MANDEL

THINK AND SPEAK FOR RESULTS® SERIES

Presenting with Impact™

Virtual Workshop - Handout Packet

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Planning Tool Introduction

Taking the time to identify both your intentions for the presentation and your audience's needs enables you to plan a concise message that will help influence your audience and accomplish your goals. This planning is the foundation for all successful presentations. Use the information below to help you complete the Planning Tool on the next page.

A. Your Topic

What is the subject of your presentation or communication? Consider the amount of time you have, if specified, and determine the appropriate scope of your topic.

B. Your Intention

What business goals and specific results do you want to achieve by making your presentation? This includes what you want your audience to know, do, and feel in relation to both you and your topic.

C. Your Audience

First, consider how many audiences you really have. Are you presenting to one homogeneous group with similar backgrounds and concerns? Or do you actually have multiple audience segments, each with their own concerns (for example, technical, financial and sales)?

Next, analyze your audience by identifying their:

Specific Needs and Relevant Demographics	Consider what's important to your audience, what they need to make decisions, and what motivates them. Determine their level in the organization (for example, executive, mid management, entry level) and identify both their business and their personal needs. If relevant, factor in culture, age range, language, and male/female ratios.
Topic Knowledge and Attitude	Determine how much your audience already knows about your topic. Consider the source of that knowledge and its accuracy. Then factor in how they feel about you and your organization.
Communication Environment	Take into account the impact of the room size and set-up, time of day, and even current events. If presenting virtually, consider both your and your audience's environment.

D. Your Content

Given your intention and your audience, answer the remaining six questions on the Planning Tool. Your responses will help you prepare a listener-focused, results-getting message using the Mandel Blueprint®.

Planning Tool

Bring a completed, printed copy to your workshop

A. Your Topic:

B. Your Intention – What goals/results do you want to achieve by making this presentation?

C. Your Audience – Who is your audience and what do you know about them?

	Audience 1	Audience 2	Audience 3
Specific Needs and Relevant Demographics Topic Knowledge and Attitude Communication Environment			

D. Your Content – What information do you want to convey in your message?

1. In relation to your topic, what is the current situation for your audience? What are they experiencing now?	
2. What changes, pressures, or challenges are creating either problems or opportunities for your audience and/or the business?	
3. What are the consequences of not acting on the issues described above? How can you quantify the impact of these consequences?	
4. What idea or recommendation do you have to address the issues above? What do you believe needs to be done?	
5. What actions will you ask your audience to take, both during and after your presentation?	
6. How will taking action benefit your audience? How can you quantify the benefit?	

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Blueprint®

Topic:

Intention:

Audience/their care-abouts:

Type your notes directly into each box. To find out more about a specific step in the Blueprint process, let your cursor rest over each box for instructions.

ENTRANCE

Situation	Complication	Implication

Position	Opening Action	Benefit(s)

(Situation Complication Implication Position Action Benefit®)

PREVIEW

Main Idea #1

Supporting Information & Color Spots

Main Idea #2

Supporting Information & Color Spots

Main Idea #3

Supporting Information & Color Spots

REVIEW

Position	Closing Action	Benefit(s)

EXIT

Clear Transition Phrases

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ENTRANCE

Situation

Situation

"Currently…"

"As you know…"

"At the present…"

"Today we…"

Complication

Complication

"The challenge is…"

"Complicating this…"

"What's changing is…"

"The problem with…"

Implication

Implication

"This will impact…"

"The consequence…"

"What this could affect is…"

"That means…"

Position

Position

"The proposal…"

"We suggest…"

"It's critical to…"

"I recommend…"

Opening Action

Action

"During our meeting please…"

"While we review…"

"At the end of our conversation…"

Benefit(s)

Benefit

"This will result in…"

"The advantages are…"

"You'll experience…"

tion Complicat… it®)

How to Use SCI-PAB® in a Variety of Business Scenarios

Every day in business, success is at least partially determined by the ability to create result-getting messages, whether they are delivered live or in writing. Significant time is spent creating those messages. And if the message isn't both clear and compelling, the desired result is often not achieved.

Adopting SCI-PAB (Situation→ Complication→ Implication→ Position→Action→ Benefit™) as your *Personal Communication Framework* takes the guesswork out of structuring result-getting messages. Use the following templates to quickly apply the power of SCI-PAB to many of your most common verbal and written business communication scenarios. This time saving approach is guaranteed to improve the efficacy of your messages.

Sharing Ideas

SCI-PAB helps others support your suggestion because it helps them buy into the problem or opportunity:

- S Begin with a top of mind topic (related to your idea) for the audience you want to influence
- C Share new information about changes or issues impacting the topic in your situation
- I Describe the impact of not taking action on the complication, linking the consequences to the care-abouts of your target audience
- P Provide a compelling high-level description of your idea or recommendation
- A Ask for input, questions, support, and/or approval
- B Project results generated from acting on your idea linked to the target audience's **care-abouts**

Requesting Action

SCI-PAB helps people understand why they are being asked to do something, improving the results produced:

- S Identify the work that needs to happen
- C Share the particular requirements and/or challenges involved in doing the work
- I Clarify what happens if the issues in the complication are not addressed
- P Describe the approach you'd like people to take
- A Ask for input, questions, and commitment
- B Link the results that will be produced to the care-abouts of the people taking action

Coaching Others

SCI-PAB® is an effective way to structure objective feedback that reduces the risk of defensive reactions:

- S Objectively describe an incident where the target behavior was observed
- C Clarify the problem or opportunity that resulted from the behavior
- I Link the consequences of continuing the behavior (positive or negative) to the listener's care-abouts
- P Share a better approach for handling similar situations, or ideas that strengthen the original approach if reinforcing a positive behavior
- A Ask for feedback, questions, and agreement to an action plan
- B Link the results from taking action to the listener's care-abouts

Pushing Back

SCI-PAB enables you to push back on ideas and requests, while minimizing the risk of offending the originator:

- S Demonstrate that you understand why the request was made or the idea was suggested
- C Make the listener aware of the information that you believe impacts their request or idea
- I Raise your concern, linking it to the listener's care-abouts
- P Suggest another solution or alternative approach
- A Ask for input and agreement
- B Link the results from acting on your position to the listener's care-abouts

Providing Updates

SCI-PAB can make your updates brief, targeted, and impactful for the audience:

- S Provide a high-level reminder of how things were when you last communicated on this subject
- C List what of importance has changed since that last communication
- I Describe the impact of those changes on the issue or project
- P Provide a high-level overview of how you are addressing or plan to address the changes you identified in your complication
- A Ask for support or help on specific issues as required
- B Link results to the target audience's care-abouts to reassure and build trust

Tips for Technincal Presenters

Scope Out Your Audience's Technical Savvy

Knowing your audience is always important, but it's especially critical when your presentation has a lot of technical elements. Will your audience understand your technical terms? Be familiar with or interested in the concepts? It's worth making an effort to find out. If your listeners get lost—or bored—during your presentation, you will lose them. The Mandel Presentation Planning Tool can help you zero in on audience specifics.

- **Talk to a few audience members ahead of time.** It may not be possible, but there's no better way to get a real sense of your listeners' level of technical expertise. Sometimes what you find out when you arrive a few minutes early for your presentation can be helpful.
- **Create overview slides for technical content, and put the detail on handouts**. This way you can avoid confusing your less technical listeners, and give the rest of your audience the information it can understand. (These handouts may also give those who are less technical a chance to review the material later at their own pace.)
- **Check frequently for understanding.** As much as possible, try to keep the audience moving forward together. Beware of audiences that are too quiet—especially in a technical presentation where you are trying to build understanding step by step. Ask for questions frequently; create air space for people to jump in if they need to.
- **If you give your presentation several times, don't assume all your audiences will be the same.** You may find differences in job level, culture, language, and level of interest—all of which may call for some adapting on your part.
- **Plan on a longer Q&A.** Let your audience know you will build in additional Q&A time at the end of your remarks.

Frame Your Data

Your technical presentation may contain a lot of detailed information in the form of graphs, charts, lists, or diagrams. But be careful: too much undigested data and even technical audiences can tune out. All audiences will be better able to appreciate this detail if you embed it in an understandable context. Here are some possibilities:

- **Tell a story.** People remember stories, especially about characters they can identify with. If you can create a story and use your data to illustrate the events of your story, your audience will tend to retain them. (You can also adapt your data to match the technical understanding of your audience.)
- **Use analogies.** Analogies can clarify an unfamiliar concept or idea by linking it to something the audience knows.
- **Decide what your data is telling you.** Does it illuminate trends? Concepts? Progress and results (or the lack thereof)? Once you figure this out, you can organize your remarks accordingly and your presentation will have greater impact. The Mandel Blueprint® can help you here.

Say It Like You Mean It

Even the most informational technical presentation will benefit from an energetic delivery. Starting with your introduction, focus on what you want your audience to do, think, or feel. Speak with enthusiasm—even passion, if appropriate.

This may require some rehearsal. People with technical expertise aren't always comfortable "selling" their ideas. You might have to start by cranking up your enthusiasm beyond a level you are comfortable with; your audience will respond and in time it will feel normal for you.

Also:

- In a technical presentation, once your listeners are lost, they're likely to stay lost. That's why it's a good idea to build in opportunities to summarize along the way and to encourage your audience to ask questions.
- People take in information in various ways. Some are visual learners, some learn by hearing, or reading. If you can provide multiple learning modes, you stand a greater chance of reaching all your listeners.

Simplify Your Visuals

The temptation when giving technical presentations is often to ignore what you know about making slides visually appealing, and pile on the data, because—well, because it's a technical presentation. However, no matter how complex the information you're presenting, your audience should be able to quickly absorb the point of each slide. This means, among other things:

- Avoid complex graphs and grids.
- Make sure your text is large enough to be easily legible.
- Don't copy pages of graphs and charts from a report onto slides. They almost certainly won't be legible to your audience, and you will end up apologizing for them.
- Don't present a slide full of charts and numbers and then direct your audience to only one small part. Instead, redesign the slide to feature the part you intend to discuss.
- If you think your audience needs all the complex data, consider printing it in handouts to distribute before or after your presentation.

Handle Questions with Confidence

The last impression you leave with an audience is how well you handled the Q&A. Your well-informed, confident answers will help cement your audience's opinion of you as a knowledgeable presenter.

- Think through answers ahead of time to questions you think will be asked. Prepare explanatory slides if you need to. Mandel's Frequently Asked Tough Questions is a good guide for this task.
- Don't bluff. If you don't know the answer, say so. Promise to find the answer and get back to them. (And be sure to tell them when and how.)
- Make sure you can answer questions about anything on your slides, including material you incorporated from other sources.

- Answer the question that was asked. Resist the temptation to answer the question you wish had been asked.
- If a question is off-topic, politely suggest it is beyond the scope of what you hoped to accomplish in the presentation, and offer to discuss it with the questioner offline.
- If a question reveals a significant lack of understanding, clarify the cause of the confusion, and decide how to best handle it (which may be offline). If several people in the audience have the same confusion, pause and take time to address it.
- For an aggressive questioner, remember Mandel's ARM™ model: Align by demonstrating your understanding of the questioner's concern, Respond by giving the appropriate answer, and Maintain by finishing on a strong, positive note.

Preparing and Delivering a Team Presentation

Before the meeting:

- ✓ The assignment of a team leader is a critical first step. The team leader may open the presentation, field questions when appropriate, and close the team presentation.
- ✓ Research the key issues and needs of the listener or audience. Typically, the team leader has responsibility for gathering and sharing this information with other presenting team members.
- ✓ Use the Mandel Blueprint® to develop Situation, Complication, Implication, Position, Action, and Benefit® statements for the *overall* team presentation.
- ✓ Develop “color spots” to keep the presentation interesting and make it memorable; e.g. stories, analogies, quotes, and statistics.
- ✓ Plan the transitions from presenter to presenter. Make sure you introduce the next presenter in a positive, friendly way. He or she should acknowledge the introduction by saying, “thank you” or “thanks, Jim.” Behave as though you are proud to be introducing your colleague. Get the audience excited about what’s to come.
- ✓ Maintain a linking thread throughout the presentation by linking to comments other presenters have already covered or to ideas that future presenters will cover.
- ✓ Prepare for tough questions. Who will handle which questions? How will you align, respond and maintain?
- ✓ Practice out loud, on your feet with your team before the meeting. Pay close attention to the timing of each segment.
- ✓ Ensure that slides and other collateral material have a consistent look.

During the meeting:

- ✓ Pay close attention to your colleagues who are presenting, even if you’ve heard it a thousand times. Occasionally look at the audience for looks of interest, confusion, and non-verbal signals, but look at the presenter most of the time. Make sure you’re not looking at your notes or checking your email!
- ✓ Team Leader should monitor timing and intervene if necessary.

After the meeting:

- ✓ Hold a debrief meeting to assess the effectiveness of the team presentation. What could we have done differently to be more effective?
- ✓ Was our content appropriate?
- ✓ How well did we answer their questions?
- ✓ Did we deliver with professionalism and credibility?

ARM™ Guidelines

Handling Questions

- Actively seek questions from listeners; give them time to ask
- Listen with your body in an open, neutral stance
- Prepare to respond by pausing, asking a clarifying question, or re-stating the question if others in the group may not have heard

1. Align

Put yourself in the listener's position.	
▪ Acknowledge and validate the fact and/or emotion the listener is expressing. Use some of his or her words if appropriate. ▪ Caution: avoid superficial responses, such as "I know how you feel," or "I understand."	*"That would be a problem for me as well."* *"No question: in your business you definitely need to stay ahead of the curve."*
▪ State what you understand to be the listener's critical issue. Use his or her name if that seems appropriate.	*"Mr. Shaw, it sounds like you need to find another way to fund this."* *"You're saying it's critical that the next project go forward without any cost overruns."*
▪ If necessary, ask a clarifying question to check your understanding or to learn more.	*"It sounds like we need to consider a broader range of support for you. Would you please tell me a little bit more about your requirements?"*

2. Respond

Keep in mind the listener's important needs.	
▪ Indicate how you can address the listener's concern. ▪ Be objective, not defensive. ▪ Avoid using words or phrases like but, however, although or nevertheless.	*"Let me try to clear up the confusion. First…"* *"We have a way to help with that. For example…"* *"What I will do next is…"*

3. Maintain

Use this exchange to build your relationship with the listener and move the presentation forward.	
▪ Return to a component of your core message: your position, action or benefit.	*"Think and Speak for Results will prepare you for your "moment-of-truth" communications…"* *"My recommendation is that we start with a proof of concept…"* *"Implementing this solution will provide you with a 15% savings in annual licensing fees…"*
▪ Let the listener know that you are committed to his or her success.	*"I'd like to help you make this project a success."* *"I believe this solution will produce the best result for you."* *"I am committed to helping you find the best approach."*
▪ If necessary, ask a question to make sure the listener doesn't have additional concerns, and is ready to continue the discussion.	*"What questions do you have about this approach?"* *"How do you think this will work for you?"* *"What other questions do you have?"*

Frequently Asked Tough Questions

Don't get caught unprepared.
Anticipate FATQ (Frequently Asked Tough Questions) and
ARM™ (Align—Respond—Maintain) yourself for the best possible outcome.

Then... Prepare your answers

First... Brainstorm possible questions from the listener(s)

First... Brainstorm possible questions from the listener(s)	Align Acknowledge facts and empathize w/emotions	→	Respond Succinctly provide necessary information	→	Maintain Reinforce position, action, or benefit

Self-Coaching Worksheet

Name:

How do I want to be perceived by others?

COMPOSURE: Master three behaviors to look real and feel in control

Posture: Use an engaged default posture to look and feel relaxed and confident

+ △ Open body to audience
+ △ Balance weight
+ △ Relax knees, arms & hands

Observations & Suggestions

Pausing: Use pauses to stay in control and punctuate thoughts

+ △ Gather thoughts
+ △ Breathe
+ △ Eliminate clutter words

Observations & Suggestions

Eye Contact: Use eye contact to talk conversationally to one person at a time

+ △ Talk only to individuals
+ △ Give one thought per person
+ △ Make random connections

Observations & Suggestions

ENERGY: Convert your presentation anxiety into audience-focused energy

Movement: Use available space to engage and involve your audience

+ △ Walk with purpose
+ △ Feet follow eyes
+ △ Look → Move → Plant

Observations & Suggestions

Gesture: Use natural gestures for description and emphasis

+ △ Use entire arm
+ △ Rest arms at side
+ △ Avoid handclasps & fidgeting

Observations & Suggestions

Voice and Face: Use your voice and facial expressions to express importance, urgency and emotions

+ △ Vary vocal volume, speed & pitch
+ △ Project to entire audience
+ △ Animate face; smile

Observations & Suggestions

Notes:

Moment of Truth Presentations Skills Review

Focus Skill

Would my audience UNDERSTAND?

- \+ △ Clearly stated opening (SCI-PAB®)
- \+ △ Provided agenda
- \+ △ Used appropriate detail and language
- \+ △ Made distinct transitions
- \+ △ Added memorable color spots and visuals
- \+ △ Demonstrated "say it; show it/write it; talk it" with use of visuals
- \+ △ Used a strong closing (PAB)

Observations & Suggestions

Would my audience SEE THE VALUE?

- \+ △ Acknowledged audience needs
- \+ △ Spoke to benefits/value to organization
- \+ △ Highlighted personal/individual benefits
- \+ △ Demonstrated with specific examples (numbers, case studies, etc.)

Observations & Suggestions

Would my audience TRUST ME?

- \+ △ Used engaged, default posture to look confident
- \+ △ Used pauses to stay in control and punctuate thoughts
- \+ △ Used eye contact to talk conversationally to one person at a time
- \+ △ Used available space to involve audience
- \+ △ Used natural gestures for description and emphasis
- \+ △ Used vocal and facial expressions to express importance, urgency and emotion
- \+ △ Created an environment that encourages dialogue

Observations & Suggestions

Next Steps:

Virtual Meeting Tips/Checklist™

(Trust us, we've been meeting/training/facilitating virtually for 10+ years)

It's easy to develop a *virtual-meeting reputation* very quickly. We all want the reputation for leading efficient, collaborative, and productive virtual meetings that respect individual's time, care-abouts and contributions. The challenge? Without truly adapting your meeting skills to the unpredictable virtual environment, you risk conducting unreliable, inefficient, and easy-to-multi-task through meetings that frequently lead to a string of other meetings.

The good news is, there are some simple tips and techniques you can employ to build a strong *virtual-meeting reputation* for both low and high-stake meetings.

Before we jump into tips – one word on virtual meeting fatigue. It's a real thing and it's important to reflect on why and how to avoid it. We start there.

Here are some tips to consider every time you virtually pull individuals together to achieve *anything*. Don't worry, although there are lots of tips to think through, once you've done them once or twice, they'll become your default behavior. Because there are quite a few, here are the key sections hyperlinked for you:

Virtual Meeting Fatigue

While virtual meeting platforms are useful alternatives to in-person meetings, they do not simulate the natural flow of communication – and can be unexpectedly more fatiguing.

The virtual platform interface forces a person to have more intense, focused attention and eye gaze than they would in a face-to-face meeting. This is a challenging effort for our brains to maintain. The cognitive load gets to be too much, and we begin to feel fatigued and inattentive. We need more room to breathe and shift around as we would in person - not stare directly into a camera – and – have a number of people staring back.

Not to mention, we are spending more hours each day multi-tasking – because let's be honest, we all do it when in virtual meetings. We may be on a videoconference while checking multiple email accounts, looking at our phones, checking Slack, texting, writing, reading documents and when working from home, engaged in a whole host of other distractions. Hours and hours of this can contribute to overload fatigue.

While we cannot change the interface of the meeting platforms, we can change our practices to help alleviate the strain.

- ☐ Turn off your camera periodically (and make this a ground rule for everyone at the meeting). It doesn't mean you're not paying attention; it just means you need a break from being on-screen.
- ☐ Exit full screen mode when cameras are on. Minimize face size so you're not staring at everyone all the time. Or use the "speaker view" so you only see one individual at a time.
- ☐ Get an external camera with a larger field of view. Many times, the built-in computer camera is too close for comfort and doesn't allow the space to fidget/doodle/stretch (all things you would normally do in a meeting).
- ☐ Give yourself an "audio only" break, not just by turning off the camera but also by standing up, turning your chair around, folding laundry, etc.
- ☐ Switch it up now and again and have just a phone call – video isn't always necessary.
- ☐ Build in breaks between meetings – we know it can be difficult, but even 5 minutes will allow your brain to relax, reset and prepare for more video time.

Before your meeting

- ☐ Keep attendees, and meeting length, to an absolute minimum. Everyone will appreciate your effort. Employing Mandel's skills and tools will help you achieve this goal.
- ☐ Craft an informative invite. Your meeting invite sets the tone. If you invest the time to set an agenda and provide preparatory information, your participants are more likely to follow suit. Virtual meetings need structure – provide it from minute one.

- ☐ **Enable the platform features you need.** Decide what features you'll need and make sure they are available and enabled before you start your meeting. This is especially important if someone ELSE is providing the platform. Check to be sure the features you want are enabled. For example, do you want the group to annotate freely, complete polls, share content, or go into breakouts? You can set those preferences when you schedule your meeting. Beware: If you schedule an instant meeting, these preferences may be pre-set – you'll want to check them before you start the session.

- ☐ **Choose the right platform version.** Platforms commonly have meeting and webinar versions giving presenters more robust delivery options. For example, if you have a particularly large group, want to set separate presenter-participant privileges or use a waiting room feature, you may want to think about using the webinar version of a platform.

- ☐ **Plan for how you will share content.** Depending on the platform you've chosen, you may have the option to upload your content before you start your meeting/session. This can be a safe and stable way to present your slides – especially if you are presenting with others. If, however, you want to work on a document, or make changes in the moment, it's best just to screen share.

- ☐ **Close any alerts on your screen**. Alerts can be very distracting, embarrassing and tempting. And, individuals who respond to alerts during a meeting are signaling that multi-tasking is okay.

- ☐ **Provide a dial-in option.** Some people prefer to dial-in and, it can help when bandwidth is an issue.

- ☐ **Plan for video on or off.** Be sure to communicate whether you plan to use video in your invite and at the beginning of the meeting. Video on is preferred – even if momentary. Seeing one another coalesces the meeting, gives attendees an opportunity to make a cognitive connection and establish accountability to contribute. (More video tips are provided below.)

- ☐ **Practice – please – we beg of you.** Everyone will appreciate your effort. If you know your content and know the functionality of your platform, you will exude confidence, credibility and get more done! It's surprising how quickly you can lose the attention of your virtual audience when you start fumbling with platform features, asking how to do things and don't know your content. Audiences just turn off, zip to their email and it's VERY difficult to get them back.

During your meeting

- ☐ **Be on time to your own meeting**. There's nothing more disrespectful than to be late when others are on time. If you can, be a couple minutes early.

- ☐ **Ask someone to watch the time.** Giving someone the watch-clock responsibility gives that person deliberate purpose and will help you stay on task.

- ☐ Open with a clear agenda. Use your SCI-PAB® framework to establish purpose for everyone on the call and to articulate clear objectives for the meeting. Don't forget to check in with the participants to be sure everyone agrees before moving on.

- ☐ Be sure you can pronounce the names of all your participants. If you don't know how to do so, ask them to clarify at the beginning of the meeting. It's very demotivating to have your name repeatedly mispronounced – this is exponentially more important when it is a customer's name you are mispronouncing.

- ☐ Genuinely state the value each member brings. This is especially important if it is the first time the group is together. You can do this organically as individuals arrive or formally at the beginning of the meeting. As a participant, hearing your name and purpose sets the tone and expectations early-on, indicating you are there to contribute.

- ☐ Get people talking immediately. Informally or formally – just get them talking. You want your participants to know you want to hear them. It is also a great way to be sure everyone's audio is functioning properly.

- ☐ Call on people. Instead of waiting for volunteers to speak up, call on someone who you know would have value to contribute, hasn't spoken-up, or has a stake in the topic. To be sure no one is taken off guard, let your attendees know early-on that you will be calling on them for input.

- ☐ Use your platform tools. Chat, polling, breakouts, annotation options, video and/or virtual whiteboards are critical tools you can use to encourage interaction and to foster an inclusive environment. Using these tools differentiates you and your meeting/presentation from all the other virtual sessions people attend throughout their day. Be creative – be bold – have fun with it. Mixing up the tools also allows individuals to express themselves in different ways – catering to their different communication preferences.

- ☐ Your delivery matters. Remain composed; pause, make eye contact, sit up straight. Amplify your energy; gesture and express enthusiasm. Speak TO your camera so you are making virtual eye contact with your fellow meeting attendees.

- ☐ Ask questions often. Use closed questions to take the group's temperature and open-ended questions to open-up the discussion. And remember, don't be afraid to call on people – this will keep everyone engaged and you'll avoid those awkward seconds of silence.

- ☐ Recognize and leverage ideas. Expressing appreciation and highlighting someone's idea is a sure-fire way to get them to contribute again. It also demonstrates that you are listening and value their input – once again, reinforcing their purpose in the meeting.

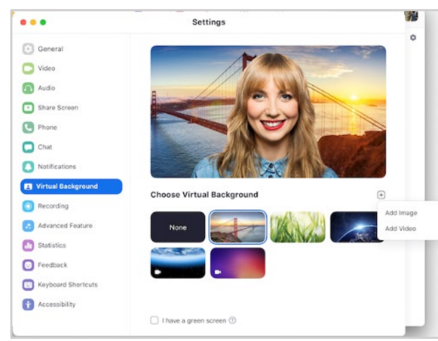
- [ ] **Keep visual cues in front of you.** To keep focused and in control, we recommend using Mandel's Virtual Attendee Log™ or another tool like it.

Leveraging video

- [ ] **Adjust your video and audio before your meeting, not during**. Adjusting your video in front of others takes time away from your meeting and can come off very unprofessional.

- [ ] **Adjust your camera to eye level.** You want to make eye contact throughout your meeting – if your camera is below or above eye level, it can be distracting and unbecoming i.e., looking up someone's nose.

- [ ] **Check your lighting.** Make sure your face, upper body and background are evenly lit – having window/office light brighten just one part of your face/body can distort your overall presence. If you present on video a lot, there are special lights you can purchase that illuminate you evenly.



- [ ] **Be aware of your background**. Find a simple and pleasing backdrop. You'll want to be careful about having personal items behind you that you may not want to have on video or recorded. You can also use virtual backgrounds. These are very popular. You can either use preloaded 'virtual backgrounds' offered in some platforms like Zoom or load your own picture to be projected behind you.

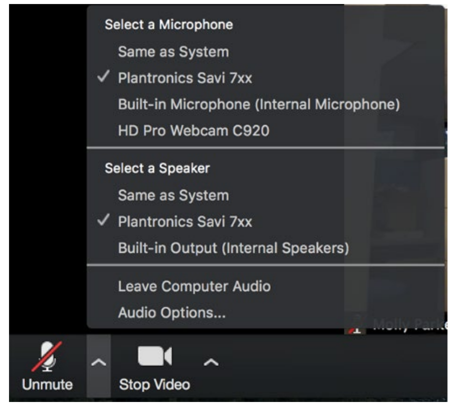
- [ ] **Consider a green screen if you present often.** Virtual backgrounds perform better using a green screen – if your meeting is particularly important, you may want to consider using one. They can be easily purchased – we recommend getting one with a stand. Especially with so many people working from home, covering a busy home office with a green screen can be very effective. You can get quite creative with backgrounds to set the tone for a meeting – either professional or fun.

- [ ] **Think about your clothing.** Video can distort clothing with small patterns, lines and/or bright white. Especially if you are recording your meeting – this can be an issue.

- [ ] **Be yourself on video.** Your genuine and authentic personality can transform a meeting helping everyone relax, connect, and treat the meeting like they would if it were face to face.

Audio best practices

- ☐ Test your audio connection before the start of your meeting. Especially when using a new platform for the first time, testing your audio is a must. The minute you are distracted fixing your audio, your meeting attendees are going back to email and other pressing work. Most platforms give you the opportunity to test your audio before you enter the virtual room – use it!



- ☐ View your platform audio settings. It is important to confirm that your preferred microphone and speaker devices are selected. If not, this can sometimes create an "echo" effect when you speak. If the issue persists during a meeting, switch from computer audio to telephone.

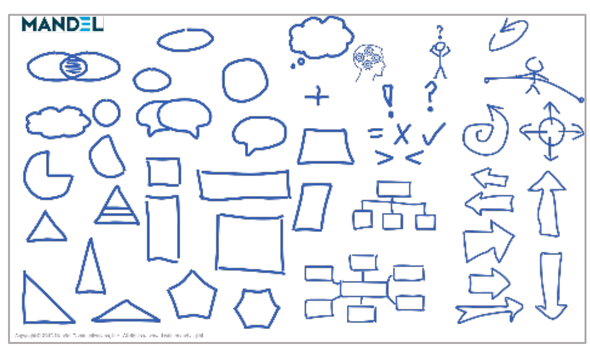
- ☐ Make sure your audience can understand you. We recommend using a headset/earbuds – it is easier to enunciate and maintain a more stable volume/tone. Avoid using speakerphones unless they are designed for virtual meetings – and even then, test them as they can work perfectly in one meeting and distort in another.

- ☐ Encourage people to have integrated audio. Integrated audio allows you to know who is talking AND manage technical disruptions. If there's a disruption, you can easily see who may be causing noise, or having complications with their audio. If a participant's audio can't be integrated, encourage them to right click on their phone number in the Participant Panel and add their name.

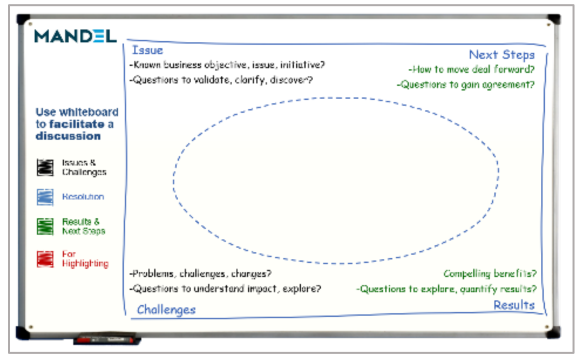
Using a whiteboard

- ☐ Make it easy. Using a whiteboard is such a valuable tool – key equipment can quickly elevate your whiteboarding skills. Though everyone can use the whiteboard annotation tools with their computer mouse or touchpad, if you whiteboard often, it is much easier if you use a touch-screen, stylus pen or whiteboard tablet (externally connected).

- ☐ Slow down, write and draw legibly. If you are writing and drawing information people can't easily read and understand, then don't use a whiteboard. Practice writing and drawing on a whiteboard before your meeting/briefing. If it helps to use whiteboard image libraries or prefab icons, do so.



- ☐ Preload whiteboards to save time. If you use the same content repeatedly, then you might want to reuse your whiteboards – you can save a whiteboard and bring it up in another room to either review or to use for further annotating and collaboration. It helps to have pre-populated headers, icons and drawn images that you can leverage while presenting.



- ☐ Plan your whiteboard layout – think it through and have a plan. Like any blank canvas, it's important to plan out how you are going to use the space.

- ☐ Use a blank slide as a whiteboard canvas. As an alternate to the whiteboard, try using a blank slide to draw and annotate on.

- ☐ Practice. It's amazing how quickly your whiteboarding skills improve with practice. Understanding the different annotation, font, color and save options is very helpful. If you are a first-time user, use platform tutorials, jump on your platform and play!

Managing technology glitches

- ☐ Be calm – Be real. Technology glitches happen all the time, to <u>everyone</u>, and most are out of your control. If you encounter something, use your Mandel composure skills to pause, breathe, authentically explain the situation, ask for patience and deal with the situation. Getting frazzled or tense just sends that energy into the virtual environment and then everyone feels that way. If it's something serious, there's nothing wrong with taking a 3-minute break to deal with a situation – your participants will appreciate it. If you need to take a break – be specific with the timeframe so you will get them back in a timely fashion.

- ☐ Know your platform. Your ease in the platform projects confidence and authenticity. Every platform has its own features and functionality. WebEx, ZOOM, Google Meet, Adobe Connect, GoToMeeting, etc., all have short videos providing functionality summaries. Jump in a session with a friend or colleague and test the key features so when you are in your meeting, you aren't fumbling around trying to figure things out.

- ☐ Bring in a Producer. If your virtual meeting is particularly high stakes, hire a producer. The Producer will manage the technical side of the meeting while you manage the agenda, engagement, and interaction.

- ☐ Log in on two separate devices. If your virtual meeting is particularly high stakes, then this tip is even more important. Logging in on two devices does two things; (1) if you log in as a participant on your second device, you can always see what your participants are seeing, and; (2) should something happen to your first device, you can always switch to your second. We recommend logging in using your name on your first device and use something like Presenter Back-Up on your second device. You may think doing this is overkill – but the first time your primary device glitches or fails, you realize just how important this practice can be.

- ☐ Use a Password. In order to keep unwanted guests from joining your virtual session, be sure to use a password. Zoom-Bombing is very real.

- ☐ Tips to manage bandwidth issues. If you are running into bandwidth issues (bad audio, multiple drop-offs, content freezing), you may want to recommend:

  - Participants disconnect from their VPN
  - Participants turn off their video
  - Presenters use full-screen mode vs. Presenter mode

- ☐ Tips to manage background noise.

  - Ask the host of the call to mute all attendees and let them unmute when they'd like to speak
  - Look to see whose audio connection is indicating sound and mute those

- ☐ Camera can't be found/image is distorted. Issues like these are generally related to the webcam software or drivers on your device. Not usually a quick fix you can take care of during the meeting. In this case, it's best to turn off your camera for now and troubleshoot the issue with your IT contact immediately after the meeting.