

Presentation Makeover Magic: Design Documentation

IT6710: Creative Designs for Instructional Materials

Greg Lea

Overview

The original presentation is used within a training course called, “Loan Administration Professional Development Series.” The LAPD series is a conference room presentation designed to educate employees in my organization about each of the departments within the Loan Administration business unit which services mortgage loans. Servicing mortgage loans includes taking customer calls, processing customer payments, and reporting data to investors.

This presentation is delivered to existing employees by middle managers and is informational, serving to educate the participant about the roles, responsibilities, and goals of the selected department. Normally, an employee would enroll in this class to learn more about the functionality of other departments, teams, or employees in Loan Administration. The employee may also wish to learn how the business unit can assist him or her and how he or she can more effectively interact with the business unit.

The selected presentation is a 44 slide overview of one team—Contact Center Operations—within Loan Administration. Contact Center Operations is a centralized support vehicle for each of the regional support centers in my organization. The presentation is a conglomeration of text, bullets, and unintelligible charts—a real snooze fest—that attempts to explain the type of support provided. This includes what the team does, where they sit, their management structure, daily tasks, and the type of data generated.

The biggest problem with this presentation is that it neither stands-alone nor makes an effective facilitator-led presentation. If it was not written in the “shorthand” of a presentation it might be able to function as an informative, stand-alone job aid. Because it is written in this “shorthand,” it requires a facilitator to present it. As a presentation it lacks pizzazz and is filled with text and data that lacks style and detail which is unlikely to motivate the observers’ eyelids to remain open. It also falls into the common presentation traps of too many concepts on a single slide, crowded slides, charts that are difficult to interpret, too many bullets, and not enough visual elements.

Audience

This presentation is part of a class that is available companywide, is offered frequently, and anyone can attend. Thus, all personality types will likely be represented and must be accommodated if possible. However, as a stand-alone kiosk-type presentation many of these accommodations are not applicable. For example, introverts may prefer to review materials ahead of time, extraverts may benefit from group discussion, and sensors should be provided additional detail via the presentation or a handout (Abela, 2008, pp. 19-27). Given the constraints of a stand-alone presentation these accommodations do not exist in my completed presentation. If the presentation was delivered by a presenter in front of an audience, such accommodations could easily be made in the form of an overview that is emailed to all attendees in advance of the presentation, a detailed handout provided during the presentation, and opportunity for questions and discussion provided throughout the presentation.

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Learning Objectives

The presentation is focused on what the business unit does and not how it may benefit the audience. An audience-centric shift is in order (Abela, 2008, pp. 5-6). Shifting the focus will help audience members make sense of how Contact Center Operations is applicable to them and how they might use the services it provides. After viewing the presentation users will be able to:

- Explain what types of services Contact Center Operations can provide.
- Determine how the types of services Contact Center Operations provides are applicable to your job responsibilities.
- Access the knowledge, data, and services provided by Contact Center Operations for future performance improvement initiatives.
- Request assistance from Contact Center Operations for future projects.

The first two objectives are less likely to be achieved by the current presentation given its lack of focus and clarity. The latter two items may be achievable with the current presentation, but, as is explained later in this document, the revised presentation should accomplish these objectives more effectively.

Problem/Solution

My audience will most likely attend this presentation because they are trying to fulfill a quota for training participation or because they want to learn more about the other departments that operate around them. Often, the audience does not know how Contact Center Operations can help them or, in some cases, that Contact Center Operations even exists.

The revised presentation introduces the viewer to the key services that Contact Center Operations provides, focusing on services that appeal to a broad audience. The original presentation listed everything that Contact Center Operations does for the company. While all of these services are important, I have eliminated the more mundane and infrequent responsibilities, such as coordinating contact center relocations and configuring seating arrangements. These tasks are only relevant when a relocation occurs, which is not often, and appeal to a very narrow audience—those who are responsible for physically moving infrastructure for the contact center. Given the scope of a building relocation, audience members affected by it will already be aware of the services that Contact Center Operations can provide. Using relevancy to streamline the presentation is in line with Abela's (2008) advice to "Keep it simple."

Evidence

My goal for this project was to transform a presentation that was just a list of what Contact Center Operations does into a device that helps the viewer to visualize what Contact Center Operations can do for them. Each viewer will interpret this differently, and that is the point—information is being presented to build awareness, allowing the consumer of that information to apply it to his or her specific environment. See *Worksheet A6: List of Evidence* in the appendix for a list of the content included in the presentation. The inclusion of this evidence is intended to persuade the viewer that the information

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is useful (Abela, 2008, p. 36). Much of the information in the original presentation is irrelevant to most of the audience, thus it was excluded (Abela, 2008, p. 61).

Anecdotes

The presentation includes one anecdote (Steve from the Training Department) that is a real account (embellished with a little humor) of how Contact Center Operations could have benefited a fellow employee if he had known what types of service it provides. This is a persuasive example that strengthens the presentation's argument—that the information contained in it is useful (Abela, 2008, p. 67).

Sequencing

The design sequence for my presentation follows the S.Co.R.E. model presented in the Abela (2008, pp. 75-79) text.

1. Situation – What can Contact Center Operations do for you
2. Conflict – Avoiding frustration and poor customer service
3. Resolution – Presentation of evidence
4. Example – Steve from the Training Department

I used humor and images to break up the presentation, interspersing lighter moments between the drier text slides. The audience can be expected to remain attentive for about 10 minutes unless something, such as an emotional device, is inserted into the presentation periodically to reengage the viewer (Medina, 2008, pp.74-93). I scaled this back to fit a short presenter-less presentation. A “comedy break” occurs about every five slides. I also applied Garr Reynolds’ principle of unexpectedness to my presentation. Unexpectedness makes a story, or in this case, the presentation “sticky” (Reynolds, 2008). Seven pair of underwear is certainly unexpected, especially in a corporate presentation.

Graphics

The designer must ensure that a slide's meaning is easy to interpret (Duarte, 2008, p. 93). One way of doing this is to make sure that graphics are relevant to the presentation. The graphics I used are not always corporate themed, but each graphic helps to convey the message of the slide. The fireman retrieving the cat is not explicitly corporate themed, but it supports the message of helping your customers. The designer should also avoid images that look over-staged (Duarte, 2008, p. 160). Additionally, I adhered to the basic graphic design principle of alignment by vertically and horizontally aligning (I used my creative license to break the rules occasionally) each item on a slide (Williams, 2008, pp. 33-50).

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Text

There is no rule for how much text to put on a slide, but simple slides with a low word count often works well (Duarte, 2008, p. 144). I used as few words as possible on each slide without damaging a slide's message. I adjusted my text boxes to create as straight a rag as possible to minimize creating shapes that distract the viewer (Duarte, 2008, p. 149). I employed two colors for nearly all of my text. One color is used as the main color and the second is used to highlight key points. Research is inconclusive regarding the effectiveness of using color in communication but highlighting key points is recommended (Abela, 2008, p. 103).

Layout

For each slide the designer must be frugal, displaying only what is important and discarding anything that does not enhance the slide's message (Reynolds, 2008). I minimized the text and the images on each slide, leaving plenty of whitespace, making the slide easier to comprehend (Duarte, 2008, p. 106). I emphasized the dominant elements of each slide to help convey the meaning of that slide (Duarte, 2008, p. 93). This was accomplished by increasing the size of an image relevant to the slide's other elements when the image best conveys the slide's theme or by highlighting key points in the text.

Measurement

Because this is a stand-alone presentation it will be difficult to measure its effectiveness, though not impossible. One possibility is to survey users after they view the presentation and gauge their reaction to it (Abela, 2008, p. 143). This would help to determine if the first two learning objectives have been met. The second two learning objectives could be also be measured via a survey. A more precise measurement of the second two objectives would be to track the number of external requests for data or assistance that are received by Contact Center Operations before and after the implementation of the presentation.

Peer Review Results

I submitted the following prompting questions for peer review:

1. This was a VERY dry presentation. I worry that it may still be. Your thoughts.
2. How do you cite an image from Flickr that requires (according to the Creative Commons license) attribution? Often you don't even know the author's name because they have used a fake screen name. I wonder if anyone has any experience with this and knows the proper APA format.
3. Is the lighter blue color readable?
4. Initially, I did not provide any type of introduction, because, in theory, this is an internal piece for my company. The problem is none of you work at my company. Do you understand what the presentation is about without getting to far into it? I am debating if I should add a more detailed intro slide to help provide context.

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5. Does the presentation speak for itself? I worry that without a presenter it may lack detail.

Suggestions from peer reviews of my presentation include:

- General: A suggestion to highlight additional text on one slide for consistency
- Questions 1, 3, & 5: Reviews were supportive, thus I stuck with my original vision
- Question 2: Guidance for determining the correct format for Flickr citations
- Question 4: I chose not to use a suggestion to add more background at the beginning of the presentation to clarify the organization's business purpose. I discarded this advice because the presentation will only be viewed internally by employees who are familiar with that information.

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Resources

Abela, A. (2008). *Advanced presentations by design: Creating communication that drives action*. San Francisco, CA: Pfeiffer.

Duarte, N. (2008). *slide:ology: The art and science of creating great presentations*. Sebastopol, CA: O'Reilly Media, Inc.

Medina, J. (2008). *Brain rules: 12 principles for surviving and thriving at work, home, and school*. Seattle, WA: Pear Press.

Reynolds, G. (2008, March 28). Authors@google: Garr reynolds. Retrieved from <http://www.youtube.com/watch?v=DZ2vtQCESpk>

Williams, R. (2008). *The non-designer's design book*. Berkeley, CA: Peachpit Press.

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Appendix

Worksheet A1a: Audience Personality Type

Audience	Personality Type
This presentation is part of a class that is available companywide, is offered frequently, and anyone can attend. Thus, all personality types will likely be represented and must be accommodated.	Introvert, Extravert, Sensor, Intuitor, Thinker, Feeler, Judger, Perceiver

Worksheet A1b: Audience Personality Implications

Presentation Implications

- Provide all or part of presentation in advance
- Plan for lots of discussion and Q&A
- Make sure to include all relevant facts and details in presentation or appendix
- Provide overview up-front
- Identify principles, costs, and benefits (mostly benefits since this is more informational than persuasive)
- State implications for each person or group of stakeholders involved (How does this team benefit the audience?)
- Present conclusions up-front (with intuitor overview)
- List all alternatives considered

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Worksheet A2: From-To Think-Do Matrix

	<i>FROM</i>	<i>TO</i>
<i>THINK</i>	What does Contact Center Operations (CCO) do?	Explain what types of services CCO can provide. Determine how the types of services CCO provides are applicable to your job responsibilities.
<i>DO</i>	Does CCO do anything that affects me and can they provide me or my team a service that improves our performance?	Access the knowledge, data, and services provided by CCO for future performance improvement initiatives. Request assistance from CCO for future projects.

Worksheet A3: Audience Problem

The problem that my audience has is:

My audience will most likely attend this presentation because they are trying to fulfill a quota for training participation as required by their department or because they want to learn more about the other departments that operate around them. In both cases, the audience probably does not know how Contact Center Operations can help them or, in some cases, that Contact Center Operations even exists.

For instance, a member of the Training Department may have an interest in implementing a more robust evaluation program for a training program that is delivered to agents in the Default Contact Center (this would be one of the contact centers that Contact Center Operations supports). The trainer may believe that implementing such an evaluation program would require that he or she create a method of evaluating default contact center agents post-training, implement the evaluation, and then gather, analyze, and report the results. The amount of work that is seemingly required to implement such a program may prevent such a program from ever coming to fruition. The audience member's problem is that he or she may not be aware that Contact Center Operations is already evaluating agent performance in the Default Contact Center and is also compiling, analyzing, and reporting the results of the evaluations. If the trainer utilizes this existing data, the time and resources needed to implement the training evaluation program would be reduced significantly.

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Worksheet A4: Spectrum of Solution Contributions

Help recognize that there is a problem	Help define the problem	Help define the solution space	Solve part of the problem	Solve the whole problem
<p>The presentation should determine the level of audience knowledge about Contact Center Services. If knowledge is low, then the presentation becomes an opportunity to identify opportunities for the audience to utilize its services.</p>	<p>By clearly identifying the services provided by Contact Center Operations the audience may recognize that some of these services may be useful to them.</p>	<p>I think the key here is to get each member of the audience thinking about how they can apply the information in the presentation to their jobs. The presentation can help to facilitate this in two ways: 1. Provide examples of how someone else has done this. 2. Initiate questions and discussions that will help the participants make connections between the presentation and their job.</p>	<p>This may include educating the audience about Contact Center Operations, but not making an immediate connection between an audience member's need and a service provided by Contact Center Operations. This is OK because the audience will at least understand what services are available and who they can speak with if a solution is identified later.</p>	<p>In this case the audience is educated about the services provided by Contact Center Operations and is able to apply those services to their job and identify areas where they may benefit from those services.</p>

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Worksheet A5: Solution Evaluation

	Option 1 (Proposed Solution)	Option 2 (Alternative 1)	Option 3 (Alternative 2)
Evaluation Criteria	My revised presentation	Continue using the current presentation	Eliminate the presentation
Able to clearly explain what services CCO provides	Yes	No	No
Determine how CCO services applicable to job	Yes	No	No
Access CCO knowledge, data, and services for future projects	Yes	Yes, but less likely to be used effectively	No
Request assistance from CCO for future projects	Yes	Yes, but less likely to be used effectively	No

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Worksheet A6: List of Evidence

1. Overview of Contact Center Operations responsibilities
2. Details of services provided
3. Use of examples: The example that I used on worksheet A3 happened to me. I spent a lot of time interviewing people before I discovered that much of the evaluative data that I needed for a project I was working on was already being assembled by Contact Center Operations. I think this is a great opportunity to highlight the time I spent searching for something that is already available.
4. I have not gathered this evidence yet, but it may be helpful to seek out anecdotal examples of how Contact Center Operations has benefited other individuals or departments in the company.
5. Provide contact information.
6. Examples of data, communications, and reports provided.
7. Opposing arguments
 - a. Do it myself – time, resources, expertise
 - b. Hire personnel in my department – time, cost, ability

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Worksheet A7: Stakeholder Analysis

Whose help will we need for our recommendations to be implemented?	Contact Center Operations Management	LAPD Training program facilitator	
What must each of them think or do for our recommendations to be successful?	They must believe that we are improving their image and not in any way damaging their message or reputation.	He must believe that we are improving the presentation.	
Where do they stand on this?	They already support this initiative. A presentation is already in place as part of an existing informational/training program. I am simply improving the presentation.	He already supports this initiative as the creator, leader, and facilitator of the training program. A presentation is already in place as part of the existing informational/training program. I am simply improving the presentation.	
What do we need to close the gap?	Final approval of the modified presentation.	As the facilitator, he will need to be comfortable with the modifications to the presentation.	