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Nail Your Next Presentation

You have 10 minutes to speak. You'll be up onstage—or in front of a camera, or sitting with important investors—and everyone will be looking at you. It's the perfect opportunity to share your story, make your pitch, and dazzle everyone with the idea you've been working on for months. How do you make the most of it without letting your nerves hijack the show?

Begin by developing your presentation: Identify the story you want to tell, craft its structure, and turn your data into persuasive charts. In "How to Give a Killer Presentation," Chris Anderson describes how the team at TED helps speakers frame their stories, free themselves from dependence on notes and teleprompters, and use multimedia-like slides and video effectively. Also reflect on whether your deck helps or hurts you: In "Do Your Slides Pass the Glance Test?" presentations expert Nancy Duarte warns speakers to avoid text-heavy decks that draw the audience's attention away from you and your words.

Consider too the forum where you'll be presenting; you'll want to prepare differently to present on a stage than in a webinar or to a small group. Intimate settings may mean that you won't be able to project a deck, writes communication researcher JD Schramm in "How to Present to a Small Audience," so you should prepare to distribute visuals in other ways—and determine when to sit or stand.

Knowing your audience and their needs is one of the keys to being persuasive. In his classic article "The Necessary Art of Persuasion," Jay A. Conger explains how it can help you reframe your position in their terms, finding common ground and mutual benefits.

Even the most prepared speakers can get nervous before they deliver a talk. Confidence can be a matter of developing practices to conquer those fears, as Amy Jen Su describes in "How to Calm Your Nerves Before a Big Meeting." But it can also be about deploying subtle verbal and physical cues that signal you're someone to be trusted and followed. In "Learning Charisma," John Antonakis, Marika Fenley, and Sue Liechti catalog and give examples of these cues in action.

The skills involved in preparing a talk and the ability to control the emotional pitch of your delivery are becoming table stakes for ambitious leaders. The good news is that they are all learnable.

—The Editors

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SUMMER 2019

Culled by the editors of *Harvard Business Review* from the magazine's rich archives, these articles are written by some of the world's leading management scholars and practitioners. To help busy leaders apply the concepts, they are accompanied by "Idea in Brief" summaries.

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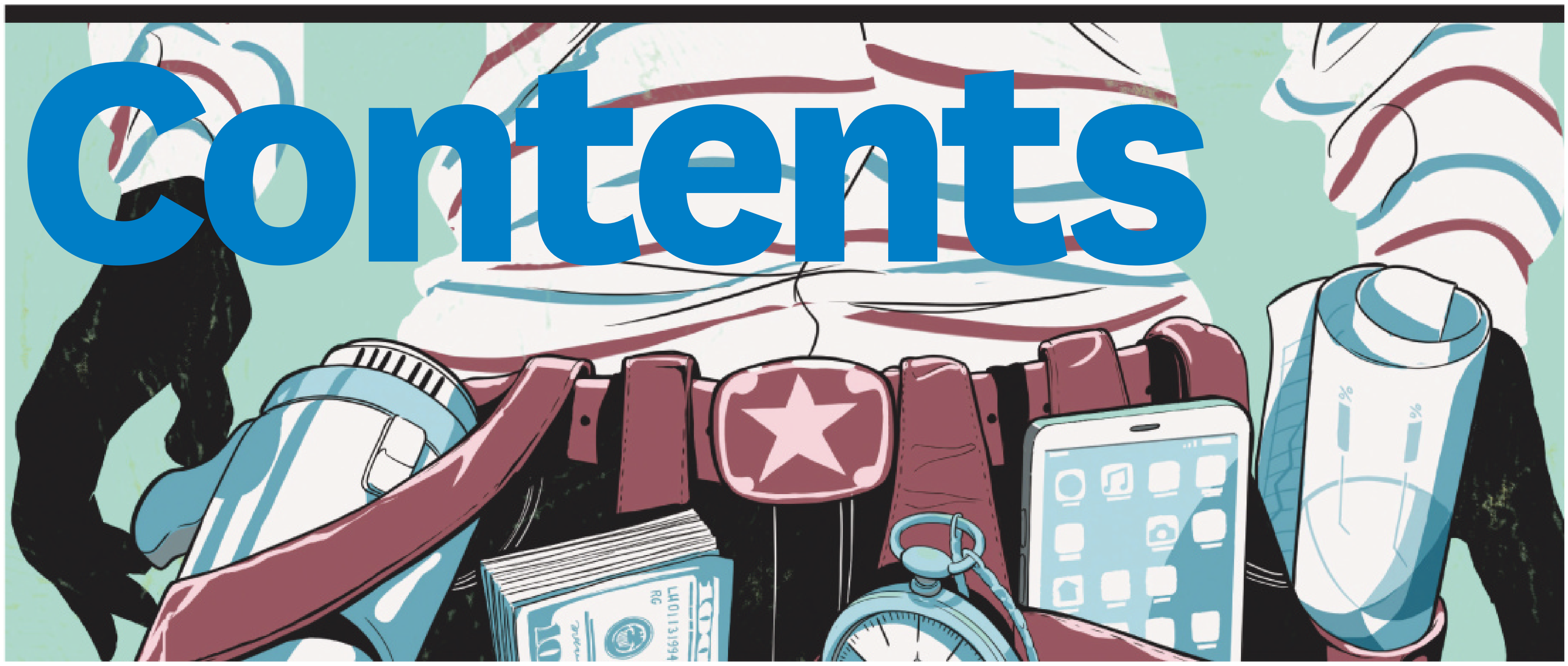

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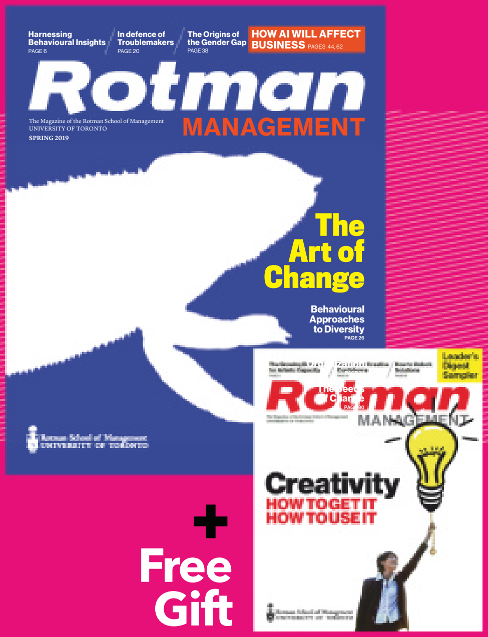

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How to Give a Killer Presentation

Lessons from TED by Chris Anderson

A LITTLE MORE THAN a year ago, on a trip to Nairobi, Kenya, some colleagues and I met a 12-year-old Masai boy named Richard Turere, who told us a fascinating story. His family raises livestock on the edge of a vast national park, and one of the biggest challenges is protecting the animals from lions—especially at night. Richard had noticed that placing lamps in a field didn't deter lion attacks, but when he walked the field with a torch, the lions stayed away. From a young age, he'd been interested in electronics, teaching himself by, for example, taking apart his parents' radio. He used that experience to devise a system of lights that would turn on and off in sequence—using solar panels, a car battery, and a motorcycle indicator box—and thereby create a sense of movement that he hoped would scare off the lions. He installed the lights, and the lions stopped attacking. Soon villages elsewhere in Kenya began installing Richard's "lion lights."

The story was inspiring and worthy of the broader audience that our TED conference could offer, but on the surface, Richard seemed an

Originally published in June 2013

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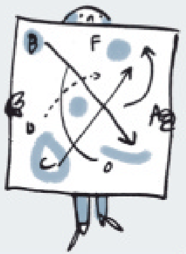
FIND THE PERFECT MIX OF DATA AND NARRATIVE

by Nancy Duarte

Most presentations lie somewhere on the continuum between a report and a story. A report is data rich, exhaustive, and informative—but not very engaging. Stories help a speaker connect with an audience, but listeners often want facts and information, too. Great presenters layer story and information like a cake and understand that different types of talks require differing ingredients.



Report
Literal,
Informational,
Factual,
Exhaustive

Story
Dramatic,
Experiential,
Evocative,
Persuasive

Research Findings
If your goal is to communicate information from a written report, send the full document to the audience in advance, and limit the presentation to key takeaways. Don't do a long slide show that repeats all your findings. Anyone who's really interested can read the report; everyone else will appreciate brevity.

Financial Presentation
Financial audiences love data, and they'll want the details. Satisfy their analytical appetite with facts, but add a thread of narrative to appeal to their emotional side. Then present the key takeaways visually, to help them find meaning in the numbers.

Product Launch
Instead of covering only specs and features, focus on the value your product brings to the world. Tell stories that show how real people will use it and why it will change their lives.

VC Pitch
For 30 minutes with a VC, prepare a crisp, well-structured story arc that conveys your idea compellingly in 10 minutes or less; then let Q&A drive the rest of the meeting. Anticipate questions, and rehearse clear and concise answers.

Keynote Address
Formal talks at big events are high-stakes, high-impact opportunities to take your listeners on a transformative journey. Use a clear story framework, and aim to engage them emotionally.

Nancy Duarte is the coauthor of *Illuminate: Ignite Change Through Speeches, Stories, Ceremonies, and Symbols,* as well as the author of *HBR Guide to Persuasive Presentations,* and two award-winning books on the art of presenting: *Slide:ology* and *Resonate*. You can follow her on Twitter: @nancyduarte.

unlikely candidate to give a TED Talk. He was painfully shy. His English was halting. When he tried to describe his invention, the sentences tumbled out incoherently. And frankly, it was hard to imagine a preteenager standing on a stage in front of 1,400 people accustomed to hearing from polished speakers such as Bill Gates, Sir Ken Robinson, and Jill Bolte Taylor.

But Richard's story was so compelling that we invited him to speak. In the months before the 2013 conference, we worked with him to frame his story—to find the right place to begin and to develop a succinct and logical arc of events. On the back of his invention Richard had won a scholarship to one of Kenya's best schools, and there he had the chance to practice the talk several times in front of a live audience. It was critical that he build his confidence to the point where his personality could shine through. When he finally gave his talk at TED, in Long Beach, California, you could tell he was nervous, but that only made him more engaging—people were hanging on his every word. The confidence was there, and every time Richard smiled, the audience melted. When he finished, the response was instantaneous: a sustained standing ovation.

Since the first TED conference, 30 years ago, speakers have run the gamut from political figures, musicians, and TV personalities who are completely at ease before a crowd to lesser-known academics, scientists, and writers—some of whom feel deeply uncomfortable giving presentations. Over the years, we've sought to develop a process for helping inexperienced presenters to frame, practice, and deliver talks that people enjoy watching. It typically begins six to nine months before the event and involves cycles of devising (and revising) a script, repeated rehearsals, and plenty of fine-tuning. We're continually tweaking our approach—because the art of public speaking is evolving in real time. But judging by public response, our basic regimen works well: Since we began putting TED Talks online, in 2006, they've been viewed more than one billion times.

On the basis of this experience, I'm convinced that giving a good talk is highly coachable. In a matter of hours, a speaker's content and delivery can be transformed from muddled to mesmerizing. And while my team's experience has focused on TED's 18-minutes-or-shorter format, the lessons we've learned are surely useful to other presenters—whether it's a CEO doing an IPO road show, a brand manager unveiling a new product, or a start-up pitching to VCs.

Frame Your Story

There's no way you can give a good talk unless you have something worth talking about. Conceptualizing and framing what you want to say is the most vital part of preparation.

We all know that humans are wired to listen to stories, and metaphors abound for the narrative structures that work best to engage people. When I think about compelling presentations, I think about taking an audience on a journey. A successful talk is a little miracle—people see the world differently afterward.

> A successful talk is a little miracle—people see the world differently afterward.

If you frame the talk as a journey, the biggest decisions are figuring out where to start and where to end. To find the right place to start, consider what people in the audience already know about your subject—and how much they care about it. If you assume they have more knowledge or interest than they do, or if you start using jargon or get too technical, you'll lose them. The most engaging speakers do a superb job of very quickly introducing the topic, explaining why they care so deeply about it, and convincing the audience members that they should, too.

The biggest problem I see in first drafts of presentations is that they try to cover too much ground. You can't summarize an entire career in a single talk. If you try to cram in everything you know, you won't have time to include key details, and your talk will disappear into abstract language that may make sense if your listeners are familiar with the subject matter but will be completely opaque if they're new to it. You need specific examples to flesh out your ideas. So limit the scope of your talk to that which can be explained, and brought to life with examples, in the available time. Much of the early feedback we give aims to correct the impulse to sweep too broadly. Instead, go deeper. Give more detail. Don't tell us about your entire field of study—tell us about your unique contribution.

Of course, it can be just as damaging to overexplain or painstakingly draw out the implications of a talk. And there the remedy is different: Remember that the people in the audience are intelligent. Let them figure some things out for themselves. Let them draw their own conclusions.

Many of the best talks have a narrative structure that loosely follows a detective story. The speaker starts out by presenting a problem and then describes the search for a solution. There's an "aha" moment, and the audience's perspective shifts in a meaningful way.

If a talk fails, it's almost always because the speaker didn't frame it correctly, misjudged the audience's level of interest, or neglected to tell a story. Even if the topic is important, random pontification without narrative is always deeply unsatisfying. There's no progression, and you don't feel that you're learning.

I was at an energy conference recently where two people—a city mayor and a former governor—gave back-to-back talks. The mayor's talk was essentially a list of impressive projects his city had

Idea in Brief

The notion of telling a story in front of a live audience can be paralyzing. Fortunately, giving a good talk is highly coachable. Here are valuable lessons from the field that can help anyone who wants their words to land.

- Have something meaningful to say, and frame it as an example-rich journey that doesn't try to cover too much ground.
- Plan your delivery of the talk, and leave yourself plenty of time to implement the approach.
- Develop stage presence: Make eye contact, and try to keep you lower body still.
- Plan your multimedia, be it photos, video, music—or even silence.
- Put it all together. Rehearse in front of the right people, and take the time you need to get things right.

Most important, remember that there's no one best way to give a successful talk. You have to make it your own. Ultimately, presentations rise and fall on the quality of the idea, the narrative, and the passion of the speaker.

undertaken. It came off as boasting, like a report card or an advertisement for his reelection. It quickly got boring. When the governor spoke, she didn't list achievements; instead, she shared an idea. Yes, she recounted anecdotes from her time in office, but the idea was central—and the stories explanatory or illustrative (and also funny). It was so much more interesting. The mayor's underlying point seemed to be how great he was, while the governor's message was "Here's a compelling idea that would benefit us all."

As a general rule, people are not very interested in talks about organizations or institutions (unless they're members of them). Ideas and stories fascinate us; organizations bore us—they're much harder to relate to. (Businesspeople especially take note: Don't boast about your company; rather, tell us about the problem you're solving.)

Plan Your Delivery

Once you've got the framing down, it's time to focus on your delivery. There are three main ways to deliver a talk. You can read it directly off a script or a teleprompter. You can develop a set of bullet points that map out what you're going to say in each section rather than scripting the whole thing word for word. Or you can memorize your talk, which entails rehearsing it to the point where you internalize every word—verbatim.

My advice: Don't read it, and don't use a teleprompter. It's usually just too distancing—people will know you're reading. And as soon as they sense it, the way they receive your talk will shift. Suddenly your intimate connection evaporates, and everything feels a lot more formal. We generally outlaw reading approaches of any kind at TED, though we made an exception a few years ago for a man who insisted on using a monitor. We set up a screen at the back of the auditorium, in the hope that the audience wouldn't notice it. At first he spoke naturally. But soon he stiffened up, and you could see this horrible sinking feeling pass through the audience as people realized, "Oh, no, he's reading to us!" The words were great, but the talk got poor ratings.

Many of our best and most popular TED Talks have been memorized word for word. If you're giving an important talk and you have the time to do this, it's the best way to go. But don't underestimate the work involved. One of our most memorable speakers was Jill Bolte Taylor, a brain

10 WAYS TO RUIN A PRESENTATION

It's really easy to blow a great talk. Here are some common mistakes that TED advises its speakers to avoid.

1. Take a really long time to explain what your talk is about.
2. Speak slowly and dramatically. Why talk when you can orate?
3. Make sure you subtly let everyone know how important you are.
4. Refer to your book repeatedly. Even better, quote yourself from it.
5. Cram your slides with numerous text bullet points and multiple fonts.
6. Use lots of unexplained technical jargon to make yourself sound smart.
7. Speak at great length about the history of your organization and its glorious achievements.
8. Don't bother rehearsing to check how long your talk is running.
9. Sound as if you're reciting your talk from memory.
10. Never, ever make eye contact with anyone in the audience.

researcher who had suffered a stroke. She talked about what she learned during the eight years it took her to recover. After crafting her story and undertaking many hours of solo practice, she rehearsed her talk dozens of times in front of an audience to be sure she had it down.

Obviously, not every presentation is worth that kind of investment of time. But if you do decide to memorize your talk, be aware that there's a predictable arc to the learning curve. Most people go through what I call the "valley of awkwardness," where they haven't quite memorized the talk. If they give the talk while stuck in that valley, the audience will sense it. Their words will sound recited, or there will be painful moments where they stare into the middle distance, or cast their eyes upward, as they struggle to remember their lines. This creates distance between the speaker and the audience.

Getting past this point is simple, fortunately. It's just a matter of rehearsing enough times that the flow of words becomes second nature. Then you can focus on delivering the talk with meaning and authenticity. Don't worry—you'll get there.

But if you don't have time to learn a speech thoroughly and get past that awkward valley, don't try. Go with bullet points on note cards. As long as you know what you want to say for each one, you'll be fine. Focus on remembering the transitions from one bullet point to the next.

Also pay attention to your tone. Some speakers may want to come across as authoritative or wise or powerful or passionate, but it's usually much better to just sound conversational. Don't force it. Don't orate. Just be you.

If a successful talk is a journey, make sure you don't start to annoy your travel companions along the way. Some speakers project too much ego. They sound condescending or full of themselves, and the audience shuts down. Don't let that happen.

Develop Stage Presence

For inexperienced speakers, the physical act of being on stage can be the most difficult part of giving a presentation—but people tend to overestimate its importance. Getting the words, story, and substance right is a much bigger determinant of success or failure than how you stand or whether you're visibly nervous. And when it comes to stage presence, a little coaching can go a long way.

> **Nerves are not a disaster. The audience *expects* you to be nervous.**

The biggest mistake we see in early rehearsals is that people move their bodies too much. They sway from side to side, or shift their weight from one leg to the other. People do this naturally when they're nervous, but it's distracting and makes the speaker seem weak. Simply getting a person to keep his or her lower body motionless can dramatically improve stage presence. There are some people who are able to walk around a stage during a presentation, and that's fine if it comes naturally. But the vast majority are better off standing still and relying on hand gestures for emphasis.

Perhaps the most important physical act onstage is making eye contact. Find five or six friendly-looking people in different parts of the audience, and look them in the eye as you speak. Think of them as friends you haven't seen in a year, whom you're bringing up to date on your work. That eye contact is incredibly powerful, and it will do more than anything else to help your talk land. Even if you don't have time to prepare fully and have to read from a script, looking up and making eye contact will make a huge difference.

Another big hurdle for inexperienced speakers is nervousness—both in advance of the talk and while they're onstage. People deal with this in different ways. Many speakers stay out in the audience until the moment they go on; this can work well, because keeping your mind engaged in the earlier speakers can distract you and limit nervousness. Amy Cuddy, a Harvard Business School professor who studies how certain body poses can affect power, utilized one of the more unusual preparation techniques I've seen. She recommends that people spend time before a talk striding around, standing tall, and extending their bodies; these poses make you feel more powerful. It's what she did before going onstage, and she delivered a phenomenal talk. But I think the single best advice is simply to breathe deeply before you go onstage. It works.

In general, people worry too much about nervousness. Nerves are not a disaster. The audience *expects* you to be nervous. It's a natural body response that can actually improve your performance: It gives you energy to perform and keeps your mind sharp. Just keep breathing, and you'll be fine.

Acknowledging nervousness can also create engagement. Showing your vulnerability, whether through nerves or tone of voice, is one of the most powerful ways to win over an audience, provided it is authentic. Susan Cain, who wrote a book about introverts and spoke at our 2012 conference, was terrified about giving her talk. You could feel her fragility onstage, and it created this dynamic where the audience was rooting for her—everybody wanted to hug her afterward. The fact that we knew she was fighting to keep herself up there made it beautiful, and it was the most popular talk that year.

Plan the Multimedia

With so much technology at our disposal, it may feel almost mandatory to use, at a minimum, presentation slides. By now most people have heard the advice about PowerPoint: Keep it simple; don't use a slide deck as a substitute for notes (by, say, listing the bullet points you'll discuss—those are best put on note cards); and don't repeat out loud words that are on the slide. Not only is reciting slides a variation of the teleprompter problem—"Oh, no, she's reading to us, too!"—but information is interesting only once, and hearing and seeing the same words feels repetitive. That advice may seem universal by now, but go into any company and you'll see presenters violating it every day.

Many of the best TED speakers don't use slides at all, and many talks don't require them. If you have photographs or illustrations that make the topic come alive, then yes, show them. If not, consider doing without, at least for some parts of the presentation. And if you're going to use slides, it's worth exploring alternatives to PowerPoint. For instance, TED has invested in the company Prezi, which makes presentation software that offers a camera's-eye view of a two-dimensional landscape. Instead of a flat sequence of images, you can move around the landscape and zoom in to it if need be. Used properly, such techniques can dramatically boost the visual punch of a talk and enhance its meaning.

Artists, architects, photographers, and designers have the best opportunity to use visuals. Slides can help frame and pace a talk and help speakers avoid getting lost in jargon or overly intellectual language. (Art can be hard to talk about—better to experience it visually.) I've seen great presentations in which the artist or designer put slides on an automatic timer so that the image changed every 15 seconds. I've also seen presenters give a talk accompanied by video, speaking along to it. That can help sustain momentum. The industrial designer Ross Lovegrove's highly visual TED Talk, for instance, used this technique to bring the audience along on a remarkable creative journey.

Another approach creative types might consider is to build silence into their talks, and just let the work speak for itself. The kinetic sculptor Reuben Margolin used that approach to powerful effect. The idea is not to think "I'm giving a talk." Instead, think "I want to give this audience a powerful experience of my work." The single worst thing artists and architects can do is to retreat into abstract or conceptual language.

Video has obvious uses for many speakers. In a TED Talk about the intelligence of crows, for instance, the scientist showed a clip of a crow bending a hook to fish a piece of food out of a tube—essentially creating a tool. It illustrated his point far better than anything he could have said.

Used well, video can be very effective, but there are common mistakes that should be avoided. A clip needs to be short—if it's more than 60 seconds, you risk losing people. Don't use videos—particularly corporate ones—that sound

> There's no way to "coach in" the basic story—the presenter has to have the raw material.

self-promotional or like infomercials; people are conditioned to tune those out. Anything with a soundtrack can be dangerously off-putting. And whatever you do, don't show a clip of yourself being interviewed on, say, CNN. I've seen speakers do this, and it's a really bad idea. No one wants to go along with you on your ego trip. The people in your audience are already listening to you live; why would they want to simultaneously watch your talking-head clip on a screen?

Putting It Together

We start helping speakers prepare their talks six months (or more) in advance so that they'll have plenty of time to practice. We want people's talks to be in final form at least a month before the event. The more practice they can do in the final weeks, the better off they'll be. Ideally, they'll practice the talk on their own and in front of an audience.

The tricky part about rehearsing a presentation in front of other people is that they will feel obligated to offer feedback and constructive criticism. Often the feedback from different people will vary or directly conflict. This can be confusing or even paralyzing, which is why it's important to be choosy about the people you use as a test audience, and whom you invite to offer feedback. In general, the more experience a person has as a presenter, the better the criticism he or she can offer.

I learned many of these lessons myself in 2011. My colleague Bruno Giussani, who curates our TEDGlobal event, pointed out that although I'd worked at TED for nine years, served as the emcee at our conferences, and introduced many of the speakers, I'd never actually given a TED Talk myself. So he invited me to give one, and I accepted.

It was more stressful than I'd expected. Even though I spend time helping others frame their stories, framing my own in a way that felt compelling was difficult. I decided to memorize my presentation, which was about how web video powers global innovation, and that was really hard: Even though I was putting in a lot of hours and getting sound advice from my colleagues, I definitely hit a point where I didn't quite have it down and began to doubt I ever would. I really thought I might bomb. I was nervous right up until the moment I took the stage. But it ended up going fine. It's definitely not one of the all-time great TED Talks, but it got a positive reaction—and I survived the stress of going through it.

Ultimately I learned firsthand what our speakers have been discovering for three decades: Presentations rise or fall on the quality of the idea, the narrative, and the passion of the speaker. It's about substance, not speaking style or multimedia pyrotechnics. It's fairly easy to "coach out" the problems in a talk, but there's no way to "coach in" the basic story—the presenter has to have the raw material. If you have something to say, you can build a great talk. But if the central theme isn't there, you're better off not speaking. Decline the invitation. Go back to work, and wait until you have a compelling idea that's really worth sharing.

The single most important thing to remember is that there is no one good way to do a talk. The most memorable talks offer something fresh, something no one has seen before. The worst ones are those that feel formulaic. So do not on any account try to emulate every piece of advice I've offered here. Take the bulk of it on board, sure. But make the talk your own. You know what's distinctive about you and your idea. Play to your strengths, and give a talk that is truly authentic to you.

HBR Reprint R1306K

Chris Anderson is head of TED.

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WHAT IS
AVAXHOME?

AVAXHOME -

the biggest Internet portal, providing you various content: brand new books, trending movies, fresh magazines, hot games, recent software, latest music releases.

Unlimited satisfaction one low price
Cheap constant access to piping hot media
Protect your downloadings from Big brother
Safer, than torrent-trackers

18 years of seamless operation and our users' satisfaction

All languages
Brand new content
One site

AVXLIVE.ICU

AvaxHome - Your End Place

We have everything for all of your needs. Just open https://avxlive.icu

Visualizations That Really Work

Know what message you're trying to communicate before you get down in the weeds.

by Scott Berinato

NOT LONG AGO, the ability to create smart data visualizations, or dataviz, was a nice-to-have skill. For the most part, it benefited design- and data-minded managers who made a deliberate decision to invest in acquiring it. That's changed. Now visual communication is a must-have skill for all managers, because more and more often, it's the only way to make sense of the work they do.

Data is the primary force behind this shift. Decision making increasingly relies on data, which comes at us with such overwhelming velocity, and in such volume, that we can't comprehend it without some layer of abstraction, such as a visual one. A typical example: At Boeing the managers of the Osprey program need to improve the efficiency of the aircraft's takeoffs and landings. But each time the Osprey gets off the ground or touches back down, its sensors create a terabyte of data. Ten takeoffs and landings produce as much data as is held in the Library of Congress. Without visualization, detecting the inefficiencies hidden in the patterns and anomalies of that data would be an impossible slog.

But even information that's not statistical demands visual expression. Complex systems—business process workflows, for example, or the

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ILLUSTRATION BY LLOYD MILLER

way customers move through a store—are hard to understand, much less fix, if you can't first see them.

Thanks to the internet and a growing number of affordable tools, translating information into visuals is now easy (and cheap) for everyone, regardless of data skills or design skills. This is largely a positive development. One drawback, though, is that it reinforces the impulse to "click and viz" without first thinking about your purpose and goals. *Convenient* is a tempting replacement for good, but it will lead to charts that are merely adequate or, worse, ineffective. Automatically converting spreadsheet cells into a chart only visualizes pieces of a spreadsheet; it doesn't capture an idea. As the presentation expert Nancy Duarte puts it, "Don't project the idea that you're showing a chart. Project the idea that you're showing a reflection of human activity, of things people did to make a line go up and down. It's not 'Here are our Q3 financial results,' it's 'Here's where we missed our targets.'"

Managers who want to get better at making charts often start by learning rules. When should I use a bar chart? How many colors are too many? Where should the key go? Do I have to start my y-axis at zero? Visual grammar is important and useful—but knowing it doesn't guarantee that you'll make good charts. To start with chart-making rules is to forgo strategy for execution; it's to pack for a trip without knowing where you're going.

Your visual communication will prove far more successful if you begin by acknowledging that it is not a lone action but, rather, several activities, each of which requires distinct types of planning, resources, and skills. The typology I offer here was created as a reaction to my making the very mistake I just described: The book from which this article is adapted started out as something like a rule book. But after exploring the history of visualization, the exciting state of visualization research, and smart ideas from experts and pioneers, I reconsidered the project. We didn't need another rule book; we needed a way to think about the increasingly crucial discipline of visual communication as a whole.

The typology described in this article is simple. By answering just two questions, you can set yourself up to succeed.

The Two Questions

To start thinking visually, consider the nature and purpose of your visualization:

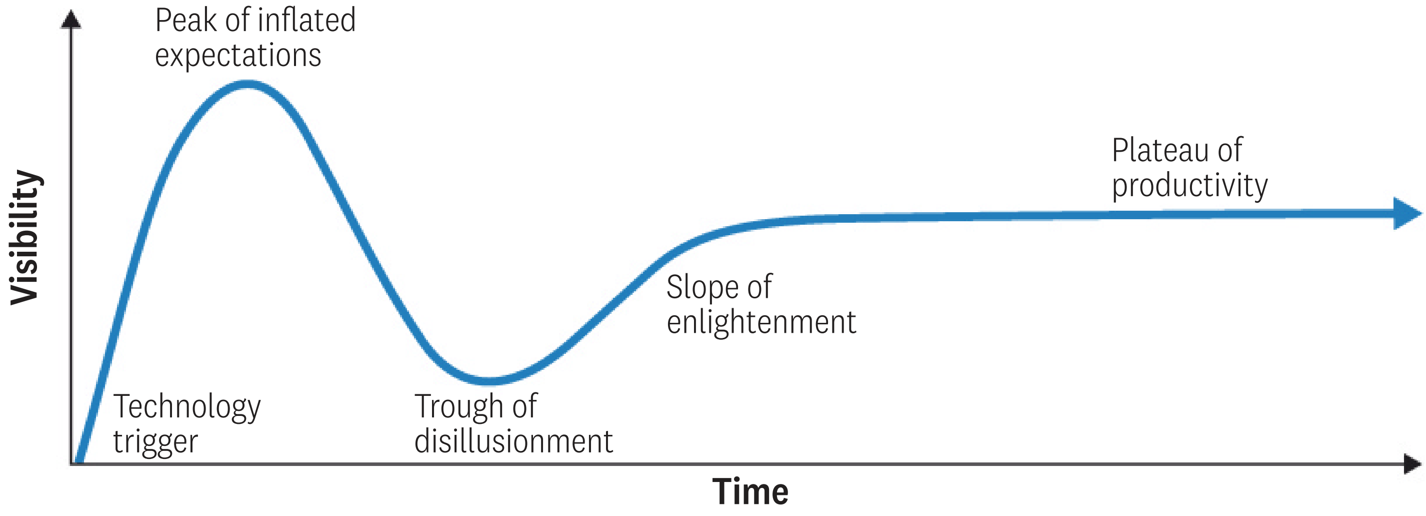
Is the information *conceptual* or *data-driven?*

Am I *declaring* something or *exploring* something?

If you know the answers to these questions, you can plan what resources and tools you'll need and begin to discern what type of visualization will help you achieve your goals most effectively.

The first question is the simpler of the two, and the answer is usually obvious. Either you're visual-

Hype Cycle for Emerging Technologies



izing qualitative information or you’re plotting quantitative information: ideas or statistics. But notice that the question is about the information itself, not the forms you might ultimately use to show it. For example, the classic Gartner Hype Cycle (see the exhibit at left) uses a traditionally data-driven form—a line chart—but no actual data. It’s a concept.

	CONCEPTUAL	DATA-DRIVEN
FOCUS	IDEAS	STATISTICS
GOALS	SIMPLIFY, TEACH “Here’s how our organization is structured.”	INFORM, ENLIGHTEN “Here are our revenues for the past two years.”

If the first question identifies what you *have*, the second elicits what you’re *doing*: either communicating information (declarative) or trying to figure something out (exploratory).

	DECLARATIVE	EXPLORATORY
FOCUS	DOCUMENTING, DESIGNING	PROTOTYPING, ITERATING, INTERACTING, AUTOMATING
GOALS	AFFIRM “Here is our budget by department.”	CONFIRM “Let’s see if marketing investments contributed to rising profits.” DISCOVER “What would we see if we visualized customer purchases by gender, location, and purchase amount in real time?”

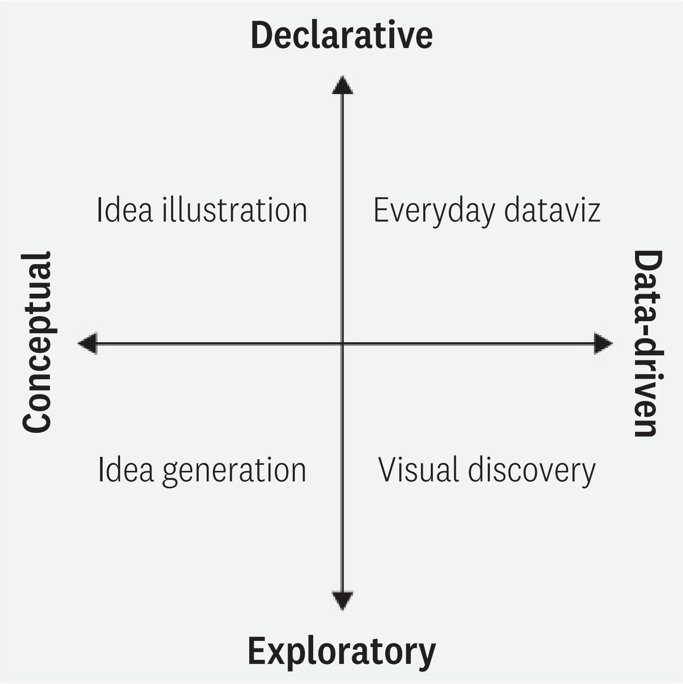
Managers most often work with declarative visualizations, which make a statement, usually to an audience in a formal setting. If you have a spreadsheet workbook full of sales data and you’re using it to show quarterly sales in a presentation, your purpose is declarative.

But let’s say your boss wants to understand why the sales team’s performance has lagged lately. You suspect that seasonal cycles have caused the dip, but you’re not sure. Now your purpose is exploratory, and you’ll use the same data to create visuals that will confirm or refute your hypothesis. The audience is usually yourself or a small team. If your hypothesis is confirmed, you may well show your boss a declarative visualization, saying, “Here’s what’s happening to sales.”

Exploratory visualizations are actually of two kinds. In the example above, you were testing a hypothesis. But suppose you don’t have an idea about why performance is lagging—you don’t know what you’re looking for. You want to mine your workbook to see what patterns, trends, and anomalies emerge. What will you see, for example, when you measure sales performance in relation to the size of the region a salesperson manages? What happens if you compare seasonal trends in various geographies? How does weather affect sales? Such data brainstorming can deliver fresh insights. Big strategic questions—Why are revenues falling? Where can we find efficiencies? How do customers interact with us?—can benefit from a discovery-focused exploratory visualization.

The Four Types

The nature and purpose questions combine in a classic 2×2 to define four types of visual communication: idea illustration, idea generation, visual discovery, and everyday dataviz.



Idea in Brief

CONTEXT

Knowledge workers need greater visual literacy than they used to, because so much data—and so many ideas—are now presented graphically. But few of us have been taught data-visualization skills.

TOOLS ARE FINE...

Inexpensive tools allow anyone to perform simple tasks such as importing spreadsheet data into a bar chart. But that means it’s easy to create terrible charts. Visualization can be so much more: It’s an agile, powerful way to explore ideas and communicate information.

...BUT STRATEGY IS KEY

Don’t jump straight to execution. Instead, first think about what you’re representing—ideas or data? Then consider your purpose: Do you want to inform, persuade, or explore? The answers will suggest what tools and resources you need.

IDEA ILLUSTRATION

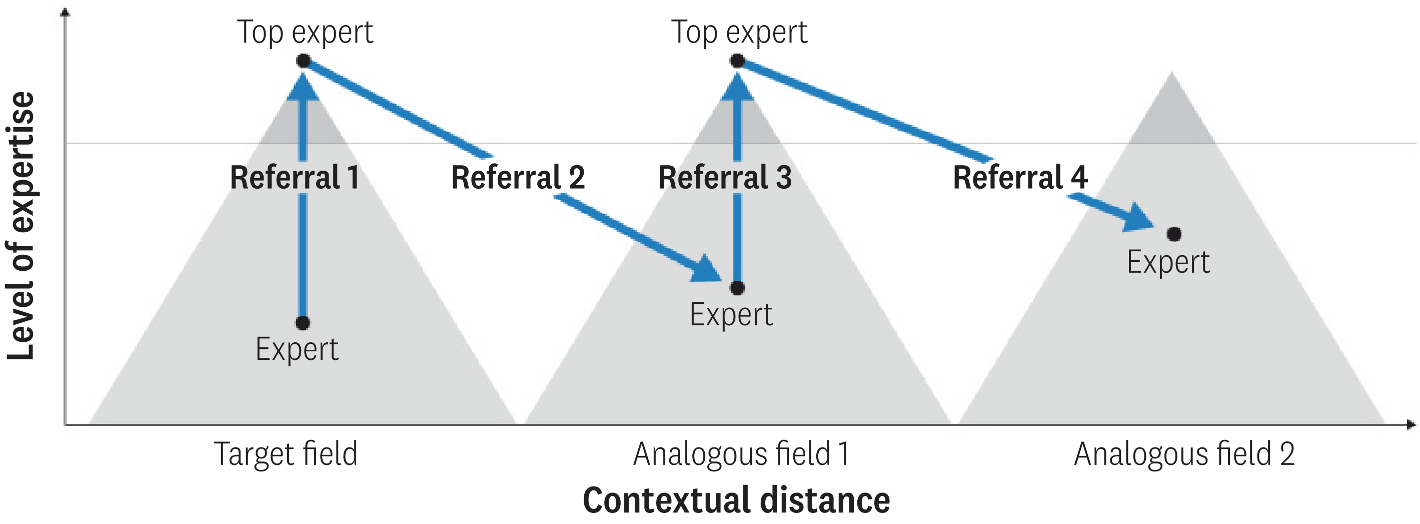
INFO TYPE	PROCESS, FRAMEWORK
TYPICAL SETTING	PRESENTATIONS, TEACHING
PRIMARY SKILLS	DESIGN, EDITING
GOALS	LEARNING, SIMPLIFYING, EXPLAINING

We might call this quadrant the "consultants' corner." Consultants can't resist process diagrams, cycle diagrams, and the like. At their best, idea illustrations clarify complex ideas by drawing on our ability to understand metaphors (trees, bridges) and simple design conventions (circles, hierarchies). Org charts and decision trees are classic examples of idea illustration. So is the 2×2 that frames this article.

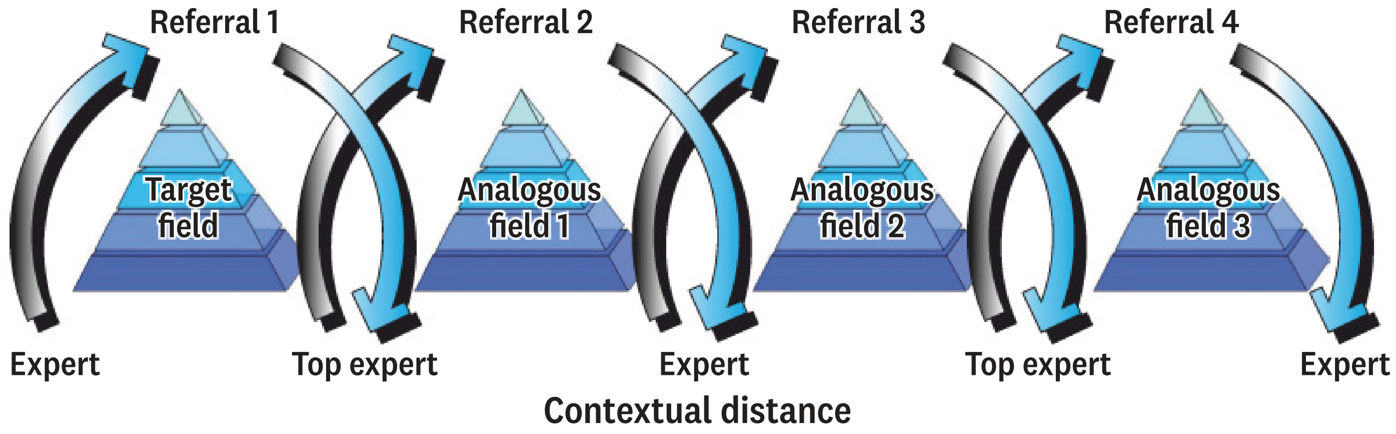
Idea illustration demands clear and simple design, but its reliance on metaphor invites unnecessary adornment. Because the discipline and boundaries of data sets aren't built in to idea illustration, they must be imposed. The focus should be on clear communication, structure, and the logic of the ideas. The most useful skills here are similar to what a text editor brings to a manuscript—the ability to pare things down to their essence. Some design skills will be useful too, whether they're your own or hired.

Suppose a company engages consultants to help its R&D group find inspiration in other industries. The consultants use a technique called the *pyramid search*—a way to get information from experts in other fields close to your own, who point you to the top experts in their fields, who point you to experts in still other fields, who then help you find the experts in those fields, and so on.

Climbing Pyramids in Search of Ideas


Level of expertise
Top expert
Top expert
Referral 1
Referral 2
Referral 3
Referral 4
Expert
Expert
Expert
Target field
Analogous field 1
Analogous field 2
Contextual distance

How a Pyramid Search Works


Referral 1
Referral 2
Referral 3
Referral 4
Target field
Analogous field 1
Analogous field 2
Analogous field 3
Expert
Top expert
Expert
Top expert
Expert
Contextual distance

It's actually tricky to explain, so the consultants may use visualization to help. How does a pyramid search work? It looks something like the exhibit at left (center).

The axes use conventions that we can grasp immediately: industries plotted near to far and expertise mapped low to high. The pyramid shape itself shows the relative rarity of top experts compared with lower-level ones. Words in the title—"climbing" and "pyramids"—help us grasp the idea quickly. Finally, the designer didn't succumb to a temptation to decorate: The pyramids aren't literal, three-dimensional, sandstone-colored objects.

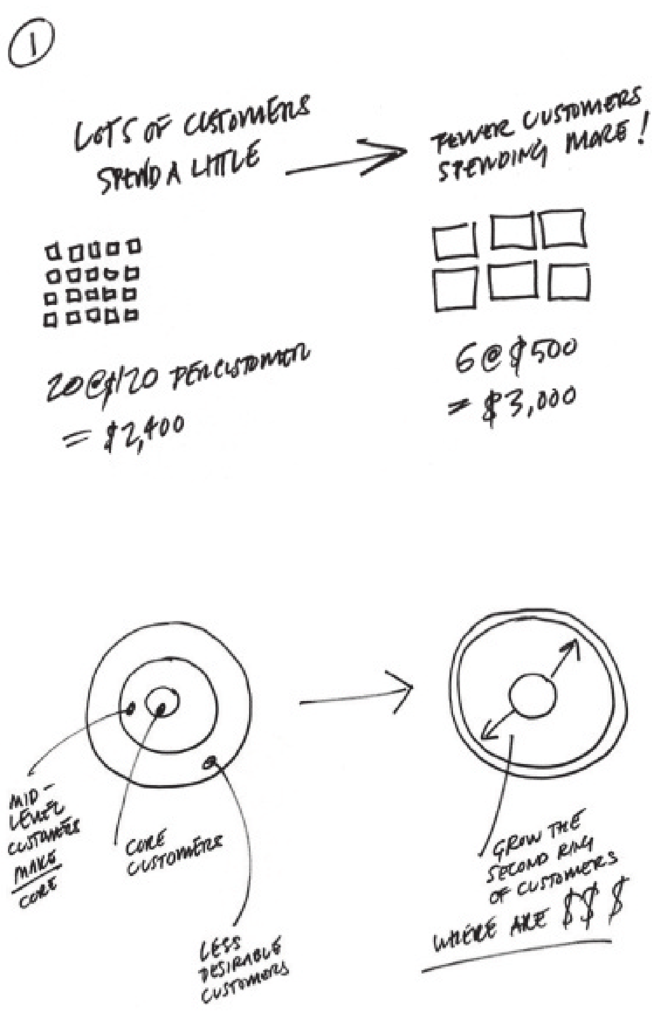
Too often, idea illustration doesn't go that well, and you end up with something like the exhibit at left (bottom).

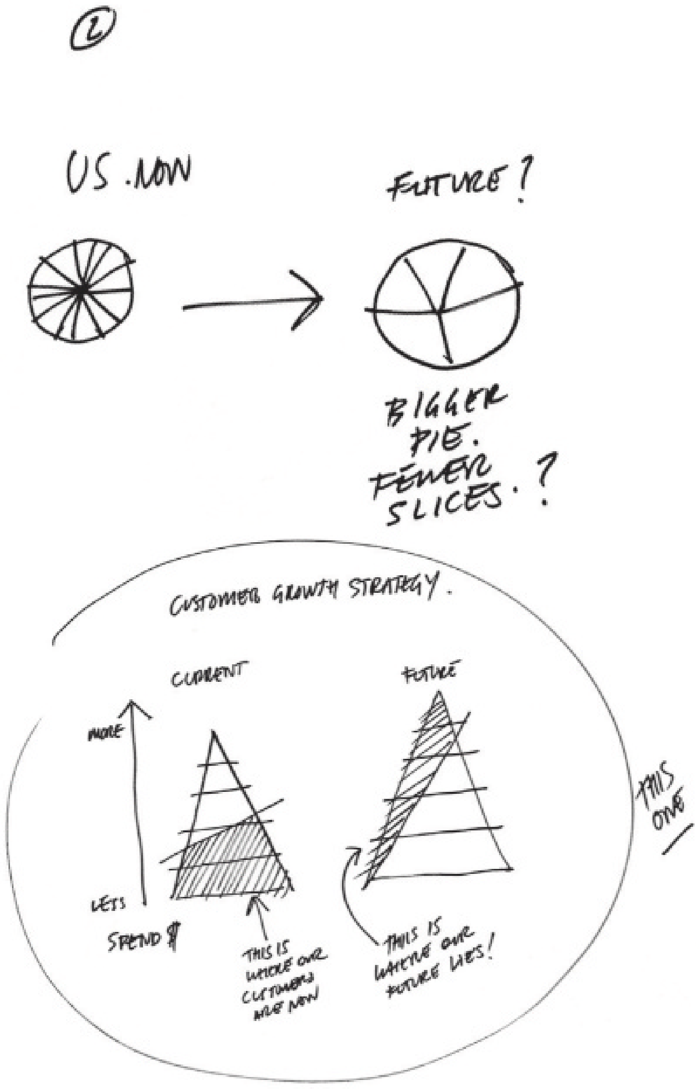
Here the color gradient, the drop shadows, and the 3-D pyramids distract us from the idea. The arrows don't actually demonstrate how a pyramid search works. And experts and top experts are placed on the same plane instead of at different heights to convey relative status.

IDEA GENERATION

INFO TYPE	COMPLEX, UNDEFINED
TYPICAL SETTING	WORKING SESSION, BRAINSTORMING
PRIMARY SKILLS	TEAM-BUILDING, FACILITATION
GOALS	PROBLEM SOLVING, DISCOVERY, INNOVATION

Managers may not think of visualization as a tool to support idea generation, but they use it to brainstorm all the time—on whiteboards, on butcher paper, or, classically, on the back of a napkin. Like idea illustration, idea generation relies on conceptual metaphors, but it takes place in more-informal settings, such as off-sites, strategy sessions, and early-phase innovation projects. It's used to find new ways of seeing how the business works and to answer complex managerial challenges: restructuring an organization, coming up with a new business process, codifying a system for making decisions.


①
LOTS OF CUSTOMERS SPEND A LITTLE
FEWER CUSTOMERS SPENDING MORE!
20@$120 PER CUSTOMER = $2,400
6@$500 = $3,000
MID-LEVEL CUSTOMERS MAKE CORE
CORE CUSTOMERS
LESS DESIRABLE CUSTOMERS
GROW THE SECOND RING OF CUSTOMERS
WHERE ARE $$$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US. NOW
FUTURE?
BIGGER PIE. FEWER SLICES.?
CUSTOMER GROWTH STRATEGY.
CURRENT
FUTURE
MORE
LESS
SPEND $
THIS IS WHERE OUR CUSTOMERS ARE NOW
THIS IS WHERE OUR FUTURE LIES!
THIS ONE

Although idea generation can be done alone, it benefits from collaboration and borrows from design thinking—gathering as many diverse points of view and visual approaches as possible before homing in on one and refining it. Jon Kolko, the founder and director of the Austin Center for Design and the author of *Well-Designed: How to Use Empathy to Create Products People Love,* fills the whiteboard walls of his office with conceptual, exploratory visualizations. “It’s our go-to method for thinking through complexity,” he says. “Sketching is this effort to work through ambiguity and muddiness and come to crispness.” Managers who are good at leading teams, facilitating brainstorming sessions, and encouraging and then capturing creative thinking will do well in this quadrant. Design skills and editing are less important here, and sometimes counterproductive. When you’re seeking breakthroughs, editing is the opposite of what you need, and you should think in rapid sketches; refined designs will just slow you down.

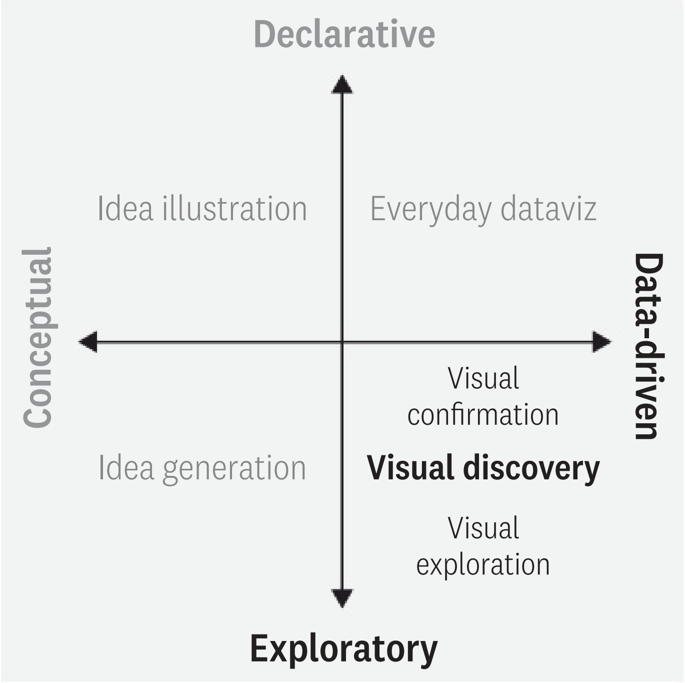
Suppose a marketing team is holding an off-site. The team members need to come up with a way to show executives their proposed strategy for going upmarket. An hourlong whiteboard session yields several approaches and ideas (none of which are erased) for presenting the strategy. Ultimately, one approach gains purchase with the team, which thinks it best captures the key point: Get fewer customers to spend much more. The whiteboard looks something like the illustration on the preceding page.

Of course, visuals that emerge from idea generation often lead to more formally designed and presented idea illustrations.

VISUAL DISCOVERY

INFO TYPE	BIG DATA, COMPLEX, DYNAMIC
TYPICAL SETTING	WORKING SESSIONS, TESTING, ANALYSIS
PRIMARY SKILLS	BUSINESS INTELLIGENCE, PROGRAMMING, PAIRED ANALYSIS
GOALS	TREND SPOTTING, SENSE MAKING, DEEP ANALYSIS

This is the most complicated quadrant, because in truth it holds two categories. Recall that we originally separated exploratory purposes into two kinds: testing a hypothesis and mining for patterns, trends, and anomalies. (See the matrix above right.) The former is focused, whereas the latter is more flexible. The bigger and more complex the data, and the less you know going in, the more open-ended the work.



Visual confirmation. You’re answering one of two questions with this kind of project: Is what I suspect actually true? or What are some other ways of depicting this idea?

The scope of the data tends to be manageable, and the chart types you’re likely to use are common—although when trying to depict things in new ways, you may venture into some less-common types. Confirmation usually doesn’t happen in a formal setting; it’s the work you do to find the charts you want to create for presentations. That means your time will shift away from design and toward prototyping that allows you to rapidly iterate on the dataviz. Some skill at manipulating spreadsheets and knowledge of programs or sites that enable swift prototyping are useful here.

Suppose a marketing manager believes that at certain times of the day more customers shop his site on mobile devices than on desktops, but his marketing programs aren’t designed to take advantage of that. He loads some data into an online tool (called Datawrapper) to see if he’s right (1 at right).

He can’t yet confirm or refute his hypothesis. He can’t tell much of anything, but he’s prototyping and using a tool that makes it easy to try different views into the data. He works fast; design is not a concern. He tries a line chart instead of a bar chart (2).

Now he’s seeing something, but working with three variables still doesn’t quite get at the mobile-versus-desktop view he wants, so he tries again with two variables (3). Each time he iterates, he evaluates whether he can confirm his original hypothesis: At certain times of day more customers are shopping on mobile devices than on desktops.

On the fourth try he zooms in and confirms his hypothesis (4).

New software tools mean this type of visualization is easier than ever before: They're making data analysts of us all.

Visual exploration. Open-ended data-driven visualizations tend to be the province of data scientists and business intelligence analysts, although new tools have begun to engage general managers in visual exploration. It's exciting to try, because it often produces insights that can't be gleaned any other way.

Because we don't know what we're looking for, these visuals tend to plot data more inclusively. In extreme cases, this kind of project may combine multiple data sets or load dynamic, real-time data into a system that updates automatically. Statistical modeling benefits from visual exploration.

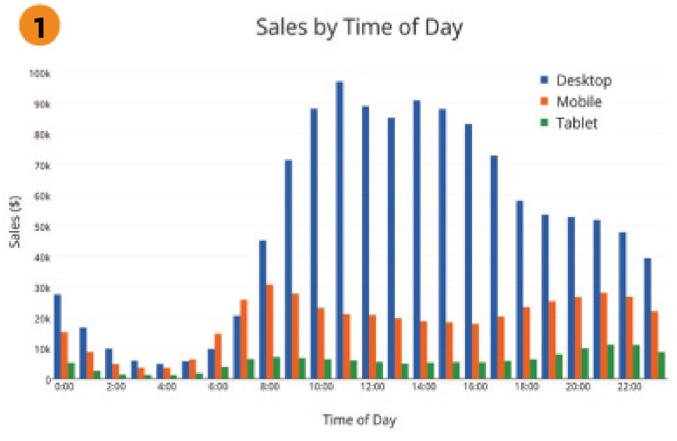
Exploration also lends itself to interactivity: Managers can adjust parameters, inject new data sources, and continually revisualize. Complex data sometimes also suits specialized and unusual visualization, such as *force-directed diagrams* that show how networks cluster, or topographical plots.

Function trumps form here: Analytical, programming, data management, and business intelligence skills are more crucial than the ability to create presentable charts. Not surprisingly, this half of the quadrant is where managers are most likely to call in experts to help set up systems to wrangle data and create visualizations that fit their analytic goals.

Anmol Garg, a data scientist at Tesla Motors, has used visual exploration to tap into the vast amount of sensor data the company's cars produce. Garg created an interactive chart that shows the pressure in a car's tires over time. In true exploratory form, he and his team first created the visualizations and then found a variety of uses for them: to see whether tires are properly inflated when a car leaves the factory, how often customers reinflate them, and how long customers take to respond to a low-pressure alert; to find leak rates; and to do some predictive modeling on when tires are likely to go flat. The pressure of all four tires is visualized on a scatter plot, which, however inscrutable to a general audience, is clear to its intended audience. (See the illustration at the top of the next page.)

Garg was exploring data to find insights that could be gleaned only through visuals. "We're dealing with terabytes of data all the time," he says. "You can't find anything looking at spreadsheets and querying databases. It has to be visual."

1



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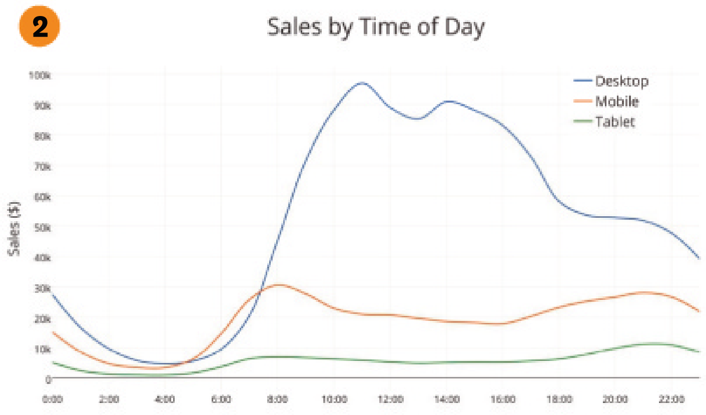

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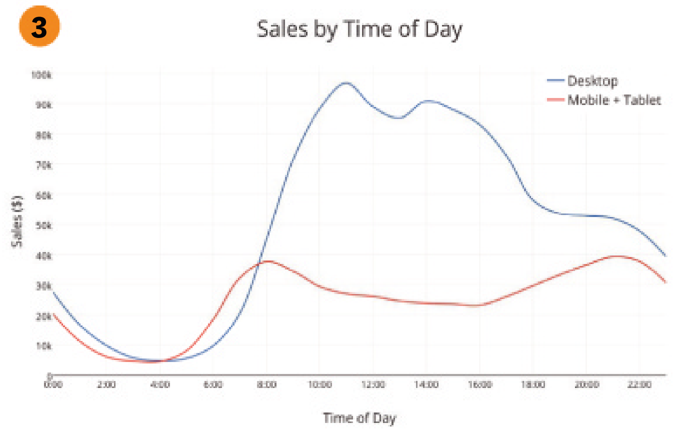

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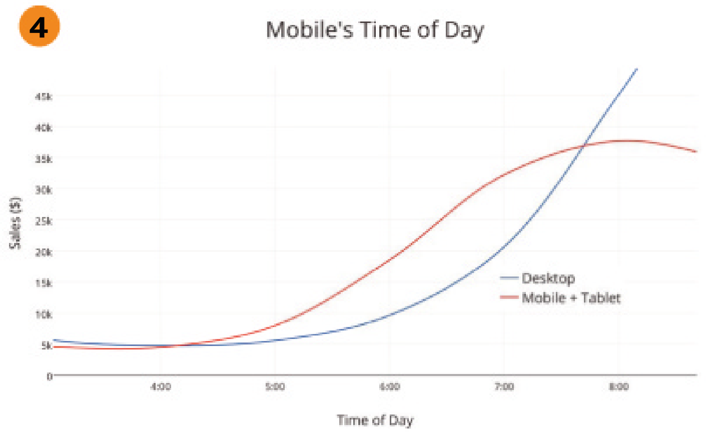
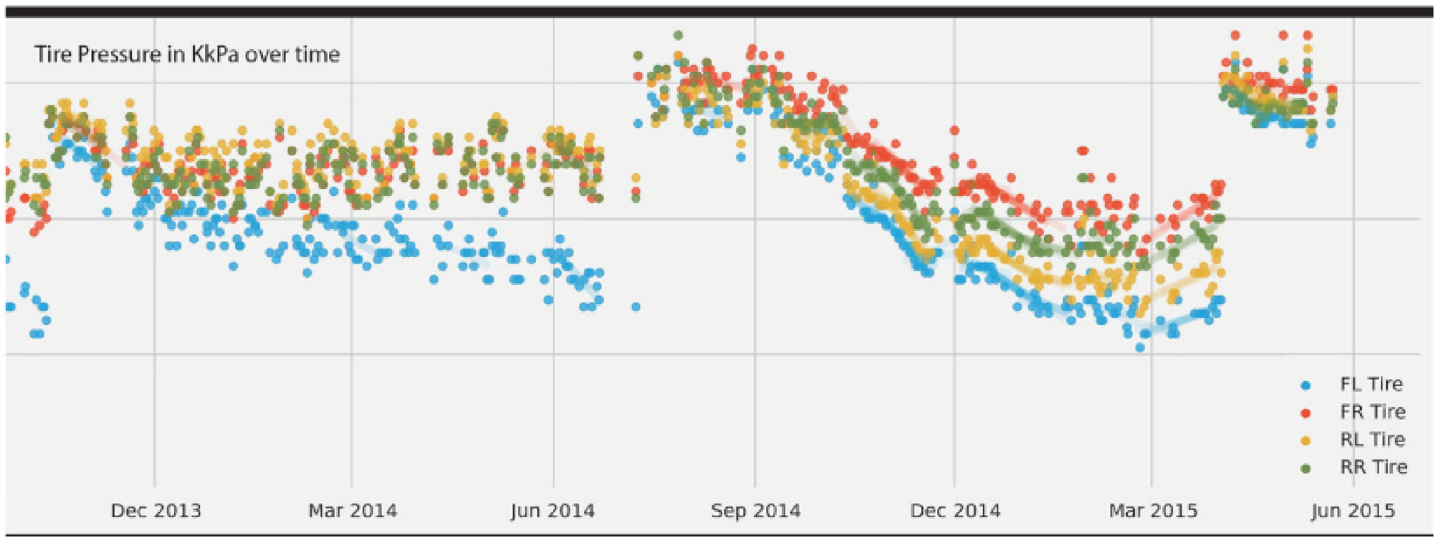




For presentations to the executive team, Garg translates these exploration sessions into the kinds of simpler charts discussed below. “Management loves seeing visualizations,” he says.

EVERYDAY DATAVIZ

INFO TYPE	SIMPLE, LOW VOLUME
TYPICAL SETTING	FORMAL, PRESENTATIONS
PRIMARY SKILLS	DESIGN, STORYTELLING
GOALS	AFFIRMING, SETTING CONTEXT

Whereas data scientists do most of the work on visual exploration, managers do most of the work on everyday visualizations. This quadrant comprises the basic charts and graphs you normally paste from a spreadsheet into a presentation. They are usually simple—line charts, bar charts, pies, and scatter plots.

“Simple” is the key. Ideally, the visualization will communicate a single message, charting only a few variables. And the goal is straightforward: affirming and setting context. Simplicity is primarily a design challenge, so design skills are important. Clarity and consistency make these charts most effective in the setting where they’re typically used: a formal presentation. In a presentation, time is constrained. A poorly designed chart will waste that time by provoking questions that require the presenter to interpret information that’s meant to be obvious. If an everyday dataviz can’t speak for itself, it has failed—just like a joke whose punch line has to be explained.

That’s not to say that declarative charts shouldn’t generate discussion. But the discussion should be about the idea in the chart, not the chart itself.

Suppose an HR VP will be presenting to the rest of the executive committee about the company’s health care costs. She wants to convey that the growth of these costs has slowed significantly, creating an opportunity to invest in additional health care services.

The VP has read an online report about this trend that includes a link to some government data. She downloads the data and clicks on the line chart option in Excel. She has her viz in a few seconds. But because this is for a presentation, she asks a designer colleague to add detail from the data set to give a more comprehensive view, as shown in the exhibit at top right.

This is a well-designed, accurate chart, but it’s probably not the right one. The executive committee doesn’t need two decades’ worth of historical context to discuss the company’s strategy for employee benefits investments. The point the VP wants to make is that cost increases have slowed over the past few years. Is that clearly communicated here?

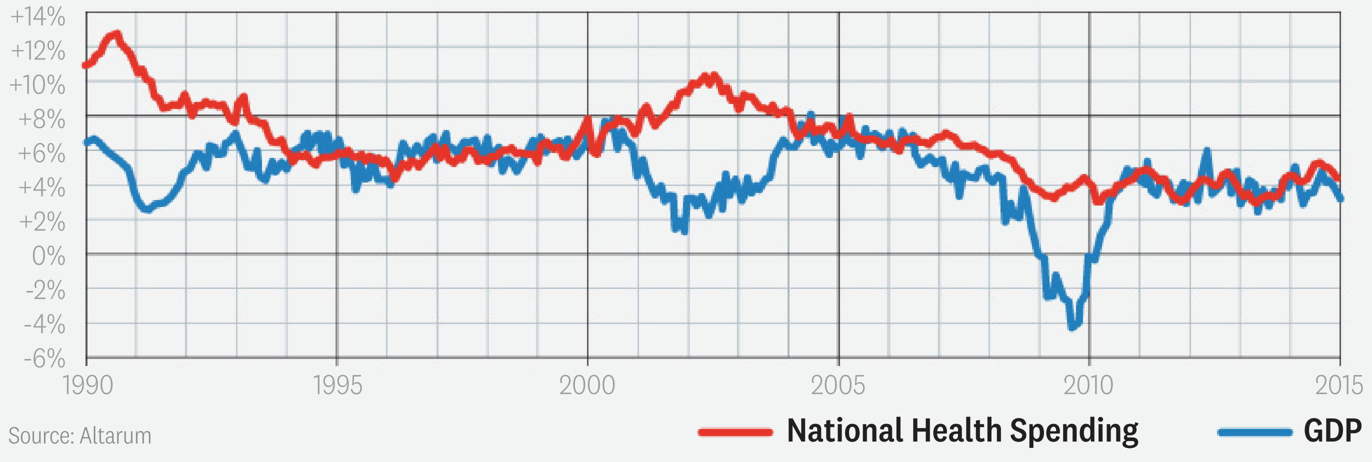
In general, when it takes more than a few seconds to digest the data in a chart, the chart will work better on paper or on a personal-device screen, for someone who’s not expected to listen to a presentation while trying to take in so much information. For example, health care policy makers might benefit from seeing this chart in advance of a hearing at which they’ll discuss these long-term trends.

Our VP needs something cleaner for her context. She could make her point as simply as the exhibit at bottom right.

Simplicity like this takes some discipline—and courage—to achieve. The impulse is to include everything you know. Busy charts communicate the idea that you’ve been just that—busy. “Look at all the data I have and the work I’ve done,”

Change in Health Spending and GDP

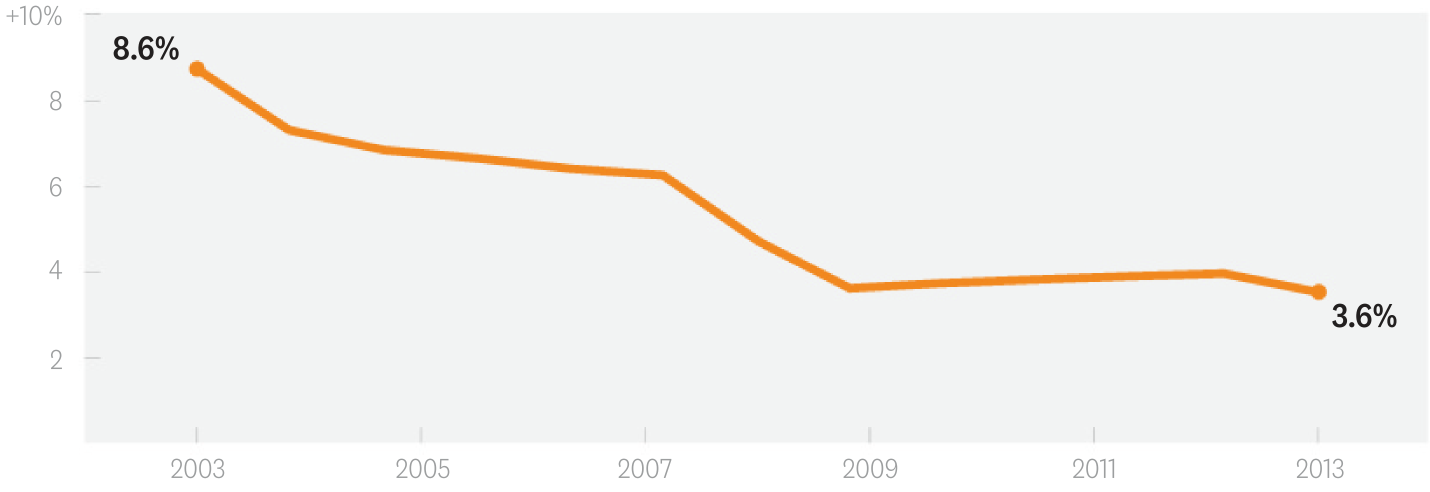
Percentage change over previous year



Source: Altarum

Annual Growth Is Declining

Annual growth in health care spending



they seem to say. But that's not the VP's goal. She wants to persuade her colleagues to invest in new programs. With this chart, she won't have to utter a word for the executive team to understand the trend. She has clearly established a foundation for her recommendations.

IN SOME WAYS, "data visualization" is a terrible term. It seems to reduce the construction of good charts to a mechanical procedure. It evokes the tools and methodology required to create rather than the creation itself. It's like calling *Moby-Dick* a "word sequentialization" or *The Starry Night* a "pigment distribution."

It also reflects an ongoing obsession in the data-viz world with process over outcomes. Visualization is merely a process. What we actually do when we make a good chart is get at some truth and move people to feel it—to see what couldn't be seen before. To change minds. To cause action.

Some basic common grammar will improve our ability to communicate visually. But good outcomes require a broader understanding and a strategic approach—which the typology described here is meant to help you develop.

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Scott Berinato is a senior editor at HBR and the author of *Good Charts: The HBR Guide to Making Smarter, More Persuasive Data Visualizations* (2016), from which this article is adapted.

Quick Takes

ANNA1311/GETTY IMAGES

How to Give a Stellar Presentation

by Rebecca Knight

SPEAKING IN front of a group—no matter how big or small—can be stressful. Preparation is key, whether it's your first time or your hundredth. From creating your slides to wrapping up your talk, what should you do to give a presentation that people will remember?

What the Experts Say

Public speaking often tops the list of people's fears. "When all eyes are on you, you feel exposed," says Nick Morgan, the president and founder of Public Words and author of *Power Cues: The Subtle Science of Leading Groups, Persuading Others, and Maximizing Your Personal Impact* (Harvard Business Review Press, 2014). "This classically leads to feelings of shame and embarrassment." In other words, fear of humiliation is at the root of our performance anxiety. Another problem: "Speakers often set a standard of perfection for themselves that they will never live up to," Morgan says. "And then they'll spend the next few hours, weeks, or years thinking 'I should have said this' or 'I should have done that.'" But presenters shouldn't "fear a hostile environment" or second-guess themselves, says Nancy Duarte, the CEO and principal of Duarte Design and author of the *HBR Guide to Persuasive Presentations* (Harvard Business Review Press, 2012). "Most often the audience is rooting for you," she explains. They want to hear what you have to say, and they want you to be successful. These tips will help you deliver.

Understand your audience. While working on your presentation, think about your message and content from the listener's point of view. "Research your audience," says Morgan. "Understand their points of pain, what they're interested in, their fears, needs, and wants." Don't think of your presentation as a chance to show off your expertise. "Instead, think about it as an opportunity to take your audience on a journey," he adds, in which you provide new perspectives and ideas. Go in with the mindset of a mentor, says Duarte. "Think about why your audience is coming to hear you speak. Ask yourself: What can I give them?"

Open with conviction. According to Morgan, the three classic mistakes speakers tend to make often happen in the first few minutes of a talk. The first mistake is introducing yourself—especially in a long-winded fashion. The second is telling the audience what you're going to say—often in the form of a PowerPoint agenda slide. The third is what Morgan refers to as "throat clearing," where you stand up and say things like: "Gee, it's nice to be here. Wasn't that a fun party last night? I see a lot of familiar faces in the audience." Saying these things might make you feel more comfortable, "but you're just babbling at the audience," Morgan says. And more important, you're squandering the opening few minutes that are key to engaging the audience. "Your goal is to immediately grab their attention and draw them in."

Tell a story. A growing body of research points to the power of stories to change our attitudes, beliefs, and behaviors. Bear this in mind as you create your slides and talking points. "Stories wrap information in meaning and help your audience absorb your message in a memorable way," says Duarte. First-person anecdotes about overcoming hardships or obstacles build tension and give the audience something or someone to cheer for, she adds. The common alternative to stories—overloading your audience "with lists and slides of data and facts"—often results in glazed and distant looks, adds Morgan. "Stories will appeal to them on a deeper emotional level."

Seek to inspire. Even when your talk is internal and your content is mundane—a presentation before your team about a product road map, say—your message shouldn't be humdrum. "You could talk about the road map in chronological order and discuss the various deliverables, or you could remind your team of what *could* be and remind people how they are solving a problem bigger than themselves," says Duarte. Your presentation should still focus on the topic or task at hand, but by bringing in concepts like "meaning and purpose, you create a longing to get the job done" and do it well.

Think positively. The physiological signs of stage fright—racing heart, clammy palms, and churning stomach—are "keenly felt by you but are far less visible to the eyes of the audience," says Morgan. "You must remind yourself that you don't look as bad as you feel." And when your brain starts in on a feverish loop of negativity—*I'm a fraud; this talk is going to go horribly*—you need to counteract it. Replace negative thoughts with positive ones, he says. "Tell yourself: 'I'm going to be fine. I am passionate about this topic. I've given this talk plenty of times before.'" You might feel silly the first time you speak to yourself this way, but positive self-talk really helps.

Review and rehearse. One of the best ways to prepare for an important speech is to practice it in front of a live audience. This person needn't be a professional coach. A friend or group of colleagues will suffice, says Morgan. After the rehearsal, "they can give you feedback on how you're parsing your content and coach you on which sections of the presentation work best" and which need improvement, says Duarte. For high-stakes talks, try to visit the venue where you're presenting so that you can get a feel for the stage and the environment. Duarte also suggests asking someone to film your rehearsal. "Then go over the footage together to identify idiosyncrasies and improve your gestures and facial expressions." The goal is to make sure "your body tells the story you want it to tell."

But don't practice too much. Sometimes rehearsing too much can backfire. "Your audience will feel insulted if you haven't prepared, but you can also overprepare and end up coming across robotic and contrived," warns Duarte. "Once you've practiced it enough and you feel good about the material, let go of the script and talk from the heart."

Think about your message and content from the listener's point of view.

Principles to Remember

Do

- Research your audience and keep listeners' wants and needs in mind as you sharpen your content
- Practice your presentation in front of friends or colleagues and be open to their suggestions on how to improve
- Think positive thoughts by reminding yourself of your passion and interest in the topic

Don't

- Babble, especially at the beginning—open strong by grabbing your audience's attention in the first few minutes
- Worry too much about appearing nervous; stage fright is natural and your audience will probably be forgiving
- Overburden your audience with facts and figures; tell stories and anecdotes that will appeal to your listeners on an emotional level

CASE STUDY 1

Polish Your Story and Then Practice, Practice, Practice

In early 2013, Ted Karkus, the CEO of ProPhase Labs (the makers of Cold-EEZE lozenges), received a last-minute invitation to speak at a large investor conference that was only a week away. Ted would be part of a panel with executives from two other companies, both of which were about five times bigger than ProPhase.

"It was nerve-racking when I found that out, but then I realized: 'I can talk passionately about this company because I believe in this company,'" he says. "But I also knew I needed to practice beforehand. I believe the degree of preparation is directly related to the quality of a presentation."

While working on his talk he was guided by the principle that "every slide should tell a story." He did not want to overwhelm the audience with numbers. "We're a public company—if people want numbers, they can look on the internet. Instead, I wanted to talk about my goals and the history of Cold-EEZE."

He was confident that the story was compelling: When Ted took over the brand in 2009 after a long proxy battle, sales were spiraling downward. Not only did he have to cut a large percentage of his workforce, he also had to plead with retailers not to cut shelf space for his products. But after a "Herculean turnaround effort" that included a new marketing strategy, new packaging, and an expanded product line, sales were growing rapidly.

Ted did not prepare for the speech alone. Around that same time, he was going to be in a TV commercial for Cold-EEZE, and he had hired an acting coach to help him. "I happened to bring my presentation to the rehearsal, and the coach taught me how to memorize my talk and still seem natural."

About an hour before the speech, an investor asked Ted for a one-on-one meeting. "It gave me a chance to go over the presentation," he says. "It helped to say it out loud one last time before I went onstage. Afterward, I reminded myself that talking to this one person wasn't much different from talking to 200."

Ted's talk was a big success. Before he left the podium, about a half-dozen audience members approached him with ideas for the company.

CASE STUDY 2

Find Your Theme and Think About What Will Inspire Your Audience

In 2010, Michelle Reed, then chief marketing officer for a higher education software company, was asked to give the keynote address to kick off her firm's weeklong customer event. About 8,000 people would be in the audience.

"I was terrified, frankly," she says. "I wanted to do well, and I wanted to make sure my message would resonate."

The theme of the conference was: "Today's priorities. Tomorrow's possibilities." Her aim was to get the audience thinking about how to improve students' experiences using technology. "Higher education is about making a better life for yourself and for your family and ultimately making the world a better place," says Michelle. "It was an aspirational, passionate message that I wanted to get across."

As Michelle began to develop her content, she mined her life for examples. "I told a personal story of my experience registering for classes as a college student in the 1980s, which posed a stark contrast to what it was like for my kids in the mid-2000s," she recalls. "When I registered for courses, I literally slept on the streets of Philadelphia, and when my number was called, I went into a room and ran around from table to table to try to find courses. My kids registered for courses online from the comfort of their dorm rooms ... I wanted to demonstrate a strong understanding of how far we've come, but I also wanted the audience to be thinking: 'Wow. What's next?'"

The talk was well received, and the experience has made her more confident. Today Michelle is the CMO at SkillSurvey, which provides reference assessments to help employers make better hiring decisions, and regularly has to give presentations to large groups. "I always try to focus on my audience members," she says. "I think: How will they receive it? What do they care about? And what am I trying to compel them to do?"

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Rebecca Knight is a freelance journalist in Boston. Her work has been published in *The New York Times*, *USA Today*, and *The Financial Times*.

The Art of the Elevator Pitch

by Carmine Gallo

LONG BEFORE your favorite movie made it to a theater near you, it was presented in a pitch meeting. Hollywood screenwriters typically get three to five minutes to propose an idea, but it takes only around 45 seconds for producers to know if they want to invest. Specifically, producers are listening for a logline: one or two sentences that explain what the movie is about. If there is no logline, more often than not, there is no sale.

A winning pitch starts with a winning logline—a valuable lesson for innovators in any field. The best innovations offer novel solutions to challenging problems. But without the support of investors, even the best ideas might never get off the ground. To influence the people who can turn your idea into a reality, you need to deliver your pitch in an exciting and straightforward way. All this starts with the logline—an art that screenwriters have mastered.

STUART MCCALL/GETTY IMAGES

When successful screenwriters are asked what their movie is about, they have a clear, concise, and engaging answer. Business leaders are asked a version of this same question throughout their careers:

- What is your presentation about?
- What does your start-up or product do?
- What's your idea?

If you can answer in one compelling sentence, you can hook your audience. According to molecular biologist John Medina of the University of Washington School of Medicine, the human brain craves meaning before details. When listeners don't understand the overarching idea being presented in a pitch, they have a hard time digesting the information. A logline will help you paint the big picture for your audience.

In Hollywood cinema, one of the greatest loglines of all time belongs to the iconic thriller that kept kids out of the ocean during the summer of 1975: "A police chief, with a phobia for open water, battles a gigantic shark with an appetite for swimmers and boat captains, in spite of a greedy town council who demands that the beach stay open."

What makes it work? The logline for *Jaws* identifies the key elements of the story: the hero, his weakness, his conflict, and the hurdles he must overcome—all in one sentence. It depicts the overarching storyline in an interesting, straightforward way, rather than focusing on details that might seem meaningless without the context of the bigger picture.

Business leaders can use loglines in a similar manner to clearly explain a complex idea. If mastered, this can be a powerful and influential tool. But communicating your point in a simple, digestible way is hard. It's actually easier to add clutter to business presentations than it is to condense by eliminating unnecessary details. Although challenging, you can take steps to master the logline.

Keep it short. In his book *Leading: Learning from Life and My Years at Manchester United* (Hachette Books, 2015), venture capital investor Michael Moritz, with Alex Ferguson, tells the story of two Stanford graduate students who walked into his office at Sequoia Capital and delivered the most concise business plan he had ever heard. Sergey Brin and Larry Page told Moritz: "Google organizes the world's information and makes it universally accessible." In 10 words, that logline led to Google's first major round of funding. Moritz said the pitch was clear and had a sense of purpose.

A logline should be easy to say and easy to remember. As an exercise, challenge yourself to keep it less than 140 characters, short enough to post on the old version of Twitter (before the platform allowed 280 characters per tweet). At 77 characters, the Google pitch makes the grade.

Identify one thing you want your audience to remember. Steve Jobs was a genius at identifying what he wanted us to remember most about a new product. In 2001 it was that the original iPod allowed you to carry "1,000 songs in your pocket." In 2008 it was that the MacBook Air was "the world's thinnest notebook." Apple still uses this strategy today. Executives repeat a one-sentence description when presenting new products. This same logline then appears on the Apple website and in the company's press releases.

If mastered, a logline can be a powerful and influential tool.

The "one thing" should cater to the needs of your audience. A sales professional for a large tech company recently told me a logline he uses to address the needs of his audience—IT buyers: "Our product will reduce your company's cell phone bill by 80%." With one sentence, his customers want to know more because his logline solves a specific problem and will make them look like heroes to their bosses. Above all, the logline is easy to remember and gives people a story they can take to other decision makers in their organizations.

Make sure your team is on the same page. Every person who speaks on behalf of your company or sells your product should deliver the same logline. For example, I worked with top leaders at SanDisk, the flash memory company, to prepare them for a major financial analyst conference. Seven executives delivered five hours of presentations. I suggested that before going into nitty-gritty financial details, each person should deliver the same logline at the beginning of their presentations and end their presentations by repeating it once more. As a group we decided on the logline: "In the coming decade, flash will be bigger than you think."

The logline was meant to stir up excitement for all the products flash memory would enable, like iPads, laptops, smartphones, and cloud services. As the conference concluded, the first financial blog post that appeared carried the headline: "Flash will be bigger than you think." Loglines attract attention; consistent loglines are memorable and repeatable.

If you can't communicate your pitch in one short sentence, don't give up. Sometimes the language will come to you immediately; other times it might take more practice. Be patient. Once you master the logline, you will be able to easily clarify your ideas and help the audience retain, remember, and act on them.

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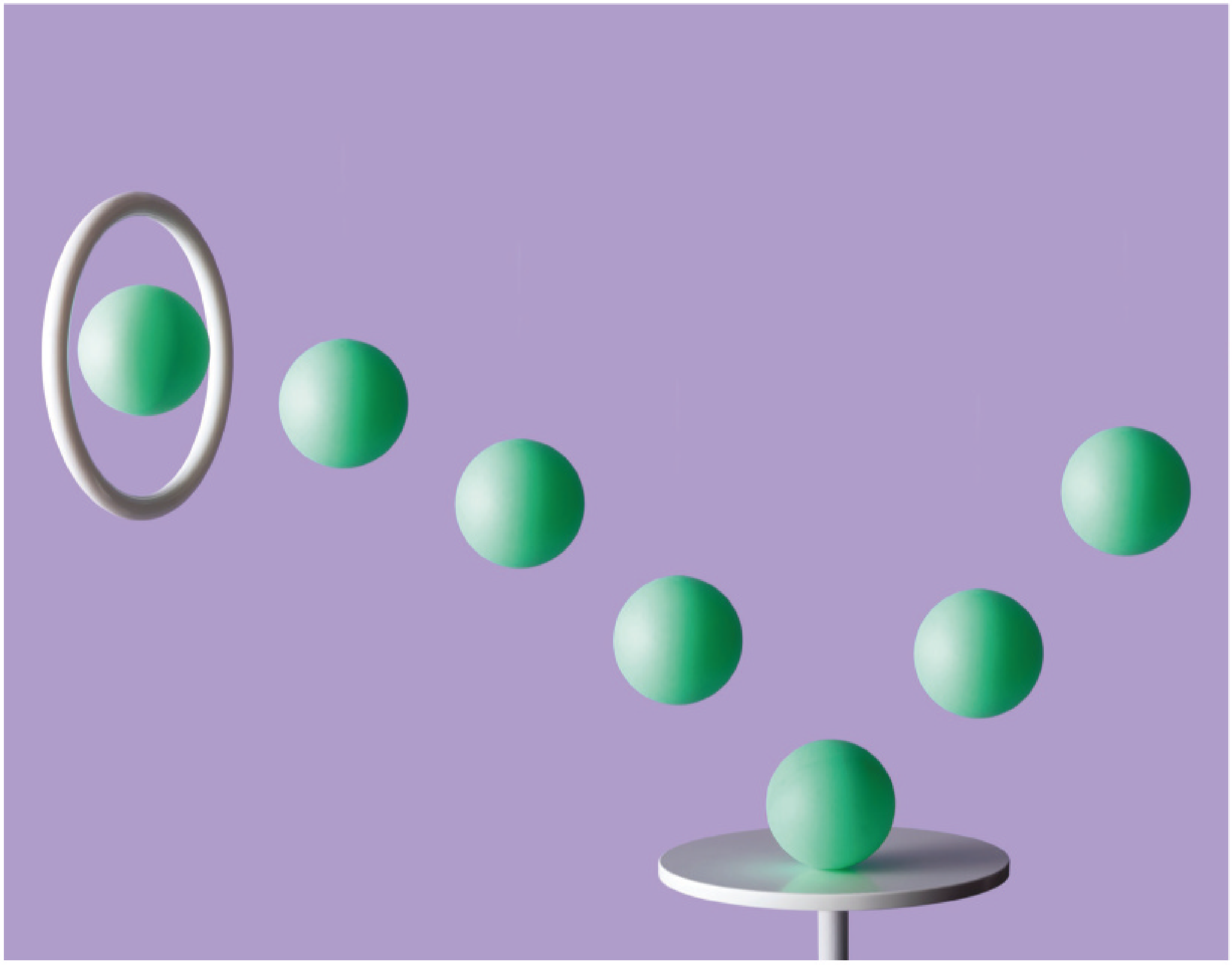


Structure Your Presentation Like a Story

by Nancy Duarte

AFTER STUDYING hundreds of speeches, I've found that the most effective presenters use the same techniques as great storytellers: By reminding people of the status quo and then revealing the path to a better way, they set up a conflict that needs to be resolved.

That tension helps them persuade the audience to adopt a new mindset or behave differently—to move from what *is* to what *could be.* And by following Aristotle's three-part story structure (beginning, middle, end), they create a message that's easy to digest, remember, and retell.

See the chart on the next page for how it looks when you chart it out.

And here's how to do it in your own presentations.

Craft the Beginning

Start by describing life as the audience knows it. People should be nodding their heads in recognition because you're articulating what they already understand. This creates a bond between you and them, and opens them up to hear your ideas for change.

After you set that baseline of what is, introduce your vision of what could be. The gap between the two will throw the audience a bit off-balance and jar them out of complacency. For instance:

What is. We fell short of our Q3 financial goals partly because we're understaffed and everyone's spread too thin.

What could be. But what if we could solve the worst of our problems by bringing in a couple of powerhouse clients? Well, we can.

Once you establish that gap, use the rest of the presentation to bridge it.

Develop the Middle

Now that people in your audience realize their world is off-kilter, keep playing up the contrast between what is and what could be.

Let's go back to that Q3 update. Revenues are down, but you want to motivate employees to make up for it. Here's one way you could structure the middle of your presentation:

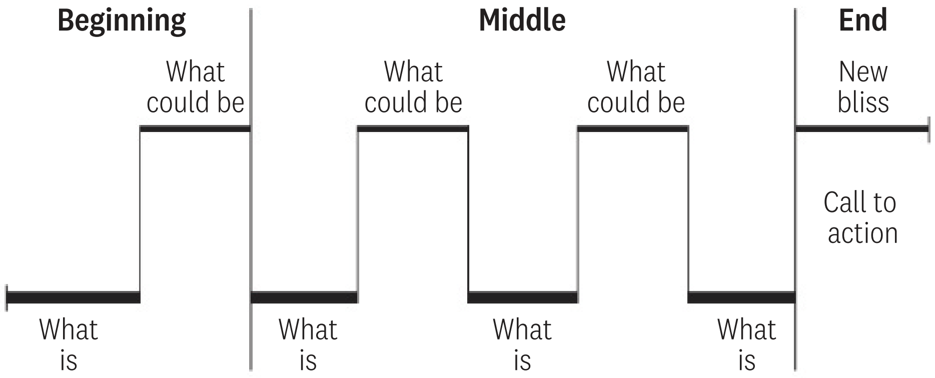
What is. We missed our Q3 forecast by 15%.

What could be. Q4 numbers must be strong for us to pay out bonuses.

What is. We have six new clients on our roster.

PM IMAGES/GETTY IMAGES

Persuasive Story Pattern



What could be. Two of them have the potential to bring in more revenue than our best clients do now.

What is. The new clients will require extensive retooling in manufacturing.

What could be. We'll be bringing in experts from Germany to help.

As you move back and forth between what is and what could be, the audience will find the latter more and more alluring.

Make the Ending Powerful

You don't want to end with a burdensome list of to-dos. Definitely include a call to action—but make it inspiring so that people will want to act. Describe what I call the "new bliss": how much better their world will be when they adopt your ideas.

So if you're wrapping up that Q3 update from above, you might approach it this way:

Call to action. It will take extra work from all departments to make Q4 numbers, but we can deliver products to our important new clients on time and with no errors.

New bliss. I know everyone's running on fumes, but hang in there. This is our chance to pull together like a championship team, and things will get easier if we make this work. The reward if we meet our Q4 targets? Bonuses, plus days off at the end of the year.

By defining future rewards, you show people that getting on board will be worth their effort. It'll meet their needs, not just yours.

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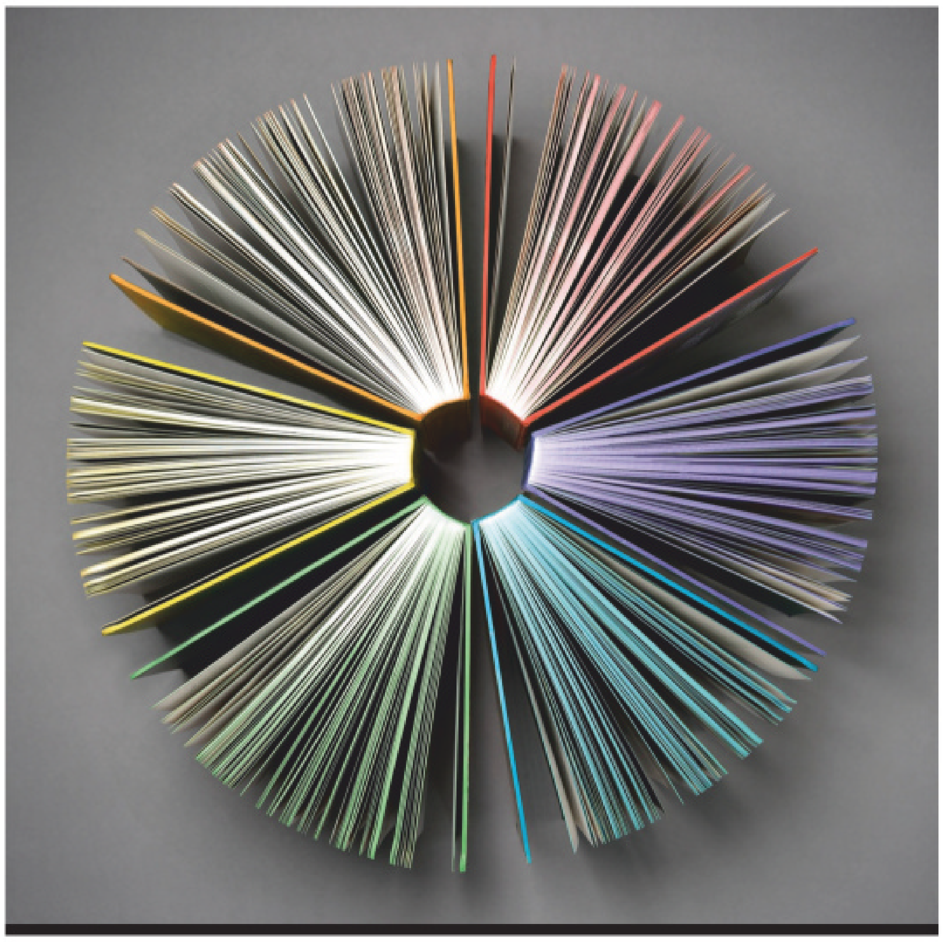
Nancy Duarte is the coauthor, with Patti Sanchez, of *Illuminate: Ignite Change Through Speeches, Stories, Ceremonies, and Symbols* (Portfolio, 2016), as well as the author of the *HBR Guide to Persuasive Presentations* (Harvard Business Review Press, 2012) and two award-winning books on the art of presenting, *Slide:ology* (O'Reilly Media, 2008) and *Resonate* (John Riley and Sons, 2010). Her team at Duarte has created more than 250,000 presentations for its clients and teaches public and corporate workshops on presenting. You can follow her on Twitter: @nancyduarte.



DAVID MALAN/GETTY IMAGES

Ten Kinds of Stories to Tell with Data

by Thomas H. Davenport

FOR ALMOST a decade I have heard that good quantitative analysts can "tell a story with data." Narrative—along with visual analytics—is an important way to communicate analytical results to nonanalytical people. Very few people would question the value of such stories, but just knowing that they work is not much help to anyone trying to master the art of analytical storytelling. A framework for understanding the different types of stories that data and analytics can tell is needed. If you don't know what kind of story you want to tell, you probably won't tell a good one.

This insight came in an interview several years ago with Joe Megibow, a leading analytics practitioner who was head of web analytics at Expedia and senior vice president of omnichannel e-commerce at American Eagle. We simultaneously realized that there are several different types of analytical stories and that it might be useful to create a typology of them. I later created what may be the first typology of analytical stories in my book (with Jinho Kim) *Keeping Up with the Quants: Your Guide to Understanding and Using Analytics* (Harvard Business Review, 2013), and since its publication, I've refined the typology further. Practically speaking, four key dimensions determine the type of story you can tell with data and analytics.

Time. Analytical stories can be about the past, present, or future. The most common type of analytical story is about the past—it's a *reporting* story using descriptive analytics to tell what happened last week, month, quarter, or year. (Most visual analytics stories are this type.) They're not the most valuable form of story, but it's undeniably useful to know what happened.

Stories about the present usually include some form of survey—an analysis of what people or objects are currently up to. It may actually involve survey research—asking people what they think about something. In some cases survey analysis involves a statistical model of what factors drive others. These are *explanatory survey* stories. In the book we talk about social science surveys, surveys of cable TV viewers, and surveys of bombers in World War II.

Stories about the future are *prediction* stories; they use, of course, predictive analytics. They use data from the past to create a statistical model, which is then used to predict the future. Quants create prediction stories all the time—about what customers will probably buy, about how likely it is for an event to happen, about future economic conditions. These types of prediction stories always involve assumptions (notably that the future will be like the past in some key respects) and probabilities. The good news is that we can specify the likelihood that the story will be true.

Focus. Are you trying to tell a *what* story, a *why* story, or a *how-to-address-the-issue* story? *What* stories are like reporting stories—they simply tell what happened. *Why* stories go into the underlying factors that caused the outcome. *How-to-address-the-issue* stories explore various ways to improve the situation identified in the what and the why stories. A really complete story may have all these focus elements. P&G has made considerable progress in quickly getting agreement on the what story, and then spending more time and energy on the why and how topics. Having all parties involved in telling the story working off the same data is key.

Four key dimensions determine the type of story you can tell with data and analytics.

Depth. There is also a depth dimension to analytical stories. When I spoke with Megibow, then at Expedia, he said that many of their stories were *"CSI"* projects—relatively small, ad hoc investigations to find out why something suboptimal was happening. One of his favorite examples involved discovering why some Irish customers were dropping online transactions when they got to the postal code input form. It turned out that some rural Irish locations don't have postal codes. Just like on *CSI*—story solved in a short time.

The alternative I call *eureka* stories, which involve long, analytically driven searches for a solution to a complex problem. When you solve it, you want to yell, "Eureka!" My primary example in the book involved discovering the right way to refer and price potential buyers to real estate agents at Zillow. The project was core to the company's business model and was worth a long story; after a few false starts and the use of several different analytical methods, the company got it right. These types of stories are typically long, important, and expensive, so getting stakeholder buy-in is critical if you plan to reach the end of them.

Methods. Finally, there are different types of stories based on the analytical method used. Are you trying to tell, for example, a *correlation* story, in which the relationships among variables rose or fell at the same time, or a *causation* story, in which you'll argue that one variable caused the other? In most cases, doing some sort of controlled experiment is really the only way to establish causation. People—particularly those in the media—tell bad stories all the time because they confuse causation with correlation.

These 10 kinds of stories are not mutually exclusive. There are certainly other method-based stories, and probably other important dimensions as well. But knowing that there are at least 10 ways to tell analytical stories is much more useful than knowing there is only one. There are other important aspects of analytical storytelling as well, such as that the story told to businesspeople should generally begin with the result and the recommended outcome. You can save the details of how you got there analytically for the footnote of your report or presentation. And terms like "R^2," "coefficient," "logistic," and "heteroskedasticity" should not be appearing in your public story at all!

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Do Your Slides Pass the Glance Test?

by Nancy Duarte

AN AUDIENCE can't listen to your presentation and read detailed, text-heavy slides at the same time (not without missing key parts of your message, anyway). So make sure your slides pass what I call the "glance test": People should be able to comprehend each slide in about three seconds.

Think of your slides as billboards. When people drive, they only briefly take their eyes off their main focus—the road—to process billboard information. Similarly, your audience should focus intently on what you're saying, looking only briefly at your slides as you display them.

Keep It Simple

Research shows that people learn more effectively from multimedia messages when they're stripped of extraneous words, graphics, animation, and sounds. A lot of extras actually take away meaning because they become a distraction. They overtax the audience's cognitive resources.

When adding elements to your slides, have a good reason: Does the audience need to see your logo on each slide to remember what company you work for? Does that blue swoosh add meaning? If not, leave it off. The same goes for text. Keep it short and easy to skim. Scale the type as large as possible so that the people in the back of the room can see it.

It's also important to stick to a consistent visual style in your slide deck. Select one typeface—two at most. Use the same color palette throughout (limit yourself to three complementary colors, plus a couple of neutral shades, like gray and pale blue). Photos should be taken by the same photographer or look as if they are. Illustrations should be done in the same style.

Consider the "before" slide on the next page. It fails the glance test because it's packed with text. It's functioning like a teleprompter, which may help you remember what to cover but won't make it easier for the audience to digest the information.

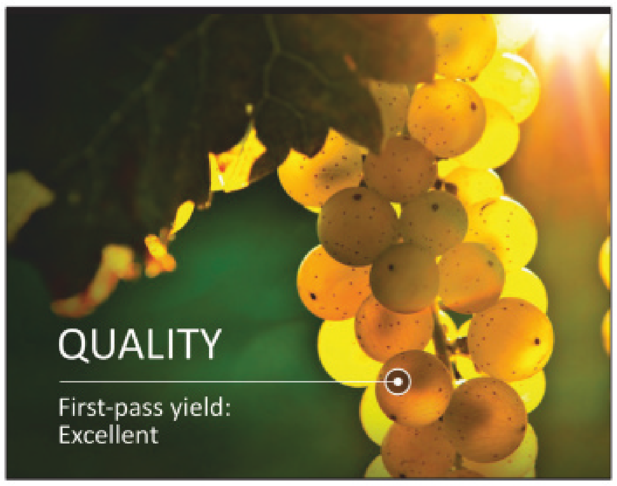
Instead, streamline the text and incorporate simple visual elements (and save teleprompter text for the "notes" field, which the audience can't see). You'll reinforce your message and make it easier for people to get what you're saying. (See the "after" slide on the next page.)

Arrange Slide Elements with Care

To help people process your visuals more quickly, think like a designer when you arrange slide elements. These five design principles will help you simplify your slides so that they'll pass the glance test:

Flow. You can direct people's eyes to certain areas of a slide to emphasize important points. In the example below, for example, your eye takes in the cluster of grapes, then moves to the

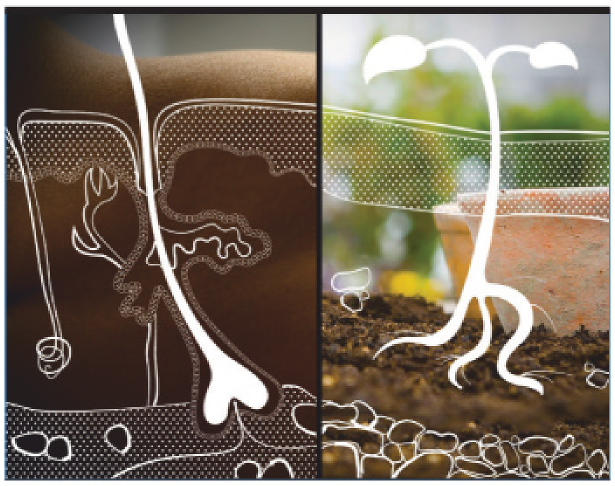
Flow



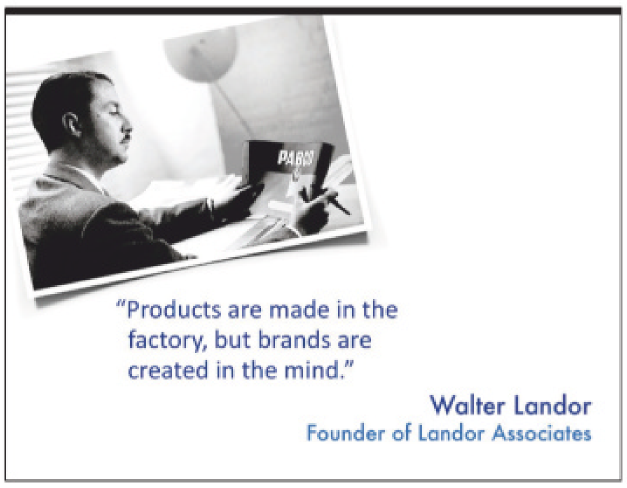
QUALITY

First-pass yield:
Excellent

Contrast



White Space

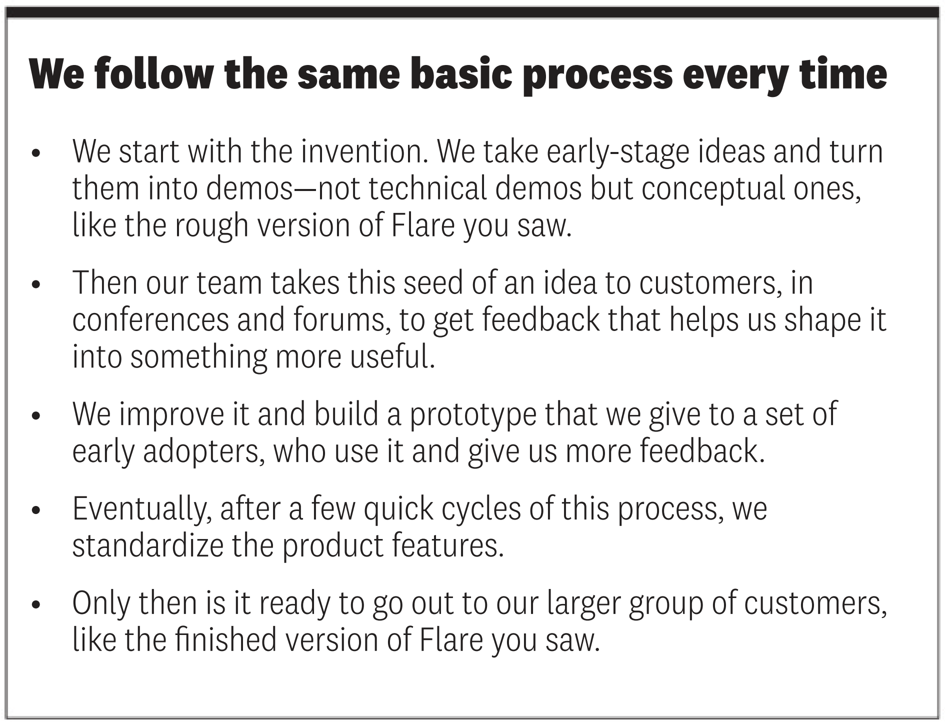


"Products are made in the factory, but brands are created in the mind."

Walter Landor
Founder of Landor Associates

ZARGON DESIGN/GETTY IMAGES

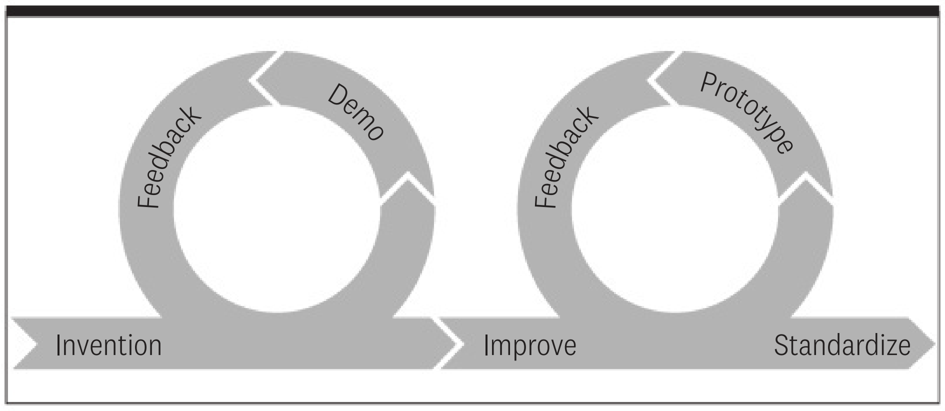
Before



We follow the same basic process every time

- We start with the invention. We take early-stage ideas and turn them into demos—not technical demos but conceptual ones, like the rough version of Flare you saw.
- Then our team takes this seed of an idea to customers, in conferences and forums, to get feedback that helps us shape it into something more useful.
- We improve it and build a prototype that we give to a set of early adopters, who use it and give us more feedback.
- Eventually, after a few quick cycles of this process, we standardize the product features.
- Only then is it ready to go out to our larger group of customers, like the finished version of Flare you saw.

After



message about quality, and then focuses on one beautiful grape from the "yield."

Contrast. Our eyes are drawn to things that stand out, so designers use contrast to focus attention. Create contrast through your elements' size, shape, color, and proximity. In the example on the previous page, a presenter compared cross-sections of skin and soil to show that tending to both requires an understanding of the microbiological activity beneath the surface. The blurred backgrounds set off the stark white illustrations for quick visual processing.

White space. White space is the open space surrounding items of interest. Presenters are often tempted to fill it up with additional content that competes for attention. But including a healthy amount of white space sharpens viewers' focus by isolating elements. In the example on the previous page, if we had paired the text with a larger or more detailed image, your eye wouldn't know where to begin, and the quote would have lost its power.

Hierarchy. A clear visual hierarchy allows viewers to quickly ascertain a slide's most important elements. (See the example below.)

Unity. Slides with visual unity look as though the same person created them and make your message feel cohesive. You can achieve this through consistent type styles, color, image treatment, and element placement throughout the slide deck. Below are a pair of slides to illustrate.

Presentation software gives us many shiny, seductive elements to work with. But there's beauty and clarity in restraint. Use simple visuals that support your message, and you'll free people up to really hear—and adopt—your ideas.

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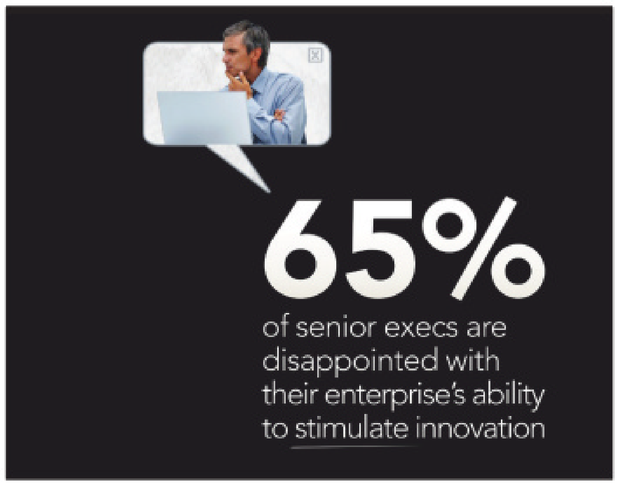
Nancy Duarte is the coauthor, with Patti Sanchez, of *Illuminate: Ignite Change Through Speeches, Stories, Ceremonies, and Symbols* (Portfolio, 2016), as well as the author of the *HBR Guide to Persuasive Presentations* (Harvard Business Review Press, 2012) and two award-winning books on the art of presenting, *Slide:ology* (O'Reilly Media, 2008) and *Resonate* (John Riley and Sons, 2010). You can follow her on Twitter: @nancyduarte.

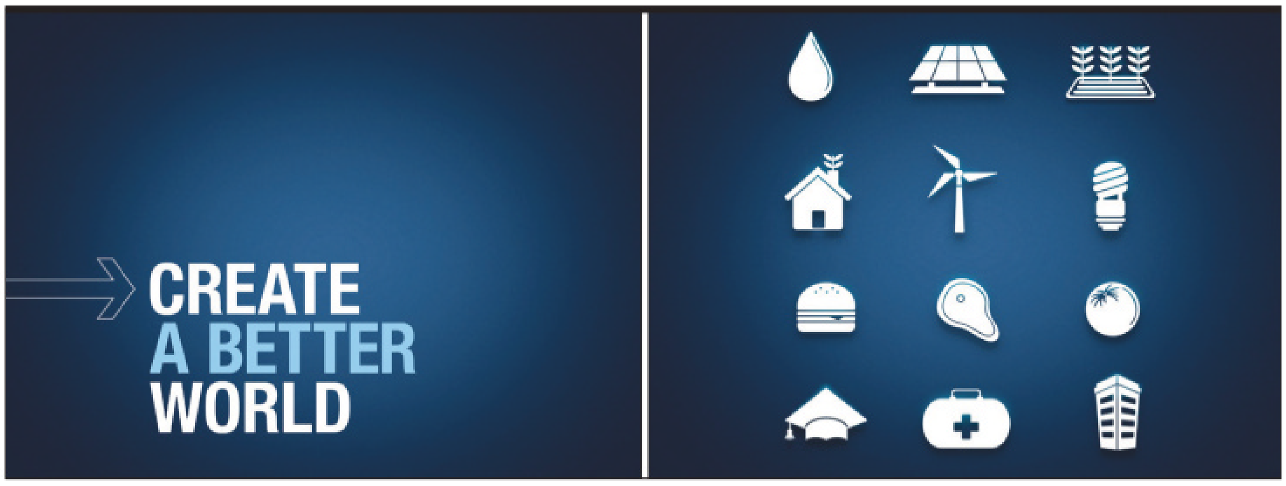
Hierarchy



65%

of senior execs are disappointed with their enterprise's ability to stimulate innovation

Unity



CREATE
A BETTER
WORLD

Tailor Your Presentation to Fit the Culture

by Erin Meyer

FOURTEEN YEARS ago I moved from Chicago to Paris. The first time I ran a training session in France, I prepared thoroughly, considering how to give the most persuasive presentation possible. I practiced my points and anticipated questions that might arise.

The day of the session, my actions were guided by the lessons I had learned from many successful years of training in the U.S. I started by getting right to the point, introducing strategies, practical examples, and next steps.

But the group did not seem to be responding as usual, and soon the first hand came up. "How did you get to these conclusions? You are giving us your tools and recommended actions, but I haven't heard enough about how you got here. How many people did you poll? What questions did you ask?" Then another jumped in: "Please explain what methodology you used for analyzing your data and how that led you to come to these findings."

The interruptions seemed out of place, even arrogant. Why, I wondered, did they feel the need to challenge my credibility? The material was practical, actionable, and interesting. Their questions, on the other hand—if I were to spend the necessary time answering them—were so conceptual they were sure to send the group into a deep slumber. So I assured them that the methodology behind the recommendations was sound and based on careful research, which I would be happy to discuss with them during a break. I then moved back to my conclusions, tools, and practical examples. Let's just say things got worse from there.

The stone wall I had run into was "principles-first reasoning" (sometimes called deductive reasoning), which derives conclusions or facts from general principles or concepts. People from principles-first cultures, such as France, Spain, Germany, and Russia (to name just a few), most often seek to understand the "why" behind proposals or requests before they move to action.

But as an American, I had been immersed throughout my life in "applications-first reasoning" (sometimes called inductive reasoning), in which general conclusions are reached on the basis of a pattern of factual observations from the real world. Applications-first cultures tend to focus less on the "why" and more on the "how." Later, as I began to understand the differences between one culture and another in how to influence other people, I heard many examples of the way the typical American presentation style is viewed from a European perspective.

Jens Hupert, a German living in the U.S. for many years, explained his opposite experience during an interview. "In the U.S., when giving a talk to my American colleagues, I would start my presentation by laying the foundation for my conclusions, just like I had learned in Germany; setting the parameters; outlining my data and my methodology; and explaining my argument." Hupert was taken aback when his American boss told him, "In your next presentation, get right to the point. You lost their attention before you got to the impor-

MANLEY099/GETTY IMAGES

tant part." In Hupert's mind, "You cannot come to a conclusion without first defining the parameters."

Most people are capable of practicing both principles-first and applications-first reasoning, but your habitual pattern of reasoning is heavily influenced by the kind of thinking emphasized in your culture's education structure.

Different cultures have different systems for learning, in part because of the philosophers who influenced the approach to intellectual life in general. Although Aristotle, a Greek, is credited with articulating the applications-first thinking, it was British thinkers, including Roger Bacon in the 13th century and Francis Bacon in the 16th century, who popularized these methodologies. General conclusions are reached on the basis of a pattern of actual observations in the real world.

For example, if you travel to my hometown in Minnesota in January and you observe during every visit that the temperature is considerably below zero, you will conclude that Minnesota winters are cold. You observe data from the real world, and you draw broader conclusions on the basis of these empirical observations. Francis Bacon was British, but later Americans with their pioneer mentality came to be even more applications-first than the British.

By contrast, philosophy on the European continent has been largely driven by principles-first approaches. In the 17th century, Frenchman René Descartes spelled out a method of principles-first reasoning in which the scientist first formulates a hypothesis and then seeks evidence to prove or disprove it.

For example, you may start with a general principle like "all men are mortal." Then move to "Justin Bieber is a man." And that leads you to conclude that "Justin Bieber will eventually die." One starts with the general principle and from that moves to a practical conclusion. In the 19th century, the German philosopher Friedrich Hegel introduced the dialectic model of deduction, which reigns supreme in schools in Latin and Germanic countries. The Hegelian dialectic begins with a thesis, or foundational argument; this is opposed by an antithesis, or conflicting argument; and the two are then reconciled in a synthesis.

What you say is important, but how you say it can make all the difference.

No matter which type of country you were raised in, and which cultures you are working with, it helps to be able to adapt your style according to your audience. Here are a few tips to guide your preparation when working internationally.

When working with applications-first people:

Presentations. Make your arguments effective by getting right to the point. Stick to concrete examples, tools, and next steps. Spend relatively little time building up the theory or concept behind your arguments. You'll need less time for conceptual debate.

Persuading others. Provide practical examples of how it worked elsewhere.

Providing instructions. Focus on the "how" more than the "why."

When working with principles-first people:

Presentations. Make your argument effective by explaining and validating the concept underlying your reasoning before coming to conclusions and examples. Leave enough time for challenge and debate of the underlying concepts. Training sessions may take longer.

Persuading others. Provide background principles and welcome debate.

Providing instructions. Explain why, not just how.

These days, I give a lot of presentations to groups across Europe and the Americas. I do my best to adapt to my audience, instead of thinking that the whole world thinks like me.

If I'm presenting to a group of New Yorkers, I'll spend only a moment talking about the research behind the tool. But if I'm in Moscow, I'll carefully set the stage, laying out the parameters for my arguments and engaging in debate before arriving at conclusions. If I fail to do this, they will probably think, "Does this woman think that we are stupid? That we will just swallow anything?"

When you hope to engage, when you hope to inform and persuade and convince, what you say is important, but how you say it, how you structure your message, can make all the difference—to the Americans, to the French, to everyone.

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How to Give a Webinar Presentation

by Dorie Clark

AS MORE and more companies cultivate a global workforce and international client base, it's increasingly necessary to present remotely. For years, teleconferencing was the best option, but in the past five years internet speeds and web-conferencing technologies have become sufficiently robust to support a shift to live video streaming. But presenting in a webinar—when you often don't have access to visual cues about how the audience is responding—can sometimes feel disconcerting or awkward.

While promoting my books, delivering client trainings, and teaching executive education programs, I've conducted several hundred webinars over the past few years. I've found the following strategies to be most effective in engaging executive audiences.

Make use of the camera. It's shocking to me how many professionals still consider it acceptable to host webinars with no video, merely providing voice-over as they click through a series of slides. At the dawn of the webinar era, there were legitimate bandwidth concerns; you sometimes avoided using video so that you wouldn't overtax the system and cause it to freeze (and that's still a concern in some situations).

But most of the time, the internet quality should be just fine. And just as television flourished only when its creators stopped thinking of it as "radio with pictures," it's essential for professionals steeped in teleconferencing to realize that successful webinars must make use of the inherent strengths and possibilities of the medium—namely video. Many professionals don't like looking at themselves on camera, but that's not a valid excuse when you consider how much more engaged listeners are when watching a real person talk to them, rather than a disembodied voice. It may feel uncomfortable to present in the absence of audience feedback, but one popular trick is to imagine a good friend of yours "on the other end of the line" and pretend you're presenting to that person.

If you're using the camera, be mindful of visual aesthetics. We've all watched colleagues whose eyes were permanently skewed to one side because of the placement of their camera or whose laptop lens gave us a view of their chin and the ceiling. If you're going to be presenting online, it's essential to plan your visuals carefully. Specifically, adjust your camera so that it's giving a straight-on view of your face (even if that means propping your laptop up on several books). Test it out with a practice session to see how your chosen backdrop will appear to participants.

For instance, you'll probably want to avoid presenting in front of a window, because the light coming in from behind may render you almost too dark to see. Similarly, make sure the backdrop is professional, such as a bookcase or diplomas or a tasteful piece of art. One participant in my Recognized Expert course purchased a brightly colored abstract painting because he knew it would provide a memorable visual anytime he was interviewed or conducted a webinar. As with any television appearance, it's best to avoid busy patterns or dangly jewelry, which can distract viewers.

Rehearse the mechanics of the webinar software you're using. My clients or universities expect me to use their preferred software; I can count at least seven types I've had to employ. The fundamentals of each platform are similar, of course, but the particulars are just different enough that it's worth a brief run-through, including how to toggle between slides and screen sharing, mute or unmute participants (it's a good idea to mute everyone upon entry to avoid random blasts of noise), access questions or comments, and run instant polls.

Make sure you can maintain eye contact with the camera so that you appear to be looking viewers in the eye. Some platforms display video images in one corner by default; if so, your eyes may drift over there, making you appear to be staring off to one side for no reason.

DAVID ARKY/GETTY IMAGES

Guard against this by familiarizing yourself with the platform and adjusting the default settings as needed.

Decide in advance how you'll handle audience participation. Depending on the number of attendees, you may ask them to "raise their hand" if they have a question, type their questions into the comment box, or use a separate Q and A feature. Whatever you decide, make sure you're explicit at the beginning of the webinar and remind people periodically throughout to avoid frustration or confusion.

> **If you're going to be presenting online, it's essential to plan your visuals carefully.**

Some participants may need time to formulate their questions, especially if they're writing them down, so give several minutes' warning before you dive into the Q and A. Otherwise, you may encounter a few awkward moments of silence when you ask for questions and people are still busy typing. If the number of attendees is large enough (implying that there will be a heavy stream of comments), you may want to have an assistant on hand who can help you dig through questions and identify the most promising ones so that you don't have to multitask.

In the corporate world, professionals are increasingly asked to present via webinar. (In fact, how to do it effectively is one of the most common questions I receive during the executive communication programs I teach for Duke University's Fuqua School of Business.) The financial and time-saving benefits of online presentations are obvious, so this trend will only continue to grow. By mastering these techniques and enhancing your webinar presentation skills, you'll make yourself a more persuasive and effective leader.

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MORSA IMAGES/GETTY IMAGES

How to Present to a Small Audience

by JD Schramm

IT'S EASY to associate delivering presentations with standing in front of an audience and gesturing toward projected slides. However, many meetings or pitches involve fewer than 10 participants in a room, where everyone remains seated and walks through the same slide deck together. This is quite a different scenario with greater constraints on the presenter and fewer tools to engage the audience. But thoughtful planning and awareness of nonverbal cues can make these "nonpresentations" successful.

When preparing for a seated presentation, certain tools like a lectern, projector, or microphone may not be readily available, as they might if you were presenting in front of the room. Shift your focus by asking yourself these six questions:

How do you prepare your printed deck? It is important to work from the same printed deck (with the same page numbers) as the audience. When you assemble your deck, use a limited number of handwritten notes (possibly even in light pencil) so that you don't appear overly reliant on them. One colleague shared that when she had forgotten her own deck, the pitch went particularly well. She had more of a conversation when she wasn't bound to her script. If you can't project your slides, bring a set with you on a USB stick or e-mail a PDF to yourself as a backup.

How do you prepare the deck for your audience? Make it easy for people to follow what you're saying by guiding them directly to each slide. Use highlights or sticky notes to emphasize important sections. Or try purposefully leaving something blank that you wish to have the audience fill in. My first sales job was in grad school selling advertising on a desk blotter that was given to college students. My mentor showed me that if I provided a "mini mock-up" of the calendar and quoted the prices to prospective advertisers, most of them would write down the prices as I spoke. When they later looked back at the document, with their own handwriting on it, it formed a more lasting impression.

What else should you bring with you? Since typically every member of the audience will have their own copy of the deck, I try to bring one item that everybody will look at together for at least a portion of the presentation. One group of executives I trained from Rabobank in the Netherlands had to deliver an update to senior leaders on their three-week fact-finding trip in California. Rather than print a small map of the state for each person's deck, they instead unfolded a large AAA road map in the middle of the conference table and marked it up as they went through the presentation, showing the various stops on their trip. Clients of mine who work in architecture or real estate development often bring a floor plan and several sheets of clear acetate when reviewing building or site plans so that the decision makers can sketch what they hope to see in the next iteration.

When should you stand? Nonverbal experts agree that if you can stand while others remain seated, you gain some power. So decide if you can stand for the more formal portion of the pitch and then sit to field questions. Should this prove too awkward or out of the norm, consider standing for only a few moments. Perhaps stand to illustrate something on the whiteboard or flip chart, then remain on your feet for a bit longer as you facilitate comments about what you've just illustrated.

Where should you sit? Seating should not be accidental. If you are the primary presenter, take a position beside or at a corner adjacent to the decision maker. Research shows that if you share a corner or side of the table with the decision maker, it will be easier to reach an agreement. Conversely, the most adversarial position (think of a chess game) is directly opposite someone. Try to sit where you can maximize eye contact. Sitting near the end of a long conference table lets you easily see the majority of the people in the room (and avoids the tennis-match position where you must turn your head whenever a person speaks from each end of the table). Choose a seat that minimizes the barriers between you and the audience. In a room where you regularly present, you may readily know which seat provides you the greatest nonverbal advantage; in an unfamiliar space, you have to quickly decide what's the best option. When you are on a team for a presentation, enter the room in a way that allows the person with the greatest speaking role to select her or his seat first.

When should you distribute the pitch book? Delay this if possible. Take some time to talk about the audience's goals and hopes for the meeting before you begin. Once they have their slide decks, you will be competing for their attention. Your initial read of the audience can also help you guide them directly to the parts of your material that matter most to them.

One colleague shared that when she had forgotten her own deck, the pitch went particularly well.

Aside from these six questions, consider the effect of your voice and your gestures. When seated, you still need to breathe fully from the diaphragm and speak with a strong voice. Make sure that those furthest from you can clearly hear you. Being seated allows for a more conversational and informal tone, but don't become too relaxed, or you may lose your edge as an authority. Be sure both feet are firmly planted on the floor with your weight evenly distributed. Lean just slightly forward when you are speaking so that your audience sees your engagement with them. Some experts suggest relaxing this slightly when taking questions: Sink back into the chair a bit so that you appear approachable during the Q and A. Make eye contact with each person in the room and sustain it for four to seven seconds per person, or longer if there are fewer people. Men and women face different obstacles nonverbally, as Amy Cuddy shared in her 2012 TED Talk. Knowing our personal predisposition in terms of space use, gestures, and nonverbal communication can maximize your nonverbal power.

Ultimately, it comes down to being thoughtful and strategic. When communicating from a seated position, success depends on your relationship with the audience and how well you can engage them within certain constraints. If you think about it, we all present much more often than we realize. We need to be conscious of how we can deliver our best, even when we're sitting down.

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JD Schramm teaches communication at Stanford's Graduate School of Business, where he created and leads the Mastery in Communication Initiative.

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The Necessary Art of Persuasion

The language of leadership is misunderstood, underutilized—and more essential than ever. by Jay A. Conger

IF THERE EVER WAS A TIME for businesspeople to learn the fine art of persuasion, it is now. Gone are the command-and-control days of executives managing by decree. Today businesses are run largely by cross-functional teams of peers and populated by baby boomers and their Generation X offspring, who show little tolerance for unquestioned authority. Electronic communication and globalization have further eroded the traditional hierarchy, as ideas and people flow more freely than ever around organizations and as decisions get made closer to the markets. These fundamental changes, more than a decade in the making but now firmly part of the economic landscape, essentially come down to this: work today gets done in an environment where people don't just ask What should I do? but Why should I do it?

To answer this why question effectively is to persuade. Yet many businesspeople misunderstand persuasion, and more still underutilize it. The reason? Persuasion is widely perceived as a skill reserved for selling products and closing deals. It is also commonly seen as just another form of manipulation—devious and to be avoided. Certainly, persuasion can be used in selling and deal-clinching situations, and it can be misused to manipulate people. But exercised constructively and to its full potential, persuasion supersedes sales and is quite the opposite of deception. Effective persuasion becomes a negotiating and learning process through which a persuader leads

Originally published in
May–June 1998

ILLUSTRATION BY RYAN GARCIA

TWELVE YEARS OF WATCHING AND LISTENING

The ideas behind this article spring from three streams of research.

For the last 12 years as both an academic and as a consultant, I have been studying 23 senior business leaders who have shown themselves to be effective change agents. Specifically, I have investigated how these individuals use language to motivate their employees, articulate vision and strategy, and mobilize their organizations to adapt to challenging business environments.

Four years ago, I started a second stream of research exploring the capabilities and characteristics of successful cross-functional team leaders. The core of my database comprised interviews with and observations of 18 individuals working in a range of U.S. and Canadian companies. These were not senior leaders as in my earlier studies but low- and middle-level managers. Along with interviewing the colleagues of these people, I also compared their skills with those of other team leaders—in particular, with the leaders of less successful cross-functional teams engaged in similar initiatives within the same companies. Again, my focus was on language, but I also studied the influence of interpersonal skills.

The similarities in the persuasion skills possessed by both the change-agent leaders and effective team leaders prompted me to explore the academic literature on persuasion and rhetoric, as well as on the art of gospel preaching. Meanwhile, to learn how most managers approach the persuasion process, I observed several dozen managers in company meetings, and I employed simulations in company executive-education programs where groups of managers had to persuade one another on hypothetical business objectives. Finally, I selected a group of 14 managers known for their outstanding abilities in constructive persuasion. For several months, I interviewed them and their colleagues and observed them in actual work situations.

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colleagues to a problem's shared solution. Persuasion does indeed involve moving people to a position they don't currently hold, but not by begging or cajoling. Instead, it involves careful preparation, the proper framing of arguments, the presentation of vivid supporting evidence, and the effort to find the correct emotional match with your audience.

Effective persuasion is a difficult and time-consuming proposition, but it may also be more powerful than the command-and-control managerial model it succeeds. As AlliedSignal's CEO Lawrence Bossidy said recently, "The day when you could yell and scream and beat people into good performance is over. Today you have to appeal to them by helping them see how they can get from here to there, by establishing some credibility, and by giving them some reason and help to get there. Do all those things, and they'll knock down doors." In essence, he is describing persuasion—now more than ever, the language of business leadership.

Think for a moment of your definition of persuasion. If you are like most businesspeople I have encountered (see the insert "Twelve Years of Watching and Listening"), you see persuasion as a relatively straightforward process. First, you strongly state your position. Second, you outline the supporting arguments, followed by a highly assertive, data-based exposition. Finally, you enter the deal-making stage and work toward a "close." In other words, you use logic, persistence, and personal enthusiasm to get others to buy a good idea. The reality is that following this process is one surefire way to fail at persuasion. (See the insert "Four Ways Not to Persuade.")

What, then, constitutes effective persuasion? If persuasion is a learning and negotiating process, then in the most general terms it involves phases of discovery, preparation, and dialogue. Getting ready to persuade colleagues can take weeks or months of planning as you learn about your audience and the position you intend to argue. Before they even start to talk, effective persuaders have considered their positions from every angle. What investments in time and money will my position require from others? Is my supporting evidence weak in any way? Are there alternative positions I need to examine?

Dialogue happens before and during the persuasion process. Before the process begins, effective persuaders use dialogue to learn more about their audience's opinions, concerns, and perspectives.

During the process, dialogue continues to be a form of learning, but it is also the beginning of the negotiation stage. You invite people to discuss, even debate, the merits of your position, and then to offer honest feedback and suggest alternative solutions. That may sound like a slow way to achieve your goal, but effective persuasion is about testing and revising ideas in concert with your colleagues' concerns and needs. In fact, the best persuaders not only listen to others but also incorporate their perspectives into a shared solution.

Persuasion, in other words, often involves—indeed, demands—compromise. Perhaps that is why the most effective persuaders seem to share a common trait: they are open-minded, never dogmatic. They enter the persuasion process prepared to adjust their viewpoints and incorporate others' ideas. That approach to persuasion is, interestingly, highly persuasive in itself. When colleagues see that a persuader is eager to hear their views and willing to make changes in response to their needs and concerns, they respond very positively. They trust the persuader more and listen more attentively. They don't fear being bowled over or manipulated. They see the persuader as flexible and are thus more willing to make sacrifices themselves. Because that is such a powerful dynamic, good persuaders often enter the persuasion process with judicious compromises already prepared.

Four Essential Steps

Effective persuasion involves four distinct and essential steps. First, effective persuaders establish credibility. Second, they frame their goals in a way that identifies common ground with those they intend to persuade. Third, they reinforce their positions using vivid language and compelling evidence. And fourth, they connect emotionally with their audience. As one of the most effective executives in our research commented, "The most valuable lesson I've learned about persuasion over the years is that there's just as much strategy in how you present your position as in the position itself. In fact, I'd say the strategy of presentation is the more critical."

Establish credibility. The first hurdle persuaders must overcome is their own credibility. A persuader can't advocate a new or contrarian position without having people wonder, Can we trust this individual's perspectives and opinions? Such a reaction is understandable. After all, allowing oneself to be persuaded is risky, because any new initiative demands a commitment of time and resources. Yet even though persuaders must have high credibility, our research strongly suggests that most managers overestimate their own credibility—considerably.

In the workplace, credibility grows out of two sources: expertise and relationships. People are considered to have high levels of expertise if they have a history of sound judgment or have proven themselves knowledgeable and well informed about their proposals. For example, in proposing a new product idea, an effective persuader would need to be perceived as possessing a thorough understanding of the product—its specifications, target markets, customers, and competing products. A history of prior successes would further strengthen the persuader's perceived expertise. One extremely successful executive in our research had a track record of 14 years of devising highly effective advertising campaigns. Not surprisingly, he had an easy time winning colleagues over to his position. Another manager had a track record of seven successful new-product launches in a period of five years. He, too, had an advantage when it came to persuading his colleagues to support his next new idea.

On the relationship side, people with high credibility have demonstrated—again, usually over time—that they can be trusted to listen and to work in the best interests of others. They have also consistently shown strong emotional character and integrity; that is, they are not known for mood

Research strongly suggests that most managers are in the habit of overestimating their own credibility—often considerably.

Idea in Brief

Today, employees don't just ask, "What should I do?" They also ask, "Why should I do it?" This is where persuasion comes into play. It's often perceived as a skill only for sales and deal closing—just another form of manipulation. But persuasion is much more than a selling technique, and it represents the opposite of deception. Effective persuasion is a learning and negotiating process for leading your colleagues to a **shared solution** to a problem.

FOUR WAYS NOT TO PERSUADE

In my work with managers as a researcher and as a consultant, I have had the unfortunate opportunity to see executives fail miserably at persuasion. Here are the four most common mistakes people make:

1. They attempt to make their case with an up-front, hard sell. I call this the John Wayne approach. Managers strongly state their position at the outset, and then through a process of persistence, logic, and exuberance, they try to push the idea to a close. In reality, setting out a strong position at the start of a persuasion effort gives potential opponents something to grab onto—and fight against. It's far better to present your position with the finesse and reserve of a lion tamer, who engages his "partner" by showing him the legs of a chair. In other words, effective persuaders don't begin the process by giving their colleagues a clear target in which to set their jaws.

2. They resist compromise. Too many managers see compromise as surrender, but it is essential to constructive persuasion. Before people buy into a proposal, they want to see that the persuader is flexible enough to respond to their concerns. Compromises can often lead to better, more sustainable shared solutions.

By not compromising, ineffective persuaders unconsciously send the message that they think persuasion is a one-way street. But persuasion is a process of give-and-take. Kathleen Reardon, a professor of organizational behavior at the University of Southern California, points out that a persuader rarely changes another person's behavior or viewpoint without altering his or her own in the process. To persuade meaningfully, we must not only listen to others but also incorporate their perspectives into our own.

3. They think the secret of persuasion lies in presenting great arguments. In persuading people to change their minds, great arguments matter. No doubt about it. But arguments, per se, are only one part of the equation. Other factors matter just as much, such as the persuader's credibility and his or her ability to create a proper, mutually beneficial frame for a position, connect on the right emotional level with an audience, and communicate through vivid language that makes arguments come alive.

4. They assume persuasion is a one-shot effort. Persuasion is a process, not an event. Rarely, if ever, is it possible to arrive at a shared solution on the first try. More often than not, persuasion involves listening to people, testing a position, developing a new position that reflects input from the group, more testing, incorporating compromises, and then trying again. If this sounds like a slow and difficult process, that's because it is. But the results are worth the effort.

extremes or inconsistent performance. Indeed, people who are known to be honest, steady, and reliable have an edge when going into any persuasion situation. Because their relationships are robust, they are more apt to be given the benefit of the doubt. One effective persuader in our research was considered by colleagues to be remarkably trustworthy and fair; many people confided in her. In addition, she generously shared credit for good ideas and provided staff with exposure to the company's senior executives. This woman had built strong relationships, which meant her staff and peers were always willing to consider seriously what she proposed.

If expertise and relationships determine credibility, it is crucial that you undertake an honest assessment of where you stand on both criteria before beginning to persuade. To do so, first step back and ask yourself the following questions related to expertise: How will others perceive my knowledge about the strategy, product, or change I am proposing? Do I have a track record in this area that others know about and respect? Then, to assess the strength of your relationship credibility, ask yourself, Do those I am hoping to persuade see me as helpful, trustworthy, and supportive? Will they see me as someone in sync with them—emotionally, intellectually, and politically—on issues like this one? Finally, it is important to note that it is not enough to get your own read on these matters. You must also test your answers with colleagues you trust to give you a reality check. Only then will you have a complete picture of your credibility.

In most cases, that exercise helps people discover that they have some measure of weakness, either on the expertise or on the relationship side of credibility. The challenge then becomes to fill in such gaps.

In general, if your area of weakness is on the expertise side, you have several options:

- First, you can learn more about the complexities of your position through either formal or informal education and through conversations with knowledgeable individuals. You might also get more relevant experience on the job by asking, for instance, to be assigned to a team that would increase your insight into particular markets or products.
- Another alternative is to hire someone to bolster your expertise—for example, an industry consultant or a recognized outside expert, such as a professor. Either one may have the knowledge and experience required to support your position effectively. Similarly, you may tap experts within your organization to advocate your position. Their credibility becomes a substitute for your own.
- You can also utilize other outside sources of information to support your position, such as respected business or trade periodicals, books, independently produced reports, and lectures by experts. In our research, one executive from the clothing industry successfully persuaded his company to reposition an entire product line to a more youthful market after bolstering his credibility with articles by a noted demographer in two highly regarded journals and with two independent market-research studies.
- Finally, you may launch pilot projects to demonstrate on a small scale your expertise and the value of your ideas.

As for filling in the relationship gap:

- You should make a concerted effort to meet one-on-one with all the key people you plan to persuade. This is not the time to outline your position but rather to get a range of perspectives on the issue at hand. If you have the time and resources, you should even offer to help these people with issues that concern them.
- Another option is to involve like-minded coworkers who already have strong relationships with your audience. Again, that is a matter of seeking out substitutes on your own behalf.

For an example of how these strategies can be put to work, consider the case of a chief operating officer of a large retail bank, whom we will call Tom Smith. Although he was new to his job, Smith ardently wanted to persuade the senior management team that the company was in serious trouble. He believed that the bank's overhead was excessive and would jeopardize its position as the industry entered a more competitive era. Most of his colleagues, however, did not see the potential seriousness of the situation. Because the bank had been enormously successful in recent years, they believed changes in the industry posed little danger. In addition to being newly appointed, Smith had another problem: his career had been in financial services, and he was considered an outsider in the world of retail banking. Thus he had few personal connections to draw on as he made his case, and he was not perceived to be particularly knowledgeable about marketplace exigencies.

As a first step in establishing credibility, Smith hired an external consultant with respected credentials in the industry who showed that the bank was indeed poorly positioned to be a low-cost producer. In a series of interactive presentations to the bank's top-level management, the consultant revealed how the company's leading competitors were taking aggressive actions to contain operating costs. He made it clear from these presentations that not cutting costs would soon cause the bank to fall drastically behind the competition. These findings were then distributed in written reports that circulated throughout the bank.

Next, Smith determined that the bank's branch managers were critical to his campaign. The buy-in of those respected and informed individuals would signal to others in the company that his concerns were valid. Moreover, Smith looked to the branch managers because he believed that they could increase his expertise about marketplace trends and also help him test his own assumptions. Thus, for the next three months, he visited every branch in his region of Ontario, Canada—135 in all. During each visit, he spent time with branch managers, listening to their perceptions of the bank's strengths and weaknesses. He learned firsthand about the competition's initiatives and customer trends, and he solicited ideas for improving the bank's services and minimizing costs. By the time he was through, Smith had a broad perspective on the bank's future that few people even in senior management possessed. And he had built dozens of relationships in the process.

Finally, Smith launched some small but highly visible initiatives to demonstrate his expertise and capabilities. For example, he was concerned about slow growth in the company's mortgage business and the loan officers' resulting slip in morale. So he devised a program in which new mortgage customers would make no payments for the first 90 days. The initiative proved remarkably successful, and in short order Smith appeared to be a far more savvy retail banker than anyone had assumed.

Another example of how to establish credibility comes from Microsoft. In 1990, two product-development managers, Karen Fries and Barry Linnett, came to believe that the market would greatly welcome software that featured a "social interface." They envisioned a package that would employ animated human and animal characters to show users how to go about their computing tasks.

Inside Microsoft, however, employees had immediate concerns about the concept. Software programmers ridiculed the cute characters. Animated characters had been used before only in software for children, making their use in adult environments hard to envision. But Fries and Linnett felt their proposed product had both dynamism and complexity, and they remained convinced that consumers would eagerly buy such programs. They also believed that the home-computer software market—largely untapped at the time and with fewer software standards—would be open to such innovation.

Within the company, Fries had gained quite a bit of relationship credibility. She had started out as a recruiter for the company in 1987 and had worked directly for many of Microsoft's senior executives. They trusted and liked her. In addition, she had been responsible for hiring the company's product and program managers. As a result, she knew all the senior people at Microsoft and had hired many of the people who would be deciding on her product.

Linnett's strength laid in his expertise. In particular, he knew the technology behind an innovative tutorial program called PC Works. In addition, both Fries and Linnett had managed Publisher, a product with a unique help feature called Wizards, which Microsoft's CEO, Bill Gates, had liked. But those factors were sufficient only to get an initial hearing from Microsoft's senior management. To persuade the organization to move forward, the pair would need to improve perceptions of their expertise. It hurt them that this type of social-interface software had no proven track record of success and that they were both novices with such software. Their challenge became one of finding substitutes for their own expertise.

> A persuader should make a concerted effort to meet one-on-one with all the key people he or she plans to persuade.

Their first step was a wise one. From within Microsoft, they hired respected technical guru Darrin Massena. With Massena, they developed a set of prototypes to demonstrate that they did indeed understand the software's technology and could make it work. They then tested the prototypes in market research, and users responded enthusiastically. Finally, and most important, they enlisted two Stanford University professors, Clifford Nass and Bryon Reeves, both experts in human-computer interaction. In several meetings with Microsoft senior managers and Gates himself, they presented a rigorously compiled and thorough body of research that demonstrated how and why social-interface software was ideally suited to the average computer user. In addition, Fries and Linnett asserted that considerable jumps in computing power would make more realistic cartoon characters an increasingly malleable technology. Their product, they said, was the leading edge of an incipient software revolution. Convinced, Gates approved a full product-development team, and in January 1995, the product called BOB was launched. BOB went on to sell more than half a million copies, and its concept and technology are being used within Microsoft as a platform for developing several internet products.

Credibility is the cornerstone of effective persuading; without it, a persuader won't be given the time of day. In the best-case scenario, people enter into a persuasion situation with some measure of expertise and relationship credibility. But it is important to note that credibility along either lines can be built or bought. Indeed, it must be, or the next steps are an exercise in futility.

Frame for common ground. Even if your credibility is high, your position must still appeal strongly to the people you are trying to persuade. After all, few people will jump on board a train that will bring them to ruin or even mild discomfort. Effective persuaders must be adept at describing their positions in terms that illuminate their advantages. As any parent can tell you, the fastest way to get a child to come along willingly on a trip to the grocery store is to point out that there are lollipops by the cash register. That is not deception. It is just a persuasive way of framing the benefits of taking such a journey. In work situations, persuasive framing is obviously more complex, but the underlying principle is the same. It is a process of identifying shared benefits.

Monica Ruffo, an account executive for an advertising agency, offers a good example of persuasive framing. Her client, a fast-food chain, was instituting a promotional campaign in Canada; menu items such as a hamburger, fries, and cola were to be bundled together and sold at a low price. The strategy made sense to corporate headquarters. Its research showed that consumers thought the company's products were higher priced than the competition's, and the company was anxious to overcome this perception. The franchisees, on the other hand, were still experiencing strong sales and were far more concerned about the short-term impact that the new, low prices would have on their profit margins.

A less experienced persuader would have attempted to rationalize headquarters' perspective to the franchisees—to convince them of its validity. But Ruffo framed the change in pricing to demonstrate its benefits to the franchisees themselves. The new value campaign, she explained, would actually improve franchisees' profits. To back up this point, she drew on several sources. A pilot project in Tennessee, for instance, had demonstrated that under the new pricing scheme, the sales of french fries and drinks—the two most profitable items on the menu—had markedly increased. In addition, the company had rolled out medium-sized meal packages in 80% of its U.S. outlets, and franchisees' sales of fries and drinks had jumped 26%. Citing research from a respected business periodical, Ruffo also showed that when customers raised their estimate of the value they receive from a retail establishment by 10%, the establishment's sales rose by 1%. She had estimated that the new meal plan would increase value perceptions by 100%, with the result that franchisees' sales could be expected to grow 10%.

Ruffo closed her presentation with a letter written many years before by the company's founder to the organization. It was an emotional letter extolling the values of the company and stressing the importance of the franchisees to the company's success. It also highlighted the importance of the company's position as the low-price leader in the industry. The beliefs and values contained in the letter had long been etched in the minds of Ruffo's audience. Hearing them again only confirmed the company's concern for the franchisees and the importance of their winning formula. They also won Ruffo a standing ovation. That day, the franchisees voted unanimously to support the new meal-pricing plan.

The Ruffo case illustrates why—in choosing appropriate positioning—it is critical first to identify your objective's tangible benefits to the people you are trying to persuade. Sometimes that is easy. Mutual benefits exist. In other situations, however, no shared advantages are readily apparent—or meaningful. In these cases, effective persuaders adjust their positions. They know it is impossible to engage people and gain commitment to ideas or plans without highlighting the advantages to all the parties involved.

At the heart of framing is a solid understanding of your audience. Even before starting to persuade, the best persuaders we have encountered closely study the issues that matter to their colleagues. They use conversations, meetings, and other forms of dialogue to collect essential information. They are good at listening. They test their ideas with trusted confidants, and they ask questions of the people they will later be persuading. Those steps help them think through the arguments, the evidence, and the perspectives they will present. Oftentimes, this process causes them to alter or compromise their own plans before they even start persuading. It is through this thoughtful, inquisitive approach they develop frames that appeal to their audience.

Consider the case of a manager who was in charge of process engineering for a jet engine manufacturer. He had redesigned the workflow for routine turbine maintenance for airline clients in a manner that would dramatically shorten the turnaround time for servicing. Before presenting his ideas to the company's president, he consulted a good friend in the company, the vice president of engineering, who knew the president well. This conversation revealed that the president's prime concern would not be speed or efficiency but profitability. To get the president's buy-in, the vice president explained, the new system would have to improve the company's profitability in the short run by lowering operating expenses.

At first this information had the manager stumped. He had planned to focus on efficiency and had even intended to request additional funding to make the process work. But his conversation with the vice president sparked him to change his position. Indeed, he went so far as to change the workflow design itself so that it no longer required new investment but rather drove down costs. He then carefully documented the cost savings and profitability gains that his new plan would produce and presented this revised plan to the president. With his initiative positioned anew, the manager persuaded the president and got the project approved.

Provide evidence. With credibility established and a common frame identified, persuasion becomes a matter of presenting evidence. Ordinary evidence, however, won't do. We have found that the most effective persuaders use language in a particular way. They supplement numerical data with examples, stories, metaphors, and analogies to make their positions come alive. That use of language paints a vivid word picture and, in doing so, lends a compelling and tangible quality to the persuader's point of view.

Think about a typical persuasion situation. The persuader is often advocating a goal, strategy, or initiative with an uncertain outcome. Karen Fries and Barry Linnett, for instance, wanted Microsoft to invest millions of dollars in a software package with chancy technology and unknown market demand. The team could have supported its case solely with market research, financial projections, and the like. But that would have been a mistake, because research shows that most people perceive such reports as not entirely informative. They are too abstract to be completely meaningful or memorable. In essence, the numbers don't make an emotional impact.

By contrast, stories and vivid language do, particularly when they present comparable situations to the one under discussion. A marketing manager trying to persuade senior executives to invest in a new product, for example, might cite examples of similar investments that paid off handsomely. Indeed, we found that people readily draw lessons from such cases. More important, the research shows that listeners absorb information in proportion to its vividness. Thus it is no wonder that Fries and Linnett hit a home run when they presented their case for BOB with the following analogy:

> Imagine you want to cook dinner and you must first go to the supermarket. You have all the flexibility you want—you can cook anything in the world as long as you know how and have the time and desire to do it. When you arrive at the supermarket, you find all these overstuffed aisles with cryptic single-word headings like

> "sundries" and "ethnic food" and "condiments." These are the menus on typical computer interfaces. The question is whether salt is under condiments or ethnic food or near the potato chip section. There are surrounding racks and wall spaces, much as our software interfaces now have support buttons, tool bars, and lines around the perimeters. Now after you have collected everything, you still need to put it all together in the correct order to make a meal. If you're a good cook, your meal will probably be good. If you're a novice, it probably won't be.
>
> We [at Microsoft] have been selling under the supermarket category for years, and we think there is a big opportunity for restaurants. That's what we are trying to do now with BOB: pushing the next step with software that is more like going to a restaurant, so the user doesn't spend all of his time searching for the ingredients. We find and put the ingredients together. You sit down, you get comfortable. We bring you a menu. We do the work, you relax. It's an enjoyable experience. No walking around lost trying to find things, no cooking.

Had Fries and Linnett used a literal description of BOB's advantages, few of their highly computer-literate colleagues at Microsoft would have personally related to the menu-searching frustration that BOB was designed to eliminate. The analogy they selected, however, made BOB's purpose both concrete and memorable.

A master persuader, Mary Kay Ash, the founder of Mary Kay Cosmetics, regularly draws on analogies to illustrate and "sell" the business conduct she values. Consider this speech at the company's annual sales convention:

> Back in the days of the Roman Empire, the legions of the emperor conquered the known world. There was, however, one band of people that the Romans never conquered. Those people were the followers of the great teacher from Bethlehem. Historians have long since discovered that one of the reasons for the sturdiness of this folk was their habit of meeting together weekly. They shared their difficulties, and they stood side by side. Does this remind you of something? The way we stand side by side and share our knowledge and difficulties with each other in our weekly unit meetings? I have so often observed when a director or unit member is confronted with a personal problem that the unit stands together in helping that sister in distress. What a wonderful circle of friendships we have. Perhaps it's one of the greatest fringe benefits of our company.

Through her vivid analogy, Ash links collective support in the company to a courageous period in Christian history. In doing so, she accomplishes several objectives. First, she drives home her belief that collective support is crucial to the success of the organization. Most Mary Kay salespeople are independent operators who face the daily challenges of direct selling. An emotional support system of fellow salespeople is essential to ensure that self-esteem and confidence remain intact in the face of rejection. Next she suggests by her analogy that solidarity against the odds is the best way to stymie powerful oppressors—to wit, the competition. Finally, Ash's choice of analogy imbues a sense of a heroic mission to the work of her sales force.

You probably don't need to invoke the analogy of the Christian struggle to support your position, but effective persuaders are not afraid of unleashing the immense power of language. In fact, they use it to their utmost advantage.

Connect emotionally. In the business world, we like to think that our colleagues use reason to make their decisions, yet if we scratch below the surface we will always find emotions at play. Good persuaders are aware of the primacy of emotions and are responsive to them in two important ways. First, they show their own emotional commitment to the position they are advocating. Such expression is a delicate matter. If you act too emotional, people may doubt your clearheadedness. But you must also show that your commitment to a goal is not just in your mind but in your heart and gut as well. Without this demonstration of feeling, people may wonder if you actually believe in the position you're championing.

Perhaps more important, however, is that effective persuaders have a strong and accurate sense of their audience's emotional state, and they adjust the tone of their arguments accordingly. Sometimes that means coming on strong, with forceful points. Other times, a whisper may be all that is required. The idea is that whatever your position, you match your emotional fervor to your audience's ability to receive the message.

Effective persuaders seem to have a second sense about how their colleagues have interpreted past events in the organization and how they will probably interpret a proposal. The best persuaders in our study would usually canvass key individuals who had a good pulse on the mood and emotional expectations of those about to be persuaded. They would ask those individuals how various proposals might affect colleagues on an emotional level—in essence, testing possible reactions. They were also quite effective at gathering information through informal conversations in the hallways or at lunch. In the end, their aim was to ensure that the emotional appeal behind their persuasion matched what their audience was already feeling or expecting.

To illustrate the importance of emotional matchmaking in persuasion, consider this example. The president of an aeronautics manufacturing company strongly believed that the maintenance costs and turnaround time of the company's U.S. and foreign competitors were so much better than his own company's that it stood to lose customers and profits. He wanted to communicate his fear and his urgent desire for change to his senior managers. So one afternoon, he called them into the boardroom. On an overhead screen was the projected image of a smiling man flying an old-fashioned biplane with his scarf blowing in the wind. The right half of the transparency was covered. When everyone was seated, the president explained that he felt as this pilot did, given the company's recent good fortune. The organization, after all, had just finished its most successful year in history. But then with a deep sigh, he announced that his happiness was quickly vanishing. As the president lifted the remaining portion of the sheet, he revealed an image of the pilot flying directly into a wall. The president then faced his audience and in a heavy voice said, "This is what I see happening to us." He asserted that the company was headed for a crash if people didn't take action fast. He then went on to lecture the group about the steps needed to counter this threat.

The reaction from the group was immediate and negative. Directly after the meeting, managers gathered in small clusters in the hallways to talk about the president's "scare tactics." They resented what they perceived to be the president's overstatement of the case. As the managers saw it, they had exerted enormous effort that year to break the company's records in sales and profitability. They were proud of their achievements. In fact, they had entered the meeting expecting it would be the moment of recognition. But to their absolute surprise, they were scolded.

The president's mistake? First, he should have canvassed a few members of his senior team to ascertain the emotional state of the group. From that, he would have learned that they were in need of thanks and recognition. He should then have held a separate session devoted simply to praising the team's accomplishments. Later, in a second meeting, he could have expressed his own anxieties about the coming year. And rather than blame the team for ignoring the future, he could have calmly described what he saw as emerging threats to the company and then asked his management team to help him develop new initiatives.

Now let us look at someone who found the right emotional match with his audience: Robert Marcell, head of Chrysler's small-car design team. In the early 1990s, Chrysler was eager to produce a new subcompact—indeed, the company had not introduced a new model of this type since 1978. But senior managers at Chrysler did not want to go it alone. They thought an alliance with a foreign manufacturer would improve the car's design and protect Chrysler's cash stores.

Marcell was convinced otherwise. He believed that the company should bring the design and production of a new subcompact in-house. He knew that persuading senior managers would be difficult, but he also had his own team to contend with. Team members had lost their confidence that they would ever again have the opportunity to create a good car. They were also angry that the United States had once again given up its position to foreign competitors when it came to small cars.

It's important for people to understand persuasion for what it is—not convincing and selling but learning and negotiating.

Marcell decided that his persuasion tactics had to be built around emotional themes that would touch his audience. From innumerable conversations around the company, he learned that many people felt as he did—that to surrender the subcompact's design to a foreign manufacturer was to surrender the company's soul and, ultimately, its ability to provide jobs. In addition, he felt deeply that his organization was a talented group hungry for a challenge and an opportunity to restore its self-esteem and pride. He would need to demonstrate his faith in the team's abilities.

Marcell prepared a 15-minute talk built around slides of his hometown, Iron River, a now defunct mining town in Upper Michigan, devastated, in large part, by foreign mining companies. On the screen flashed recent photographs he had taken of his boarded-up high school, the shuttered homes of his childhood friends, the crumbling ruins of the town's ironworks, closed churches, and an abandoned railroad yard. After a description of each of these places, he said the phrase, "We couldn't compete"—like the refrain of a hymn. Marcell's point was that the same outcome awaited Detroit if the production of small cars was not brought back to the United States. Surrender was the enemy, he said, and devastation would follow if the group did not take immediate action.

Marcell ended his slide show on a hopeful note. He spoke of his pride in his design group and then challenged the team to build a "made-in-America" subcompact that would prove that the United States could still compete. The speech, which echoed the exact sentiments of the audience, rekindled the group's fighting spirit. Shortly after the speech, group members began drafting their ideas for a new car.

Marcell then took his slide show to the company's senior management and ultimately to Chrysler chairman Lee Iacocca. As Marcell showed his slides, he could see that Iacocca was touched. Iacocca, after all, was a fighter and a strongly patriotic man himself. In fact, Marcell's approach was not too different from Iacocca's earlier appeal to the United States Congress to save Chrysler. At the end of the show, Marcell stopped and said, "If we dare to be different, we could be the reason the U.S. auto industry survives. We could be the reason our kids and grandkids don't end up working at fast-food chains." Iacocca stayed on for two hours as Marcell explained in greater detail what his team was planning. Afterward, Iacocca changed his mind and gave Marcell's group approval to develop a car, the Neon.

With both groups, Marcell skillfully matched his emotional tenor to that of the group he was addressing. The ideas he conveyed resonated deeply with his largely Midwestern audience. And rather than leave them in a depressed state, he offered them hope, which was more persuasive than promising doom. Again, this played to the strong patriotic sentiments of his American-heartland audience.

No effort to persuade can succeed without emotion, but showing too much emotion can be as unproductive as showing too little. The important point to remember is that you must match your emotions to your audience's.

The Force of Persuasion

The concept of persuasion, like that of power, often confuses and even mystifies businesspeople. It is so complex—and so dangerous when mishandled—that many would rather just avoid it altogether. But like power, persuasion can be a force for enormous good in an organization. It can pull people together, move ideas forward, galvanize change, and forge constructive solutions. To do all that, however, people must understand persuasion for what it is—not convincing and selling but learning and negotiating. Furthermore, it must be seen as an art form that requires commitment and practice, especially as today's business contingencies make persuasion more necessary than ever.

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Change the Way You Persuade

Managers typically use a one-size-fits-all approach when trying to influence their bosses and colleagues. New research shows that's a mistake. Persuasion works best when it's tailored to five distinct decision-making styles.

by Gary A. Williams and Robert B. Miller

IT'S HAPPENED TO YOU BEFORE. You call a meeting to try to convince your boss and peers that your company needs to make an important move—for instance, funding a risky but promising venture. Your argument is impassioned, your logic unassailable, your data bulletproof. Two weeks later, though, you learn that your brilliant proposal has been tabled. What went wrong?

All too often, people make the mistake of focusing too much on the content of their argument and not enough on how they deliver that message. Indeed, far too many decisions go the wrong way because information is presented ineffectively. In our experience, people can vastly improve their chances of having their proposals succeed by determining who the chief decision maker is among the executives they are trying to persuade and then tailoring their arguments to that business leader's decision-making style.

Specifically, we have found that executives typically fall into one of five decision-making categories: *Charismatics* can be initially exuberant about a new idea or proposal but will yield a final decision based on a balanced set of information. *Thinkers* can exhibit contradictory points of view within a single meeting and need to cautiously work through all the options before coming to a decision. *Skeptics* remain highly suspicious of data that doesn't fit with their worldview and make decisions based on their gut feelings. *Followers* make decisions based on how other trusted executives, or they themselves, have made similar decisions in the past. And *controllers* focus on the pure facts and analytics of a decision because of their own fears and uncertainties.

The five styles span a wide range of behaviors and characteristics. Controllers, for instance, have a strong aversion to risk; charismatics tend to seek it out. Despite such differences, people frequently use a one-size-fits-all approach when trying to convince their bosses, peers, and staff. They argue their case to a thinker the same way they would to a skeptic. Instead, managers should tailor their presentations

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to the executives they are trying to persuade, using the right buzzwords to deliver the appropriate information in the most effective sequence and format. After all, Bill Gates does not make decisions in the same way that Larry Ellison does. And knowing that can make a huge difference.

Five Approaches

Executives make it to the senior level largely because they are effective decision makers. Learning mostly from experience, they build a set of criteria that guides them. Each decision is influenced by both reason and emotion, but the weight given to each of these elements during the decision-making process can vary widely depending on the person.

In a two-year project, we studied the decision-making styles of more than 1,600 executives across a wide range of industries. Our work focused on how those people made purchasing decisions, but we contend that the results have broader applicability to decision making in general. We interviewed participants about various facets of their decision-making processes. For instance, how strong was their desire to have others educate them about the issues involved in a particular decision? How willing were they to move beyond the status quo? How much risk were they comfortable with in making the decision? These characteristics and preferences are often set early in a business-person's career and evolve based on experience. In other words, people have a natural tendency toward a certain style of decision making that gets reinforced through successes—or that changes after repeated failures.

Our research should not be confused with standard personality tests and indicators like Myers-Briggs. Our framework is simply a categorization of how people tend to make decisions. Of course, people do not always make decisions in the same way; much depends on the situation they're in. But our research has shown that when it comes to making tough, high-stakes choices that involve many complex considerations and serious consequences, people tend to resort to a single, dominant style. Call it a default mode of decision making.

In this article, we describe each of the five decision-making styles in detail. This information is intended to be neither exhaustive nor definitive, and most executives will exhibit only some of the traits we list. Nevertheless, knowing the general characteristics of the different styles can help you better tailor your presentations and arguments to your audience. Unfortunately, many people fail in this regard. In our experience, more than half of all sales presentations are mismatched to the decision maker's style. Specifically, close to 80% of all sales presentations focus on skeptics and controllers, but those two groups accounted for just 28% of the executives we surveyed.

To investigate the various subtleties of the five decision-making styles, we present the following hypothetical situation. In each of the subsequent sections devoted to explaining the categories, we will use this tale to demonstrate how our fictional protagonist should best argue her case to her CEO.

PERSUASION IN PRACTICE

MaxPro is a leading manufacturer of office equipment, including printers, photocopiers, and fax machines. The company has a centralized structure, with the bulk of its marketing and sales operations located at corporate headquarters. Mary Flood, the executive vice president of sales and marketing, knows she must restructure her operations to become more customer-focused. Specifically, she needs to form major-account teams at the regional level instead of at the corporate level. All national accounts and targeted marketing would be based in one of five regions (Northeast, Southeast, Midwest, Southwest, and West), each run by a different vice president. In Flood's plan, account executives for MaxPro's major customers (clients with revenues over $50 million) would relocate near the headquarters of those companies and would report directly to their respective regional VP. Each region would have its own

In our experience, more than half of all sales presentations are mismatched to the decision maker's style.

marketing team and distribution channels, leaving corporate marketing responsible just for brand development. Flood needs to persuade George Nolan, MaxPro's CEO, to approve these changes.

1. Charismatics

Charismatics (25% of all the executives we interviewed) are easily enthralled by new ideas. They can absorb large amounts of information rapidly, and they tend to process the world visually.

They want to move quickly from the big idea to the specifics—especially those details regarding implementation. Charismatics are often described as enthusiastic, captivating, talkative, dominant, and persistent. They are risk-seeking yet responsible individuals. They are impressed with intelligence and facts and not usually given to self-absorption and compulsiveness. Prominent examples of charismatics include Richard Branson, Lee Iacocca, Herb Kelleher, and Oprah Winfrey. (Note that many of the categorizations of the executives we cite in this article are based on our firsthand observations and experiences with them. Some are based on secondary sources, including media accounts.)

Although charismatics may show great exuberance for a new idea, getting a final commitment from them can be difficult. They've learned from experience—particularly from the bad decisions they've made—to temper their initial enthusiasm with a good dose of reality. They seek out facts to support their emotions, and if such data can't be found, they will quickly lose their enthusiasm for an idea. Furthermore, charismatics prefer arguments that are tied directly to bottom-line results and are particularly keen on proposals that will make their company more competitive. They are rarely convinced by one-sided arguments that lack a strong orientation toward results. At the end of the day, charismatics make their final decisions very methodically, and the decisions are based on balanced information.

When trying to persuade a charismatic, you need to fight the urge to join in his excitement. One approach is to slightly undersell the parts of your proposal that pique his interest. In other words, you should be prepared to merely acknowledge the items that he greets with enthusiasm and discuss the risks of each of those things. This will ground your proposal in reality and strengthen his confidence and trust in you. You also need to keep the discussion focused on results. Your arguments must be simple and straightforward, and you should use visual aids to stress the features and benefits of your proposal. If you don't provide this results-oriented information (even when it's not asked for), you risk that the charismatic will not have it later when he needs it. Furthermore, you should be very honest and up-front about the risks involved with accepting your proposal, while also delineating the measures that can help minimize those risks. If you try to conceal any potential downsides, you can be sure that the charismatic will discover them later—when you're not available to address any concerns he may have.

All executives are busy people, but the attention span of a charismatic can be particularly short. In a meeting, you need to start with the most critical information. Otherwise, you risk losing his attention if you take your time leading up to a crucial point. Even if you have a two-hour meeting scheduled, you might not get through your entire presentation. Charismatics disdain canned arguments and will often interrupt you to get to the bottom line. Indeed, charismatics prefer highly interactive meetings; at times, they will want to move around the room and take control of the discussion.

Although charismatics might appear to be independent thinkers, they often rely on other high-profile executives in the company when making major decisions. Addressing this tendency will help increase your chances of success. Also critical will be your quiet perseverance: Charismatics expect you to wait patiently for them to make a decision, which could take some time, even though their initial enthusiasm may have led you to believe otherwise. Buzzwords that can help hold a charismatic's interest include: "results," "proven," "actions," "show," "watch," "look," "bright," "easy," "clear," and "focus."

PERSUASION IN PRACTICE

Nolan the Charismatic

Flood has scheduled an hour-long meeting with Nolan and the other members of the senior executive committee to discuss her proposed reorganization. Before that day, she previews her recommendations with COO Jack Warniers, Nolan's most trusted lieutenant. Warniers has several concerns about the restructuring, which Flood addresses and resolves through follow-up memos and e-mails.

Idea in Brief

Your proposal was brilliant, your logic unassailable, your argument impassioned. So why didn't your CEO buy it?

Chances are, you took a one-size-fits-all approach to persuasion. But different executives tend to use one of five different decision-making styles, and each calls for certain kinds of information to be delivered at specific steps in the process.

One style isn't necessarily better than another. But to tip the outcome your way, you must understand your listener's preferences—and then tailor your persuasive efforts accordingly.

Flood has prepared a few charts for the meeting, but these are merely for her own reference. Because she wants Nolan to feel like he can steer the discussion any which way, she will modify the charts in her head as necessary and redraw the information on a white board. Flood also knows that Nolan will at some point need all the details of the implementation—most of this information won't be discussed in the meeting—so she prepares a full report that she will give him afterward.

Flood starts her presentation by drawing a diagram that shows the current organization and its problems. Then she immediately jumps into her recommendations with a chart that outlines the new structure and how it will solve those problems. She emphasizes how the reorganization will increase MaxPro's overall competitiveness. "The restructuring," she says, "will help us to better focus on our customers, and the result will be fewer defections, particularly among our important accounts." She delineates how the reorganization will help propel MaxPro ahead of the competition.

Flood's ideas initially appeal to Nolan, who likes bold, out-of-the-box solutions, and he starts talking about the new restructuring as if it's already been accomplished. To keep him grounded, Flood outlines the potential impact of the new structure. Specifically, she notes the cost of relocating staff and the strong possibility that the change will meet fierce resistance from several groups, including the IT division, which would be responsible for supporting a large number of employees in remote locations.

Next, Flood presents a detailed risk assessment of the implementation—what will happen if the reorganization fails and the steps the company can take to minimize those risks. This information is as much for Nolan as it is for the others in the company who will be charged with implementing the plan. She then talks about the risk of doing nothing by highlighting evidence that at least three of MaxPro's major customers are already considering switching to a competitor because they are dissatisfied with MaxPro's customer service.

Knowing that the charismatic Nolan will want to move forward quickly, Flood ends her presentation by asking what their next steps should be. Nolan requests a detailed schedule, with milestone dates, of how the reorganization might progress. "I thought you might be interested in that information," she says, "so I've included it in this report, along with supporting data from the research

FIVE STYLES OF DECISION MAKING—

In our research, we found that executives typically have a default style of decision making that lands them in one of five distinct categories: charismatics, thinkers, skeptics, followers, and controllers.

From January 1999 to June 2001, we and our colleagues at Miller-Williams surveyed 1,684 executives to study their decision-making processes. The participants were from a range of industries (including automotive, retail, and high tech) and were interviewed by email, in person, or over the

	Charismatics
Description	Charismatics account for 25% of all the executives we polled. They are easily intrigued and enthralled by new ideas, but experience has taught them to make final decisions based on balanced information, not just emotions.
Typical Characteristics	enthusiastic, captivating, talkative, dominant
Prominent Examples	Richard Branson, Lee Iacocca, Herb Kelleher
Buzzwords to Use	"results," "proven," "actions," "show," "watch," "easy," "clear," "focus"
Bottom Line	When trying to persuade a charismatic, fight the urge to join in his excitement. Focus the discussion on results. Make simple and straightforward arguments, and use visual aids to stress the features and benefits of your proposal.

AND THE WAYS TO INFLUENCE EACH

telephone. The participants described their decision-making tendencies for our researchers—for instance, how long it took them to make a decision; their willingness to make a choice that might have negative consequences; their desire for others to educate them about the issues involved; and so on.

We performed a cluster analysis of this data and found that the executives' behaviors fell into the five groupings described below. The accuracy of the survey results reported in this article—for example, that 25% of the executives we interviewed were charismatics—is plus or minus 2.9%. For many of the prominent CEO examples cited, the categorizations are based on our firsthand observations and experiences with those executives; other categorizations are based on secondary sources, including media accounts.

Thinkers	**Skeptics**	**Followers**	**Controllers**
Thinkers account for 11% of the executives we surveyed and can be the toughest executives to persuade. They are impressed with arguments that are supported by data. They tend to have a strong aversion to risk and can be slow to make a decision.	Skeptics account for 19% of the executives we polled. They tend to be highly suspicious of every data point presented, especially any information that challenges their worldview. They often have an aggressive, almost combative style and are usually described as take-charge people.	Followers account for 36% of all the executives we surveyed. They make decisions based on how they've made similar choices in the past or on how other trusted executives have made them. They tend to be risk-averse.	Controllers account for 9% of the executives we interviewed. They abhor uncertainty and ambiguity, and they will focus on the pure facts and analytics of an argument.
cerebral, intelligent, logical, academic	demanding, disruptive, disagreeable, rebellious	responsible, cautious, brand-driven, bargain-conscious	logical, unemotional, sensible, detail-oriented, accurate, analytical
Michael Dell, Bill Gates, Katharine Graham	Steve Case, Larry Ellison, Tom Siebel	Peter Coors, Douglas Daft, Carly Fiorina	Jacques Nasser, Ross Perot, Martha Stewart
"quality," "academic," "think," "numbers," "intelligent," "plan," "expert," "proof"	"feel," "grasp," "power," "action," "suspect," "trust," "demand," "disrupt"	"innovate," "expedite," "expertise," "similar to," "previous"	"details," "facts," "reason," "logic," "power," "handle," "physical," "grab," "just do it"
Have lots of data ready. Thinkers need as much information as possible, including all pertinent market research, customer surveys, case studies, cost-benefit analyses, and so on. They want to understand all perspectives of a given situation.	You need as much credibility as you can garner. If you haven't established enough clout with a skeptic, you need to find a way to have it transferred to you prior to or during the meeting—for example, by gaining an endorsement from someone the skeptic trusts.	Followers tend to focus on proven methods; references and testimonials are big persuading factors. They need to feel certain that they are making the right decision—specifically, that others have succeeded in similar initiatives.	Your argument needs to be structured and credible. The controller wants details, but only if presented by an expert. Don't be too aggressive in pushing your proposal. Often, your best bet is to simply give him the information he needs and hope that he will convince himself.

we've conducted so far, case studies of similar reorganizations at other companies, and other pertinent facts. In particular, you might want to look at the section on risk assessment." Flood also tells Nolan that there are two versions of the report: an executive summary and an in-depth analysis. That night, on a red-eye flight to the East Coast, Nolan starts thinking about Flood's proposal and begins wondering how the restructuring will affect MaxPro's biggest customers. He turns to her report and finds that information in the table "Impact on Our Ten Largest Customers."

2. Thinkers

Thinkers (11% of the executives we interviewed) are the most difficult decision makers to understand and consequently the toughest to persuade.

They are often described as cerebral, intelligent, logical, and academic. Typically, they are voracious readers and selective about the words they use. They are impressed with arguments that are quantitative and supported by data. Not usually known for their social skills, thinkers tend to guard their emotions. They have two strong visceral desires in business—to anticipate change and to win—and they often pride themselves on their ability to outthink and outmaneuver the competition. They are driven more by the need to retain control than by the need to innovate. Prominent examples include Michael Dell, Bill Gates, Katharine Graham, and Alan Greenspan.

Thinkers have a strong desire for comparative data, which can make it difficult to persuade them. To make a decision, they need as much information as possible, including all pertinent market research, customer surveys, case studies, cost-benefit analyses, and so on. Perhaps the single most important piece of information thinkers need is the presenter's methodology for getting from point A to point B. They strive to understand all perspectives of a given situation. And, unlike charismatics, thinkers have a strong aversion to risk.

When trying to persuade thinkers, your best approach is to openly communicate your worries and concerns about your proposal, because thinkers work best when they know the risks up front. Often they will ask a battery of questions to explore and understand all the risks associated with an option. Thinkers can be swayed when the arguments and presentation appeal directly to their intelligence. Interestingly, their thought process is very selective but not always completely methodical. They will, for instance, sometimes circumvent their own decision-making processes if they feel a bargain—a relatively low-risk opportunity to save time or money—is in their best interest.

Thinkers will never forget a bad experience, so you need to make sure that your recommendations to them are truly the best options. (Of course, you should do this for any of the five types of decision makers, but particularly so with thinkers.) And anyway, thinkers will eventually figure out for themselves whether something was truly the best alternative, so you might be better off refraining from drawing conclusions for them. Otherwise you'll risk being seen as too helpful and potentially not credible. One effective strategy for persuading thinkers is to give them ample time and space to come to their own conclusions.

In a meeting, thinkers will often take contradictory points of view. This can be extremely confusing, but remember that thinkers do not like to show their cards up front, so expect that you may not be able to discern how they feel about any of the options you present. In fact, thinkers often do not reveal their intentions until they render their final decisions. Furthermore, they can be self-absorbed, so be prepared for silence as they digest the information you've given them. Buzzwords and phrases that will capture a thinker's attention include: "quality," "academic," "think," "numbers," "makes sense," "intelligent," "plan," "expert," "competition," and "proof."

PERSUASION IN PRACTICE

Nolan the Thinker

To convince Nolan, Flood knows she must present as many data, facts, and figures as possible, so her strategy is to deliver that information in huge chunks over a long-enough period of time for him to absorb and make sense of everything. Consequently, she decides that her best approach is to present her argument over the course of two meetings.

In the first, she begins by making her best case for why MaxPro needs to restructure. She emphasizes that if things stay the same, MaxPro will likely lose customers to competitors. (Interestingly, this piece of information—the risk of doing nothing—would be one of the last things she would present to Nolan if he were a charismatic.

In fact, the order of presentation to a thinker is almost exactly the reverse order of presentation to a charismatic.)

Flood then explains how she arrived at the three options she has proposed for the restructuring. She details the methodology she used to gather and assess the data, and Nolan is quick to point out where she may have missed certain steps or made incorrect assumptions. This will benefit Flood in the long run, because Nolan is now taking ownership of her methodology.

Next, Flood highlights the pros and cons of each option, and she presents case studies of similar restructurings, including those from other industries and from different time periods. The case studies represent roughly an equal number of successes and failures. Flood points out why each was successful or why each failed, and from that she begins to write on a white board a list of reorganizing dos and don'ts, to which Nolan is quick to add his input.

Throughout her presentation, Flood is undaunted by Nolan's barrage of questions. She knows it's not a personal attack; it's an attack on her process or data. Flood is very up-front about where her data might be inconclusive or conflicting, where she's made assumptions using just her intuition, and areas where her argument is weak. Together, she and Nolan pick through the presentation. For one risk assessment that Flood has weighted as 60-40, for example, Nolan says it should be 50-50.

At the end of the first meeting, Flood draws up a to-do list that indicates where she needs to plug in more data or fill in gaps in her argument before the next meeting; Nolan helps her prioritize the list. In several instances, however, he says, "Well, I don't think we can get good data here, so let's just go by gut feel."

During the second meeting, Flood briefly summarizes what they discussed previously—with all the corrections and adjustments that Nolan has requested. Knowing that he hates surprises, she clearly points out anything new and different from the first presentation—for example, revised data. Next, using the updated information, she explains how she arrived at the optimum restructuring that maximizes the probability of success while keeping risks to an acceptable level. In conclusion, she shows the projected financial costs and additional revenues that the change will likely generate. After the meeting, Flood is prepared to wait weeks, if not months, for Nolan's decision.

Thinkers will never forget a bad experience; make sure your recommendations are the best options.

3. Skeptics

Skeptics (19% of the executives we polled) are highly suspicious of every single data point, especially any information that challenges their worldview.

Perhaps the most defining trait of skeptics is that they tend to have very strong personalities. They can be demanding, disruptive, disagreeable, rebellious, and even antisocial. They may have an aggressive, almost combative style and are usually described as take-charge people. They tend to be self-absorbed and act primarily on their feelings. Prominent examples include Steve Case, Larry Ellison, and Tom Siebel.

During your presentation, a skeptic may get up and leave temporarily, take a phone call, or even carry on a side conversation for an extended period of time. He will be demanding of both your time and energy, locking horns with you whenever the opportunity arises. The thinker launches a volley of questions, and it is not personal; with a skeptic, it is. Do not let it get to you; just go through your presentation coolly and logically. The good news is that you will know almost immediately where you stand with skeptics. You can almost always depend on them to tell you what they are thinking because of their strong personalities.

To persuade a skeptic, you need as much credibility as you can garner. Skeptics tend to trust people who are similar to them—for instance, people who went to the same college or worked for the same companies. If you haven't established credibility with a skeptic, you need to find a way to have it transferred to you prior to or during the meeting—for example, by gaining an endorsement from someone the skeptic trusts. Doing this will let the skeptic maintain his superior position while allowing you to openly discuss issues on his level. Credibility can be transferred (from a colleague, for instance), but ultimately it must be earned, and you may have to go through some very aggressive questioning to establish it.

Challenging a skeptic is risky and must be handled delicately. Sometimes, to make your case, you will need to correct bad information that the skeptic is relying on. If, for instance, the skeptic states incorrectly that your company's R&D costs have been spiraling out of control recently, you might reply, "Are you testing me? Because I remember you telling me a couple months ago that we need to spend more to regain our leadership in developing innovative products. But maybe that's changed?" In other words, when you need to correct a skeptic, give him room to save face. For him to trust you, he needs to maintain his reputation and ego. And remember that skeptics do not like being helped; they prefer having people think they know something already.

Although persuading a skeptic might sound daunting, the process is actually very straightforward. Skeptics want to move forward with groundbreaking ideas, but they first need to make sure that those ideas are from people they fully trust. Skeptics usually make decisions quickly—within days, if not right on the spot. Buzzwords to use with a skeptic include: "feel," "grasp," "power," "action," "suspect," "trust," "agreeable," "demand," and "disrupt."

PERSUASION IN PRACTICE

Nolan the Skeptic

Flood knows that she lacks the necessary clout to make her pitch directly to Nolan. So she enlists the aid of COO Jack Warniers, whom Nolan trusts. After she obtains Warniers's buy-in, she asks him to copresent the idea with her, hoping that his credibility will add to hers. They agree beforehand that Warniers will deliver all key messages, including the proposed restructuring and any data that might be controversial.

At the meeting, Flood and Warniers make their arguments in roughly the same order they would if Nolan were a thinker instead of a skeptic, but they emphasize the credibility of all their information sources. Flood knows that Nolan needs to hear things from multiple reputable sources—the more the better. So when discussing a recent marketing survey, she says, "I took the liberty of arranging a call between you and several other local market-research experts to discuss these results in greater detail." Whenever Nolan challenges anything, Flood and Warniers work quickly to ease his discomfort. Knowing that Nolan respects Bill Gates, for example, Flood softens one of Nolan's attacks by saying, "I see your point, but you probably remember that Microsoft made a similar move about two years ago."

At every turn, Flood and Warniers are careful to tread lightly around Nolan's ego. When discussing the case studies, for instance, they introduce each one by saying, "You've probably seen this before..." or "As you know, Hewlett-Packard failed in a similar restructuring because...." For each example, Flood and Warniers are quick to point out whether the company's image and reputation were enhanced or degraded as a result of the restructuring.

Because Nolan is particularly skeptical of anything abstract, Flood and Warniers are careful to make their arguments as concrete as possible, usually by grounding them in the real world. When they talk about relocating 200 employees, for example, they try to include the specifics: "We would need to close our building here on Hunter Avenue and sublease the space, including the adjacent parking lot. Because the building has a modular, funky layout, we might consider turning it into a business incubator."

At the end of their presentation, Flood and Warniers appeal to Nolan's rebellious streak by stating how the proposed reorganization would buck the trend in their industry. They also are quick to credit Nolan for inspiring the idea. "At the last meeting of the senior executive commit-

You will know almost immediately where you stand with skeptics because of their strong personalities.

tee," Warniers says, "you talked about how we needed to ensure that we didn't lose touch with our customers. Your comment started us thinking about this restructuring." Flood and Warniers end their presentation with their proposed action plan for the reorganization, complete with a schedule of milestones. At that point, Nolan takes charge of the discussion.

4. Followers

Followers (36% of the executives we interviewed) make decisions based on how they've made similar choices in the past or on how other trusted executives have made them.

Because they are afraid of making the wrong choice, followers will seldom be early adopters. Instead, they trust in known brands and in bargains, both of which represent less risk. They are also very good at seeing the world through other people's eyes. Interestingly, despite their cautiousness, followers can be spontaneous at times. Above all, though, they are responsible decision makers, which is why they are most often found in large corporations. In fact, followers account for more than a third of all the executives we surveyed, representing the largest group among the five types of decision makers. Prominent examples include Peter Coors, Douglas Daft, and Carly Fiorina.

Followers may engage you in long lists of issues and repeatedly challenge your position (similar to what a skeptic does), but don't be fooled. In the end, they will agree to something only if they've seen it done elsewhere. But followers won't admit this. In fact, they will seldom concede that they are followers; they would much rather have you believe that they are innovative and forward thinking. Frequently, followers are mistaken for skeptics. However, followers are not inherently suspicious; they prefer that you help them gain a better grasp of what they don't understand. And although followers may exhibit a take-charge approach, they will yield when challenged. (As a general rule, people who are difficult to classify into a decision-making style are usually followers, because people in the other four groups tend to show their characteristics more definitively.)

Although followers are often the most difficult to identify, they can be the easiest to persuade—if you know which buttons to push. To obtain buy-in from a follower, you need to make him feel confident about deciding to move in a certain direction by proving that others have succeeded on that path. Not surprisingly, followers tend to focus on proven methods, and references and testimonials are big persuading factors.

With a follower, don't try to sell yourself unless you have a strong track record of success. Instead, look for past decisions by the follower that support your views or find similar decisions by other executives the follower trusts. Ideally, followers want solutions that are innovative yet proven, new but trusted, leading-edge yet somewhat safe. At the end of the day, though, what followers need most is to know that they won't lose their jobs. This is why they rarely make out-of-the-box decisions. In fact, for some followers, the only way to persuade them to adopt a truly bold strategy is to get someone else to do it successfully first. Buzzwords and phrases to use with a follower include: "innovate," "expedite," "swift," "bright," "just like before," "expertise," "similar to," "previous," "what works," and "old way."

PERSUASION IN PRACTICE

Nolan the Follower

Flood knows that her mission is simple: She must make Nolan feel comfortable that the decision to restructure has minimal risk. And to seal the deal, she must somehow also make him feel that he is being innovative.

In the meeting, Flood presents her arguments in roughly the same order that she would if Nolan were a thinker or skeptic. But because Nolan is a follower, Flood emphasizes the case studies—eight of them in all. This discussion resonates with Nolan because, like all followers, he is particularly adept at placing himself in others' shoes. As part of her strategy, Flood has decided to omit any examples of failed restructurings—but she has that information on hand, just in case Nolan asks for it. The eight case studies are from industries outside of MaxPro's business so that Flood can appeal to Nolan's desire to be innovative by saying, "We could be the first in our industry to do this kind of restructuring."

Next, Flood presents three options for the proposed restructuring, and she links each of her case studies to one of those options. To steer Nolan toward option three, which she prefers, she has linked four of the cases to that option; by contrast, she has provided Nolan with only two case study references for each of the other two options. When Nolan notes that option one is the cheapest, Flood is ready to address that issue head-on because she knows how bargain-conscious he is: Her detailed analysis shows that, on a risk-adjusted basis, option three is actually the least expensive because it is more proven.

Presenting three options to Nolan does more than just give him the opportunity to make a choice; it also affords him the chance to be creative. He begins to combine aspects of options one and three—something Flood had anticipated he would do. In fact, she has even encouraged him to do so by presenting certain minor components of the different options individually. For Nolan, the ability to mix and match different parts of proven strategies is perfect: It makes him feel innovative without having to incur any major risk.

At the conclusion of the meeting, Flood further plays on Nolan's desire for both innovation and security by saying, "Yes, other companies have done this type of restructuring, but we will have more expertise implementing it, so we will do it faster and more cheaply. And because we already know what works and what doesn't, we'll be able to take the appropriate steps to avoid potential problems."

Flood understands that followers will maintain the status quo unless they're presented with information they can't afford to ignore. Because Nolan seems genuinely engrossed in hearing how the other companies have successfully reorganized, Flood expects she will hear from him within days. (Followers tend to act quickly once they see big potential for success with minimal risk.)

5. Controllers

Controllers (9% of the executives we surveyed) abhor uncertainty and ambiguity, and they will focus on the pure facts and analytics of an argument. They are both constrained and driven by their own fears and insecurities.

They are usually described as logical, unemotional, sensible, detail-oriented, accurate, analytical, and objective. Like skeptics, controllers often have strong personalities and can even be overbearing. In their minds, they are the best salespeople, the best marketing experts, the best strategists, and so on. Whereas followers are good at putting themselves in others' shoes, controllers see things only from their own perspectives and will frequently make snap judgments and remarks that alienate others. Controllers can be loners and are often self-absorbed, traits that lead them to make unilateral decisions. Indeed, although a controller may talk to others about a decision, he will seldom genuinely listen to them or consider their input. Prominent examples include Jacques Nasser, Ross Perot, and Martha Stewart.

> **Dealing with controllers can be like playing a game of cat and mouse—you will always be chasing down some information at their request.**

When dealing with controllers, you need to overcome their internal fears, which they will pretend they don't have. In fact, they will cover them up by paying an inordinate amount of attention to the intricate details of processes and methods. Dealing with controllers can be like playing a game of cat and mouse—you will always be chasing down some information at their request.

In a meeting, remember that controllers can be self-absorbed, so be prepared for long silences during your interactions. It is also crucial to remember that when cornered, controllers rarely capitulate. Furthermore, even though controllers seek accuracy and facts, that does not necessarily mean they will make intelligent, rational decisions. Often, a controller will jump to illogical conclusions. And unlike charismatics, who are willing to take responsibility for their decisions, controllers try to avoid being held accountable. When something goes wrong, they assume others are at fault.

To persuade controllers, your argument needs to be structured, linear, and credible. They want details, but only if presented by an expert. In practice, the only way to sell an idea to controllers is *not* to sell it; instead, let them make the choice to buy. Your best bet is to simply supply them with the information they need and hope they will convince themselves.

Although controllers and skeptics share several characteristics, a key difference is that controllers need ample time to make decisions (they hate to be rushed). By contrast, skeptics are much quicker on the draw. One of the worst things you can do with a controller is to push your proposal too aggressively. When that happens, controllers are likely to see you as part of the problem and not the solution. Buzzwords and phrases to use with a controller include: "details," "facts," "reason," "logic," "power," "handle," "physical," "grab," "keep them honest," "make them pay," and "just do it."

PERSUASION IN PRACTICE

Nolan the Controller

Nolan is notorious for implementing only his own ideas, so Flood knows she must somehow make him take ownership of her proposed restructuring plan. To do that, she gears herself up for the long journey ahead. Over the course of several months, she continually sends him information—customer reports, marketing studies, financial projections, and so on—through all types of media (including print, video, and the Web) and in person. She needs to gently wear down his defenses by steadily supplying him with so much information that he simply has to make a decision.

First, Flood focuses on data that highlights MaxPro's problems because she knows that case studies and other information won't be as important to him. Her memos often prompt Nolan to request other information, sometimes arcane and irrelevant data. She gets this for him, knowing full well that he may not even look at it.

After four months she is tempted to schedule a formal presentation, but she resists the urge. Nolan himself must request that meeting. Until that time, she will have to be content with sending him still more information. When she does, she always provides the information in a structured, linear format. In a typical memo, she begins by writing, "Attached, please find the results from a recent customer survey, and here's how they fit in with the other material we have." Flood is also quick to point out (but not resolve) apparent contradictions in the data, knowing that Nolan prides himself in uncovering those kinds of inconsistencies. In one memo, she writes, "Here's some new research from Walker Consulting. It seems to contradict the study we commissioned last year. I'm not sure which to trust."

Finally, an event—the defection of one of MaxPro's largest customers—triggers action. Thanks to Flood's patient but incessant prodding, Nolan is sensitized to this latest development. He calls a meeting of the senior staff to discuss what MaxPro should do. Included will be a discussion of a possible reorganization.

CRITICS MIGHT view some of our categorizations as derogatory—after all, few executives would like being classified as followers or controllers. We do not intend to imply that any decision-making style is superior to another; our labels are merely brief descriptors of the primary behavior of each group. In fact, each style can be highly effective in certain environments. Followers, for instance, have a high sense of responsibility and can be excellent leaders at large, established corporations. And controllers can be extremely effective business leaders; Martha Stewart is a case in point.

Furthermore, we do not mean to oversimplify the complex and often mysterious ways in which people reach conclusions. To be sure, decision making is a complicated, multifaceted process that researchers may never fully unpick. That said, we strongly believe that executives tend to make important decisions in predictable ways. And knowing their preferences for hearing or seeing certain types of information at specific stages in their decision-making process can substantially improve your ability to tip the outcome your way.

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Telling Tales

The age-old practice of storytelling is one of the most effective tools leaders can use. But they need to pick their stories carefully and match them to the situation.

by Stephen Denning

IN 1998, I made a pilgrimage to the International Storytelling Center in Jonesborough, Tennessee, seeking some enlightenment. Several years earlier, as the program director of knowledge management at the World Bank, I had stumbled onto the power of storytelling. Despite a career of scoffing at such touchy-feely stuff—like most business executives, I knew that analytical was good, anecdotal was bad—I had changed my thinking because I'd seen stories help galvanize an organization around a defined business goal.

In the mid-1990s, that goal was to get people at the World Bank to support efforts at knowledge management—a pretty foreign notion within the organization at the time. I offered people cogent arguments about the need to gather the knowledge that was scattered throughout the organization. They didn't listen. I gave PowerPoint presentations that compellingly demonstrated the importance of sharing and leveraging this information. My audiences merely looked dazed. In desperation, I was ready to try almost anything.

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ILLUSTRATION BY RYAN GARCIA

Then in 1996 I began telling people a story:

> In June of 1995, a health worker in a tiny town in Zambia went to the website of the Centers for Disease Control and got the answer to a question about the treatment for malaria. Remember that this was in Zambia, one of the poorest countries in the world, and it happened in a tiny place 600 kilometers from the capital city. But the most striking thing about this picture, at least for us, is that the World Bank isn't in it. Despite our know-how on all kinds of poverty-related issues, that knowledge isn't available to the millions of people who could use it. Imagine if it were. Think what an organization we could become.

This simple story helped World Bank staff and managers envision a different kind of future for the organization. When knowledge management later became an official corporate priority, I used similar stories to maintain the momentum. So I began to wonder how the tool of narrative might be put to work even more effectively. Being a typically rational manager, I decided to consult the experts.

At the International Storytelling Center, I told the Zambia story to a professional storyteller, J.G. "Paw-Paw" Pinkerton, and asked the master what he thought. You can imagine my chagrin when he said he didn't hear a story at all. There was no real telling. There was no plot. There was no building up of the characters. Who was this health worker in Zambia? And what was her world like? What did it feel like to be in the exotic environment of Zambia, facing the problems she faced? My anecdote, he said, was a pathetic thing, not a story at all. I needed to start from scratch if I hoped to turn it into a "real story."

Was I surprised? Well, not exactly. The story *was* pretty bland. There was a problem with this advice from the expert, though. I knew in my heart it was wrong. And with that realization, I was on the brink of an important insight: Beware the well-told story!

The Power of Narrative

But let's back up a bit. Do stories really have a role to play in the business world? Believe me, I'm familiar with the skepticism about them. When you talk about "storytelling" to a group of hardheaded executives, you'd better be prepared for some eye rolling. If the group is polite as well as tough, don't be surprised if the eyes simply glaze over.

That's because most executives operate with a particular—and generally justified—mindset. Analysis is what drives business thinking. It cuts through the fog of myth, gossip, and speculation to get to the hard facts. It goes wherever the observations and premises and conclusions take it, undistorted by the hopes or fears of the analyst. Its strength lies in its objectivity, its impersonality, its heartlessness.

Yet this strength is also a weakness. Analysis might excite the mind, but it hardly offers a route to the heart. And that's where we must go if we are to motivate people not only to take action but to do so with energy and enthusiasm. At a time when corporate survival often requires disruptive change, leadership involves inspiring people to act in unfamiliar, and often unwelcome, ways. Mind-numbing cascades of numbers or daze-inducing PowerPoint slides won't achieve this goal. Even the most logical arguments usually won't do the trick.

But effective storytelling often does. In fact, in certain situations nothing else works. Although good business arguments are developed through the use of numbers, they are typically approved on the basis of a story—that is, a narrative that links a set of events in some kind of causal sequence. Storytelling can translate those dry and abstract numbers into compelling pictures of a leader's goals. I saw this happen at the World Bank—by 2000, we were increasingly recognized as leaders

Analysis might excite the mind, but it hardly offers a route to the heart—and that's where we must go to motivate people.

in the area of knowledge management—and have seen it in numerous other large organizations since then.

So why was I having problems with the advice I had received from the professional storyteller in Jonesborough?

A "Poorly Told" Story

The timing of my trip to Tennessee was fortunate. If I had sought expert advice two years earlier, I might have taken the master's recommendations without question. But I'd had some time to approach the idea of organizational storytelling with a beginner's mind, free of strictures about "the right way" to tell a story.

It wasn't that I couldn't follow Paw-Paw Pinkerton's recommendations. I saw immediately how to flesh out my modest anecdote about the health worker in Zambia: You'd dramatically depict her life, the scourge of malaria that she faced in her work, and perhaps the pain and suffering of the patient she was treating that day. You'd describe the extraordinary set of events that had led to her being seated in front of a computer screen deep in the hinterland of Zambia. You'd describe the false leads she had followed before she came across the CDC website. You'd build up to the moment of triumph when she found the answer to her question about malaria and vividly describe how that answer was about to transform the life of her patient. The story would be a veritable epic.

This "maximalist" account would be more engrossing than my relatively dry anecdote. But I had learned enough by then to realize that telling the story in this way to a corporate audience would not galvanize implementation of a strange new idea like knowledge management. I knew that in the modern workplace, people had neither the time nor the patience—remember executives' general skepticism about storytelling in the first place—to absorb a richly detailed narrative. If I was going to hold the attention of my audience, I had to make my point in seconds, not in minutes.

There was another problem. Even if my audience did take the time to listen to a fully developed tale, my telling it in that fashion would not allow listeners the mental space to relate the story to their own quite different worlds. Although I was describing a health worker in Zambia, I wanted everyone to focus not on Zambia but on their own situations. I hoped they would think, "If the CDC can reach a health worker in Zambia, why can't the World Bank? Why don't we put our knowledge on the web and broaden our scope?" But if my listeners were immersed in a saga about that health worker and her patient, they might not have any attention left to ask themselves these questions—or to provide answers. In other words, I didn't want my audience too interested in Zambia. A minimalist narrative was effective, in fact, because it lacked detail and texture. The same characteristic that the professional storyteller saw as a flaw was, for my purposes, a strength.

On my return from Jonesborough, I educated myself about the principles of traditional storytelling. More than 2,000 years ago, Aristotle, in his *Poetics,* said stories should have a beginning, a middle, and an end. They should include complex characters as well as a plot that incorporates a reversal of fortune and a lesson learned. Furthermore, the storyteller should be so engaged with the story—visualizing the action, feeling what the characters feel—that the listeners become drawn into the narrative's world. Aristotle's formula has proved successful over the ages, from *The Arabian Nights* to *The Decameron* to *The Adventures of Tom Sawyer* and most Hollywood screenplays.

Despite the narrative power of the traditional story, I knew that it probably wouldn't spark action in an organization. In retrospect, though, I realize that my insight blinded me to something else. Believing that this wonderful and rich tradition had no place in the time-constrained world of modern business was as wrongheaded as thinking that all stories had to be full of detail and color. I would later see that the well-told story is relevant in a modern organization. Indeed, a number of surprises about the use of storytelling in organizations awaited me.

Tales of Success and Failure

In December 2000, I left the World Bank and began to consult with companies on their knowledge management and, by extension, their use of organizational stories. As part of this work, I once found myself in London with Dave Snowden, a director of IBM's Institute of Knowledge Management, teaching a master class on storytelling to around 70 executives from private- and public-sector organizations.

Idea in Brief

- Objective analysis and hard facts have their limits when it comes to inspiring change. Leaders sometimes need to dig deeper.
- Effective storytelling can do what numbers, presentations, and even the most logical arguments can't. It can motivate people to take action with energy and enthusiasm. Leaders with the strength to push past some of the initial skepticism about the enterprise of storytelling will find that the creative effort pays off.
- The key is to know which narrative strategies are right for different circumstances, since a carefully chosen anecdote can help translate an abstract concept into a meaningful mandate.
- The ability to tell the right story at the right time can not only successfully transmit your company's values and impart knowledge; it can also foster collaboration and lead people into the future.

A STORYTELLING CATALOG

Storytelling is an increasingly accepted way to achieve management goals. But leaders need to use a variety of narrative patterns for different aims.

Sparking Action. Leadership is, above all, about getting people to change. To achieve that goal, you need to communicate the sometimes complex nature of the changes required and inspire an often skeptical organization to enthusiastically carry them out. This is the place for what I call a "springboard story," one that enables listeners to visualize the transformation needed in their circumstances and then to act on that realization.

Such a story is based on an actual event, preferably recent enough to seem relevant. It has a single protagonist with whom members of the target audience can identify. And there is an authentically happy ending, in which a change has at least in part been successfully implemented. (There is also an implicit alternate ending, an unhappy one that would have resulted had the change not occurred.)

The story has enough detail to be intelligible and credible but—and this is key—not so much texture that the audience becomes completely wrapped up in it. If that happens, people won't have the mental space to create an analogous scenario for change in their own organization. For example, if you want to get an organization to embrace a new technology, you might tell stories about individuals elsewhere who have successfully implemented it, without dwelling on the specifics.

Communicating Who You Are. You aren't likely to lead people through wrenching change if they don't trust you. And if they're to trust you, they have to know you: who you are, where you've come from, and why you hold the views you do. Ideally, they'll end up not only understanding you but also empathizing with you.

Stories for this purpose are usually based on a life event that reveals some strength or vulnerability and shows what the speaker took from the experience. For example, Jack Welch's success in making General Electric a winner was undoubtedly aided by his ability to tell his own story, which includes a tongue-lashing he once received from his mother after he hurled a hockey stick across the ice in response to a disappointing loss. "You punk!" she said, as Welch tells it in his memoir *Jack: Straight from the Gut*. "If you don't know how to lose, you'll never know how to win."

Unlike a story designed to spark action, this kind is typically well told, with colorful detail and context. So the speaker needs to ensure that the audience has enough time and interest to hear the story.

Transmitting Values. Stories can be effective tools for ingraining values within an organization, particularly those that help forestall problems by clearly establishing limits on destructive behavior. A story of this type ensures that the audience understands "how things are done around here."

These narratives often take the form of a parable. Religious leaders have used them for thousands of years to communicate values. The stories are usually set in some kind of generic past and have few context-setting details—though the context needs to seem relevant to the listeners. The "facts" of such tales can be hypothetical, but they must be believable. For example, a story might tell the sad fate of someone who failed to see the conflict of interest in not disclosing his or her financial interest in a company supplier.

Of course, narratives alone cannot establish values in an organization. Leaders need to live the values on a daily basis.

Fostering Collaboration. Every management textbook talks about the value of getting people to work together. But the only advice most of them offer on making that happen in real-life work environments is "Encourage conversations." Yes, but how?

One approach is to generate a common narrative around a group's concerns and goals, beginning with a story told by one member of the group. Ideally, that first story sparks another, which sparks another. If the process continues, group members develop a shared perspective, one that creates a sense of community. The first story must be emotionally moving enough to unleash the narrative impulse in others and to create a readiness to hear more stories. It could, for example, vividly describe how the speaker had grappled with a difficult work situation.

For this process to occur, it is best if the group has an open agenda that allows the stories to surface organically. It is also desirable to have a plan ready so that the energy generated by the positive experience of sharing stories can be immediately channeled into action.

Taming the Grapevine. Rumors flow incessantly through every organization. "Have you heard the latest?" is a refrain that's difficult for managers to deal with. Denying a rumor can give it credibility. Asking how it got started can ensure its spread. Ignoring it risks allowing it to spiral out of control. Rumors about issues central to the future of the organization—takeovers, reorganizations, major managerial changes—can be an enormous distraction (or worse) to employees.

So as an executive, what can you do? One response is to harness the energy of the grapevine to defuse the rumor, using a story to convince listeners that the gossip is either untrue or unreasonable. This kind of story highlights the incongruity between the rumor and reality. You could use gentle satire to mock the rumor, the rumor's author, or even yourself, in an effort to undermine the rumor's power. For example, you might deal with a false rumor of "imminent companywide reorganization" by jokingly recounting how the front office's current struggles involving the seating chart for executive committee meetings would have to be worked out first. Keep in mind, though, that humor can backfire. Mean-spirited teasing can generate a well-deserved backlash.

The trick is to work with, not against, the flow of the vast underground river of informal communication that exists in every organization. Of course, you can't ridicule a rumor into oblivion if it's true or at least reasonable. If that's the case, there is little you can do but admit the substance of the rumor, put it in perspective, and move on.

If your objective is:	You will need a story that:	In telling it, you will need to:	Your story will inspire such responses as:
Sparking action	Describes how a successful change was implemented in the past, but allows listeners to imagine how it might work in their situation.	Avoid excessive detail that will take the audience's mind off its own challenge.	"Just imagine…" "What if…"
Communicating who you are	Provides audience-engaging drama and reveals some strength or vulnerability from your past.	Include meaningful details, but also make sure the audience has the time and inclination to hear your story.	"I didn't know that about him!" "Now I see what she's driving at."
Transmitting values	Feels familiar to the audience and will prompt discussion about the issues raised by the value being promoted.	Use believable (though perhaps hypothetical) characters and situations, and never forget that the story must be consistent with your own actions.	"That's so right!" "Why don't we do that all the time?"
Fostering collaboration	Movingly recounts a situation that listeners have also experienced and that prompts them to share their own stories about the topic.	Ensure that a set agenda doesn't squelch this swapping of stories—and that you have an action plan ready to tap the energy unleashed by this narrative chain reaction.	"That reminds me of the time that I…" "Hey, I've got a story like that."
Taming the grapevine	Highlights, often through the use of gentle humor, some aspect of a rumor that reveals it to be untrue or unlikely.	Avoid the temptation to be mean-spirited, and be sure that the rumor is indeed false.	"No kidding!" "I'd never thought about it like that before!"
Sharing knowledge	Focuses on mistakes made and shows in some detail how they were corrected, with an explanation of why the solution worked.	Solicit alternative—and possibly better—solutions.	"There but for the grace of God…" "Wow! We'd better watch that from now on."
Leading people into the future	Evokes the future you want to create without providing excessive detail that will only turn out to be wrong.	Be sure of your storytelling skills. (Otherwise, use a story in which the past can serve as a springboard to the future.)	"When do we start?" "Let's do it!"

Sharing Knowledge. Much of the intellectual capital of an organization is not written down anywhere but resides in people's minds. Communicating this know-how across an organization and beyond typically occurs informally, through the sharing of stories.

Knowledge-sharing narratives are unusual in that they lack a hero or even a detectable plot. They are more about problems, and how and why they got—or, more likely, didn't get—resolved. They include a description of the problem, the setting, and the solution. Because they highlight a problem—say, the challenge employees face in learning to use a new system—they tend to have a negative tone. And because they often focus in detail on why a particular solution worked, they may be of little interest outside a defined group of people. Though unashamedly unentertaining and lacking most elements of a conventional story, they are nonetheless the uncelebrated workhorse of organizational narrative.

They present a difficulty, however. In a corporate setting, stories about problems don't flow easily, not only because people fear the consequences of admitting mistakes, but also because, in the flush of success, people tend to forget what they learned along the way. As a result, the knowledge-sharing story cannot be compelled; it has to be teased out. That is, a discussion of successes may be needed in order to get people to talk about what has gone wrong and how it can be fixed.

Leading People into the Future. An important part of a leader's job is preparing others for what lies ahead, whether in the concrete terms of an actual scenario or the more conceptual terms of a vision. A story can help take listeners from where they are now to where they need to be, by making them comfortable with an image of the future. The problem, of course, lies in crafting a credible narrative about the future when the future is unknowable.

Thus, if such stories are to serve their purpose, they should whet listeners' imaginative appetite about the future without providing detail that will likely turn out to be inaccurate. Listeners should be able to remold the story in their minds as the future unfolds with all its unexpected twists and turns. And clearly, the story should portray that state in a positive way: People are more likely to overcome uncertainty about change if they are shown what to aim for rather than what to avoid.

Note that telling an evocative narrative about the future requires a high degree of verbal skill, something not every leader possesses. But the springboard story, described above, provides an alternative. Hearing about a change that has already happened elsewhere can help listeners to imagine how it might play out for them in the future.

During the class's morning session, I spoke about my experience at the World Bank and how a positive orientation was essential if a narrative like the one about Zambia was to be effective. But in the afternoon, to my dismay, my fellow presenter emphatically asserted the opposite. At IBM and elsewhere, Dave had found purely positive stories to be problematic. They were, he said, like the Janet and John children's stories in the United Kingdom or the Dick and Jane stories in the United States: The characters were so good they made you feel queasy. The naughtiest thing Janet and John would do was spill a bottle of water in the yard. Then they would go and tell their mother about it and promise never to do it again. Janet would volunteer to help out with the cleanup and John would offer to help wash the car. These stories for children reflected a desire to show things as they should be rather than as they are. In a corporate environment, Dave told his audience, listeners would respond to such rosy tales by conjuring up negative "antistories" about what must have actually happened. His message: Beware the positive story!

After the workshop, Dave and I discussed why his stories focused on the negative while mine accentuated the positive. I could see he had a point, that negative stories can be more powerful than positive ones. I'd used negative stories myself when trying to teach people the nitty-gritty of any subject. The fact is, people learn more from their mistakes than from their successes.

Eventually, however, it dawned on me that our points of view were complementary and that our stories served different purposes: My stories were crafted to motivate people, and Dave's were designed to share knowledge. His stories might describe how and why a team failed to accomplish an objective, with the aim of helping others avoid the same mistakes. (To elicit such stories, Dave often had to start by getting people to talk about their successes, even if these accounts were ultimately less useful vehicles for conveying knowledge.) It was then I began to realize that the purpose of telling a story might determine its form.

Granted, even optimistic stories have to be true and believable, since jaded corporate audiences know too well the experience of being presented with half-truths. Stories told in order to spur action need to make good on their promises and contain sufficient evidence of a positive outcome. But stories intended mainly to transfer knowledge must be more than true. Because their objective is to generate understanding and not action, they tend to highlight the pitfalls of ignorance; they are meant not to inspire people but to make them cautious. Just as the minimalist stories that I told to spark action were different from traditional entertainment stories, so effective knowledge-sharing stories would have negative rather than positive overtones.

A Collective Yawn

Once I saw that different narrative forms could further different business goals, I looked for other ways that managers could make stories work for them. A number of distinct story types began to emerge—ones that didn't necessarily follow Aristotelian guidelines but were nonetheless used to good effect in a variety of organizations. (For descriptions of some of them and the purposes for which they might be used, see the sidebar "A Storytelling Catalog.") I continued to come across unexpected insights about the nature of storytelling within organizations.

For instance, if negative stories have their place, so do "boring" ones. In his book *Talking about Machines,* Julian Orr recounts a number of stories that have circulated among Xerox repair technicians. While rich in detail, they are even less storylike than my little anecdote about the health care worker in Zambia. Most of these tales, which present solutions to technical problems, lack a plot and a distinct character. In fact, they are hardly stories at all, with little to hold the interest of anyone except those close to the often esoteric subject matter. Why are they compelling even to this limited audience? Because they are driven by a detailed explanation of the cause-and-effect relationship between an action and its consequence. For example:

> You've got a malfunctioning copy machine with an E053 error code, which is supposed to mean a problem in the 24-volt Interlock Power Supply. But you could chase the source of that 24-volt Interlock problem forever, and you'd never, ever find out what it is. If you're lucky enough, you'll eventually get an F066 error code, which indicates the true source of the malfunction—namely, a shorted dicorotron. Apparently, this is happening because the circuitry in the XER

> board has been changed to prevent the damage that would otherwise occur when a dicorotron shorted. Before the change in circuitry, a shorted dicorotron would have fried the whole XER board. Changing the circuitry has prevented damage to the XER board, but it's created a different issue. Now an E053 error message doesn't give you the true source of the machine's malfunction.

This story, slightly condensed here, doesn't just describe the technician's accurate diagnosis of a problem; it also relates why things happened as they did. So the account, negative in tone and almost unintelligible to an outsider, is both informative and interesting to its intended audience.

As I continued my investigation, one area of particular interest to me was the link between storytelling and leadership. I already knew from personal experience how stories could be used as a catalyst for organizational action. And I had read in two influential books about leadership—*Leading Minds* by Howard Gardner and *The Leadership Engine* by Noel Tichy—how stories could help leaders define their personality for their followers, boosting others' confidence in the leaders' integrity and providing some idea of how they might act in a given situation.

I also had seen leaders using narrative to inculcate a positive set of corporate values and beliefs in the hearts and minds of their employees. Think, for example, of Tyco's effort to repair its battered value system. The company began by creating a straightforward manual that outlined new rules in such areas as sexual harassment, conflicts of interest, and fraud. But Eric Pillmore, senior vice president of corporate governance, quickly figured out that, as written, the booklet would merely gather dust on people's shelves. So he threw out what he had done and started again in an attempt to bring the principles alive through narrative. The story below became part of the revised guide, as a sidebar in the section on sexual harassment and other forms of intimidating behavior in the workplace:

> The entire team jokes about Tom being gay. Tom has never complained and doesn't seem to mind, but when Mark is assigned to work with Tom, the jokes turn on Mark. Now that Mark receives the brunt of the jokes, he tells his supervisor he wants to be reassigned. His supervisor complies with Mark's request.

While the guide clearly lays out the company's policy on harassment, the simple narrative helps bring the policy to life and provides a starting point for thinking about and discussing the complex issues involved. Dozens of similar stories illustrate an array of company policies.

An Enticing but Hazy Future

Although these types of stories furthered leadership goals in a relatively predictable way, others I came across were more quirky—particularly ones used to communicate vision. Noel Tichy writes in *The Leadership Engine* about the importance of preparing an organization for change. He notes that "the best way to get humans to venture into unknown terrain is to make that terrain familiar and desirable by taking them there first in their imaginations." Aha! I thought. Here is a place where storytelling, perhaps the most powerful route to people's imaginations, could prove indispensable.

But as I looked at examples of such stories in a number of arenas, I discovered that most of the successful ones were surprisingly sketchy about the details of the imagined future. Consider

A story designed to prepare people for change needs to evoke the future and conjure up a direction for getting there, but without being too precise.

The professional storyteller saw minimalism as a flaw; for my purposes, it was a strength.

Winston Churchill's "We Shall Fight on the Beaches" speech and Martin Luther King Jr.'s "I Have a Dream" speech. Neither of these famous addresses came close to describing the future in enough detail that it became, in listeners' minds, "familiar terrain."

Over time—and, in part, through my work in corporate scenario planning—I realized why. Specific predictions about the future are likely to be proved wrong. Because such predictions almost inevitably differ in major or minor ways from what eventually happens, leaders who proclaim them risk losing people's confidence. Consequently, a story designed to prepare people for change needs to evoke the future and conjure up a direction for getting there—but without being too precise. Think of the corporate future that was laid out in a famous mandate by Jack Welch: "General Electric will be either number one or number two in the field, or we will exit the sector." This is a clear, but general, description of where Welch wanted to take the company. Like my Zambia story, although for different reasons, this statement doesn't convey *too* much information.

I also came across stories used in somewhat unusual situations that called for reactive rather than proactive measures. These stories counteracted negative ones that circulated like a virus within an organization and threatened to infect the entire body. Dave Snowden of IBM first pointed out to me how stories could be used in this manner. His hypothesis was that you could attach a positive story to a negative one in order to defuse it, as an antibody would neutralize an antigen.

For example, at an IBM manufacturing site for laptop computers in the United Kingdom, stories circulated among the blue-collar workers about the facility's managers, who were accused of "not doing any real work," "being overpaid," and "having no idea what it's like on the manufacturing line." But an additional story was injected into the mix: One day, a new site director turned up in a white coat, unannounced and unaccompanied, and sat on the line making ThinkPads. He asked workers on the assembly line for help. In response, someone asked him, "Why do you earn so much more than I do?" His simple reply: "If you screw up badly, you lose your job. If I screw up badly, 3,000 people lose their jobs."

While not a story in the traditional sense, the manager's words—and actions—served as a seed for the story that eventually circulated in opposition to the one about managers being lazy and overpaid. You can imagine the buzz: "Blimey, you should've seen how he fumbled with those circuit boards. I guess *he'll* never work on the line. But you know, he does have a point about his pay." The atmosphere at the facility began improving within weeks.

MUCH WORK remains to be done in developing a menu of narrative patterns that can be used for different purposes in an organizational setting. Although the handful of story types that I've identified is no more than a start, I hope it inspires leaders to consider the various ways storytelling might be used. Certainly, the ability to tell the right story at the right time is emerging as an essential leadership skill, one that can help managers cope with, and get business results in, the turbulent world of the twenty-first century.

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How Venture Capitalists Really Assess a Pitch

The surprising behaviors that can make a difference

Originally published in May–June 2017

BEFORE LAKSHMI BALACHANDRA entered academia, she spent a few years working for two venture capital firms, where she routinely witnessed a phenomenon that mystified her. The VCs would receive a business plan from an entrepreneur, read it, and get excited. They'd do some research on the industry, and their enthusiasm would grow. So they'd invite the company founder in for a formal pitch meeting—and by the end of it they'd have absolutely no interest in making an investment. Why did a proposal that looked so promising on paper become a nonstarter when the person behind the plan actually pitched it? "That's what led me to pursue a PhD," says Balachandra, now an assistant professor at Babson College. "I wanted to break down and study the interaction between the VC and the entrepreneur."

Even before she began her research, Balachandra had some hunches. Most entrepreneurs believe that the investment decision will hinge primarily on the substance of their pitch—the information and logic, usually laid out in a PowerPoint deck. But in fact most VCs review pitch decks beforehand; the in-person encounter is more about asking questions, gaining clarity, and sizing up personalities. To better understand those dynamics, Balachandra spent almost 10 years capturing what happens in pitch meetings and quantifying the results. Some patterns were obvious from the start. For instance, entrepreneurs who laugh during their pitches have more success, as do people who name-check friends they have in common with the VCs. But after drilling down, she drew four broad conclusions:

Passion is overrated. Working with video recordings of 185 one-minute pitches during an MIT Entrepreneurship Competition (with real VCs as judges), Balachandra had coders turn off the sound and use only the visuals to assess how energetic and how positive or negative each founder appeared. (The coders controlled for presenters' gender and attractiveness along with the size of the market the start-ups were addressing.) Among both VCs and entrepreneurs, conventional wisdom holds that "passion" is a positive attribute, connoting high energy, persistence, and commitment.

ILLUSTRATION BY RYAN GARCIA

BONG KOH

“I PREFER INVESTING IN MISSIONARIES”

Bong Koh worked for a traditional venture capital firm based in the Bay Area and cofounded three start-ups before launching KohFounders, a Chicago- and Los Angeles–based early-stage investment fund. He spoke with HBR about how he sizes up founders. Edited excerpts follow.

Do entrepreneurs overestimate the importance of the business idea they’re pitching relative to the way they present themselves?

I 100% believe that they do. Although the business idea is obviously very important, I tend to filter out ideas and markets I’m not interested in before deciding whether to even take a pitch meeting. In the earliest stages, when you’re an angel or a pre-seed investor, there isn’t a lot of information about whether the business will gain traction. You have to take an educated guess about whether there’s a market, and you have to evaluate the other aspects of the pitch. A lot of it comes down to ‘Do you believe in this team?’ That’s first and foremost for me once I’ve decided something is a market opportunity I want to explore. I want to know if the entrepreneurs are willing to grind it out.

This research suggests that a calm demeanor is more attractive to investors than passion or energy. Do you agree?

I actually prefer high-passion, high-energy entrepreneurs. People who start businesses are either mercenaries or missionaries, and I prefer investing in missionaries—people who really believe in the pain point they’re solving.

How important is an entrepreneur’s willingness to be mentored?

I can’t make a company succeed. Any investors who say they can are arrogant. That said, I do look for people who will be good partners, who are open to feedback. If people get too defensive when receiving feedback, it can be challenging to work with them.

How hard is it to assess these traits in a single pitch?

I try not to focus too much on how the entrepreneur pitches. Just as there are people who excel in job interviews but make horrible employees, there are people who are really good at pitching but are not necessarily good as operators. I try to spend a lot of time with an entrepreneur outside the pitch setting before I invest. That’s one of the reasons I do not invest a lot in the Bay Area—deals can move very quickly there, so it can be hard to spend a lot of time with a start-up before reaching a decision.

PHOTOGRAPHY BY MEIKO TAKECHI ARQUILLOS

"There's this mythology that they want to see that you're dying to do this business and work hard," Balachandra says. But when the coders looked at their assessments in light of which start-ups were chosen as finalists in the competition, they found that the opposite was true: The judges preferred a calm demeanor. Follow-up studies showed that people equate calmness with leadership strength. So temper the enthusiasm and project stone-cold preparedness instead.

Trust beats competence. In a second study, Balachandra worked with a California-based network of angel investors who gather monthly to hear 20-minute pitches from start-ups. Immediately after each pitch, the investors filled out detailed surveys about their reactions and indicated whether they wanted to send the company through to due diligence (the next step before investing). The results showed that interest in a start-up was driven less by judgments that the founder was competent than by perceptions about character and trustworthiness. Balachandra says that this makes sense: A CEO who lacks a skill-based competency, such as a financial or technical background, can overcome that through training or by hiring the right complementary talent, but character is less malleable. And because angel investors often work closely for several years with entrepreneurs on highly risky ventures, they seek evidence that their new partners will behave in honest, straightforward ways that don't heighten the risks. In fact, the research showed that entrepreneurs who projected trustworthiness increased their odds of being funded by 10%.

Coachability matters. Particularly among angel investors, who get involved earlier than traditional VCs do, decisions aren't driven only by potential returns; they are driven by ego as well. Most angel investors are experienced entrepreneurs who want to be hands-on mentors, so they prefer investments where they can add value. For that to happen, a founder must be receptive to feedback and have the potential to be a good protégé.

Balachandra reached this conclusion by conducting surveys and evaluating video sessions with the same California investors' network. Coders examined the videos for behaviors, such as nodding and smiling in response to questions, indicating that founders were open to ideas. When analysis and survey results indicated that they were, and when the investor was experienced in the relevant industry—giving him or her knowledge that could add value—the company was more likely to move on to due diligence.

Gender stereotypes play a role. In Balachandra's first job in venture capital, she rarely encountered other women, whether among VCs or among entrepreneurs; in fact, she says, 94% of venture capitalists are male. (She then worked at an all-female firm that focused on funding start-ups headed by women.) In her research, she and her colleagues used videos from the MIT competition to test the perception that VCs are biased against female entrepreneurs. Coders noted whether the presenter was male or female and then measured whether he or she exhibited stereotypically masculine behaviors (such as forcefulness, dominance, aggressiveness, and assertiveness) or stereotypically female ones (warmth, sensitivity, expressiveness, and emotionality). The analysis revealed that although gender alone didn't influence success, people with a high degree of stereotypically female behavior were less likely than others to succeed at pitching. "The study shows that VCs are biased against femininity," Balachandra says. "They don't want to see particular behaviors, so if you're overly emotional or expressive, you should consider practicing to avoid those things."

The most important takeaway for entrepreneurs is this: You should approach the pitching process less as a formal presentation and more as an improvisational conversation in which attitude and mindset matter more than business fundamentals. Listen hard to the questions you're asked, and be thoughtful in your responses. If you don't know something, offer to find out—or ask the investor what he or she thinks. Don't react defensively to critical questions. And instead of obsessing over the specifics of your pitch deck, Balachandra advises, "think about being calm, cool, and open to feedback."

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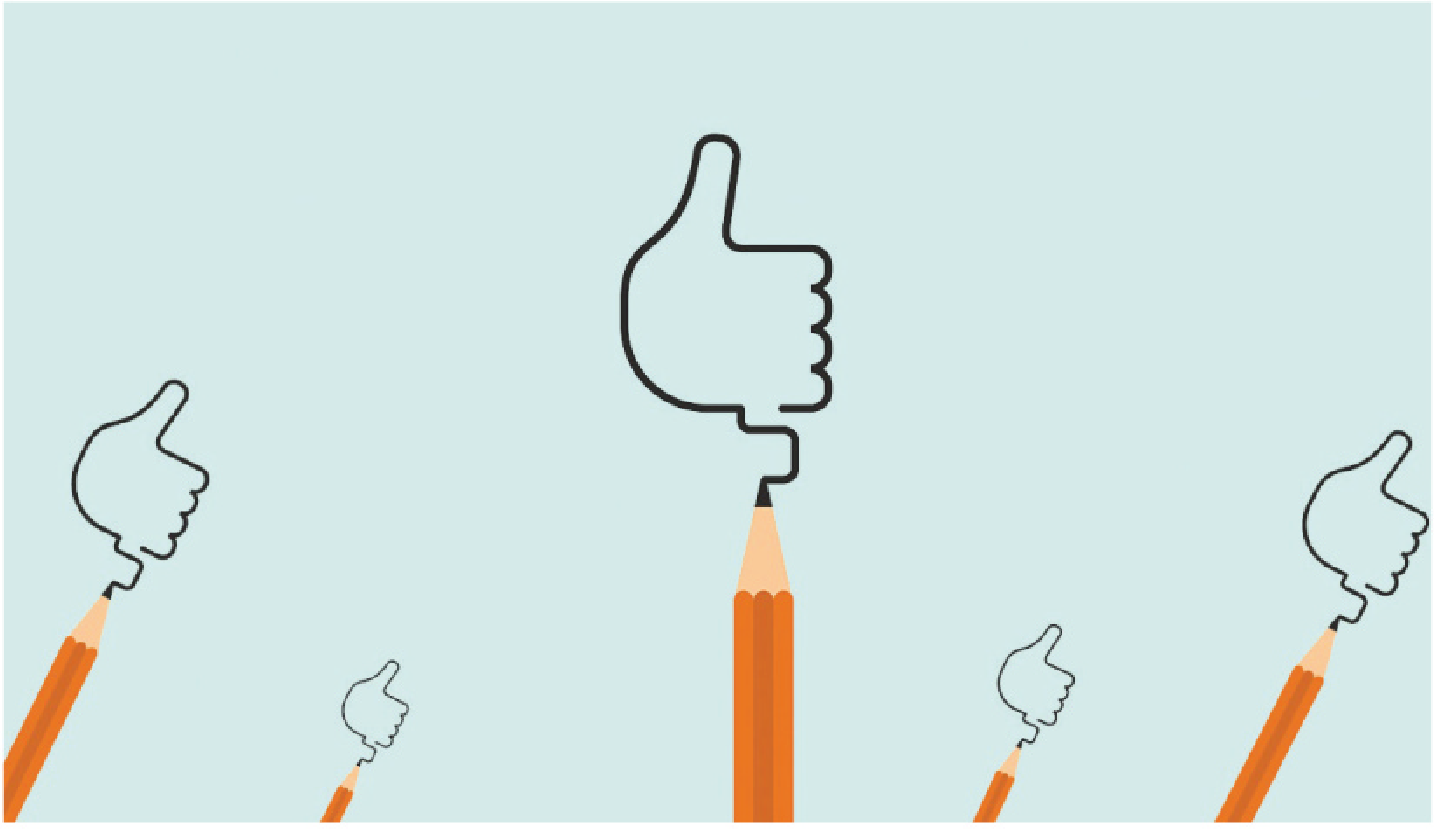
BY THE EDITORS

ABOUT THE RESEARCH "Calm, Cool and Competent: The Impact of an Entrepreneur's Displayed Emotions on Investor Decisions," by L. Balachandra and A. Corbett (working paper); "Pitching Trust: Investors Value Character Over Competency," by L. Balachandra (working paper); "Investor Mentor: Evaluating the Entrepreneur as Protégé," by L. Balachandra, H. Sapienza, and D. Kim (working paper); "Don't Pitch Like a Girl! How Gender Stereotypes Influence Investor Decisions," by L. Balachandra et al. (*Entrepreneurship Theory and Practice,* September 2017)

Quick Takes



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A Checklist for More-Persuasive Presentations

by Dorie Clark

WE ALL KNOW the basics of good presentation skills: Don't read from a script, don't overwhelm your audience with verbose slides, and the like. But for a particular kind of high-stakes presentation—one in which you're trying to get buy-in from key decision-makers—those basics aren't enough.

To convince the people who have the power to approve your idea or let it die, you must start with a strong outline. To structure a presentation from the outset that defuses potential objections up front and is so compelling that a "yes" becomes far more likely, ask yourself these questions:

What's the problem you're solving? Too often, even experienced professionals start their presentations by talking about the solutions they're offering. But if you're presenting to outsiders, or even high-level leaders inside your company, they may not have been following the development process of your project very closely. If you don't explain the context and why it matters, you risk people tuning out early on because they're not sure if your idea is relevant.

Why now? The problem may be relevant, but they've been just fine avoiding it up until this point. Why is this the moment they should change what's been working? Why do they need to take immediate action? Until you prove to them that the problem is urgent and will continue to get worse unless you address it, their inclination will be to "wait and see" or prioritize other things. Make sure you've clearly explained the cost of not taking action.

How has the idea been vetted? You may have spent two years working on this project. But the CEO or the board may not fully appreciate the depth of your effort, so it's useful to contextualize it for them. This doesn't mean spending five minutes bragging about your past accomplishments, but you want to highlight evidence of your competence and the seriousness with which you pursued this solution. For instance, it's worth mentioning that your team interviewed 100 leading researchers to identify the best practices you're recommending or that you ran three pilots to test the concept. As you outline, make sure you build in this critical element.

Have you simplified the structure? You're so familiar with your idea, even complex facets of it seem obvious to you. But that won't be the case for people hearing it for the first time. Clarify and simplify the information you're presenting, perhaps into a series of numbered steps or phases. For instance, in my book *Reinventing You,* I describe a three-phase process for reinventing yourself professionally (discovering your brand, creating your brand, and living your brand) that helps you break an involved process into discrete steps so that you feel comfortable taking action. That enables the audience to grasp a complex solution more readily and inspires more confidence in the path you're proposing. It also provides an overarching structure for the meat of your presentation.

Aesthetics and theatrics matter, but your content is at the heart of whether you win or lose in the moment.

Have you included a story? Some professions—engineering comes to mind—embrace a "just the facts, ma'am" approach, rich with statistics but devoid of stories. It may seem frivolous or pandering if you're not used to presentations that feature illustrative anecdotes, but you're putting yourself at a significant disadvantage if you don't use storytelling as part of your tool kit. That doesn't mean concocting treacly leadership fables but rather recognizing that a piece of data can become more powerful if you pair it with a concrete example to help others visualize what you're talking about. Make sure your outline includes at least one story to enliven your presentation.

Have you included a call to action? Most professionals go wrong by failing to present a clear call to action at the end of their presentation. The next step may be obvious to you—"invest in our company" or "approve the budget for the full-scale launch." But it's rarely that clear to the audience, who is hearing the pitch for the first time. If you've done your job up to this point, they'll be on your side. Now you can clarify exactly what action they can take to show their support.

Presentations are critical for most professionals, yet too much emphasis is often placed on how your slides look or where you're standing onstage. Of course, aesthetics and theatrics matter, but your content is at the heart of whether you win or lose in the moment. If your presentation covers all these bases, you're far more likely to get the audience on your side quickly and achieve the result you desire.

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SITTIG FAHR-BECKER/EYEEM

To Persuade Others, Give Them Options

by Steve Martin

THERE ARE MANY techniques used to influence others. But researchers have found that the most successful tactics gain their persuasive power from just a few simple human motivations.

One of these is the desire to make effective decisions efficiently. This may not be surprising, but you can significantly enhance your persuasive power by triggering it with small changes in your approach.

When making a choice, we strive to achieve the best outcome—anything less can mean a waste of our time, effort, and resources. But in today's crazy, information-overloaded world, we also need to balance the quality of our choices with the time it takes to make them. Understanding the mental shortcuts we all rely on to speed up the decision-making process reveals some useful ways to convince others that your option or proposal is the most effective and efficient one.

One of these mental shortcuts is to use comparisons to evaluate a choice, rather than judge an option in isolation. We often do this intentionally. Trying to determine if a vendor's quote is fair? Get some other bids. Trying to decide whether you can reach your sales goals by the end of the quarter? Compare your current performance to the last period. The underlying psychological principle at play here is perceptual contrast, and it can also be an unconscious process rather than an intentional one. We perceive a $35 bottle of wine very differently when offered a $15 house wine versus a $60 bottle first, regardless of whether we actively register those differences.

Businesses can use this to their advantage when persuading customers to make purchase decisions based on pricing. As an extreme example, take the Carluccio's Restaurant Group, which has more 70 cafés across Europe and the Middle East. They serve a range of authentic Italian foods such as pastas, salads, gelatos, and motorcycles. That's right: Prominently displayed on each menu is a Vespa Primavera 50 that diners can order, in a color of their choosing, for $4,500. Compared to salads and sandwiches, of course, Carluccio's doesn't sell that many motorcycles. It's not included on the menu to sell but rather to make the target items (the salads and sandwiches) appear as more effective and efficient decisions for its customers.

Understanding perceptual contrast can be helpful in contexts beyond pricing decisions as well.

Use comparisons to evaluate a choice, rather than judge an option in isolation.

For example, if you are presenting a business plan for a new product to your board, first review the products you've decided not to pursue. This doesn't mean you should invent lousy alternatives to your great idea so that your idea appears more impressive, but you can provide your audience with the same legitimate comparisons you've considered.

You may fear that your board may home in on one of your alternatives instead. Although that is certainly possible, it shouldn't really be thought of as a risk: The options you present first are indeed legitimate; if your audience chooses them, there is still some benefit to the choice (and maybe more than you knew!). You also gain a reputation as someone who supports open decision-making, rather than someone who deliberately sweeps alternative options under the rug to always get their own way. In addition, including legitimate comparisons provides you with a great opportunity to lead further meaningful conversations.

Beyond legitimate comparisons there are many other ways to trigger the "effective and efficient decisions" motivator. Providing testimonials, for example, shows that if people similar to your audience are making a specific choice, it's probably a good one for them to make too. Likewise, signaling the progress you've already made toward achieving a goal can persuade others to join you—it's usually more effective and efficient to hitch aboard existing programs than to start from scratch.

Whether you want to persuade an individual or a whole group, understanding how to trigger this deeply seated motivation can give you the power to convince your audience that the choice you're offering is the right one.

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PETER DAZELEY/GETTY IMAGES

How to Blow a Presentation to the C-Suite

by Sabina Nawaz

DIVYA, A DIRECTOR who leads a large engineering team, was invited to a two-day retreat with the CEO and senior executives of her *Fortune* 50 company. She and 30 of her high-potential peers were excited to rub shoulders with the leadership team.

The purpose of the retreat was to expose up-and-coming leaders to broader challenges, expand their network across silos, and, of course, give them the chance to connect personally with C-suite executives.

The session kicked off with participants dividing into small teams to tackle companywide strategic challenges. This was a rare opportunity to present directly in front of the CEO, so Divya and her teammates worked hard to research their assigned topic, frame the specific challenge, and debate different ideas and solutions. Instead of hanging out at the bar after dinner, they worked far into the night finalizing their presentation. Divya was selected as the spokesperson for her group, and the next morning she made their pitch.

The team's idea was met with a lukewarm reaction and a polite round of applause. Naturally, they were disappointed in this tepid response.

Divya and her team are all smart, do great work in their current jobs, and have promising careers ahead of them. What went wrong?

On the basis of my experience watching hundreds of presentations made by high-potential leaders, I can tell you that Divya and her colleagues are not alone in failing to land a key pitch. When presenting ideas to the CEO, even seasoned leaders who don't regularly interact with the C-suite fall into a few common traps that can be easily avoided.

TRAP 1

An Idea Without Its Problem

Smart, successful people tend to have great ideas. It's natural for you to be excited about your ideas and eager to share them with your executives. But place yourself in your CEO's shoes: She's on the receiving end of endless smart ideas. For yours to stand out and be useful to the CEO, it must solve a problem.

Begin the presentation with the problem you've identified and spend time up front creating context, surfacing the pain points, and building a sense of urgency around addressing the challenge. Many presenters move straight to the solution and neglect to build a sound case for immediate action. It's the problem, not the idea, that executives want to hear first. Spend the first quarter of your allotted time calling out the problem and the next quarter on the idea. The more urgent the problem appears, the more eager your audience will be for the solution.

Unfortunately, in Divya's case, her presentation started with an idea. She didn't realize that pitching a solution outside the context of its founding problem left it wide open to criticism. Executives have a host of responsibilities and crises to manage, so they need to triage which ones they'll act on. They'll be more motivated to prioritize your idea if they can see a direct connection to a problem that won't go away or that will become more significant without their attention.

TRAP 2

An Idea Without a Clear ROI

Once you've established the problem in your presentation, the next step is to prove that your idea will not only solve it but do so in ways that grow the business. First, show how your initiative will self-fund within a short period of time. Next, project how it will grow in revenue to support its expansion as well as begin to fund other parts of the organization. Make sure you include estimates for the often-overlooked money needed for infrastructure and setup.

Divya's team started with an idea and proceeded to explain how they would implement it. They were excited about the idea's technical merits but didn't mention how the solution might be helpful to the company in the marketplace or against the competition. What's more, the idea would require a heavy investment in tools that currently didn't exist.

TRAP 3

A Presentation Without Interaction

Of course, you want to meet your audience where they are. But when speaking with the C-suite, presenters often overexplain obvious things and don't leave enough time for interaction.

Divya spent four minutes out of their allotted 20-minute slot reviewing their research process and what the group learned. Since none of this was new information to the executives, she lost their attention. The entire presentation took 17 minutes, leaving a precious few minutes for questions and follow-up.

Reserve the second half of your allotted time for questions. Although that seems like an outsized chunk, if used well, it can be the most valuable part of your talk. Blunt rapid-fire questions are a sign that executives are interested in your idea. They're processing what you said, testing various angles and hypotheses, and generally want to know more. A common misconception is that if there are no questions, then things went well. The opposite is usually true—the more questions you receive, the better the presentation.

For your idea to stand out and be useful to the CEO, it must solve a problem.

One word of caution: Don't count critiques framed as questions as healthy interaction. For example, "How can this possibly work? You haven't accounted for extra head count." That's not really a question. If your audience is curious and engaged, a genuine question will sound more like, "How would you deal with head count if your growth projections are accurate?"

TRAP 4

Data Without Attention to Detail

Even when you set aside enough time for interaction, you can run into trouble if you don't have the correct answer to an executive's question. Presenters can be imprecise or sloppy with details when questioned, especially when it comes to numbers.

During the Q&A, Divya's teammate Josh made a claim about the number of current customers using a particular product. He missed the actual number by 12% because of a calculation error.

Once you present an incorrect number, your executives may write off the rest of your data. Be sure of your facts, be prepared with the source of your information, and, if there's an error, be ready to quickly follow up with a correction. And if you don't know the answer, don't waste time. Simply admit to that, and tell them you'll look into it and follow up.

If you're in a position to present to the most senior executives in your organization, you're already considered smart and capable. You don't need to prove it by launching directly into your idea and sharing endless details. Instead, give your audience what it really wants: an overview of the problem and how you think it can be solved for the benefit of the company. Give them plenty of time to interact with you, and you'll prove that you're as smart and capable as they thought you were.

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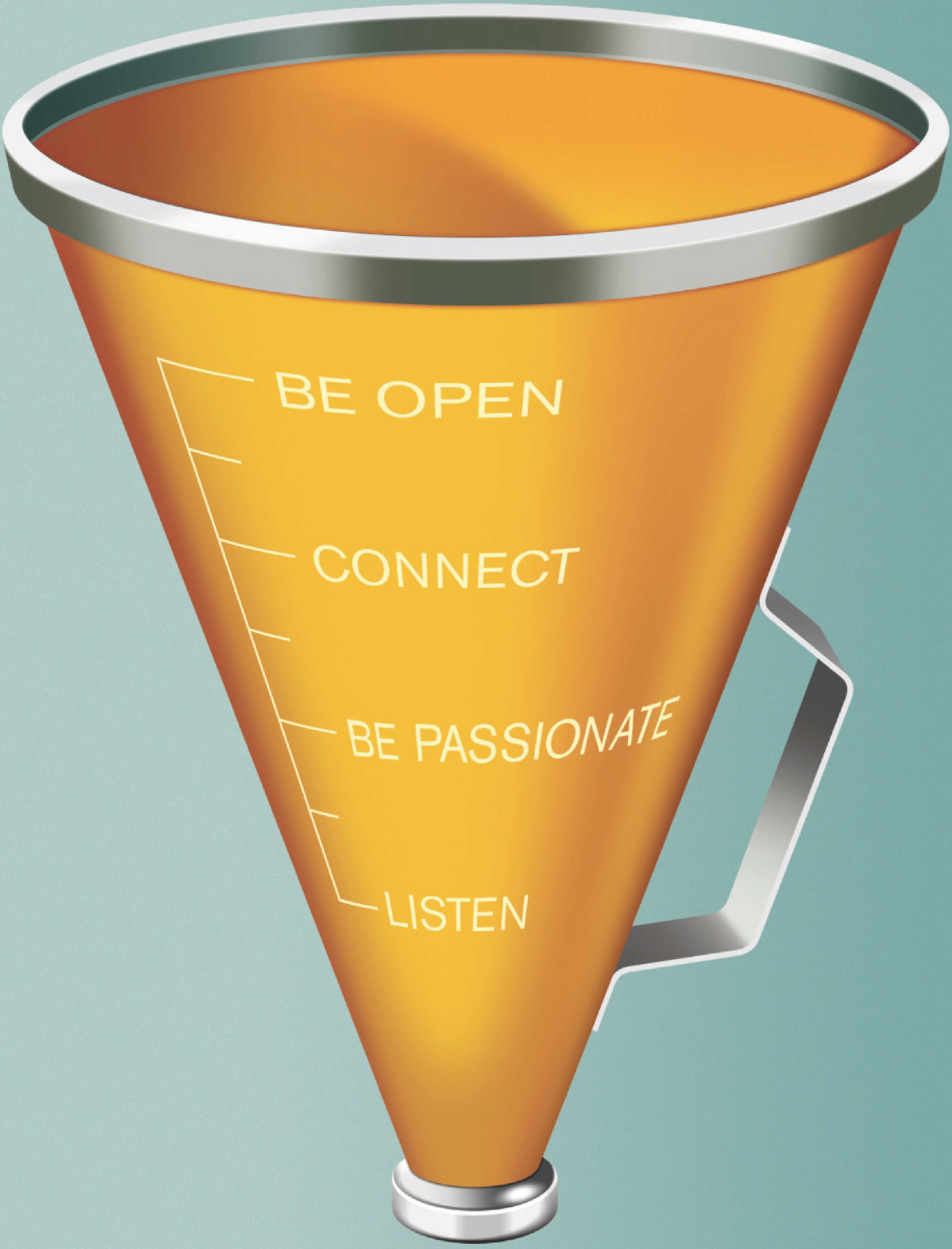
BE OPEN
CONNECT
BE PASSIONATE
LISTEN

How to Become an Authentic Speaker

Even sincere speeches often come across as contrived. A four-step process will help you create a true emotional connection with your audience. by Nick Morgan

AT A COMPANYWIDE sales meeting, Carol, a vice president of sales, strides energetically to the podium, pauses for a few seconds to look at the audience, and then tells a story from her days as a field rep. She deftly segues from her anecdote to a positive assessment of the company's sales outlook for the year, supplementing her speech with colorful slides showing strong growth and exciting new products in the pipeline. While describing those products, she accents her words with animated gestures.

Having rehearsed carefully in front of a small audience of trusted colleagues, all of whom liked her message and her energy, she now confidently delivers the closer: Walking to the edge of the stage, she scans the room and challenges her listeners to commit to a stretch sales goal that will put many of them in the annual winners' circle.

But Carol senses that something's amiss. The audience isn't exhibiting the kind of enthusiasm needed to get the year off to a great start. She begins to panic: What's happening? Is there anything she can do to salvage the situation?

We all know a Carol. (You may be one yourself.) We've all heard speeches like hers, presentations in which the speaker is apparently doing all the right things, yet something—something we can't quite identify—is wrong.

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ILLUSTRATION BY LLOYD MILLER

If asked about these speeches, we might describe them as "calculated," "insincere," "not real," or "phoned in." We probably wouldn't be able to say exactly why the performance wasn't compelling. The speaker just didn't seem *authentic*.

In today's difficult economy, and especially in the aftermath of numerous scandals involving individual executives, employees and shareholders are more skeptical than ever. Authenticity—including the ability to communicate authentically with others—has become an important leadership attribute. When leaders have it, they can inspire their followers to make extraordinary efforts on behalf of their organizations. When they don't, cynicism prevails and few employees do more than the minimum necessary to get by.

In my 22 years of working as a communications coach, I have seen again and again how hard it is for managers to come across in public communications as authentic—even when they passionately believe their message. Why is this kind of communication so difficult? Why can't people just stand up and tell the truth?

What Science Teaches Us

The answer lies in recent research into the ways our brains perceive and process communication. We all know by now the power of nonverbal communication—what I call the "second conversation." If your spoken message and your body language are mismatched, audiences will respond to the nonverbal message every time. Gestures speak louder than words. And that means you *can't* just stand up and tell the truth. You'll often hear someone say in advance of a speech, "I don't want to look over-rehearsed, so I'm going to wing it." But during the presentation his body language will undermine his credibility. Because he's in a stressful situation with no preparation, he'll appear off-kilter. Whatever the message of his words, he'll seem to be learning as he goes—not likely to engender confidence in a leader.

So preparation is important. But the traditional approach—careful rehearsal like Carol's—often doesn't work either. That's because it usually involves specific coaching on nonverbal elements—"maintain eye contact," "spread your arms," "walk out from behind the podium"—that can ultimately make the speaker seem artificial. The audience can see the wheels turning in her head as she goes through the motions.

Why does this calculated body language come off as inauthentic? Here's where the brain research comes in. We're learning that in human beings the second, nonverbal conversation actually starts *first,* in the instant after an emotion or an impulse fires deep within the brain but before it has been articulated. Indeed, research shows that people's natural and unstudied gestures are often indicators of what they will think and say next.

You might say that words are after-the-fact explanations of why we just gestured as we did. Think of something as simple as a hug: The impulse to embrace someone begins *before* the thought that you're glad to see him or her has fully formed, much less been expressed aloud. Or think about a typical conversation: Reinforcement, contradiction, and commentary arise first in gesture. We nod vigorously, shake our heads, roll our eyes, all of which express our reactions more immediately—and more powerfully—than words can.

If gesture precedes conscious thought and thought precedes words—even if by no more than a tiny fraction of a second—that changes our thinking about speech preparation. When coached in the traditional way, rehearsing specific gestures one by one, speakers end up employing those gestures at the same time that—or even slightly after—they speak the associated words. Although audiences are not consciously aware of this unnatural sequence, their innate ability to read body language leads them to feel that something's wrong—that the speaker is inauthentic.

"Rehearsing" Authenticity

So if neither casual spontaneity nor traditional rehearsal leads to compelling communication, how can you prepare for an important presentation? You have to tap into the basic impulses underlying your speech. These should include four powerful aims: to be open, to connect, to be passionate, and to listen. Each of these aims informs nearly all successful presentations.

Rehearse your speech with them in mind. Try practicing it four ways, adopting the mind-set of each aim in turn, feeling it more than thinking about it. Forget about rehearsing specific gestures. If you are able to sincerely realize these feelings, your body language will take care of itself, emerging naturally and at the right moment. (The approach described here may also lead you to

People's natural and unstudied gestures are often indicators of what they will think and say next.

refine some of your verbal message, to make it accord with your nonverbal one.) When you actually deliver the speech, continue to focus on the four underlying aims.

Note the paradox here. This method is designed to achieve authenticity through the mastery of a calculated process. But authenticity arises from the four aims, or what I call "intents," that I have mentioned. If you can physically and emotionally embody all four, you'll achieve the perceived *and* real authenticity that creates a powerful bond with listeners.

What Underlies an Authentic Speech

Creating that bond isn't easy. Let me offer some advice for tapping into each of the four intents.

The intent to be open with your audience. This is the first and in some ways the most important thing to focus on in rehearsing a speech, because if you come across as closed, your listeners will perceive you as defensive—as if they somehow represent a threat. Not much chance for communication there.

How can you become more open? Try to imagine giving your presentation to someone with whom you're completely relaxed—your spouse, a close friend, your child. Notice what that mental picture looks like but particularly what it *feels* like. This is the state you need to be in if you are to have an authentic rapport with your audience.

If it's hard to create this mental image, try the real thing. Find a patient friend and push yourself to be open with him or her. Notice what that scene looks like and, again, how you feel. Don't overintellectualize: This is a bit like practicing a golf swing or a tennis serve. Although you might make tiny mental notes about what you're doing, they shouldn't get in the way of recognizing a feeling that you can try to replicate later.

Openness immediately feels risky to many people. I worked with a CEO who was passionate about his work, but his audiences didn't respond. He realized that he'd learned as a boy not to show emotion precisely about the things that meant the most to him. We had to replace this felt experience with one of talking to a close friend he was excited to see.

Let's go back to Carol (a composite of several clients). As she works on feeling more open in her presentations, her face begins to light up with a big smile when she speaks, and her shoulders relax. She realizes that without meaning to, she has come across as so serious that she has alienated her audiences.

A change in nonverbal behavior can affect the spoken message. Over and over, I've seen clients begin speaking more comfortably—and more authentically—as the intent to be more open physically led to a more candid expression of their thoughts.

The intent to connect with your audience. Once you begin to feel open, and you've stored away the memory of what it looks and feels like, you're ready to practice the speech again, this time focusing on the audience. Think about wanting—*needing*—to engage your listeners. Imagine that a young child you know well isn't heeding you. You want to capture that child's attention however you can. You don't strategize—you simply do what feels natural and appropriate. You increase the intensity or volume of your voice or move closer.

You also want to *keep* your audience's attention. Don't let listeners slide away into their thoughts instead of following yours. Here, you might transform your young child into a teenager and imagine yearning to keep this easily distractible listener focused on your words.

If openness is the ante that lets you into the game, connection is what keeps the audience playing. Now that Carol is intent on being connected with her listeners, she realizes that she typically waits too long—in fact, until the very end of her speech—to make contact with them. She begins her next presentation by reaching out to audience members who have contributed significantly to the company's sales success, establishing a connection that continues throughout her speech.

The intent to be passionate about your topic. Ask yourself what it is that you feel deeply about. What's at stake? What results do you want your presentation to produce? Are you excited about the prospects of your company? Worried that they look bleak? Determined to improve them?

Focus not on what you want to say but on why you're giving the speech and how you feel about that. Let the underlying emotion come out (once you've identified it, you won't need to force it) in every word you deliver during this round of rehearsal. Then raise the stakes for yourself: Imagine that somebody in the audience has the power to take everything away from you unless you win him or her over with your passionate argument.

Idea in Brief

You rehearsed your speech thoroughly—and mastered that all-important body language. But when you delivered the talk, you sensed little enthusiasm in your audience.

What's going on? You're probably coming across as artificial. The reason: When we r ehearse specific body language elements, we use them incorrectly during the actual speech—slightly *after* speaking the associated words. Listeners feel something's wrong because during natural conversation, body language emerges *before* the associated words.

To demonstrate your authenticity, don't rehearse your body language. Instead, imagine meeting four aims:

- Being open to your audience
- Connecting with your audience
- Being passionate about your topic
- Listening to your audience

When you rehearse this way, you'll genuinely experience these feelings when delivering your speech. Your body language will emerge at the right moment. And your listeners will know you're the real thing.

Don’t overintellectualize: Working to be open is a bit like practicing a golf swing or a tennis serve.

I worked with a senior partner at a consulting firm who was planning to talk to her colleagues about the things at the firm she valued and wanted to pass on to the next generation as she got ready to retire. Her speech, when she began practicing it, was a crystal-clear but dull commentary on the importance of commitment and hard work. As she began focusing on the emotion beneath the speech, she recalled how her mother, a dancer, had instilled in her the value of persisting no matter what the obstacles. She decided to acknowledge her mother in her talk. She said that her mother, then 92, had never let the pain and difficulties she had experienced during her career obscure her joy in performing. Although the speaker shed most of her tears during rehearsal, her passion transformed the talk into something memorable.

Somewhat more prosaically, Carol begins to think about what she’s passionate about—her determination to beat a close competitor—and how that might inform her presentations. She realizes that this passion fuels her energy and excitement about her job. She infuses her next speech with some of that passion and immediately comes across as more human and engaging.

The intent to “listen” to your audience. Now begin thinking about what your listeners are likely to be feeling when you step up to begin your presentation. Are they excited about the future? Worried about bad sales news? Hopeful they can keep their jobs after the merger? As you practice, imagine yourself watching them very closely, looking for signs of their response to you.

Of course, your intent to discover the audience’s emotional state will be most important during the actual presentation. Usually your listeners won’t actually be talking to you, but they will be sending you nonverbal messages that you’ll need to pick up and respond to.

This isn’t as hard as it may sound. As a fellow member of the human race, you are as expert as your audience in reading body language—if you have an intent to do so. As you read the messages your listeners are sending with their bodies, you may want to pick up the pace, vary your language, even change or eliminate parts of your talk. If this leads you to involve the audience in a real dialogue—say, by asking an impromptu question—so much the better.

If time has been set aside for questions at the end of your presentation, you’ll want to listen to the audience with your whole body, keeping yourself physically and psychologically still in the way you might when someone is telling you something so important that you dare not miss a word. Without thinking about it, you’ll find yourself leaning forward or nodding your head—gestures that would appear unnatural if you were doing them because you’d been told to.

Of course, listening to and responding to an audience in the middle of your speech requires that you have your material down cold. But you can also take what your listeners tell you and use it to improve future presentations. I worked with a sales executive who had been so successful that she began touring the world in order to share her secrets with others. In listening to audiences, paying attention to their bodies as well as their words, she began to realize that they didn’t just want to receive what she had to say; they wanted to give her something in return. The executive’s speeches were inspiring, and her listeners wanted to thank her. So we designed a brief but meaningful ceremony near the end of her speech that allowed the audience members to get up, interact with one another, and give back to the speaker some of the inspiration she was giving them.

Consider Carol once again. Because of her intent to pick up on her listeners’ emotions, Carol begins to realize over the course of several speeches that she has been wrongly assuming that her salespeople share her sense of urgency about their major competitor. She resolves to spend more time at the beginning of her next presentation explaining why stretch goals are important. This response to her listeners’ state of mind, when combined with her own desire to be open, connected, and passionate, strengthens her growing ability to come across as—and be—an authentic speaker.

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BUILD YOUR CONFIDENCE

Learning Charisma

Transform yourself into the person others want to follow. by John Antonakis, Marika Fenley, and Sue Liechti

JANA STANDS at the podium, palms sweaty, looking out at hundreds of colleagues who are waiting to hear about her new initiative. Bill walks into a meeting after a failed product launch to greet an exhausted and demotivated team that desperately needs his direction. Robin gets ready to confront a brilliant but underperforming subordinate who needs to be put back on track.

We've all been in situations like these. What they require is charisma—the ability to communicate a clear, visionary, and inspirational message that captivates and motivates an audience. So how do you learn charisma? Many people believe that it's impossible. They say that charismatic people are born that way—as naturally expressive and persuasive extroverts. After all, you can't teach someone to be Winston Churchill.

While we agree with the latter contention, we disagree with the former. Charisma is not all innate; it's a learnable skill or, rather, a set of skills that have been practiced since antiquity. Our research with managers in the laboratory and in the field indicates that anyone trained in what we

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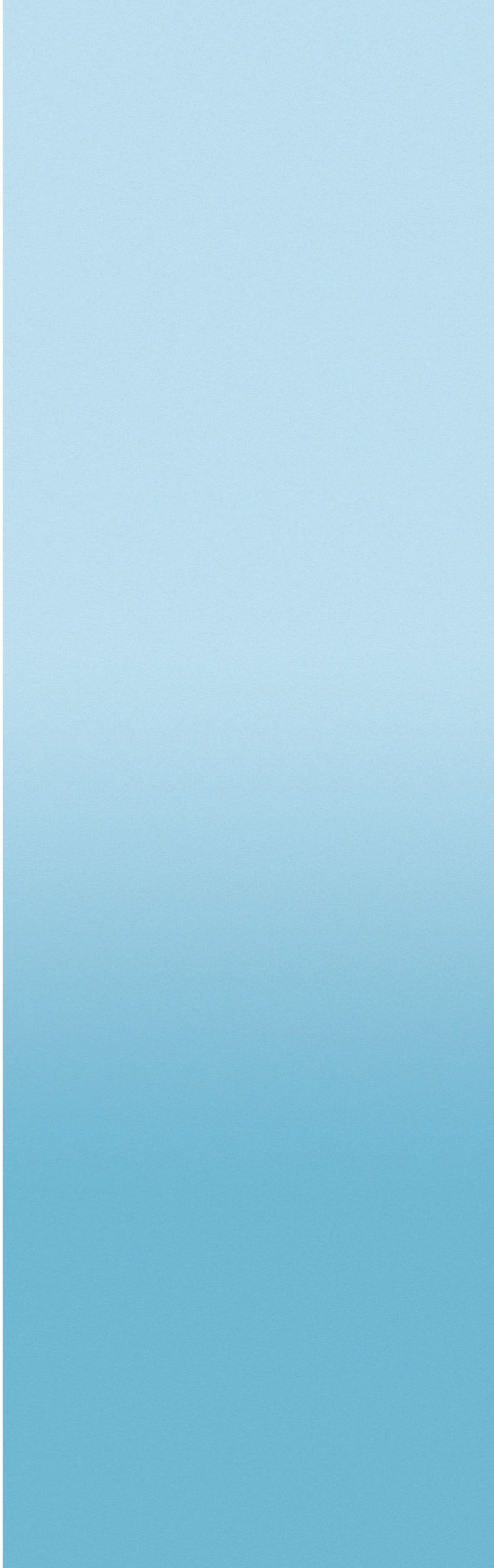

ILLUSTRATION BY LLOYD MILLER

call "charismatic leadership tactics" (CLTs) can become more influential, trustworthy, and "leaderlike" in the eyes of others. In this article we'll explain these tactics and how we help managers master them. Just as athletes rely on hard training and the right game plan to win a competition, leaders who want to become charismatic must study the CLTs, practice them religiously, and have a good deployment strategy.

What Is Charisma?

Charisma is rooted in values and feelings. It's influence born of the alchemy that Aristotle called the *logos,* the *ethos,* and the *pathos;* that is, to persuade others, you must use powerful and reasoned rhetoric, establish personal and moral credibility, and then rouse followers' emotions and passions. If a leader can do those three things well, he or she can then tap into the hopes and ideals of followers, give them a sense of purpose, and inspire them to achieve great things.

Several large-scale studies have shown that charisma can be an invaluable asset in any work context—small or large, public or private, Western or Asian. Politicians know that it's important. Yet many business managers don't use charisma, perhaps because they don't know how to or because they believe it's not as easy to master as transactional (carrot-and-stick) or instrumental (task-based) leadership. Let's be clear: Leaders need technical expertise to win the trust of followers, manage operations, and set strategy; they also benefit from the ability to punish and reward. But the most effective leaders layer charismatic leadership on top of transactional and instrumental leadership to achieve their goals.

> After executives were trained in these tactics, the leadership ratings observers gave them rose by about 60%.

In our research, we have identified a dozen key CLTs. Some of them you may recognize as longstanding techniques of oratory. Nine of them are verbal: metaphors, similes, and analogies; stories and anecdotes; contrasts; rhetorical questions; three-part lists; expressions of moral conviction; reflections of the group's sentiments; the setting of high goals; and conveying confidence that they can be achieved. Three tactics are nonverbal: animated voice, facial expressions, and gestures.

There are other CLTs that leaders can use—such as creating a sense of urgency, invoking history, using repetition, talking about sacrifice, and using humor—but the 12 described in this article are the ones that have the greatest effect and can work in almost any context. In studies and experiments, we have found that people who use them appropriately can unite followers around a vision in a way that others can't. In eight of the past 10 U.S. presidential races, for instance, the candidate who deployed verbal CLTs more often won. And when we measured "good" presentation skills, such as speech structure, clear pronunciation, use of easy-to-understand language, tempo of speech, and speaker comfort, and compared their impact against that of the CLTs, we found that the CLTs played a much bigger role in determining who was perceived to be more leaderlike, competent, and trustworthy.

Still, these tactics don't seem to be widely known or taught in the business world. The managers who practice them typically learned them by trial and error, without thinking consciously about them. As one manager who attended our training remarked: "I use a lot of these tactics, some without even knowing it." Such learning should not be left to chance.

We teach managers the CLTs by outlining the concepts and then showing news and film clips that highlight examples from business, sports, and politics. Managers must then experiment with and practice the tactics—on video, in front of peers, and on their own. A group of midlevel European executives (with an average age of 35) that did so as part of our training almost doubled their use of CLTs in presentations. As a result, they saw observers' numerical ratings of their competence as leaders jump by about 60% on average. They were then able to take the tactics back to their jobs. We saw the same thing happen with another group of executives (with an average age of 42) in a large Swiss firm. Overall, we've found that about 65% of people who have been trained in the CLTs receive above-average ratings as leaders, in contrast with only 35% of those who have not been trained.

The aim is to use the CLTs not only in public speaking but also in everyday conversations—to be more charismatic all the time. The tactics work because they help you create an emotional connection with followers, even as they make you appear more powerful, competent, and worthy of respect. In Greek, the word "charisma" means special gift. Start to use the CLTs correctly, and that's what people will begin to think you have.

Let's now look at the tactics in detail.

Connect, Compare, and Contrast

Charismatic speakers help listeners understand, relate to, and remember a message. A powerful way to do this is by using *metaphors, similes, and analogies.* Martin Luther King Jr. was a master of the metaphor. In his "I Have a Dream" speech, for example, he likened the U.S. Constitution to "a promissory note" guaranteeing the unalienable rights of life, liberty, and the pursuit of happiness to all people but noted that America had instead given its black citizens "a bad check," one that had come back marked "insufficient funds." Everyone knows what it means to receive a bad check. The message is crystal clear and easy to retain.

Metaphors can be effective in any professional context, too. Joe, a manager we worked with, used one to predispose his team to get behind an urgent relocation. He introduced it by saying: "When I heard about this from the board, it was like hearing about a long-awaited pregnancy. The difference is that we have four months instead of nine months to prepare." The team instantly understood it was about to experience an uncomfortable but ultimately rewarding transition.

Stories and anecdotes also make messages more engaging and help listeners connect with the speaker. Even people who aren't born raconteurs can employ them in a compelling way. Take this example from a speech Bill Gates gave at Harvard, urging graduates to consider their broader responsibilities: "My mother...never stopped pressing me to do more for others. A few days before my wedding, she hosted a bridal event, at which she read aloud a letter about marriage that she had written to Melinda. My mother was very ill with cancer at the time, but she saw one more opportunity to deliver her message, and at the close of the letter she [quoted]: 'From those to whom much is given, much is expected.'"

Lynn, another manager we studied, used the following story to motivate her reports during a crisis: "This reminds me of the challenge my team and I faced when climbing the Eiger peak a few years ago. We got caught in bad weather, and we could have died up there. But working together, we managed to survive. And we made what at first seemed impossible, possible. Today we are in an economic storm, but by pulling together, we can turn this situation around and succeed." The story made her team feel reassured and inspired.

Contrasts are a key CLT because they combine reason and passion; they clarify your position by pitting it against the opposite, often to dramatic effect. Think of John F. Kennedy's "Ask not what your country can do for you—ask what you can do for your country." In our experience, contrasts are one of the easiest tactics to learn and use, and yet they aren't used enough. Here are some examples from managers newly trained in the CLTs. Gilles, a senior VP, speaking to a direct report managing a stagnant team: "It seems to me that you're playing too much defense when you need to be playing more offense." (That's also a metaphor.) And Sally, introducing herself to her new team: "I asked to lead the medical division not because it has the best location but because I believe we can accomplish something great for our company and at the same time help save lives."

Engage and Distill

Rhetorical questions might seem hackneyed, but charismatic leaders use them all the time to encourage engagement. Questions can have an obvious answer or pose a puzzle to be answered later. Think again of Martin Luther King Jr., who said, "There are those who are asking the devotees of civil rights, 'When will you be satisfied?'" and then went on to show that oppressed people can never be satisfied. Anita Roddick—founder of the Body Shop—once used three rhetorical questions to explain what led her to help start the social responsibility movement. The thinking, she said, "was really simple: How do you make business kinder? How do you embed it in the community? How do you make community a social purpose for business?"

Idea in Brief

Charisma—the ability to captivate and inspire an audience—is the hallmark of great orators like Winston Churchill and Martin Luther King Jr. Many believe that charisma is innate and can't be taught, but the authors' research shows otherwise. So how do you learn charisma?

You can employ 12 "charismatic leadership tactics" (CLTs) to become more influential, trustworthy, and "leaderlike" in the eyes of others.

- Using *metaphors, similes,* and *analogies; stories* and *anecdotes;* and *contrasts* helps listeners understand, relate to, and remember a message.
- *Asking rhetorical questions* and *employing three-part lists* help engage the audience and distill the message.
- *Expressions of moral conviction* and *statements that reflect the sentiments of the group* demonstrate integrity, authority, and passion, as do *setting high goals* and *conveying confidence that the goals can be achieved.*
- These nonverbal cues show passion, draw attention, and win listeners: *animated expressions of voice, body, and face.*

Using CLTs can make you more charismatic, and that will make you a more effective leader.

CHARISMA IN VOICE AND BODY

THREE TACTICS FOR SHOWING PASSION—AND WINNING OVER LISTENERS

Animated voice People who are passionate vary the volume with which they speak—whispering at appropriate points or rising to a crescendo to hammer home a point. Emotion—sadness, happiness, excitement, surprise—must come through in the voice. Pauses are also important because they convey control.

Facial expressions These help reinforce your message. Listeners need to see as well as hear your passion—especially when you're telling a story or reflecting their sentiments. So be sure to make eye contact (one of the givens of charisma), and get comfortable smiling, frowning, and laughing at work.

Gestures These are signals for your listeners. A fist can reinforce confidence, power, and certitude. Waving a hand, pointing, or pounding a desk can help draw attention.

This tactic works just as well in private conversations. Take Mika, a manager in our study, who effectively motivated an underperforming subordinate by asking, "So, where do you want to go from here? Will it be back to your office feeling sorry for yourself? Or do you want to show what you are capable of achieving?" Here's another question (also employing metaphor) used by Frank, an IT executive who needed to push back at the unrealistic goals being set for him: "How can you expect me to change an engine in a plane midflight?"

Three-part lists are another old trick of effective persuasion because they distill any message into key takeaways. Why three? Because most people can remember three things; three is sufficient to provide proof of a pattern, and three gives an impression of completeness. Three-part lists can be announced—as in "There are three things we need to do to get our bottom line back into the black"—or they can be under the radar, as in the sentence before this one.

Here's a list that Serge, a midlevel manager, used at a team meeting: "We have the best product on the market. We have the best team. Yet we did not make the sales target." And here's one that Karin, division head of a manufacturing company, employed in a speech to her staff: "We can turn this around with a three-point strategy: First, we need to look back and see what we did right. Next, we need to see where we went wrong. Then, we need to come up with a plan that will convince the board to give us the resources to get it right the next time."

Show Integrity, Authority, and Passion

Expressions of moral conviction and *statements that reflect the sentiments of the group*—even when the sentiments are negative—establish your credibility by revealing the quality of your character to your listeners and making them identify and align themselves with you. On Victory Day at the end of the Second World War, Winston Churchill brilliantly captured the feelings of the British people and also conveyed a spirit of honor, courage, and compassion. He said: "This is your hour. This is not victory of a party or of any class. It's a victory of the great British nation as a whole. We were the first, in this ancient island, to draw the sword against tyranny....There we stood, alone. The lights went out and the bombs came down. But every man, woman, and child in the country had no thought of quitting the struggle....Now we have emerged from one deadly struggle—a terrible foe has been cast on the ground and awaits our judgment and our mercy."

Another nice example of moral conviction (plus a number of other CLTs) comes from Tina, a manager in an NGO pushing for a needed supply-chain change: "Who do you think will pay for the logistical mess we've created? It is not our donors who'll feel it, but the children we're supposed to be feeding that will go to bed one more time with an empty belly and who may not make it through the night. Apart from wasting money, this is not right, especially because the fix is so simple." And here's Rami, a senior IT director trained in the CLTs, expertly reflecting the sentiments of his disheartened team: "I know what is going through your minds, because the same thing is going through mine. We all feel disappointed and demotivated. Some of you have told me you have had sleepless nights; others, that there are tensions in the team, even at home because of this. Personally, life to me has become dull and tasteless. I know how hard we have all worked and the bitterness we feel because success just slipped out of our reach. But it's not going to be like this for much longer. I have a plan."

Another CLT, which helps charismatic leaders demonstrate passion—and inspire it in their followers—is *setting high goals.* Gandhi set the almost impossible (and moral) goal of liberating India from British rule without using violence, as laid out in his famous "quit India" speech. An example from the business world that we often cite is the former CEO of Sharp, Katsuhiko Machida. In 1998, at a time when Sharp faced collapse, cathode-ray tubes dominated the TV market, and the idea of using LCD technology was commercially unviable, he energized his employees by stating the unthinkable: "By 2005, all TVs we sell in Japan will be LCD models."

But one must also *convey confidence that the goals can be achieved.* Gandhi noted: "I know the British Government will not be able to withhold freedom from us, when we have made enough self-sacrifice." In a later speech he expressed his conviction more forcefully: "Even if all the United Nations opposes me, even if the whole of India forsakes me, I will say, 'You are wrong. India will wrench with nonviolence her liberty from unwilling hands.' I will go ahead not for India's sake alone but for the sake of the world. Even if my eyes close before there is freedom, nonviolence will not end." Machida personally took his vision to Sharp's engineers to convince them that they could realize his risky goal; he made it the company's most important project, brought together cross-functional teams from LCD and TV development to work on it, and told them plainly that it was crucial to Sharp's survival. Or take Ray, an engineer we know, addressing his team after a setback: "The deadline the CEO gave us is daunting. Other teams would be right to tremble at the knees, but we are not just another team. I know you can rise to the challenge. I believe in each one of you, which means that I believe that we can get the prototype to manufacturing in three months. Let's commit to do what it takes to get the job done: We have the smarts. We have the experience. All we need is the will, and that's something only great teams have." Passion cannot emerge unless the leader truly believes that the vision and strategic goal can be reached.

The three nonverbal cues—*expressions of voice, body, and face*—are also key to charisma. They don't come naturally to everyone, however, and they are the most culturally sensitive tactics: What's perceived as too much passion in certain Asian contexts might be perceived as too muted in southern European ones. But they are nonetheless important to learn and practice because they are easier for your followers to process than the verbal CLTs, and they help you hold people's attention by punctuating your speech. (For more on these, see the exhibit "Charisma in Voice and Body.")

Putting It All into Practice

Now that you've learned the CLTs, how do you start using them? Simple: Preparation and practice. When you're mapping out a speech or a presentation, you should certainly plan to incorporate the tactics and rehearse them. We also encourage leaders to think about them before one-on-one conversations or team meetings in which they need to be persuasive. The idea is to arm yourself with a few key CLTs that feel comfortable to you and therefore will come out spontaneously—or at least look as if they did. The leaders we've trained worked on improving their charisma in groups and got feedback from one another; you could ask your spouse or a friendly colleague to do the same, or videotape yourself and do a self-critique.

The goal isn't to employ all the tactics in every conversation but to use a balanced combination. With time and practice, they will start to come out on the fly. One manager we know, who met his wife after being trained in the CLTs, showed her his "before" videos and told us she couldn't believe it was he. The charismatic guy in the "after" videos—the one whose CLT use had more than doubled—was the person she had married. Another manager, who learned the tactics six years ago and has since become the chief operating officer of his company, says he now uses them every day—personally and professionally—such as in a recent talk to his team about a relocation, which went "much better than expected" as a result.

If you think you can't improve because you're just not naturally charismatic, you're wrong. The managers with the lowest initial charisma ratings in our studies were able to significantly narrow the gap between themselves and their peers to whom the tactics came naturally. It's true that no amount of training or practice will turn you into Churchill or Martin Luther King Jr. But the CLTs can make you more charismatic in the eyes of your followers, and that will invariably make you a more effective leader.

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Connect, Then Lead

To exert influence, you must balance competence with warmth.

by Amy J.C. Cuddy, Matthew Kohut, and John Neffinger

IS IT BETTER to be loved or feared?

Niccolò Machiavelli pondered that timeless conundrum 500 years ago and hedged his bets. "It may be answered that one should wish to be both," he acknowledged, "but because it is difficult to unite them in one person, it is much safer to be feared than loved."

Now behavioral science is weighing in with research showing that Machiavelli had it partly right: When we judge others—especially our leaders—we look first at two characteristics: how lovable they are (their warmth, communion, or trustworthiness) and how fearsome they are (their strength, agency, or competence). Although there is some disagreement about the proper labels for the traits, researchers agree that they are the two primary dimensions of social judgment.

Why are these traits so important? Because they answer two critical questions: "What are this person's intentions toward me?" and "Is he or she capable of acting on those intentions?" Together, these assessments underlie our emotional and behavioral reactions to other people, groups, and even brands and companies. Research by one of us, Amy Cuddy, and colleagues Susan Fiske, of Princeton, and Peter Glick, of Lawrence University, shows that people judged to be competent but lacking in warmth often elicit envy in others, an emotion involving both respect and

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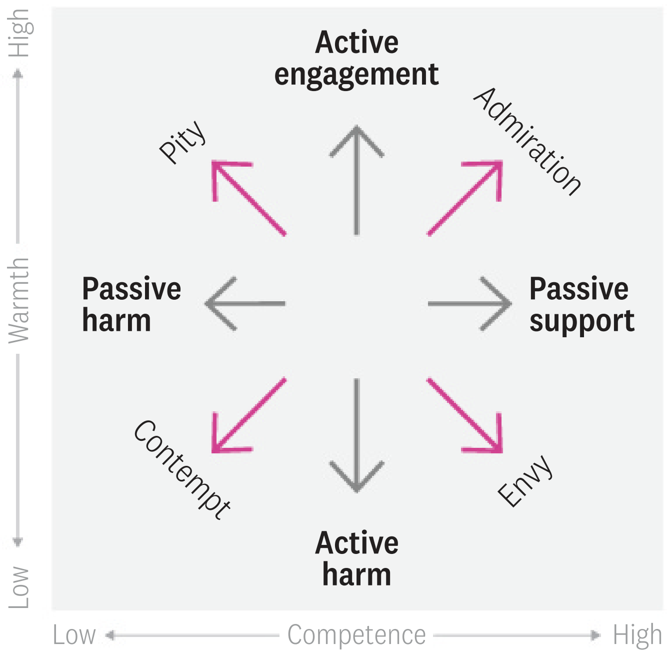
ILLUSTRATION BY LLOYD MILLER

resentment that cuts both ways. When we respect someone, we want to cooperate or affiliate ourselves with him or her, but resentment can make that person vulnerable to harsh reprisal (think of disgraced Tyco CEO Dennis Kozlowski, whose extravagance made him an unsympathetic public figure). On the other hand, people judged as warm but incompetent tend to elicit pity, which also involves a mix of emotions: Compassion moves us to help those we pity, but our lack of respect leads us ultimately to neglect them (think of workers who become marginalized as they near retirement or of an employee with outmoded skills in a rapidly evolving industry).

To be sure, we notice plenty of other traits in people, but they're nowhere near as influential as warmth and strength. Indeed, insights from the field of psychology show that these two dimensions account for more than 90% of the variance in our positive or negative impressions we form of the people around us.

How Will People React to Your Style?

Research by Amy Cuddy, Susan Fiske, and Peter Glick suggests that the way others perceive your levels of warmth and competence determines the emotions you'll elicit and your ability to influence a situation. For example, if you're highly competent but show only moderate warmth, you'll get people to go along with you, but you won't earn their true engagement and support. And if you show no warmth, beware of those who may try to derail your efforts—and maybe your career.



So which is better, being lovable or being strong? Most leaders today tend to emphasize their strength, competence, and credentials in the workplace, but that is exactly the wrong approach. Leaders who project strength before establishing trust run the risk of eliciting fear, and along with it a host of dysfunctional behaviors. Fear can undermine cognitive potential, creativity, and problem solving and cause employees to get stuck and even disengage. It's a "hot" emotion, with long-lasting effects. It burns into our memory in a way that cooler emotions don't. Research by Jack Zenger and Joseph Folkman drives this point home: In a study of 51,836 leaders, only 27 of them were rated in the bottom quartile in terms of likability and in the top quartile in terms of overall leadership effectiveness—in other words, the chances that a manager who is strongly disliked will be considered a good leader are only about one in 2,000.

A growing body of research suggests that the way to influence—and to lead—is to begin with warmth. Warmth is the conduit of influence: It facilitates trust and the communication and absorption of ideas. Even a few small nonverbal signals—a nod, a smile, an open gesture—can show people that you're pleased to be in their company and attentive to their concerns. Prioritizing warmth helps you connect immediately with those around you, demonstrating that you hear them, understand them, and can be trusted by them.

When Strength Comes First

Most of us work hard to demonstrate our competence. We want to see ourselves as strong—and want others to see us the same way. We focus on warding off challenges to our strength and providing abundant evidence of competence. We feel compelled to demonstrate that we're up to the job by striving to present the most innovative ideas in meetings, being the first to tackle a challenge, and working the longest hours. We're sure of our own intentions and thus don't feel the need to prove that we're trustworthy—despite the fact that evidence of trustworthiness is the first thing we look for in others.

Organizational psychologists Andrea Abele, of the University of Erlangen-Nuremberg, and Bogdan Wojciszke, of the University of Gdańsk, have documented this phenomenon across a variety of settings. In one experiment, when asked to choose between training programs focusing on competence-related skills (such as time management) and warmth-related ones (providing social support, for instance), most participants opted for competence-based training for themselves but soft-skills training for others. In another experiment, in which participants were asked to describe an event that shaped their self-image, most told stories about themselves that emphasized their own competence and self-determination ("I passed my pilot's license test on the first try"), whereas when they described a similar event for someone else, they focused on that person's warmth and generosity ("My friend tutored his neighbor's child in math and refused to accept any payment").

But putting competence first undermines leadership: Without a foundation of trust, people in the organization may comply outwardly with a leader's wishes, but they're much less likely to conform privately—to adopt the values, culture, and mission of the organization in a sincere, lasting way. Workplaces lacking in trust often have a culture of "every employee for himself," in which people feel that they must be vigilant about protecting their interests. Employees can become reluctant to help others because they're unsure of whether their efforts will be reciprocated or recognized. The result: Shared organizational resources fall victim to the tragedy of the commons.

When Warmth Comes First

Although most of us strive to demonstrate our strength, warmth contributes significantly more to others' evaluations of us—and it's judged before competence. Princeton social psychologist Alex Todorov and colleagues study the cognitive and neural mechanisms that drive our "spontaneous trait inferences"—the snap judgments we make when briefly looking at faces. Their research shows that when making those judgments, people consistently pick up on warmth faster than on competence. This preference for warmth holds true in other areas as well. In a study led by Oscar Ybarra, of the University of Michigan, participants playing a word game identified warmth-related words (such as "friendly") significantly faster than competence-related ones (such as "skillful").

Behavioral economists, for their part, have shown that judgments of trustworthiness generally lead to significantly higher economic gains. For example, Mascha van 't Wout, of Brown University, and Alan Sanfey, of the University of Arizona, asked subjects to determine how an endowment should be allocated. Players invested more money, with no guarantee of return, in partners whom they perceived to be more trustworthy on the basis of a glance at their faces.

In management settings, trust increases information sharing, openness, fluidity, and cooperation. If coworkers can be trusted to do the right thing and live up to their commitments, planning, coordination, and execution are much easier. Trust also facilitates the exchange and acceptance of ideas—it allows people to hear others' message—and boosts the quantity and quality of the ideas that are produced within an organization. Most important, trust provides the opportunity to change people's attitudes and beliefs, not just their outward behavior. That's the sweet spot when it comes to influence and the ability to get people to fully accept your message.

The Happy Warrior

The best way to gain influence is to combine warmth and strength—as difficult as Machiavelli says that may be to do. The traits can actually be mutually reinforcing: Feeling a sense of personal strength helps us to be more open, less threatened, and less threatening in stressful situations. When we feel confident and calm, we project authenticity and warmth.

Understanding a little bit about our chemical makeup can shed some light on how this

Leaders tend to emphasize their strength, but that's exactly the wrong approach.

Idea in Brief

THE PROBLEM

Typically, leaders emphasize their strength or competence in the workplace, which can alienate colleagues and direct reports.

THE ARGUMENT

Decades of sociology and psychology research show that by first focusing on displaying warmth—and then blending in demonstrations of competence—leaders will find a clearer path to influence.

THE LESSONS

This is difficult to do but not impossible, depending on your chemical and dispositional makeup. The authors offer specific guidelines on how to project warmth and strength in various situations.

works. The neuropeptides oxytocin and arginine vasopressin, for instance, have been linked to our ability to form human attachments, to feel and express warmth, and to behave altruistically. Recent research also suggests that across the animal kingdom feelings of strength and power have close ties to two hormones: testosterone (associated with assertiveness, reduced fear, and willingness to compete and take risks) and cortisol (associated with stress and stress reactivity).

One study, by Jennifer Lerner, Gary Sherman, Amy Cuddy, and colleagues, brought hundreds of people participating in Harvard executive-education programs into the lab and compared their levels of cortisol with the average levels of the general population. The leaders reported less stress and anxiety than did the general population, and their physiology backed that up: Their cortisol levels were significantly lower. Moreover, the higher their rank and the more subordinates they managed, the lower their cortisol level. Why? Most likely because the leaders had a heightened sense of control—a psychological factor known to have a powerful stress-buffering effect. According to research by Pranjal Mehta, of the University of Oregon, and Robert Josephs, of the University of Texas, the most effective leaders, regardless of gender, have a unique physiological profile, with relatively high testosterone and relatively low cortisol.

Such leaders face troubles without being troubled. Their behavior is not relaxed, but they are relaxed emotionally. They're often viewed as "happy warriors," and the effect of their demeanor on those around them is compelling. Happy warriors reassure us that whatever challenges we may face, things will work out in the end. Ann Richards, the former governor of Texas, played the happy warrior by pairing her assertiveness and authority with a big smile and a quick wit that made it clear she did not let the rough-and-tumble of politics get her down.

During crises, these are the people who are able to keep that influence conduit open and may even expand it. Most people hate uncertainty, but they tolerate it much better when they can look to a leader who they believe has their back and is calm, clearheaded, and courageous. These are the people we trust. These are the people we listen to.

There are physical exercises that can help to summon self-confidence—and even alter your body's chemistry to be more like that of a happy warrior. Dana Carney, Amy Cuddy, and Andy Yap suggest that people adopt "power poses" associated with dominance and strength across the animal kingdom. These postures are open, expansive, and space-occupying (imagine Wonder Woman and Superman standing tall with their hands on their hips and feet spread apart). By adopting these postures for just two minutes prior to social encounters, their research shows, participants significantly increased their testosterone and decreased their cortisol levels.

Bear in mind that the signals we send can be ambiguous—we can see someone's reaction to our presence, but we may not be sure exactly what the person is reacting to. We may feel a leader's warmth but remain unsure whether it is directed at us; we sense her strength but need reassurance that it is squarely aimed at the shared challenge we face. And, as we noted earlier, judgments are often made quickly, on the basis of nonverbal cues. Especially when facing a high-pressure situation, it is useful for leaders to go through a brief warm-up routine beforehand to get in the right state of mind, practicing and adopting an attitude that will help them project positive nonverbal signals. We refer to this approach as "inside-out," in contrast to the "outside-in" strategy of trying to consciously execute specific nonverbal behaviors in the moment. Think of the difference between method acting and classical acting: In method acting, the actor experiences the emotions of the character and naturally produces an authentic performance, whereas in classical acting, actors learn to exercise precise control of their nonverbal signals. Generally speaking, an inside-out approach is more effective.

There are many tactics for projecting warmth and competence, and these can be dialed up or

Before people decide what they think of your message, they decide what they think of *you*.

down as needed. Two of us, John Neffinger and Matt Kohut, work with leaders from many walks of life in mastering both nonverbal and verbal cues. Let's look now at some best practices.

How to Project Warmth

Efforts to appear warm and trustworthy by consciously controlling your nonverbal signals can backfire: All too often, you'll come off as wooden and inauthentic instead. Here are ways to avoid that trap.

Find the right level. When people want to project warmth, they sometimes amp up the enthusiasm in their voice, increasing their volume and dynamic range to convey delight. That can be effective in the right setting, but if those around you have done nothing in particular to earn your adulation, they'll assume either that you're faking it or that you fawn over everyone indiscriminately.

A better way to create vocal warmth is to speak with lower pitch and volume, as you would if you were comforting a friend. Aim for a tone that suggests that you're leveling with people—that you're sharing the straight scoop, with no pretense or emotional adornment. In doing so, you signal that you trust those you're talking with to handle things the right way. You might even occasionally share a personal story—one that feels private but not inappropriate—in a confiding tone of voice to demonstrate that you're being forthcoming and open. Suppose, for instance, that you want to establish a bond with new employees you're meeting for the first time. You might offer something personal right off the bat, such as recalling how you felt at a similar point in your career. That's often enough to set a congenial tone.

Validate feelings. Before people decide what they think of your message, they decide what they think of *you*. If you show your employees that you hold roughly the same worldview they do, you demonstrate not only empathy but, in their eyes, common sense—the ultimate qualification for being listened to. So if you want colleagues to listen and agree with you, first agree with them.

Imagine, for instance, that your company is undergoing a major reorganization and your group is feeling deep anxiety over what the change could mean—for quality, innovation, job security. Acknowledge people's fear and concerns when you speak to them, whether in formal meetings

WHY WARMTH TRUMPS STRENGTH

The primacy of warmth manifests in many interrelated ways that powerfully underscore the importance of connecting with people before trying to lead them.

THE NEED TO AFFILIATE

People have a need to be included, to feel a sense of belonging. In fact, some psychologists would argue that the drive to affiliate ranks among our primary needs as humans. Experiments by neuroscientist Naomi Eisenberger and colleagues suggest that the need is so strong that when we are ostracized—even by virtual strangers—we experience pain that is akin to strong physical pain.

"US" VERSUS "THEM"

In recent decades, few areas have received as much attention from social psychology researchers as group dynamics—and for good reason: The preference for the groups to which one belongs is so strong that even under extreme conditions—such as knowing that membership in a group was randomly assigned and that the groups themselves are arbitrary—people consistently prefer fellow group members to nonmembers. As a leader, you must make sure you're a part of the key groups in your organization. In fact, you want to be the aspirational member of the group, the chosen representative of the group. As soon as you become one of "them"—the management, the leadership—you begin to lose people.

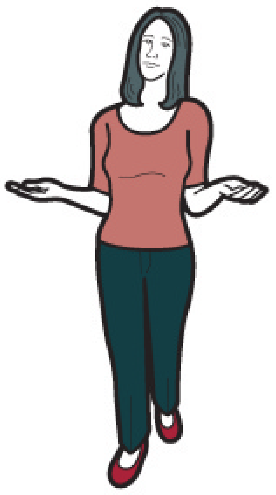
THE DESIRE TO BE UNDERSTOOD

People deeply desire to be heard and seen. Sadly, as important as perspective-taking is to good leadership, being in a position of power decreases people's understanding of others' points of view. When we have power over others, our ability to see them as individuals diminishes. So leaders need to consciously and consistently make the effort to imagine walking in the shoes of the people they are leading.

ARE YOU PROJECTING WARMTH?

How you present yourself in workplace settings matters a great deal in terms of how you're perceived by others. Even if you're not feeling particularly warm, practicing these approaches and using them in formal and informal situations can help clear your path to influence.

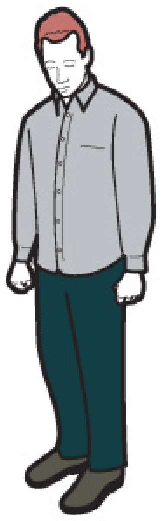
WARM



When standing, balance your weight primarily on one hip to avoid appearing rigid or tense.

Tilt your head slightly and keep your hands open and welcoming.

COLD



Avoid standing with your chin pointed down.

Don't pivot your body away from the person you're engaging with.

Avoid closed-hand positions and cutting motions.

or during watercooler chats. Look them in the eye and say, "I know everybody's feeling a lot of uncertainty right now, and it's unsettling." People will respect you for addressing the elephant in the room and will be more open to hearing what you have to say.

Smile—and mean it. When we smile sincerely, the warmth becomes self-reinforcing: Feeling happy makes us smile, and smiling makes us happy. This facial feedback is also contagious. We tend to mirror one another's nonverbal expressions and emotions, so when we see someone beaming and emanating genuine warmth, we can't resist smiling ourselves.

Warmth is not easy to fake, of course, and a polite smile fools no one. To project warmth, you have to genuinely feel it. A natural smile, for instance, involves not only the muscles around the mouth but also those around the eyes—the crow's feet.

So how do you produce a natural smile? Find some reason to feel happy wherever you may be, even if you have to resort to laughing at your predicament. Introverts in social settings can single out one person to focus on. This can help you channel the sense of comfort you feel with close friends or family.

For example, KNP worked with a manager who was having trouble connecting with her employees. Having come up through the ranks as a highly analytic engineer, she projected competence and determination, but not much warmth. We noticed, however, that when she talked about where she grew up and what she learned about life from the tight-knit community in her neighborhood, her demeanor relaxed and she smiled broadly. By including a brief anecdote about her upbringing when she kicked off a meeting or made a presentation, she was able to show her colleagues a warm and relatable side of herself.

One thing to avoid: smiling with your eyebrows raised at anyone over the age of five. This suggests that you are overly eager to please and be liked. It also signals anxiety, which, like warmth, is contagious. It will cost you much more in strength than you will gain in warmth.

How to Project Strength

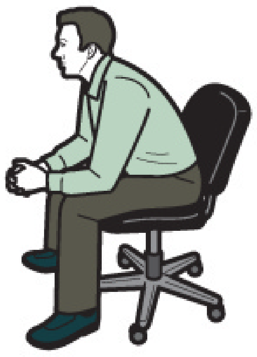
Strength or competence can be established by virtue of the position you hold, your reputation, and your actual performance. But your presence, or demeanor, always counts, too. The way you carry yourself doesn't establish your skill level, of course, but it is taken as strong evidence of your attitude—how serious you are and how determined to tackle a challenge—and that is an important component of overall strength. The trick is to cultivate a demeanor of strength without seeming menacing.

Feel in command. Warmth may be harder to fake, but confidence is harder to talk yourself into. Feeling like an impostor—that you don't belong in the position you're in and are going to be "found out"—is very common. But self-doubt completely undermines your ability to project confidence, enthusiasm, and passion, the qualities that make up presence. In fact, if you see yourself as an impostor, others will, too. Feeling in command and confident is about connecting with yourself. And when we are connected with ourselves, it is much easier to connect with others.

Holding your body in certain ways, as we discussed above, can help. Although we refer to these

COLIN HAYES

WARM

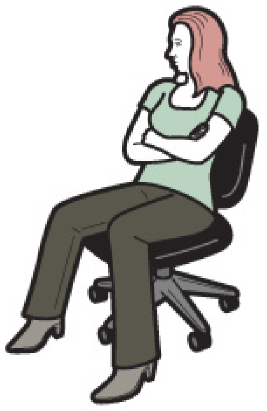


Lean inward in a nonaggressive manner to signal interest and engagement.

Place your hands comfortably on your knees or rest them on the table.

Aim for body language that feels professional but relaxed.

COLD



Try not to angle your body away from the person you're engaging.

Crossing your arms indicates coldness and a lack of receptivity.

Avoid sitting "at attention" or in an aggressive posture.

postures as power poses, they don't increase your dominance over others. They're about personal power—your agency and ability to self-regulate. Recent research led by Dacher Keltner, of the University of California, Berkeley, shows that feeling powerful in this way allows you to shed the fears and inhibitions that can prevent you from bringing your fullest, most authentic and enthusiastic self to a high-stakes professional situation, such as a pitch to investors or a speech to an influential audience.

Stand up straight. It is hard to overstate the importance of good posture in projecting authority and an intention to be taken seriously. As Maya Angelou wrote, "Stand up straight and realize who you are, that you tower over your circumstances." Good posture does not mean the exaggerated chest-out pose known in the military as standing at attention, or raising one's chin up high. It just means reaching your full height, using your muscles to straighten the S-curve in your spine rather than slouching. It sounds trivial, but maximizing the physical space your body takes up makes a substantial difference in how your audience reacts to you, regardless of your height.

Get ahold of yourself. When you move, move deliberately and precisely to a specific spot rather than casting your limbs about loose-jointedly. And when you are finished moving, be still. Twitching, fidgeting, or other visual static sends the signal that you're not in control. Stillness demonstrates calm. Combine that with good posture, and you'll achieve what's known as poise, which telegraphs equilibrium and stability, important aspects of credible leadership presence.

Standing tall is an especially good way to project strength because it doesn't interfere with warmth in the way that other signals of strength—cutting gestures, a furrowed brow, an elevated chin—often do. People who instruct their children to stand up straight and smile are on to something: This simple combination is perhaps the best way to project strength and warmth simultaneously.

IF YOU WANT to effectively lead others, you have to get the warmth-competence dynamic right. Projecting both traits at once is difficult, but the two can be mutually reinforcing—and the rewards substantial. Earning the trust and appreciation of those around you feels good. Feeling in command of a situation does, too. Doing both lets you influence people more effectively.

The strategies we suggest may seem awkward at first, but they will soon create a positive feedback loop. Being calm and confident creates space to be warm, open, and appreciative, to choose to act in ways that reflect and express your values and priorities. Once you establish your warmth, your strength is received as a welcome reassurance. Your leadership becomes not a threat but a gift.

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Amy J.C. Cuddy is an associate professor of business administration at Harvard Business School. **Matthew Kohut** and **John Neffinger** are the coauthors of *Compelling People: The Hidden Qualities That Make Us Influential* (Hudson Street Press, August 2013) and cofounders of KNP Communications.

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Paving the way for these disruptors means companies must overhaul not only their leadership development programs but the structure and culture of their businesses.

But how exactly do you get from here, to tomorrow? And how do you identify, attract, develop, retain, promote, and expand the talent you need to succeed? Consider these four key points:

1 ***Nurture your talent pool:*** *Make the most of the talent that already exists in your company. Many future-leaders occupy lower-level roles in the organization, but they need exposure to training and mentorship. Circulate these people throughout your organization to stimulate them, teach new skills, and help them experience different ways of working.*

This exposure will also help them build important relationships with colleagues of many different backgrounds, experiences, and capacities.

2 ***Manage talent as a system:*** *Widen and maintain a flow of diverse talent by ensuring traditional HR functions from recruitment to compensation work holistically. Only by developing new mindsets to successfully advance Self-Disruptive Leaders, opening up leadership development opportunities for existing staff, and fostering an “always-on” development structure, will you be ready for the future.*

3 ***Prioritize leadership*** *development: Accelerate the identification, recruitment, retention, development, and promotion of leaders with self-disruptive potential at all levels of the business. Only by acting with urgency will you be able to capitalize on an increasingly digital and disruptive business world.*

4 ***Empower ADAPT:*** *Develop a culture that empowers everyone within your organization to challenge their own thinking and disrupt themselves. By cascading ADAPT qualities throughout the business, you can build a self-perpetuating ecosystem of leaders. Leaders who will be ready, whatever the future brings.*

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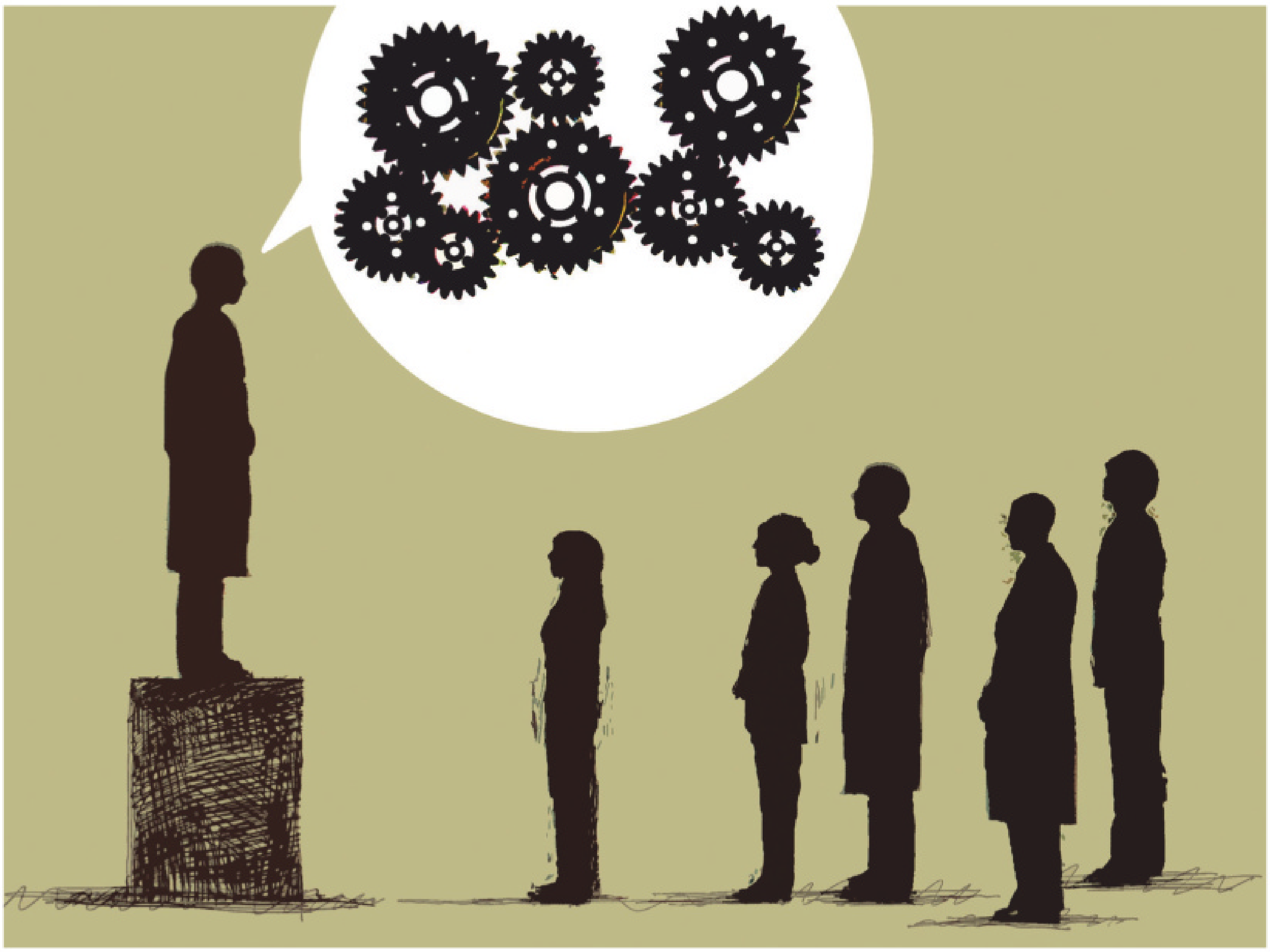
Quick Takes



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Improve Your Public Speaking with a More Effective Mindset

by Peter Bubriski

MANY EXECUTIVE coaches urge leaders to learn to communicate more powerfully through actor-led workshops. But they may have it wrong—or at least only half right.

Inspiring and often talented actors lead workshops in the corporate workplace using group improvisation, storytelling, and even Shakespearean verse. The energy and creativity this can unleash is good when it includes well-told stories that inspire colleagues, customers, and stakeholders to take action.

But it doesn't work for everyone. Too often the acting angle elicits rolling eyes, tightly folded arms, and comments like "Darryl might enjoy this—he's a bit dramatic anyway—but this isn't for me."

I know from past experience; I've had those eyes rolled at me.

I graduated with a drama degree from Yale and acted professionally for years while also teaching executives communication skills. With investment bankers, civil engineers, and internet software CEOs, the acting angle often doesn't inspire them to do really effective work.

If you're in that category, try this technique instead: Practice your speaking skills the way you practice a sport.

With a sport, you're not pretending to be someone else. You are training your body and your mind to achieve feats of skill—building your muscle memory with drills and repetition.

Even leaders who prefer a couch to a tennis court usually rise to the challenge of approaching things like Venus Williams or Roger Federer—step by step, practiced move by practiced move. So get it out of your head that you have to "perform" like a Johnny Depp or a Natalie Portman to hold your audience's attention. To be a better public speaker, you just need to get out of your own way so that we can see you for who you really are. Glimpsing that authentic core can be riveting, and that's where sports come in.

To approach speaking as a sport, leaders need to be aware of their own potent skills. They need to know their bodies—how versatile, flexible, and capable their instruments are—and how things work. Where does your voice come from? What can you accomplish with gesture and movement? How do you organize the flow of information through your body so that it has maximum impact? What's the agenda of a particular meeting or presentation, and what tools can you use to make sure it plays out the way you want it to?

We speak of certain athletes as artists in their field because they appear to master their skills effortlessly. That is where the art and sport of great communication skills come together. As either an athlete or an artist, you have to practice over and over again so that you're not thinking about the people in the stands watching your brilliant shot or about the audience hearing your brilliant words. Instead you're thinking: Here's how I always use my instrument when the "ball" comes my way.

Practice your speaking skills the way you practice a sport.

I worked with a CEO ("Bill") who had a lot of great stories to tell. His company was poised for huge wins. The numbers had been disappointing for several quarters, but now things were turning around and there were successes from divisions around the globe that could inspire—if only the rank and file could just hear them. But his stories fell flat; they were disorganized and didn't have a clear point. And, worse still, he told the stories badly, with low affect, while shuffling, mumbling, and speaking to the screen or the same few faces.

Luckily Bill had run track in college and was a golfer, so the idea of practicing public speaking like a sport came naturally to him. We set up a regimen of physical exercises to strengthen, stretch, and support his physical presence—voice, gesture, movement. And we put together outlines and organizational frameworks he could use—a game plan—as a basis for giving powerful and memorable structure to his talks. Now he knew how to practice, and he wasn't encumbered by the fear that he was "acting," pretending to be someone else, or performing a "schtick." He could think of public speaking as a sport—something he was already comfortable doing.

Here's the funny thing. Much of the preparation and practice we employed was exactly what actors use. That's the half that those acting coaches I mentioned earlier get right. But I wasn't going to bother telling Bill that.

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DAVID MALAN/GETTY IMAGES

Developing Your Leadership Presence

by John Baldoni

"What about when you are pushed in front of the microphone or given very little prep time for something like an introduction of a guest speaker?"

THIS QUESTION came from Tonya in response to one of my posts on developing your leadership pitch.

Here's the quick answer: Walk to the microphone and smile. Take a moment to size up the audience and then say what you have to say briefly and to the point. Most important, as they advise running backs who score touchdowns, act like you have been there before. The great ones hand the ball back to the referee; the wannabes whoop and holler.

At the microphone, remain calm. Why? Because you are in control! Your stomach may be churning and your palms sweaty, but you must realize the microphone is in your hands. This is a little secret that I share with people I coach: People have to listen to you. Whether you croon or wax eloquent, the audience is at your mercy.

You are the master of your destiny, or at least the next five minutes. When you keep that thought in mind, you will realize that yes, you can do this. You can speak in front of an audience and you will be OK.

You are the master of your destiny, or at least the next five minutes.

Such behavior is how you cultivate your leadership presence, a topic I address in *Lead Your Boss: The Subtle Art of Managing Up* (AMACOM, 2009). I define leadership presence as earned authority. You may have a title, but you need to earn the respect and trust of your coworkers. Presence is rooted in fundamental competence, and for anyone who aspires to lead, presence is essential. Developing this is a long process that goes far beyond speaking in public.

Some people confuse presence with charisma, but the two are not the same. The former is developed over time; the latter is what you are born with and is a matter of looks, charm, personality, and appeal. Charisma adds to presence, but you do not need to have movie-star looks to be a person of presence. An example of this was Mother Teresa.

Picture this petite woman in her white sari trimmed in blue. Old and wrinkled, Mother Teresa was never mistaken for royalty. Yet because of her lifetime of work in creating a religious order to care for the "poorest of the poor" in India, she had a radiant presence around her. Her conviction about her work was so strong that she could approach heads of state for funds to run her mission. She also had a wonderful sense of humor, which added to her personal warmth.

No matter your looks or body type, you can have presence if you work on your ability to connect with others, from behind a microphone or otherwise. And don't worry if you flub a word or mispronounce a name. Correct yourself, smile, and keep moving. The audience is yours. Leverage your presence, and be the confident speaker you have always wanted to be.

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ZACHARY SCOTT/GETTY IMAGES

How to Cure Your Dread of Public Speaking

by Art Markman

PUBLIC SPEAKING is so stressful for so many people that it is routinely used as a stress manipulation in psychological studies. Tell undergrads they have 10 minutes to prepare a speech that will be evaluated by experts, and their levels of the stress hormone cortisol shoot through the roof.

Yet success in many roles requires speaking in public. In addition to presenting in my classes, I typically give a talk per week in front of groups. People ask me if speaking gets me nervous. It doesn't. And I give a lot of credit to my fascination with stand-up comedy. While I'm not a comedian myself, I've been a fan of comedians and their process for a long time, and anyone can learn from them these three lessons about public speaking.

It's OK to Die

Why exactly is public speaking so nerve-wracking? One main reason: It's a social risk. If you give a bad talk (or trip on your way up to the stage), you worry that the stench of that talk will stick to you for the rest of your life. Your reputation will suffer, and that may have lasting consequences.

Death is a frequent metaphor for comedians. When they have a great set, they "killed" it. When they have a terrible set, they "died" onstage. Every comedian I have ever met or read about has "died." Often. And they have lived to tell the tale. Many have gone on to have successful careers.

You are much more concerned about the consequences of a bad talk than anyone else is. A lot of research suggests that we are egocentric about the things we do. In truth, other people are much less concerned about you (and notice a lot less about you) than you think. Your audience will forget most of your talk (whether good or bad) soon after you give it.

Once you realize that the downside of speaking is really not so bad, it becomes easier to give talks. Also, stress decreases your working memory capacity—the amount of memory you have available for critical thinking in the moment. When you're less stressed about speaking, you think more clearly, which helps you be more spontaneous and answer questions more effectively.

Work It Out on the Road

Once you start giving public talks, you'll probably speak on the same topic several times. In this way, you're like a comedian working out a new bit. Comedians come up with something, practice it, and then try it in front of an audience. In subsequent performances, they emphasize and embellish the parts that worked and lose the parts that didn't. After they have performed a routine several times, they have a pretty good sense of how the audience is going to react.

If you treat talks like stand-up comedy, you're likely to dread them less and less.

You can do the same. Take advantage of opportunities to give several talks on the same topic. Watch the audience closely. You can tell when they are paying attention and when they are mentally somewhere else. Getting some feedback from people can help you figure out what resonated.

Then take notes—don't rely on your memory. Highlight the elements people seem to like. Reorganize sections of the talk that sent the audience to their cell phones or daydreaming of the next coffee break. Your talks should get better over time not only because you are more practiced at giving them but also because you have edited them on the basis of feedback.

Remember the Role of Three

In my book *Smart Thinking: Three Essential Keys to Solve Problems, Innovate, and Get Things Done* (TarcherPerigee, 2012), I talk about the observation that people remember roughly three things about any experience they have. This idea has a direct parallel in comedy. Jeff Loewenstein and Chip Heath have written about what they call the repetition-break plot structure, which is common in jokes and stories. Essentially, you tell a story, then repeat it, and then on the third pass you change it in a memorable way. This is the structure of many jokes that start with "Three guys walk into a bar..."

This structure works well for two reasons. First, it's easy to remember three elements. Second, the comparison of the first element with the second sets up a schema that creates a set of expectations. When you break that expectation the third time through, you create something memorable, surprising, and (sometimes) humorous.

When preparing your talks, figure out the three things you want people to remember and focus on them. Find ways to make comparisons among the elements you are presenting to help your audience generate expectations. Resist the temptation to add more content: Less is more.

And one bonus lesson here: Comedians often use callbacks to generate humor. In a callback, they refer to a joke they had told previously in the set. Callbacks can be funny, but they also enhance memory.

Your brain wants to forget most of what it encounters. (After all, you engage with a lot of different things each day. You don't necessarily need to remember everything.) One way your brain decides what to remember is by judging whether you will need that information later. A good indication is when you've already had to remember it at least once after your first encounter with it. By calling back throughout the talk to a point you made earlier, you are giving your audience cues about the information they should remember later.

If you treat talks like stand-up comedy, you won't instantly be a stress-free presenter. But you're likely to dread them less and less as you realize that you got through another talk without the world ending. And hopefully, one day, you might even realize that you're more excited than worried about the prospect of getting up in front of a group.

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How to Calm Your Nerves Before a Big Presentation

by Amy Jen Su

IT'S NOT EASY getting ready for a big presentation. The stakes can feel high, and in our desire for things to go well, the anticipation builds. Fear, anxiety, or even paralysis can set in. What can you do to calm your nerves when this happens?

Observe, Accept, and Reframe

First, recognize that feeling anxious or being nervous before a big presentation is normal. The human fight-or-flight response kicks in, attempting to ward off the threat. But instead of running or fighting, which just creates more resistance and angst, simply observe those instincts and get comfortable with the idea that discomfort is part of the game.

Consider Bill Russell, a five-time winner of the NBA's Most Valuable Player Award and a 12-time all-star who is often credited for leading the Celtics to 11 NBA championships. Before games, Russell was often so nervous that he threw up. But he didn't let his nerves get in the way of his performance on the court. Like Russell, we can recognize that nerves are part of our process, and rather than beat ourselves up about it, we can go out and perform at a championship level.

Beth Levine, author of a book on leadership lessons from the sports world and founder of SmartMouth Communications, has worked with professional athletes as well as leaders in organizations on presentations and media training. During her 30-year career in PR, corporate communications, and coaching, Levine says, "Almost everyone I've worked with has some version of feeling nervous before big presentations. It's the rare person who doesn't get nervous. Therefore, it's best to embrace nervousness rather than resist it or push it away."

Once we notice what's happening, without judgment, we can calmly reframe the situation to take the edge off our dread. Levine advises, "Think of a quarterback playing in his first Super Bowl game. Yes, he may be nervous, but he's not dreading it or seeing it as an obligation. He's seeing it as a great opportunity that he's ready to sink his teeth into. The nerves are a signal that this is something that matters to him."

Get Present by Returning to Your Body

When we let our nerves get the best of us, we lose our presence in the moment and get hooked into an incessant stream of critical or worrisome thoughts in our minds: What if I fail? What if this doesn't go well? What will they think of me?

Bringing awareness to our physical bodies can help. Notice the physical sensations happening: a racing heart, shallow breathing, a tight chest, sweat, a cracking voice. Be aware of your body's cues and take a deep breath to regain some sense of the present. Notice your surroundings. Anchor or touch something physical, such as a table or the slide advancer, or push your weight into your toes and feet. Here are a few other ways you can help calm your nerves by tuning in to your body:

Don't take the basics for granted. Get a good night's sleep, hydrate, and watch your caffeine intake before a big presentation so that your heart

JUAN-DÍAZ-FAES

rate isn't already elevated. Also, make sure that you've eaten a good meal and that you aren't hungry.

Strike a power pose. Some research has shown that holding strong physical poses (for example, hands on hips and feet apart, like Wonder Woman) can make you feel more confident. Plenty of people say this technique helps them feel grounded before a big talk.

Shift your center of gravity. Stand up and take a deep breath. Imagine a heavy lead ball in your stomach. Feel the weight of it. Feel the solidity of it. Bring your focus here instead of to your head or chest.

Own the space. If you can, get to the room early and really imagine owning it. Walk the perimeter, check out the configuration, and notice the size of the room. Like a radio dial, think about how much you can authentically dial up your volume, expression, or gestures to match the size of the room.

Prepare a Great Opening and Warm Up

Good preparation can help ease the nerves. Allot time for organizing your thoughts, determining the best flow, and drafting your talking points. Be mindful of the ratio of time spent preparing slides versus preparing what you are going to say; most of us spend way too much time on slides. Practicing flow and transitions can also be helpful (but be careful of becoming overly scripted). The most important thing you can do is prepare and practice the opening of your presentation, which will set the stage for everything that follows. As Levine says, "The adrenaline rush of nerves usually dissipates in about two minutes. Start by saying something positive or unexpected to set the tone."

Levine describes an executive she coached who was nervous about preparing for a series of intranet videos for employees. She had him set the tone for the audience and himself by smiling and saying something positive and authentic, such as, "I love being here and what we get to do each day." This helped him relax and ease into the rest of the video.

When you're able to engage the audience directly, solicit their views to buy time and get more grounded at the start of a presentation. For example:

- In a speaking situation, poll the audience. You could ask, by show of hands, how many people have been at the organization for more than 10 years. Or ask a few members of the audience why they are here for the topic.
- In a formal business presentation, frame the agenda and check in with the group about it. You might say something like, "For our time together today, we will be covering x, y, and z—do these sound like the right topics to focus on, or is something missing?"
- Warm up your vocal cords before the presentation begins, especially if you are introverted by nature. Chat up the barista at the coffee shop or ask a colleague how her day is going.

Manage Your Nerves Along the Way

Accepting and calming your nerves before a presentation is part of sound preparation, but what can you do during the presentation itself if you still feel discomfort, doubt, or unease?

Levine says, "If you have a misstep, keep going. The audience expects you to be good and to succeed. You were chosen to present. Even if you're shaking on the inside, the audience doesn't know that." And that advice works in reverse as well. For instance, in the case of nonreactive audience members, Levine says, "Remember, one man's scowl is another man's look of concentration. You really just don't know what the audience is thinking."

It's best to embrace nervousness rather than resist it or push it away.

If you worry about being asked a question that you can't answer, prepare a list of potential questions in advance. And if you're asked something you're not sure about, have a few different responses in your back pocket, such as:

"That's a good question. I don't have the answer right now, but I'll get back to you on that."

"My initial view and instinct on that is x. It's a good question. Let me have the team dig into that this week, and I'll send out a fuller response."

Shift the question to someone else in the room or back at the audience directly:

"Let me turn this back to the group—does anyone have thoughts on that right now?"

Equally important is taking time after the presentation itself to reflect on how things went. Ask yourself or others how it really went. What succeeded and what could have been more effective? Think about whom you can ask for honest feedback and suggestions. Ask yourself what mindset, preparation, or techniques seemed to help calm your nerves. How does this event inform which routines you'll use next time? By consciously reflecting, we update our own best practices as well as the view we hold of ourselves as effective presenters and communicators over the long run.

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Rituals to Pump Yourself Up (or Calm Yourself Down) Before a Presentation

by Nancy Duarte

PUBLIC SPEAKING affects people in different ways. Some people get jittery and anxious before they talk; they need to calm themselves down before they go onstage. Other people want to make sure they have extra energy when they're in front of an audience; these people need to amp themselves up before a talk—doing whatever helps them feel invigorated.

My pretalk ritual has always been to be still. I consider this a spiritual ritual. I'll typically find a dark spot backstage to center myself, exhale calmly, and create quiet space in my head. Meanwhile, I have interviewed more than 40 professional speakers, some of whom have a more amp-it-up ritual, like doing power poses or rocking out to heavy metal bands.

Out of curiosity, I decided to try some of these different, energizing pretalk rituals before my last big keynote. I performed a few exertion rituals (see below): a couple of quick jumps, some power poses, and a handful of big stretches.

Unfortunately, because I'm already a pretty amped-up person, these routines didn't work for me. In fact, my energy was so over the top that I couldn't catch my breath through the entire talk, and afterward people told me I sounded like I couldn't breathe because I chuffed into the microphone. One client even called the speaker's bureau to ask if I was sick because of how I came across.

I determined that my tried-and-true routine still works best for me and that the right thing to do to get ready for a talk is to tap into what makes you the most comfortable right before you walk onstage.

Consider these four types of pretalk rituals before you go onstage. When selecting yours, think about how you want to come across to your audience.

Empathy Rituals

Empathy rituals help you connect better to the people in your audience. According to neuroscience professor Pascal Molenberghs, "Empathy is important because it helps us understand how others are feeling so we can respond appropriately to the situation." A ritual that generates empathy can both help you humanize the individuals in the crowd and make you less afraid of them.

You can build empathy by working the room before your talk to connect with attendees—ask them questions, and learn what they're interested in. Another technique is to zero in on a friendly face you know in the audience from backstage. Or look at the stage from your audience's vantage point. Renowned marketing speaker Nick Westergaard told me he always relies on this pretalk ritual: "I sit in the audience and quietly look at the stage I'll be on while taking some deep breaths—a great centering exercise that my high school band teacher taught me."

Consider trying a pretalk empathy ritual if you:

- Are speaking to an audience you don't relate to
- Get stage fright and clam up while speaking, losing your personality
- Have high-stakes content that simply has to resonate

Exertion Rituals

Exertion rituals are just what they sound like: You exert yourself before you speak to get your heart moving, feel in touch with your body, and boost your energy levels. Exertion can amp you up and also reduce the amount of anxiety you feel because it naturally reduces the level of the stress hormones in your body. There are many ways to execute an exertion ritual, like doing a brief workout, dancing to hip-hop music in your hotel room, or jumping up and down backstage. One contributor I interviewed told me he simply likes to walk around briskly and smile at everyone he sees.

Tap into what makes you the most comfortable right before you walk onstage.

Consider trying a pretalk exertion ritual if you:

- Are presenting at a high-energy, upbeat event
- Feel ambivalent about the subject and need to appear excited
- Tend to lack dynamism in your delivery

Spiritual Rituals

Spiritual rituals are like the moments of silence and stillness I experience backstage. Mine include prayer, meditation, contemplation, and expressing gratitude for the opportunity. Spiritual rituals can help quell jitters and make you feel grounded and positive. What I do is breathe in slowly and deeply and exhale thoroughly each time. I do that three times, and on the third inhale I do three short bursts of trying to get even more air in my lungs and then exhale slowly. It calms me down.

HILL STREET STUDIOS/GETTY IMAGES

Consider trying a pretalk spiritual ritual if you:

- Are a naturally amped-up person
- Get extremely jittery or anxious before speaking in public
- Have a spiritual practice that grounds you

Mantra-Based Rituals

Mantra-based rituals help you prepare by using repetition and self-talk for soothing. Try repeating your favorite mantra to yourself before you go onstage. For example, you might say, "I'm there to give, not receive" or "Just be present and be yourself."

Consider trying a pretalk mantra-based ritual if you:

- Feel soothed by repetition
- Have a phrase or pattern of words that comforts you
- Use self-talk to make you more comfortable or bold

When it comes to prepping for a talk, one size does not fit all. You can pick the pretalk ritual that's right for your speaking style or the scenario you're presenting in. Or, you may find it helpful to try multiple rituals. The key is to tap into what makes you uniquely your best, right before you walk onstage.

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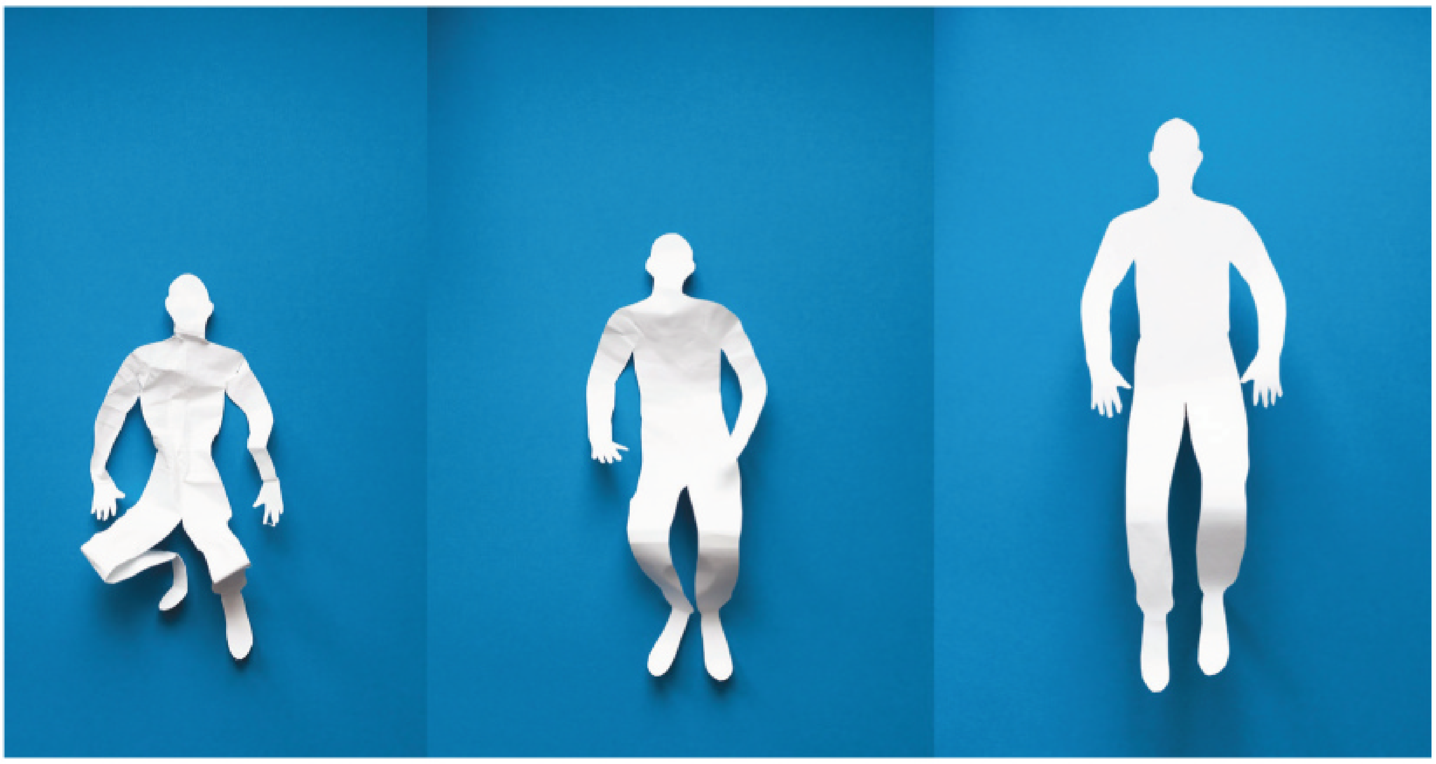
Nancy Duarte is the coauthor, with Patti Sanchez, of *Illuminate: Ignite Change Through Speeches, Stories, Ceremonies, and Symbols* (Portfolio, 2016), as well as the *HBR Guide to Persuasive Presentations* (Harvard Business Review Press, 2012) and two award-winning books on the art of presenting, *Slide:ology* (O'Reilly Media, 2008) and *Resonate* (John Riley and Sons, 2010). Her team at Duarte has created more than 250,000 presentations for its clients and teaches public and corporate workshops on presenting. You can follow her on Twitter: @nancyduarte.



RALF HIEMISCH/GETTY IMAGES

Six Ways to Look More Confident During a Presentation

by Kasia Wezowski

SEVERAL YEARS AGO, my colleagues and I were invited to predict the results of a start-up pitch contest in Vienna, where 2,500 tech entrepreneurs were competing to win thousands of euros in funds. We observed the presentations, but rather than paying attention to the ideas the entrepreneurs were pitching, we were watching the body language and microexpressions of the judges as they listened.

We gave our prediction of who would win before the winners were announced and, as we and the audience soon learned, we were spot-on. We had spoiled the surprise.

Two years later we were invited back to the same event, but this time, instead of watching the judges, we observed the contestants. Our task was not to guess the winners but to determine how the presenters' nonverbal communication contributed to their success or failure.

We evaluated each would-be entrepreneur on a scale from 0 to 15. People scored points for each sign of positive, confident body language, such as smiling, maintaining eye contact, and gesturing persuasively. They lost points for each negative signal, such as fidgeting, exhibiting stiff hand movements, and averting their eyes. We found that contestants whose pitches were rated in the top eight by competition judges scored an average of 8.3 on our 15-point scale, whereas those who did not place in that top tier had an average score of 5.5. Positive body language was strongly correlated with more-successful outcomes.

Positive body language is correlated with more-successful outcomes.

We've found similar correlations in the political realm. During the 2012 U.S. presidential election, we conducted an online study in which 1,000 participants—both Democrats and Republicans—watched two-minute video clips featuring Barack Obama and Mitt Romney at campaign events delivering both neutral and emotional content. Webcams recorded the viewers' facial expressions, and our team analyzed them for six key emotions identified in psychology research: happy, surprised, afraid, disgusted, angry, and sad. We coded for the tenor of the emotion (positive or negative) and how strongly it seem to be expressed. This analysis showed that Obama sparked stronger emotional responses and fewer negative ones. Even a significant number of Republicans—16%—reacted negatively to Romney. And when we analyzed the candidates' body language, we found that Obama's resembled those of our pitch contest winners. He displayed primarily open, positive, confident positions congruent with his speech. Romney, by contrast, often gave out negative signals, diminishing his message with contradictory and distracting facial expressions and movement.

Of course, the election didn't hinge on body language. Nor did the results of the start-up competition. But the right kinds of nonverbal communication did correlate with success.

How can you send out the same signals and hopefully generate the same success? At the Center for Body Language, we've studied successful leaders across a range of fields and identified several positions that are indicators of effective, persuasive body language.

The Box

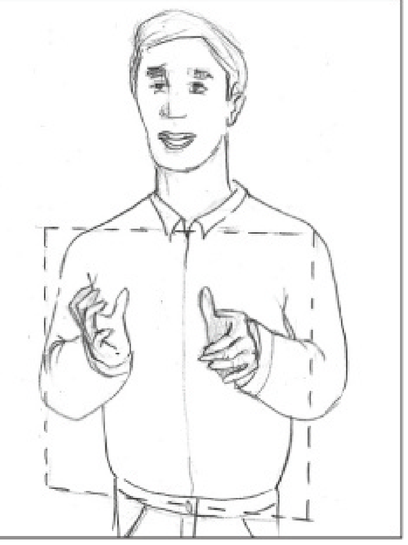
Early in Bill Clinton's political career he would punctuate his speeches with big, wide gestures that made him appear untrustworthy. To help him keep his body language under control, his advisers taught him to imagine a box in front of his chest and belly and contain his hand movements within it. Since then, "the Clinton box" has become a popular term in the field.

Holding the Ball

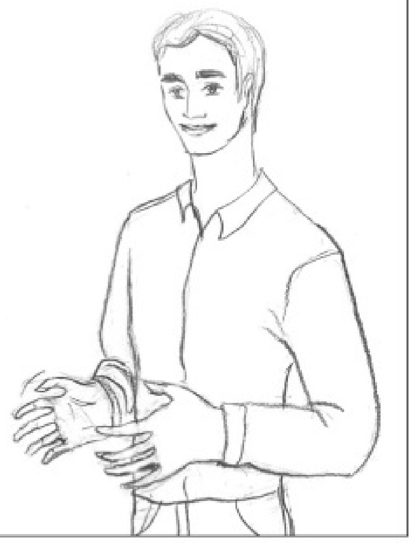
Gesturing as if you were holding a basketball between your hands is an indicator of confidence and control, as if you almost literally have the facts at your fingertips. Steve Jobs frequently used this position in his speeches.

Pyramid Hands

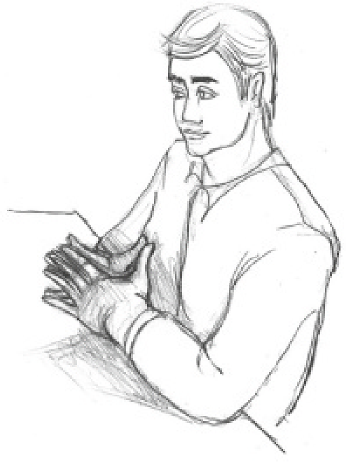
When people are nervous, their hands often flit about and fidget. When they're confident, they are still. One way to accomplish that is to clasp both



THE CLINTON BOX
trustworthy, truthful
Source: Center for Body Language



HOLDING THE BALL
commanding, dominant
Source: Center for Body Language

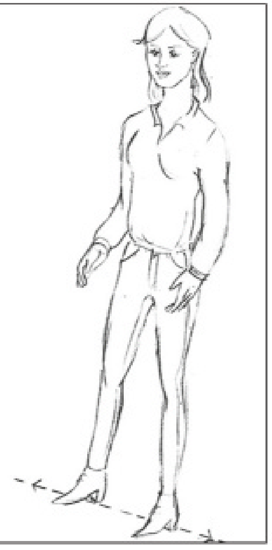


PYRAMID HANDS
self-assured, relaxed
Source: Center for Body Language

hands together in a relaxed pyramid. Many business executives employ this gesture, though beware of overuse or pairing it with domineering or arrogant facial expressions. The idea is to show you're relaxed, not smug.

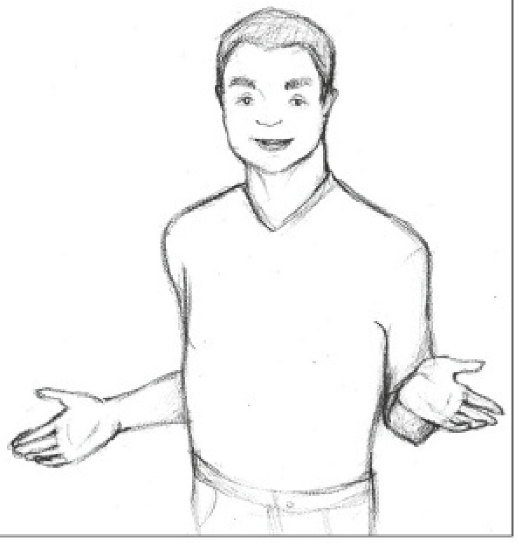
Wide Stance

How people stand is a strong indicator of their mindset. When you stand in this strong and steady position, with your feet about shoulder-width apart, it signals that you feel in control.



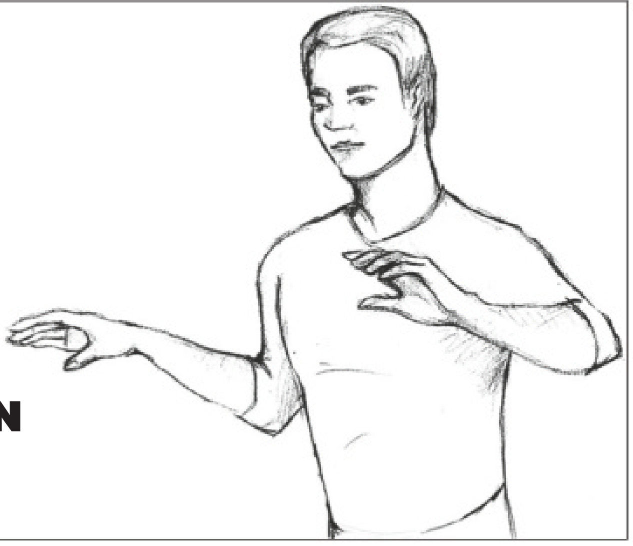
WIDE STANCE
confident, in control

Source: Center for Body Language



PALMS UP
honest, accepting

Source: Center for Body Language



PALMS DOWN
strong, assertive

Source: Center for Body Language

Palms Up

This gesture indicates openness and honesty. Oprah makes strong use of this during her speeches. She is a powerful, influential figure but also appears willing to connect sincerely with the people she is speaking to, be it one person or a crowd of thousands.

Palms Down

The opposite movement can be viewed positively, too—as a sign of strength, authority, and assertiveness. Obama has often used it to calm a crowd right after moments of rousing oration.

The next time you give a presentation, try to have it recorded, then review the video with the sound off, watching only your body language. How did you stand and gesture? Did you use any of these positions? If not, think about how you might do so the next time you're presenting to an audience or even just speaking to your boss or a big client. Practice in front of a mirror, then with friends, until the positions feel natural.

Nonverbal communication won't necessarily make or break you as a leader, but it might help you achieve more-successful outcomes.

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Kasia Wezowski is the founder of the Center for Body Language, author of four books on the subject, and producer and director of *Leap*, a documentary about the coaching profession.

MANLEY099/GETTY IMAGES

How to Stop Saying “Um,” “Ah,” and “You Know”

by Noah Zandan

UM. AH. So. You know. Like. Right? Well.

When you find yourself rattled while speaking—whether you’re nervous, distracted, or at a loss for what to say next—it’s easy to lean on filler words. They may give you a moment to collect your thoughts before you press on, and in some cases, they may be useful indicators that the audience should pay special attention to what comes next. But when you start to overuse them, they become crutches—academics call them “disfluencies”—that diminish your credibility and distract from your message.

Using research that incorporates behavioral science, AI, and data, Quantified Communications, the people science firm I run, determined that the optimum frequency is about one filler word per minute, but the average speaker uses five fillers per minute—or one every 12 seconds.

Let’s look at what the data tells us about crutch words, how they jeopardize a speaker’s impact, and how we can eliminate them from our vocabularies.

The Trouble with Filler Words

It’s hard to pay attention to a speaker when every third word is a filler, but it can be difficult to pinpoint exactly how those verbal crutches are affecting your experience. We analyzed more than 4,000 spoken-communication samples in our database to identify how much speakers are relying on filler words and how those words are affecting the way their audiences perceive them. Although we found that using fillers excessively can negatively influence audiences in many ways, three critical factors are significantly negatively correlated with too many fillers.

1. To get your message across effectively, you have to keep your audience engaged. When you use excessive fillers, audiences are less likely to hang on to your every word because the fillers get in the way of the emotional stories or fascinating research you’re trying to share.

2. Audiences want to believe that you are acting and speaking naturally—the way you might in a one-on-one conversation. Although of course most people use fillers in casual conversation, when you bring them with you to the microphone, they distract from your core personality and make you sound nervous, distracted, or disengaged rather than authentic.

3. If you want your audience to buy in to your message, you have to make it clear, logical, and easy to follow. Unfortunately, filtering through crutch words to catch the important parts requires more cognitive effort than audiences are willing to put forth. So too many fillers will probably mean people will tune out in favor of an easier cognitive task, such as thinking about their to-do lists.

Why isn't our speech fluent? Studies suggest that we verbalize hesitations because we've been conditioned to fill the void even when we don't have something to say. For example, we use "um" and "ah" to hold on to the "conversational floor" as we are planning what we are going to say next, with "ah" signaling a short delay and "um" signaling a longer delay.

Filler words diminish your credibility and distract from your message.

Embrace the Pause

The good news is that you can turn this weakness into a strength by replacing fillers with pauses.

Research suggests that most conversational speech consists of short (0.20 seconds), medium (0.60 seconds), and long (more than 1 second) pauses. Great public speakers often pause for two to three seconds or even longer. Our phonetic data shows that the average speaker uses only 3.5 pauses per minute, and that's not enough.

This is understandable. Pauses aren't easy to embrace. For many speakers, even the briefest pause can feel like an interminable silence because we tend to think faster than we speak. According to our research, the average professional speaks at a rate of 150 words per minute. Yet, according to research from Missouri University, we think at 400 words per minute (and depending on whom you ask, the rate may be as high as 1,500 words per minute).

Because of this discrepancy, when you're giving a speech, your perception of time is often distorted, and what feels like an eternity in your mind is actually a few short seconds for the audience.

Despite how they may feel at first, well-placed pauses make you sound calm and collected, and they help you do three things:

Collect your thoughts. If you lose your train of thought, a pause gives you time to get back on track. As long as the pause isn't too long (no more than five seconds), the audience won't hold it against you.

Calm your nerves. Taking a pause before starting a speech is especially important for people with a fear of public speaking, as it helps calm nerves. The tactic is useful in the middle of a speech as well. If you find yourself getting flustered, pause briefly to take a deep breath (as long as it's not audible or obvious) and reset.

Build suspense. Pauses aren't always a defensive tactic. Strategically placed silence can build suspense, emphasize a point, or give the audience time to absorb a key insight.

Like filler words, pauses give you a chance to take a break and figure out what comes next. However, pauses make you sound confident and in control, whereas overused filler words are distracting and make you sound as if you don't know what to say.

Three Steps to Silencing Crutch Words

The first step in changing any habit—whether it's biting your nails or peppering every sentence with "you know"—is awareness. To identify your crutch words, videotape or review a transcript of your most recent talk and determine what vocal fillers you rely on most. Once you're aware of them, you'll probably start to hear these words in your day-to-day communication. Pair your crutch words with small actions. Every time you catch yourself saying "like," for example, tap your leg. Or have a family member or close friend monitor your filler words and bring your attention to them with a clap or snap.

Next, after you've become cognizant of your filler words as they try to escape your lips, begin forcing yourself to be silent. To practice, record yourself on video talking about what you did from the beginning to the end of the day. Use pauses instead of filler words as you recall the events.

Finally, I can't stress enough the importance of preparation. Nerves are one of the biggest reasons people overuse vocal fillers. The less prepared you are, the more nervous you'll be, which will probably cause you to speak too quickly, trip over your words, and forget what's next. So practice. On average, the optimal ratio of preparation to performance is one hour of practice for every minute of presentation, but at the very least, Trey Guinn, one of our communication experts, recommends speakers get in at least three full runs before stepping in front of an audience.

Used sparingly and effectively, filler words can make you more relatable to your audience, give you time to catch your breath, and emphasize key points. That's why Google built fillers into the latest version of its AI assistant, Duplex. But when they become crutch words, used out of nervousness or lack of preparation, they hurt your credibility. As you prepare for your next presentation, identify the words you lean on most and train yourself to avoid them. Then, the next time you're in front of an audience, use silence to gather your thoughts, rather than filling the air with sound.

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HAYON THAPALIYA

Three Tips for Presenting in English When You're Not a Native Speaker

by Deborah Grayson Riegel

AS A COACH and international business school instructor, I have worked with hundreds of current and future leaders who are accomplished, bright, and capable—and who quickly lose their confidence and competence when making business presentations. For a subset of these leaders—those who need to present in English when it isn't their native language—the stakes and the stress can feel even higher. Meanwhile, the need for leaders to be able to present in English is growing rapidly. According to Harvard Business School associate professor Tsedal Neely, author of *The Language of Global Success: How a Common Tongue Transforms Multinational Organizations* (Princeton University Press, 2017), "English is required for global collaboration and global work."

Nevertheless, being compelled to speak in your nonnative language can lead to feelings of frustration, pressure, and insecurity. As Neely reports, "When nonnative speakers are forced to communicate in English, they can feel that their worth to the company has been diminished, regardless of their fluency level." Add to that the burden of making formal business presentations in front of superiors, decision makers, and key stakeholders in your nonnative language, and the anxiety is significantly greater.

While researching our book, *Tips of the Tongue: The Nonnative English Speaker's Guide to Mastering Public Speaking* (Indie Books International, 2017), my coauthor, Ellen Dowling, and I interviewed many leaders in this situation and asked them to share their experiences.

One leader whose primary and secondary languages are Hebrew and Spanish, but who presents primarily in English, admitted that she felt "self-conscious" about her "weird and funny accent" that seemed to get heavier the more nervous she felt. She also shared that she felt less capable of spontaneity—and less smart—when she presented in English. A Chinese leader told us, "When I can't find the word I need, I grasp the easiest word instead. So a disaster would be like saying 'you guys' at a formal conference." And a Korean leader was even more concerned: "I think one will be good at delivering what they've prepared, but if the presentation goes beyond this scope, the situation can turn your brain to mush, and it becomes a disaster."

For nonnative speakers, rehearsal and repetition are especially crucial steps for a successful presentation.

Of course, even native English speakers often anticipate disaster when making presentations (including those of us who have been public speakers for decades). But for nonnative speakers, the anticipatory and situational anxiety associated with their unique challenges—being understandable, choosing the right words, speaking spontaneously—can be overwhelming. Moreover, if these concerns interfere with your willingness or ability to make business presentations, the impact can limit your career.

Here are three strategies nonnative English speakers can employ to help them feel more confident before, during, and after a presentation:

Spend significantly more time practicing your delivery than perfecting your deck. When we asked our clients to share with us the proportion of time spent planning, designing, and perfecting their PowerPoint slides compared to practicing speaking the presentation aloud, most of them admitted that they spent almost no time doing the latter. Although this is often a problem for native speakers, too, for nonnative English speakers, rehearsal and repetition are especially crucial steps in preparing for a successful presentation. The goal here is "overlearning" your presentation—pushing on with practice even when it seems like you've done enough. This will help your presentation become embedded in your long-term memory and therefore less susceptible to the effects of stress. It will also help you speak spontaneously if you can trust that your core content is safely stored (and able to be retrieved) from your long-term memory.

Don't agonize about your accent, but do slow your speaking speed. Everyone has an accent of some sort, including native English speakers. (I'm a native New Yorker, and our accent is infamous worldwide.) Even people who live in different parts of one country can be identified by their accents. Your accent can be a problem for your listeners, however, if they have difficulty understanding you. An unfamiliar accent is particularly problematic in the first minute or two of your presentation, when your audience must initially strain to understand you. According to their research in *Frontiers in Human Neuroscience,* authors Kristin J. Van Engen and Jonathan E. Peelle say that audiences who are listening to accented speech of any kind experience "reductions in intelligibility, comprehensibility, and processing speed—the same effects caused by hearing loss or background noise." By slowing down your speaking pace, you help your audience better manage the barriers to really hearing and understanding you. Choose your opening words deliberately and pronounce them carefully, being sure to articulate your words, not just rush through them. As your presentation continues, the problem becomes less acute as the audience will slowly develop an ear for your accent and find it easier to understand what you are saying.

Pause early and often. Pausing in your presentation serves two benefits—first, to help your audience comprehend your message, and second, to give you a break. Van Engen and Peelle found that understanding accented speech requires listeners to draw on additional cognitive resources, not only to understand and remember what has been said but also to manage other information or tasks while listening to accented speech. When you pause, you give your listeners an opportunity to rest from drawing upon their cognitive resources and absorb what you're saying. But your pause is also an opportunity for you—you get to remember or consider what you want to say next, check your notes, read cues from the audience, or even take a sip of water. You can also use a pause to build rapport with your audience by checking with them about your pace and pronunciation by saying something like, "Let me pause for a moment here. I know that I am making complete sense to myself in [Spanish/French/Japanese/Hindi/your native language]. How am I doing in English?" Not only will you probably get some immediate positive and supportive feedback from your audience, but you will also be able to take a break, breathe, and gather your thoughts.

For both native and nonnative English speakers, perfection is overrated. But with some extra attention, effort, and commitment, nonnative English speakers can present with confidence, competence, and cultural comfort.

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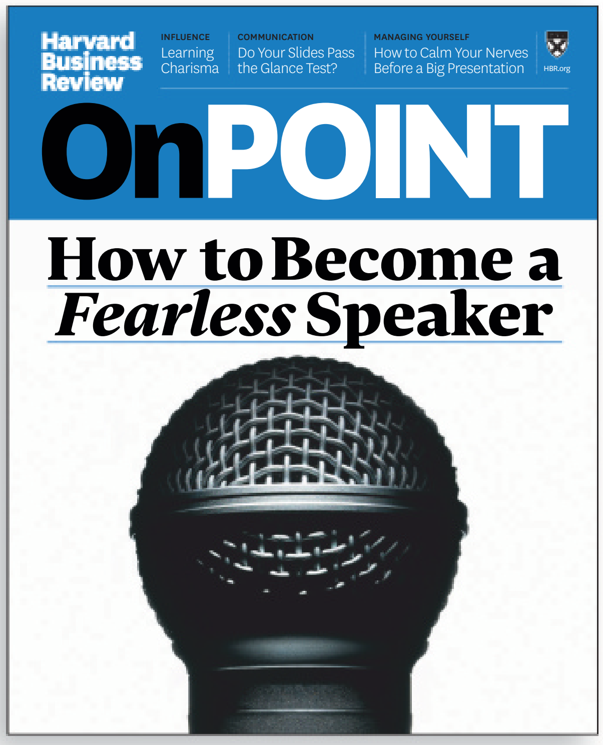
Executive Summaries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OnPOINT
How to Become a *Fearless* Speaker

> “Storytelling can translate dry and abstract numbers into compelling pictures of a leader’s goals.”

TELLING TALES
PAGE 70

12 | How to Give a Killer Presentation

Chris Anderson

For more than 30 years, the TED conference series has presented enlightening talks that people enjoy watching. In this article, Anderson, TED’s curator, shares five keys to great presentations:

- Frame your story (figure out where to start and where to end).
- Plan your delivery (decide whether to memorize your speech word for word or develop bullet points and then rehearse it—over and over).
- Work on stage presence (but remember that your story matters more than how you stand or whether you’re visibly nervous).
- Plan the multimedia (whatever you do, don’t read from PowerPoint slides).
- Put it together (play to your strengths and be authentic).

According to Anderson, presentations rise or fall on the quality of the idea, the narrative, and the passion of the speaker. It’s about substance—not style. In fact, it’s fairly easy to “coach out” the problems in a talk, but there’s no way to “coach in” the basic story—the presenter has to have the raw material. So if your thinking is not there yet, he advises, decline that invitation to speak. Instead, keep working until you have an idea that’s worth sharing.

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20 | Visualizations That Really Work

Scott Berinato

Not long ago, the ability to create smart data visualizations (or dataviz) was a nice-to-have skill for design- and data-minded managers. But now it's a must-have skill for all managers, because it's often the only way to make sense of the work they do. Decision making increasingly relies on data, which arrives with such overwhelming velocity, and in such volume, that some level of abstraction is crucial. Thanks to the internet and a growing number of affordable tools, visualization is accessible for everyone—but that convenience can lead to charts that are merely adequate or even ineffective.

By answering just two questions, Berinato writes, you can set yourself up to succeed: Is the information *conceptual* or *data-driven?* and Am I *declaring* something or *exploring* something? He leads readers through a simple process of identifying which of the four types of visualization they might use to achieve their goals most effectively: idea illustration, idea generation, visual discovery, or everyday dataviz.

This article is adapted from the author's book, *Good Charts: The HBR Guide to Making Smarter, More Persuasive Data Visualizations.*

HBR Reprint R1606H

46 | The Necessary Art of Persuasion

Jay A. Conger

Business today is largely run by teams and populated by authority-averse baby boomers and Generation Xers. That makes persuasion more important than ever as a managerial tool.

But contrary to popular belief, the author asserts, persuasion is not the same as selling an idea or convincing opponents to see things your way. It is instead a process of learning from others and negotiating a shared solution. To that end, persuasion consists of four essential elements: establishing credibility, framing to find common ground, providing vivid evidence, and connecting emotionally.

Credibility grows, the author says, out of two sources: expertise and relationships. The former is a function of product or process knowledge and the latter a history of listening to and working in the best interest of others.

But even if a persuader's credibility is high, his position must make sense—even more, it must appeal—to the audience. Therefore, a persuader must frame his position to illuminate its benefits to everyone who will feel its impact.

Persuasion then becomes a matter of presenting evidence—but not just ordinary charts and spreadsheets. The author says the most effective persuaders use vivid—even over-the-top—stories, metaphors, and examples to make their positions come alive.

Finally, good persuaders have the ability to accurately sense and respond to their audience's emotional state. Sometimes, that means they have to suppress their own emotions; at other times, they must intensify them.

Persuasion can be a force for enormous good in an organization, but people must understand it for what it is: an often painstaking process that requires insight, planning, and compromise.

HBR Reprint 4258

58 | Change the Way You Persuade

Gary A. Williams and Robert B. Miller

You call a meeting to try to convince your boss that your company needs to make an important move. Your argument is impassioned, your logic unassailable, your data bulletproof. Two weeks later, though, you learn that your brilliant proposal has been tabled. What went wrong?

It's likely the proposal wasn't appropriately geared toward your boss's decision-making style, say consultants Gary Williams and Robert Miller. Over the course of several years' research, the authors have found that executives have a default style of decision making developed early in their careers. That style is reinforced through repeated successes or changed after several failures.

Typically, the authors say, executives fall into one of five categories of decision-making styles: *Charismatics* are intrigued by new ideas, but experience has taught them to make decisions based on balanced information, not just on emotions. *Thinkers* are risk-averse and need as much data as possible before coming to decisions. *Skeptics* are suspicious of data that doesn't fit their worldview and thus make decisions based on their gut feelings. *Followers* make decisions based on how other trusted executives, or they themselves, have made similar decisions in the past. And *controllers* focus on the facts and analytics of decisions because of their own fears and uncertainties.

But most business presentations aren't designed to acknowledge these different styles—to their detriment. In this article, the authors describe the various subtleties of the five decision-making styles and how best to persuade executives from each group. Knowing executives' preferences for hearing or seeing certain types of information at specific stages in their decision-making process can substantially improve your ability to tip the outcome in your favor, the authors conclude.

HBR Reprint 9969

70 | Telling Tales

Stephen Denning

A carefully chosen story can help the leader of an organization translate an abstract concept into a meaningful mandate for employees. The key is to know which narrative strategies are right for what circumstances.

Knowledge management expert Stephen Denning explains that, for optimal effect, form should follow function. Challenging one professional storyteller's view that more is better, Denning points out that it's not always desirable (or practical) to launch into an epic that's jam-packed with complex characters, cleverly placed plot points, an intricate rising action, and a neatly resolved denouement. True, if listeners have time and interest, a narrative-savvy leader can use a vividly rendered tale to promote communication between management and staff, for instance, or even to foster collaboration—especially when the story is emotionally moving. However, if the aim is to motivate people to act when they might not be inclined to do so, it's best to take an approach that's light on detail. Otherwise, the particulars can bog listeners down and prevent them from focusing on the message.

Drawing on his experiences at the World Bank and observations made elsewhere, the author provides several dos and don'ts for organizational storytellers, along with examples of narratives that get results. The sidebar "A Storytelling Catalog" presents seven distinct types of stories, the situations in which they should be told, and tips on how to tell them. Many of these aren't even stories in the "well-told" sense—they run the rhetorical gamut from one-liners to full-blown speeches—but they succeed because they're tailored to fit the situation. So even though it's common in business to favor the analytical over the anecdotal, leaders with the strength to push past some initial skepticism about the enterprise of storytelling will find that the creative effort pays off.

HBR Reprint R0405H

80 | How Venture Capitalists Really Assess a Pitch

Harvard Business Review Staff

Lakshmi Balachandra worked for two VC firms before entering academia, and she was mystified by a phenomenon she routinely witnessed: Why did a proposal that looked so promising on paper become a nonstarter when it was actually pitched?

Balachandra, now an assistant professor at Babson College, spent almost 10 years capturing what happens in pitch meetings and quantifying the results. She drew four broad conclusions:

1. Passion is overrated. VCs prefer a calm demeanor, which they equate with leadership strength. Enthusiasm should be tempered with unruffled preparedness.

2. Trust beats competence. Skill-based competencies can be obtained through training or hiring complementary talent, but character is less malleable.

3. Coachability matters. Most angel investors want to be hands-on mentors; a founder must be receptive to feedback.

4. Gender stereotypes play a role. Whether the presenter is male or female, VCs respond poorly to high levels of stereotypically feminine behavior; if an entrepreneur tends to be overly emotional or expressive, they should practice toning down or avoiding those mannerisms.

The crucial takeaway? Entrepreneurs should approach the pitching process less as a formal presentation and more as a give-and-take conversation in which attitude and mindset matter more than business fundamentals. Careful listening, thoughtful responses, and maintaining a calm, open demeanor matter more than the specifics of the pitch deck.

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88 | How to Become an Authentic Speaker

Nick Morgan

Like the best-laid schemes of mice and men, the best-rehearsed speeches go oft astray. No amount of preparation can counter an audience's perception that the speaker is calculating or insincere. Why do so many managers have trouble communicating authenticity to their listeners?

Morgan, a communications coach for more than two decades, offers advice for overcoming this difficulty. Recent brain research shows that natural, unstudied gestures—what Morgan calls the "second conversation"—express emotions or impulses a split second before our thought processes have turned them into words. So the timing of practiced gestures will always be subtly off—just enough to be picked up by listeners' unconscious ability to read body language.

If you can't practice the unspoken part of your delivery, what can you do? Tap into four basic impulses underlying your speech—to be open to the audience, to connect with it, to be passionate, and to "listen" to how the audience is responding—and then rehearse your presentation with each in mind. You can become more open, for instance, by imagining that you're speaking to your spouse or a close friend. To more readily connect, focus on *needing* to engage your listeners and then to keep their attention, as if you were speaking to a child who isn't heeding your words. To convey your passion, identify the feelings behind your speech and let them come through. To listen, think about what the audience is probably feeling when you step up to the podium and be alert to the nonverbal messages of its members.

Internalizing these four impulses as you practice will help you come across as relaxed and authentic—and your body language will take care of itself.

HBR Reprint R0811H

94 | Learning Charisma

John Antonakis, Marika Fenley, and Sue Liechti

Many believe that charisma, the ability to captivate and inspire an audience, is innate. But through research in the laboratory and in the field, the authors have identified 12 tactics that help managers become more influential, trustworthy, and "leaderlike" in the eyes of others. Great orators and politicians employ these techniques instinctively, but anyone can learn how to use them.

Nine of the tactics are verbal: metaphors, similes, and analogies; stories and anecdotes; contrasts; rhetorical questions; expressions of moral conviction; reflections of the group's sentiments; three-part lists; the setting of high goals; and conveying confidence that they can be achieved. Three are nonverbal: animated voice, facial expressions, and gestures. Though there are other tactics that leaders can use—repetition, humor, talking about sacrifice—the 12 singled out by the authors have the greatest effect and can work in almost any context. And the research shows that they also have a larger impact than strong presentation skills and speech structure.

This article explores the 12 tactics in detail, providing examples from business and politics, and offers guidance on how to start implementing them. A manager's goal should be to incorporate them not only into public speaking but also into everyday interactions. They work because they help you create an emotional connection with your audience, even as they make you appear more powerful, competent, and worthy of respect. People who use them effectively will be able to unite their followers around a vision in a way that others can't. And in the authors' study, executives who practiced them saw the leadership scores that their audience gave them rise by about 60%.

HBR Reprint R1206K

100 | Connect, Then Lead

Amy J.C. Cuddy, Matthew Kohut, and John Neffinger

In puzzling over whether it's better to be feared or loved as a leader, Machiavelli famously said that, because it's nigh impossible to do both, leaders should opt for fear. Research from Harvard Business School's Amy Cuddy and consultants Matthew Kohut and John Neffinger refutes that theory, arguing that leaders would do much better to begin with "love"—that is, to establish trust through warmth and understanding.

Most leaders today approach their jobs by emphasizing competence, strength, and credentials. But without first building a foundation of trust, they run the risk of eliciting fear, resentment, or envy.

Beginning with warmth allows trust to develop, facilitating both the exchange and the acceptance of ideas—people really hear your message and become open to it. Cultivating warmth and trust also boosts the quantity and quality of novel ideas that are produced.

The best way to gain influence is to combine warmth and strength—as difficult as Machiavelli says that may be to do. In this article, the authors look at research from behavioral economics, social psychology, and other disciplines and offer practical tactics for leaders hoping to project a healthy amount of both qualities.

HBR Reprint R1307C

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