What You Need to Ask Your Customers before You Do an Oral Presentation (Part 1)

By Harley Stein, Partner, Tenzing Consulting

You’re reading your latest RFP, and near the end of the proposal instructions you realize that this proposal response has an oral presentation component in addition to all the usual written components. Presentations won’t be given until after you submit your proposal, but you still have to plan for it. What do you need to do?

What you need to do is get as much clarity as possible from the government with regard to how orals will be conducted. To get that clarity typically means asking the government questions that, if asked correctly, will enable your presentation team to be better prepared to deliver a superior presentation, and to be better prepared to answer the government’s clarifying questions.

What follows are the 17 questions to consider asking about oral presentations and the rationale for asking them. Occasionally, the RFP will answer some of these questions; however, most often the government won’t have even considered them when they wrote the proposal instructions.

Here is a caution with regard to asking any questions: Be careful. Remember that any question officially asked will be shared with your competition. Differentiate what information you needs/must have versus what information you want.

These questions have a time-phase element to them: The first 10 questions are part of the “Planning for Orals” phase. The last seven questions are part of the “Conducting Orals” Phase, and will be covered in Part 2 of this article.

Planning for Orals

1. Can we see the room? Ask for a time to see the room at least a few days before the presentation; the earlier you see the room, the longer you can rehearse in a space that you’ve reconfigured to closely match the actual room. If you are allowed into the room, bring as many presenters as you can. It is much easier for presenters to present in a room that they have spent even a little time in: they know where they’ll stand to present, where the evaluators will sit, how much room they have to move, how big the screen is, etc. If all presenters aren’t able to attend, have somebody draw a blueprint or, if allowed, take photos.

2. How is the room configured? If you aren’t allowed into the room ahead of time, ask the government to provide a schematic of the room. What you want to know:

- Room dimensions
- Seating configuration: where you will sit and where the evaluators will sit
- Screen size and distance from screen to closest and furthest evaluator
- Where the power outlets are located
- Where you will put you laptop and projector
- Lighting options
- If the government is recording our presentation, we also want to know about microphones and microphone cords (see #5)
3. Can we re-configure the room? Sometimes the room configuration doesn’t exactly suit us. Typically this means getting rid of unnecessary items, such as a podium. It might also simply be about where we place our projector or laptop to run the presentation or where our team sits.

4. How many people will attend orals from the customer side? This is useful information to know because it often helps you determine who is attending from the customer side, which means you have some insight or validation into who the evaluators are. It may also impact how many people you bring to orals, if there is not a limit, since we do not usually want to out-number our customer.

5. How many people can attend? Can non-keys attend and participate? Quite often the government sets a limit on the number of attendees, and frequently they limit attendance to key personnel. If the number of folks you’d like to attend exceeds the limit, make sure there is a good reason for them to attendance: what value will they provide at the presentation? At all costs, keep the number of attendees to those who will add value. For example, often we’d like a senior executive to attend, perhaps to deliver a brief introduction and to show commitment. One thing to remember: more frequently than you’d think, the number of attendees is limited by the size of the presentation room!

6. Will you provide at least five business day notice prior to orals? This is another critical question because it impacts rehearsal time and schedule as well as potential travel issues. The ideal rehearsal schedule is to ramp up right before we deliver orals. The only way we can do that is if we know exactly when we must deliver our presentation. We also need sufficient time to rehearse, and five days is often just the right amount for typical 2-4 hour presentations. Many times we deliver the presentation in a different location from where we work. We need the five days notice so we can make travel arrangements and, hopefully, get to the location where we will deliver to the government a few days early so we can acclimate ourselves, particularly where there are noticeable time differences – east coast to west coast or the U.S. to Germany, for example.

7. May we use our own equipment? The government typically tells us that they will provide at least a screen, and often they will provide a laptop and projector. We, on the other hand, often want to use our own laptop and projector, for two reasons: ours are higher quality and we have synced the PowerPoint colors on the laptop and projectors to best showcase our presentation. The downside to using our equipment? If our equipment fails, it is on us to accommodate changes on the fly while the clock is ticking.

8. What are we allowed to present, use or bring to orals? Some topics lend themselves to doing something besides presenting slides: demonstrations, models, video, posters, flip charts, and even customized giveaways such as mouse pads, water bottles, and note pads. It is important for us to determine early – before questions are due – if we want to use something besides slides. Then we need to receive permission if it is not clear from the RFP what is allowed, and we need the lead-time to prepare the material.

9. Are slides due with the written proposal or do we deliver them the day of the presentation? This is another critical question. Delivering slides with the proposal might increase the workload: you often have the same people working the written as you do the orals. If you have a resource issue, you might want a later delivery date. Delivering slides with the proposal tends to level the playing field: nobody has any extra time to work on the slides because their presentation date is days or perhaps even weeks after yours. If you think you might need more time, you might want to roll the dice with regard to a presentation delivery date. Perhaps the most important benefit of delivering slides with the proposal it that it lets you focus on rehearsing as you near your presentation date, rather than dividing your time between revising slides – often simply happy-to-glade changes – and rehearsing.

10. Who will attend the presentation from the government? We always want the answer to this question because it is useful to know who your audience will be so you can tailor your presentation to them. However, it is rare for the government to tell us. If we think we have a pretty good idea of who will attend, we don’t want to ask this question and provide competitive intel to our competition.
If you ask these questions, then even if we don’t receive the answers we want, we will have a clear idea of what we need to do to plan for orals. In Part 2 we will address the questions to ask about how the oral presentation will be conducted.

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What You Need to Ask Your Customers before You Do an Oral Presentation (Part 2)

By Harley Stein, Partner, Tenzing Consulting

In Part 1 we covered the 10 questions that relate to the “Planning for Orals” phase. In Part 2 we get into the seven questions that apply to the “Conducting Orals” Phase.

Conducting Orals

1. Will this be recorded? Audio and/or video? Who will provide/run the equipment? It is unusual for the government to allow anyone other than themselves to do the recording, but we have seen a few where they require us to record and provide the recording immediately after the presentation or question-and-answer (Q&A). If this will be recorded, then you want to rehearse using the same type of microphones. This is particularly true when there are wires and microphone handoffs involved, as there usually are; for security reasons the government rarely uses wireless microphones. Rehearsals enable your team to learn to dance with the wire and to make smooth, quick handoffs.

Interactive presentations impact how you rehearse. For these presentations you need to have a very good set of reviewers who can play the role of customers so they can ask questions during rehearsals, and so our presentation team can practice audience awareness, answering questions on the fly, as well as handing off questions as appropriate.

2. Will this be interactive or will questions be held until a Q&A session to follow the presentation? This is a critical question because the answer significantly impacts three key areas: the number of slides you build, the duration of your narrative, and how you rehearse. For most presentations the government holds questions to the end, which helps the contracting officer ensure a fair and level playing field. If you are faced with an interactive presentation that has a time limit, you need to assess how much interaction you can expect from the evaluators. For example, if you expect them to be very interactive, you probably want to build a presentation that you can deliver in half the allotted time.

3. What about phone-a-friend for pop quizzes or sample tasks? A corollary to question #7, pop quizzes or sample tasks are often part of a presentation. Do you need some folks to present but another set to prepare and answer a sample task? It is unusual, but not unheard of, for the government to allow you to have different sets of folks participate in different parts to the day. More likely is for the government to provide you with a room to prepare your sample task response, and the capability to call subject matter experts (SMEs) as needed. If you need access to SMEs to respond, then by all means ask for this option. However, carefully weigh whether this helps you or the competition more.

4. Do we have flexibility scheduling breaks? Often in somewhat longer presentations – typically 3+ hours – the government provides an agenda that includes when the breaks will occur, and those breaks are usually every 45-50 minutes or so. Nothing wrong with that ... except that are presentations rarely have a natural break that occurs every 45-50 minutes. The answer we want from the government is this: Yes, we are flexible about breaks as long as we have them. So our question needs to guide them to that answer by providing a viable solution: Will you allow us to schedule breaks to accommodate natural breaks in the presentation with the caveat that we will have all the required breaks, and each break will occur plus/minus 60 minutes after the previous break?
5. How early can we get into the room to set-up? This matters for two reasons: when we haven’t been able to see the room beforehand and when we have a lot of set-up work to do. The government typically provides about 30 minutes to set-up before orals, and that is more than enough time when all we are doing is hooking up a laptop to a projector and perhaps taping down some cords so our presenters don’t trip. It also leaves us some time to become acclimated to the room.

If we have a more complex set-up – for example, multiple laptops and projectors working off a toggle to show videos or conduct demonstrations on multiple screens, as well as a connection to the Internet – then we might need to ask for additional set-up time. The last thing we want is to be rushed on the day we deliver orals. If our set-up is really complex, we might even need to ask for permission to allow some of our technicians into the room solely for set-up and eventual breakdown of equipment.

Note: Security measures to get into government buildings might require that you arrive well before your set-up time to ensure that you pass through security.

6. Are introductions on or off the clock? We typically want to introduce our presentation team and attendees early in our time slot. With large teams, introductions, even those where all we provide is our name and our job function, can chew up valuable presentation time. In that circumstance, we can consider requesting that we be allowed to briefly introduce our team before the actual presentation clock starts. If, on the other hand, we have few presenters and we suspect our competition has many, we may want to craft a question that will help the government respond that introductions are on the clock.

7. What material/equipment will the government provide for our response to pop quizzes/sample tasks? Where this element is a part of our presentation day, there are several questions we need answered:

- May we use our laptops to build our presentation?
- If not, is the government providing transparencies and an overhead projector? (Believe it or not, a few times each year we do vugraphs!)
- Will we have our own breakout room? And if so, will it have Internet connectivity?
- Will we be allowed to either phone-a-friend or have SMEs join us in the room?

If we ask these questions, then even if we don’t receive all the answers that we want, we will still have a clear idea of how orals will be conducted and under what parameters. A good presentation coach will help guide you in determining whether to ask these questions – and how to ask these questions – to achieve your presentation objectives: a presentation team that is as prepared as possible to deliver a superior presentation.

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