

Presentation Templates

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Note – This is one from a sequence of exercises from the Sales Tools & Literature subject outlined in the Strategic Marketing Process eBook. Download the free e-book www.growthpanel.com/marketing-tools/index.html and subscribe to this subject at www.growthpanel.com/versions/get-started.html to download from Growth Panel’s Intelligent Marketing Platform.

Some of the graphics in this PDF might not display properly.

Good presentation templates will help your sales team deliver better presentations. A great presentation is probably the single best weapon in your sales arsenal.

Unfortunately, many people create and deliver poor PowerPoint presentations. It’s probably the most misused tool in corporate America.

Don’t let your team make these key mistakes:

- ▶ Using a standard, uninspired presentation flow that spends too much time talking about “us” and “why we’re great” rather than the issue at hand
- ▶ Using the PowerPoint document as a script with long phrases or complete sentences, then reading off the screen
- ▶ Missing the opportunity to use strong visuals to reinforce a message
- ▶ Completely customizing the template for the worse, not the better
- ▶ Using the document as a piece of literature and sending it out alone – it is a visual aid for a presentation, not a brochure
- ▶ Boring the meeting attendees and killing enthusiasm for your material

DEVELOP YOUR CONTENT

First, where are presentations typically used in your sales process? List the purpose of each and when it’s given.

PURPOSE OF PRESENTATION		STEP IN SALES PROCESS
1		
2		
3		

Now for each presentation, identify the typical participants and what they require from the presentation material.

Presentation #	
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	AUDIENCE MEMBERS		
	Group #1	Group #2	Group #3
Who is this audience member?			
Describe a typical person in this group			
What is his/her goal in attending the presentation			
What MUST you address to make sure this person's goal is met?*			
What are the two most important things you want this audience member to walk away with?*			

*Structure your presentation to deliver this key information. List it below.

INFORMATION TO CONVEY	PRIORITY	How can you convey it – images, data, case studies, story, etc.?
	<input type="checkbox"/> H <input type="checkbox"/> M	
	<input type="checkbox"/> H <input type="checkbox"/> M	
	<input type="checkbox"/> H <input type="checkbox"/> M	
	<input type="checkbox"/> H <input type="checkbox"/> M	

Now you can develop an outline of your presentation.

PRESENTATION OUTLINE

Think of your presentation as a story. It should have a beginning, middle and end. It should grab the audience's interest early and take them through a story that's intriguing and easy to tell – that way, your sales team will be much more at ease and deliver a better presentation than if they're working off bland slides with no real flow.

INTRODUCTION	KEY POINTS
Purpose of meeting	
Participant introductions	
Opening hook*: How can you grab their attention and get them excited about the material? Don't start out with the story of your company unless that's what your audience is there to hear – focus on the issue	

*A few ideas for your opening hook:

- ▶ Tell your audience about a similar problem that another client faced and what it meant to them. In the body of the presentation, take them through your process of solving it then wrap up with a summary of how the situations are similar.
- ▶ Start off with a rhetorical question, using humor if possible. In the presentation, show them why the question is or isn't true and why.
- ▶ Tell them about a situation faced at a certain moment in time. In the body, take them through the chronology. Use a map or calendar icon to emphasize the chronology.
- ▶ Identify a key issue and the opportunity or danger it represents. In the body, break out your recommendations for taking advantage of the opportunity or avoiding the danger.
- ▶ Compare the status quo with another compelling idea – a moment in time, a time in life, anything then show the similarities or contrasts.

Now outline the key points you'd like to deliver in the body of your presentation:

BODY – SLIDE #	KEY POINTS

- ▶ Focus each slide on a single key idea

- ▶ Continually refer to the wants and needs of your audience members (above). Don't lose their attention by going into detail in areas that aren't directly related (and of high interest) to your subject. Stay on topic and keep their interest.
- ▶ Don't put too much data on a slide – it's overwhelming and you may lose your audience's attention.
- ▶ Keep the presentation as short as possible – studies show that people lose interest after about 20 minutes. Let participants ask lots of questions afterward rather than respond to every issue they'll have in the material. A Q&A session is far more interesting and engaging.

CONCLUSION – SLIDE #	KEY POINTS
Conclusion: Wrap up the key idea in a compelling way	
Next steps: Identify them for both parties	
Q&A*	

*Prepare detailed slides for any questions that may need backup info. It's great to pull out very detailed information in the Q&A section so you don't bog down the body of the presentation, especially if a question is only relevant to one of your participants in a larger group.

WRITE YOUR PRESENTATION

Now that you have an outline, you can write the material itself.

Slide	Headline (make it short; convey the purpose of the slide)	Bullet points - use as few words as possible*	Are there any graphics that could convey your idea <u>instead of using text?</u>

*Don't use a lot of sub-points under your main bullets if they're not critical. The speaker shouldn't be reading off the slides – if s/he needs sub-points for memory, develop a separate speaker's guide.

When you've written each slide, go back and review it:

SLIDE EDITING CHECKLIST	STATUS
The headline is short and impactful	<input type="checkbox"/> Yes <input type="checkbox"/> Needs work
Any information that can be conveyed graphically rather than by words is in a graphic	<input type="checkbox"/> Yes <input type="checkbox"/> Needs work
There are as few words on the page as possible (and no complete sentences)	<input type="checkbox"/> Yes <input type="checkbox"/> Needs work
The bullets are all directly related to the headline	<input type="checkbox"/> Yes <input type="checkbox"/> Needs work
The ideas flow naturally – a speaker looking at the bullets won't be confused at their meaning	<input type="checkbox"/> Yes <input type="checkbox"/> Needs work

DESIGN THE TEMPLATE

Slide design is very important. Your presentation should convey your brand position and value proposition and use your company's colors, fonts, and other visual guidelines.

If you're using a designer to create your template, provide a creative brief. [Copywriting & Graphic Design can help] Otherwise, follow these tips:

SLIDE	DESIGN ELEMENTS	NOTES
Title page	<input type="checkbox"/> Use images if possible – for example, photos from your literature or website <input type="checkbox"/> If you put the prospect's logo on the slide, make sure it is perfect – otherwise, it will look unprofessional <input type="checkbox"/> The prospect's company name should be at least as large as your own	
Master slide template	<input type="checkbox"/> Use the Slide Master feature to create your design template <input type="checkbox"/> Keep it clean – the presentation is a visual aid for a speaker, not a video <input type="checkbox"/> Use your company fonts or commonly-used business fonts – don't use cute or obscure fonts <input type="checkbox"/> Make sure the font is attractive and easily read at small and large sizes – the most important criteria is	

SLIDE	DESIGN ELEMENTS	NOTES
	<p>readability</p> <ul style="list-style-type: none"> <input type="checkbox"/> Be extremely careful about colored backgrounds, and do not use white text on a dark background – it’s difficult to read <input type="checkbox"/> To introduce color, use it in the headline, borders or small graphics 	
Master slide template	<ul style="list-style-type: none"> <input type="checkbox"/> Use the Slide Master feature to create your design template <input type="checkbox"/> Keep it clean – the presentation is a visual aid for a speaker, not a video <input type="checkbox"/> Use your company fonts or commonly-used business fonts – don’t use cute or obscure fonts <input type="checkbox"/> Make sure the font is attractive and easily read at small and large sizes – the most important criteria is readability <input type="checkbox"/> Be extremely careful about colored backgrounds, and do not use white text on a dark background – it’s difficult to read <input type="checkbox"/> To introduce color, use it in the headline, borders or small graphics 	
Graphics	<ul style="list-style-type: none"> <input type="checkbox"/> If you use a graphic on a slide, use as few words as possible <input type="checkbox"/> Make sure the graphic is legible at all sizes 	
Other	<ul style="list-style-type: none"> <input type="checkbox"/> Use effects sparingly – they can be distracting and unprofessional when overdone 	

TRAINING & DELIVERY

Once the template is complete, here’s a suggested implementation plan:

SUGGESTION	NEXT STEPS
<p>Control customizations: If you can, centralize the process for customizing presentations for individual prospects. Salespeople should be selling, not playing around with graphics and bullets. If they need to change the presentation for a particular prospect, offer to work with them to create it. That way, you can ensure that the look is consistent and use your skill in creating a story with simple points and good structure; the salesperson gets more time to sell!</p>	

SUGGESTION	NEXT STEPS
<p>Versions: Create several versions of the template for different markets or customer segments so that it's very easy to whip out a presentation for a new prospect.</p>	
<p>Training: Train your team to deliver the information smoothly. Have different people present different portions of the material in front of the group, then work together to refine the material.</p>	

SUGGESTION	NEXT STEPS
<p>Handouts: Decide how and when handouts will be delivered. If you provide a copy of the presentation, it's usually best to do it afterwards so that participants don't jump ahead in the print version. However, the presentation may not be the right handout – you may want to create a one-page slick or a two-page meeting summary document instead.</p>	
<p>Online presentations: If your prospects are in remote locations, you may want to use an online presentation service – prospects can join a conference call and view the presentation on the web.</p>	