

Case Study

Using the *Personal Listening Profile*[®] with a Financial Research Institution

The Client

The Director of Human Resources for a major financial research institution asked me to facilitate a presentation skills seminar for a department that conducted detailed financial research. The researchers made both formal and informal presentations to senior management on a regular basis to help them as they made critical corporate investment decisions. The client believed that improving the presentation skills of the researchers would help them better communicate their findings to senior management.

The Business Need

The individuals in this department were highly educated career employees with backgrounds in finance, economics, and mathematics. They knew their material well but appeared to have difficulty in adapting their presentations to the needs of the audience. Some overwhelmed people with data overload while others failed to provide sufficient information. Impromptu questions threw others off track, and once off the prepared material, they became flustered and didn't know where to take the presentation.

The Solutions

Normally, presentation skills fall into the mechanical training category, but it seemed to me that this department knew how to structure a presentation. What they needed, instead, was to be more adaptive in their presentations, so I suggested a two-part program based on the *Personal Listening Profile*[®].

The Delivery

Part one was a half-day session that introduced the *Personal Listening Profile* and stressed the five different Listening Approaches. Participants needed to understand how their predominant Listening Approach mirrored the way they communicated. They needed to adapt to meet different listening preferences. For instance, a Discerning listener who needed a lot of facts and information needed to adapt their style to meet the preferences of Evaluative listeners, who didn't want all the details. They might want just five main points before making their decision and moving on. I gave the group homework — to practice using the methodology between classes — and asked the participants to come back with some real-life applications. I also asked them to report on what they did differently using the new Listening Approach model.

Part two occurred two weeks later. I held a half-day basic presentation skills workshop in which each participant prepared a five-minute presentation with the standard structure of an opening, main body, and closing. I also incorporated time for impromptu questions. After each presentation, the class critiqued the clarity and flexibility of the presentation, as well as the presenter's ability to adapt to his or her listeners' needs. This workshop allowed participants to demonstrate what they had learned about Listening Approaches by applying it to their financial presentations.

The Results

The program participants were amazed to discover that people have different needs for information and to learn that they needed to adapt to the preferences of an audience, both in their presentation style and in the way they packaged the material. At the end of the program, the participants talked about developing a presentation template that would standardize presentations, with "big picture" sections and appendices for the details. The two-part workshop allowed for new knowledge and information about how individuals communicate and also allowed time to apply the new knowledge in a practice session. The sessions culminated with some action learning, in which the participants applied what they had learned to existing processes and procedures to increase their efficiency and effectiveness.