

NOTE 5: MAKING AN ORAL CASE PRESENTATION

1. INTRODUCTION TO MAKING AN ORAL CASE PRESENTATION

The method for a basic case analysis presented in Note 2 of the Case Guide Series—“Performing a Case Analysis,” No. 9B18M054—can be used for various purposes: discussing the case in class, writing a report, making a presentation, or writing a case exam. This note guides you in making an oral presentation to your instructor and class colleagues. The note covers the purpose of a presentation and provides guidelines for preparing and presenting a case to a classroom audience. The note also provides general guidelines related to format, organization, and verbal communication skills.

The guidelines in this note are for general use. You should always defer to your instructor’s requirements, which may differ or be more specific.

2. PURPOSE OF A CASE PRESENTATION

Especially in the business world, an oral presentation is typically used to highlight the main findings in an accompanying written report. However, the oral presentation is distinct from the written report, largely because information presented orally is perceived and absorbed differently from information provided in writing.

An oral presentation should provide a broad overview of the main issues and recommendations. It should not provide the same level of detail as a written report, so be discerning in choosing which elements of your case analysis to emphasize. The overall goal of a presentation is to convince your audience that you understand the key issues and have a logical and feasible action plan for resolving them.

3. CRITERIA OF A GOOD PRESENTATION

A good presentation conveys information in a format that enables your audience to comprehend the intended message. With any communication, information is encoded by the sender, transmitted using one or more media, and decoded by the receiver. At any point in the process, communication can be disrupted, hindering the clarity of the message. A communication disruption can occur for a variety of reasons, including the amount of information being conveyed, the presentation tools and techniques being used, and the skills of the presenters. Good presenters are aware of the potential disruptions to a message and craft their delivery to minimize those disruptions.

For each case, you will be asked to play a specific role as a student, consultant, employee, or manager who is writing a report or making a presentation to a specific person or group, or both. Depending on the directions of your instructor, you will be presenting to your instructor, a manager, a board of directors, or a client who engages you as a consultant.

A good presentation addresses the needs and knowledge of the intended audience. However, while the presentation (and accompanying report) might be intended for one individual, you should present to the entire audience in the room. For instance, if the presentation (and accompanying report) is being directed to the vice-president of marketing, address your presentation to the vice-president and thank the individual for “inviting the rest of the management team to the presentation.”

Always use professional tone and tact. However, if you are playing the role of an external consultant, you can be a little bolder in making your points than if you are playing the role of someone from within the organization—especially when presenting to a supervisor.

4. CONTENT OF A CASE PRESENTATION

4.1. Presentation of a Full Case Report

Once a case analysis is complete and the report has been written, review the report and identify the key portions that the individuals reading the report need to know. These highlights will form the outline of your presentation and will help you to present what is written in the report and avoid introducing different material. Your audience will read your report to gain greater understanding of the information included in your presentation.

A full case presentation typically consists of three parts: the issues, key alternatives, and your recommendation.

First, describe the issue or issues you identified as being key to the case. Briefly provide your reasons for selecting those issues, reflecting the theories and models you used during the analysis stage (see Note 2 of the Case Guide Series—“Performing a Case Analysis,” No. 9B18M054). Be mindful of your audience and offer your theoretical analysis only if it adds value. Use of too much theory, especially when it is not well applied, undermines your expertise and credibility. It is inappropriate and impractical to repeat all the theoretical analysis contained in the report or to cover it in detail during a presentation.

Second, present the key alternatives you identified as being possible solutions to the issue or issues, providing a brief rationale for each. Restraint is key: do not include in your presentation everything contained in your report. A presentation is a high-level review of your report, mainly focused on what you identified as the issues and ways to resolve them.

Finally, offer your recommendation. Persuade the audience that the solutions you have chosen will best resolve the issue. Anticipate objections the audience might raise and counter them in your presentation before they are raised.

As you structure your presentation, use the slide sorter capability of the presentation software to bring a logical flow to the content. Once you have the high-level points outlined on slides, you can easily write the script for the presentation since you will be writing with the end of your presentation (i.e., your proposed solution) in mind.

4.2. Presentation without a Case Report

In some courses, your instructor will ask you either to complete only specific components of a full case study, or to present the case without writing a full report.

If you are presenting only individual components of a case analysis, performing a full analysis, as outlined in Note 2 (identify the issues, analyze the issues, develop and evaluate alternative, and recommend a course of action), will better equip you to present the analysis of the specific components your instructor requires. For example, if you are presenting only the issues, your preparation should include analysis of those issues so you can confidently present the issue statement.

If only the presentation is required, it is essential that you have a sufficient understanding of the underlying issues and analysis to select the most appropriate material for your presentation. Because you will not have a written report to use as a roadmap for the presentation, it is crucial that you follow the four case analysis steps in Note 2 so that your understanding is sufficient to present the case in a convincing manner and so you can support your recommendations with sound logic. Provide enough detail in your presentation to assure your instructor that you understand the issues and have applied appropriate theory; at the same time, avoid overwhelming your audience with too much content and theory.

5. AUDIOVISUAL AIDS

Your presentation should be accompanied by audiovisual aids, such as presentation slides (e.g., PowerPoint, Prezi, or Google Slides), video clips, a blackboard or whiteboard, a flipchart, or handouts. These audiovisual aids can give your audience an outline of your presentation and show them some details (e.g., a ratio analysis or market share analysis) or an illustration (e.g., an effective advertisement). However, use audiovisual aids thoughtfully; avoid diverting your audience's attention from both you, as the presenter, and the main message you are communicating. The focus should be on the content, not on the technology being used to present the content.

Presentation slides should be simple and use at least 28-point font. Choose a sans serif font for text. It is simpler, cleaner, and easier to read on a screen. It also does not pixelate when enlarged by the projector, making it clearer to read, even for the audience at the back of the room.

Use short phrases that supplement—and do not reiterate—what you are going to say. Do not fill the slides with text, or your audience will be more focused on reading the slides than on listening to you. It might be necessary, especially with slides containing financial statements, to break the statements into sections on two or three slides. When communicating a message that contains financial data, consider whether a pie chart or graph might better convey the message.

Animations should be used with caution; they can be distracting and cause your audience to focus more on the graphics than on the content of your presentation. Use subtle transitions and animations, with bullet points “appearing” or “wiping in.” Avoid animated graphics or cartoon clip art; they quickly become annoying to the audience and reduce the professionalism of your presentation. If you use a graphic or photograph, use high-quality images that will not pixelate or degrade as they are resized on the screen.

Know the room in which you are presenting, especially how the lighting affects the room's projection screen. The room's lighting will dictate the colours you choose for the background and font in the presentation. For example, if the room has windows, choose starkly contrasted background and font colours so the text does not get washed out by the light, making it difficult for the audience to read.

If you prepare your slides using your own computer and software, preview your presentation in the school's lab to ensure that your presentation is compatible with the version of software available in the classroom and that your computer is compatible with the projection system. If you have the opportunity, preview the presentation in the room in which you will be delivering the presentation, so you can assess whether the content of the slides is readable.

If you intend to use a blackboard or whiteboard, plan how you will use it. Include in your speaking notes a quick sketch of what you intend to write on the board, and the location of each component you will write. This preparation enhances your professionalism and keeps the presentation moving.

6. PRESENTATION SKILLS

The role identified for you in the case or by your instructor will guide how you approach your presentation. Nonetheless, some key skills are required for all presentations.

During your presentation, speak loudly enough to be heard by all members of your audience. Use an expressive voice, speak at an appropriate speed (which might feel unnaturally slow), pause where appropriate for emphasis or to allow your audience to absorb information, and make regular eye contact with members of the audience. Remember that you are the authority on the subject, so do not just read what you have written in your report.

Choose words and structure your sentences to serve the nature and capacity of the audience. Keep in mind that people's ability to absorb information is lower when the information is presented orally rather than in writing.

While it can be more comfortable to stand behind the podium where you can read from your notes, step out from the podium—at least periodically—to connect with your audience. Be comfortable. Become a professional and polished version of yourself. If you are holding cue cards or speaking notes, keep them still as you refer to them, so they do not draw attention away from the message you are communicating.

Presentation skills improve with practice. Script, adjust, and practise your presentation until it fits the time you are allotted. By exceeding the time limit, you reflect a lack of preparation. Your instructor might cut you off, or if more than one presentation is scheduled in the class period, you might infringe on the time allotted to the next presenter.

7. HANDLING AUDIENCE QUESTIONS

A presentation usually includes time at the end for questions and answers, but some presenters prefer to take questions throughout the presentation. Whichever you choose, let your audience know at the start of the presentation how you will be taking questions. Some presenters take a mixed approach, responding to brief questions of clarification during the presentation, but reserving more detailed comments and questions until the presentation is finished. This approach works well in classroom presentations when the whole class is responsible for interacting with the presenter.

The ability to listen can set you apart as a business professional, and active listening skills enable you to understand what members of the audience are asking. Be present and listen fully to the question; if you start formulating an answer before the audience member has finished asking the question, you risk responding inappropriately or incompletely.

Acknowledge the audience member and the question. Move toward the person who asked the question—this is a perfect opportunity to move away from the podium. Establish eye contact with the person during the question and the first part of your answer, then broaden your attention to other audience members. Thank the individual for the question, and if other members of the audience might not have heard the question, repeat it so all can hear. If the question refers to an option you considered but did not discuss during the presentation, respond appropriately and explain why you did not include the topic in the presentation or why you discarded the alternative. If the question raises a point you had not considered, thank the questioner for the input and acknowledge that you did not include it in your evaluation. If time allows, discuss the topic further.

Always be gracious, courteous, and professional.

8. TEAM PRESENTATIONS

In the case of a team presentation, all members of the team should be involved in some aspect of the presentation, and the transition from one presenter to the next should be as seamless as possible. Each member's part in the presentation should be agreed on in advance to avoid both duplication and omission of material. As you prepare the presentation, identify each member's strengths and weaknesses so that you can capitalize on individual presentation skills and specialized understanding of the content.

During the presentation, team members who are not speaking should avoid being a distraction. Stand back from the speaker and remain still. Do not whisper among yourselves, stand in an awkward place, or fidget. Where possible, play an appropriate supportive role; for example, distribute handouts or run the slide show to free the speaker of these duties.

To ensure your presentation is professional, script and rehearse the presentation several times, including transitions from one presenter to the next.

9. ROLE OF THE AUDIENCE

As a member of the audience, you are actively involved in the presentation. Your preparation of the case for class discussion should equip you to critically evaluate the presenter's approach to the case. (See Note 2 and Note 3 of the Case Guide Series—"Preparing to Discuss a Case," No. 9B18M055.) Your instructor might also evaluate your preparation and participation in the class.

Just as the presenter plays an assigned role, so, too, should the audience members. For example, if you are taking the role of the board, ask questions that board members would ask. Such questions might ask about the level of risk assigned to a course of action, the estimated return on investment, and the impact on other stakeholders of the organization should the recommended solution be implemented.

Listen actively, focus on the speaker, allow the speaker to completely finish, listen for the ideas being presented, and listen critically for the presenter's main arguments. Good questions are a challenge to formulate, and they should respond to the content you heard from the presenter. Bring a two- or three-page summary of the case to class, and make notes in the margins of that summary to compare what the speaker presents against your own preparation of the case. Ask questions that clarify the presenter's position so that you can persuasively argue your own position.

Again, at all times, be gracious, courteous, and respectful of the presenter and of other audience members.

10. DRESS FOR SUCCESS

Attire for presentations should be appropriate for a business setting and should also reflect your audience. Appropriate attire includes dress pants, skirt, dress shirt, blouse, and/or tie. Jackets are optional, except for when you make a formal presentation to a board of directors. Your clothing should not distract audience members from focusing on the content of your presentation; it should also reflect the highest regard for professionalism.