort and anxiety before appearing in a presentational situation in which there is some risk. The point that should be stressed is that the degree of intensity due to the presentational situation will vary from individual to individual. Sometimes the intensity is so great that it prevents an individual from presenting the message. To ignore a presenter's anxiety is to ignore a serious issue that most presenters need to understand and cope with. Therefore, the best way to understand these feelings of anxiety is to approach the two underlying causes.

Physiological Reactions. The physiological reactions such as sweaty palms, palpitations of the heart, fidgeting, trembling and other nonverbal behaviors usually do not make it impossible for the presenter to present his message before an audience. In fact, many of these symptoms are a function of inward stress and are normal. [MaKay and Sawyer, 1973, p. 36] Because the adrenalin has entered our body system and our defense shields are activated as we approach an uncertain situation, these symptoms will only become dysfunctional when they are seriously exaggerated, or the presenter becomes preoccupied with them. Personally, these symptoms can provide the presenter with a little extra stimulation which will make the presenter energetic.

Psychological Reactions. The worst problems that a presenter faces are the psychological ones [Andrews, 1979, p. 193]. For example, when an individual was told by his secretary that "he must stand at a lectern at the next Board of Directors meeting to give his report, he announced that he would resign first before he would put himself through such an ordeal." [Tacey, 1983, p. 124] Another example is when a "speaker stalled, I took his arm and said, 'Let's find out who is scaring you. . . .' As I named each person, including myself, he kept saying no. At last he confessed that no individual was guilty." [1983, p. 125] These anxiety behaviors can be traced to a lack of self-confidence in oneself. Why this lack of self-confidence? Perhaps the presenter feels inadequate in preparing for the presentation, or the presenter somehow feels unworthy to communicate the message, or the presenter allows the communication

FIGURE 3
Sample of a Persuasive Presentation

Topic: Need for Increased Training in the Company

Objectives:

1. To create an awareness of the need for increased training.
2. To gain management approval and support for increased training so they will act to:
 - a. Authorize necessary funds,
 - b. Authorize time for training, and
 - c. Give verbal and written support to training efforts.

Audience:

Members of top management plus other management personnel at director level or higher. Most will have a general knowledge of the subject; a few will be favorably inclined, but most will be neutral, skeptical, or slightly hostile.

Main ideas the audience MUST get:

1. Increased training is essential if we are to survive in the industry.
2. Money invested in training now (charged to overhead or taken from profit) will be returned manyfold in the future.
3. Time spent in training now (taken from urgent current work) will result in a much more profitable use of time in the future.

Factual supporting information:

Idea 1

- a. New technology requirements.
- b. Training experience in other similar companies.
- c. Potential application of new management concepts.

Idea 2

- a. Recent training progress in the company.
- b. Comparative cost of operation figures (before and after).
- c. Personnel training versus replacement costs.

Idea 3

- a. Comparative (before and after) time-investment ratios.
- b. Intangible time benefits, for example, increased confidence and effectivity of personnel resulting in more productive use of time.

situation to intimidate him/her. Whatever the reasons are for the stage fright, presenters can minimize and control its effects.

Causes of Stage Fright

The causes of stage fright are not yet fully known; however, communication research has been able to shed some light into this extremely disruptive communication problem. According to Baird, stage fright stems from three main sources: the audience, the message, and you, the presenter. [1981, p. 80] Let us briefly examine each category and note specific causes within each.

The Audience

A. Evaluative Apprehension. Communication researchers have confirmed that this is the most potent cause of our anxiety. Why? Because we are uncertain of what the evaluation will be. The presenters somehow feel that the performance will be judged inadequate, thus damaging their esteem. For the presenters, this is a threatening situation because one's self is being exposed to the judgment of others.

B. Fate Control. These are situations where you must make presentations before your peers. Such audiences

**FIGURE 4
PERSONAL REPORT OF COMMUNICATION APPREHENSION**

This instrument is composed of twenty-five statements concerning feelings about communicating with other people. Please indicate the degree to which each statement applies to you by marking whether you (1) Strongly Agree, (2) Agree, (3) Are Undecided, (4) Disagree, or (5) Strongly Disagree with each statement. There are no right or wrong answers. Work quickly, just record your first impressions.

| | SA | A | UN | D | SD |
|--|----|---|----|---|----|
| 1. While participating in a conversation with a new acquaintance I feel very nervous. | 1 | 2 | 3 | 4 | 5 |
| 2. I have no fear of facing an audience. | 1 | 2 | 3 | 4 | 5 |
| 3. I talk less because I'm shy. | 1 | 2 | 3 | 4 | 5 |
| 4. I look forward to expressing my opinions at meetings. | 1 | 2 | 3 | 4 | 5 |
| 5. I am afraid to express myself in a group. | 1 | 2 | 3 | 4 | 5 |
| 6. I look forward to an opportunity to speak in public. | 1 | 2 | 3 | 4 | 5 |
| 7. I find the prospect of speaking mildly pleasant. | 1 | 2 | 3 | 4 | 5 |
| 8. When communicating, my posture feels strained and unnatural. | 1 | 2 | 3 | 4 | 5 |
| 9. I am tense and nervous while participating in group discussion. | 1 | 2 | 3 | 4 | 5 |
| 10. Although I talk fluently with friends I am at loss for words on the platform. | 1 | 2 | 3 | 4 | 5 |
| 11. I have no fear about expressing myself in a group. | 1 | 2 | 3 | 4 | 5 |
| 12. My hands tremble when I try to handle objects on the platform. | 1 | 2 | 3 | 4 | 5 |
| 13. I always avoid speaking in public if possible. | 1 | 2 | 3 | 4 | 5 |
| 14. I feel that I am more fluent when talking to people than most other people are. | 1 | 2 | 3 | 4 | 5 |
| 15. I am fearful and tense all the while I am speaking before a group of people. | 1 | 2 | 3 | 4 | 5 |
| 16. My thoughts become confused and jumbled when I speak before an audience. | 1 | 2 | 3 | 4 | 5 |
| 17. I like to get involved in group discussions. | 1 | 2 | 3 | 4 | 5 |
| 18. Although I am nervous just before getting up, I soon forget my fears and enjoy the experience. | 1 | 2 | 3 | 4 | 5 |
| 19. Conversing with people who hold positions of authority causes me to be fearful and tense. | 1 | 2 | 3 | 4 | 5 |
| 20. I dislike to use my body and voice expressively. | 1 | 2 | 3 | 4 | 5 |
| 21. I feel relaxed and comfortable while speaking. | 1 | 2 | 3 | 4 | 5 |
| 22. I feel self-conscious when I am called upon to answer a question or give an opinion in class. | 1 | 2 | 3 | 4 | 5 |
| 23. I face the prospect of making a speech with complete confidence. | 1 | 2 | 3 | 4 | 5 |
| 24. I'm afraid to speak up in conversations. | 1 | 2 | 3 | 4 | 5 |
| 25. I would enjoy presenting a speech on a local television show. | 1 | 2 | 3 | 4 | 5 |

Scoring the PRCA

1. Add up your scores for items 1,3,5,8,9,10,12,13,15,16,19,20,22, and 24.
2. Add up your scores for items 2,4,6,7,11,14,17,18,21,23, and 25.
3. Complete the following formula:

$$\text{PRCA score} = 84 - (\text{total from step 1}) + (\text{total from step 2})$$

Interpretation of score:

- 60 + = Some communication apprehension
- 88 + = High communication apprehension

Source: McCroskey, James C.

can be extremely frightening thereby creating high levels of fear because of the control they exercise over your fate, such as being promoted.

C. Status. Sometimes when the audience consists of individuals with status higher than yours, they tend to produce anxiety, while audiences of equal or lower status tend to produce lesser anxiety reactions.

The Message

A. Complexity. Sometimes material difficult to comprehend causes anxiety for the presenter who must deliver it.

B. Interestingness. Sometimes the presenter worries about how to present uninteresting information in an interesting manner. This causes anxiety.

C. Significance. Sometimes the presenter worries about how an issue will be perceived by an audience. If the audience is favorable towards the issue, there is no anxiety. However, if the audience perceives the issue as trivial, our anxieties begin to grow.

You The Presenter

A. Lack of Experience. If this is your first experience at presenting then you have some anxieties. However, the more you present, the less anxieties you will have.

B. Self-Expectations. Are you realistic about the standard of achievement that you have set for yourself. Sometimes you may demand too much of yourself thereby overreacting. This tends to provoke anxieties.

C. Fear Behavior. Everything is going well in the presentation when all of a sudden you notice that your hand is shaking. You begin to think that you must be scared. All of a sudden, you have high anxieties. What you have done is—you scared yourself.

Controlling Your Stage Fright

As you can see, there are many factors which contribute to your feelings of stage fright. Your goal, therefore, is not to eliminate all of your fears about presenting, but to control the fear of presenting. You want to manage it. The following suggestions should help manage stage fright.

- Be well organized.
- Have a positive attitude.
- Make sure you practice.
- Obtain experience in presenting ideas.
- Never memorize.

Never under any circumstances destroy your confidence before a presentation with negative thoughts. Instead, build your confidence rather than tear it down.

If you are curious about your level of communication apprehension, fill out the questionnaire [McCroskey, 1970] in Figure 4. Should the questionnaire suggest that you may have high communication apprehension, it is suggested that you seek help to overcome this disruptive communication problem. The decision you make to seek help may be the most important decision you ever make.

Conclusion

To achieve effectiveness as a presenter you must understand the nature of the presentational objective, be able to identify your audience's needs, develop a preliminary plan, and select the supported material. Once you have achieved the above you now must arrange your presentational message into the three basic organizational structures: the introduction, the body, and the conclusion.

Another problem which prevents you from being effective in presenting is stage fright. To overcome this disruptive communication problem, the presenter must understand its nature and

its causes. Stage fright can be controlled by focusing on being positive, by being well organized, and by practicing.Ω

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