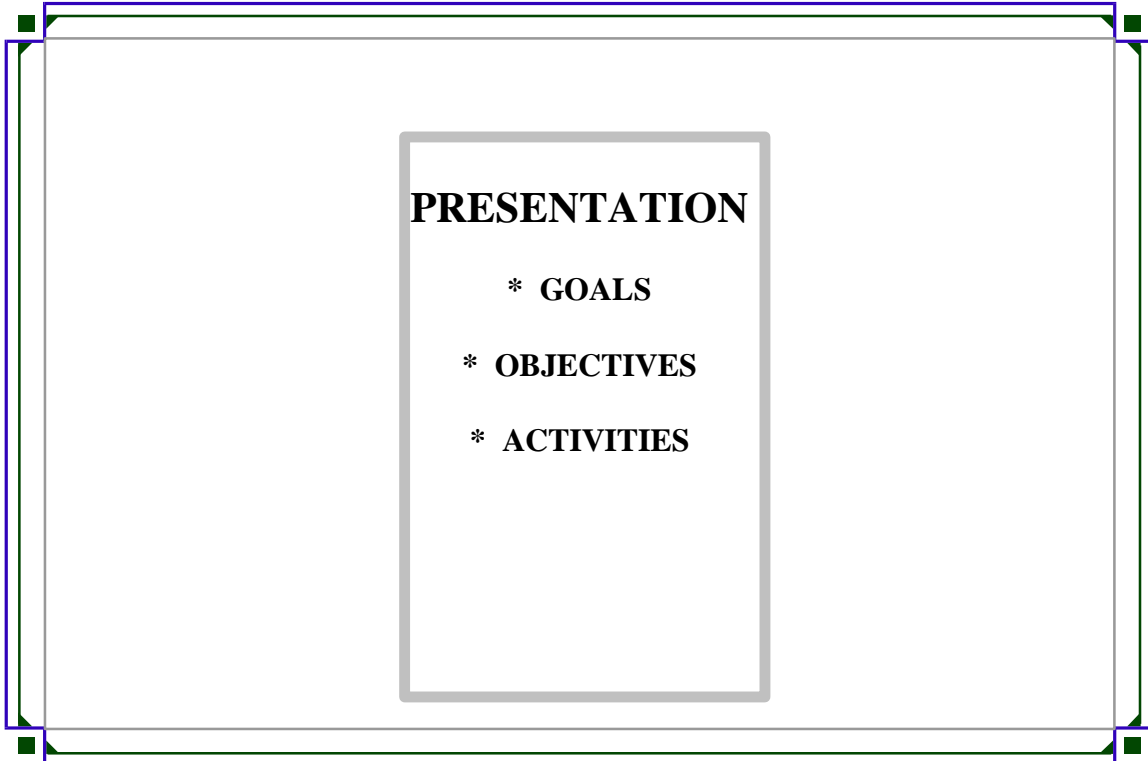
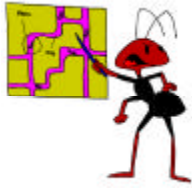

MANAGEMENT PRESENTATION CHECKLIST



Purpose

The **management presentation checklist** is a listing of key points to remember and do to assist in a team's successful "selling" of ideas to the process owners or others in the decision-making process.

It is used by teams prior to presentation of team findings. It contains a list of items needed in the briefing room, arrangements for the room, and scheduling of personnel.



Process

1. Assign presentation responsibilities and ensure that all team members have a role in the meeting. It is crucial that all members be included since each person shares the responsibility for the materials to be presented. Assignments might include logistics, attendee scheduling, flip chart and overhead projector, key presenter, additional presenters as needed, and overall coordination.
2. Reserve a room for the presentation. The room should be large enough for all planned attendees. It should not be so large as to lose the intimacy needed for effective interaction. The room should also, if possible, be physically located as close as possible to the key decision makers.
3. Invite all key decision makers, the process owners, and others that have a stake in the recommendations to be presented. The invitation may be by memo, phone call, e-mail, or other means appropriate to the work group involved.
4. Plan the presentation and determine the important data. Determine how the data will be presented. Plan handouts, flip charts, overhead projector, marking board, presentation software, slides, etc.
5. Reserve all needed audio visual equipment.
6. Prepare all materials to be presented.
7. Prepare script for the presentation.
8. Conduct one or more walk-throughs of the presentation. The first can be stop-and-go with suggested improvements and order. The last should include all team members with a “dress rehearsal.” Comments and corrections are made at the end of the presentation.
9. On the day before the presentation, contact all attendees to remind them of the meeting and confirm all audio visual equipment and the meeting room.
10. On the day of the presentation all members need to arrive early. All materials, audio visual equipment, and room setup are to be completed. Arrange the room to maximize its effective use.

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11. Greet meeting attendees as they arrive. Ensure that each attendee has a copy of a prepared agenda for the meeting.

 12. Start on time, unless the key decision maker's office calls asking for a temporary delay of the meeting.

 13. During the presentation:
 - a. introduce all team members, stake holders, and key decision makers
 - b. speak clearly and slowly
 - c. listen to questions carefully
 - d. summarize recommendations simply and clearly
 - e. outline next desired step
 - f. end on time



Example

PRESENTATION CHECKLIST		
×	Room reserved for meeting	Room 163, ok, 7/1/97
×	Key decision makers invited	All except Joyce Ingram
×	Presentation assignments made	
×	Presentation planned	
×	Audio visual equipment reserved	From DOT Training
	Presentation materials completed	
	Script for presentation made	
	Dress rehearsal conducted	
	Confirm meeting room	
	Confirm meeting attendees	
	All materials present for presentation	
	Room setup correctly	
	All team members present	



Key Points

- Ensure that the proper people have been invited.
- Begin and end the presentation on-time.
- Keep recommendations as short as possible.
- Avoid verbosity.
- Ensure that all team members are actively involved in the development of and presentation of its recommendations.
- Check-Check-Recheck.
- When using audio visual aids that may fail, ensure that you have a backup means of presenting the team's data.
- Remember, that this one presentation may be **the only opportunity** to “sell” the team's process improvement ideas.

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