

Tailoring Your Talk

By Jerry Doyle

"Do you know who you're talking to?" It may sound like a parent admonishing an insolent child but it is also a critical question when it comes to preparing for a presentation. Many presenters believe that their job is simply to get through the material that they are asked to cover in the time allotted. Some more evolved and experienced speakers may recognize the importance of effective delivery of the talking points. However, many presenters neglect another equally important aspect: making a connection with the audience. Making a strong connection is critical to delivering an effective presentation. The key to making a connection is tailoring your message points. Even if you routinely cover the same topic, you must always take the time to consider your audience when preparing for your presentation.

In order to tailor your talk, you must assess the audience, draft talking points based on this intelligence, conclude with an action step, prepare for contrarian questions specific to this group, and rehearse.

Assessing the Audience

It is critical to learn as much as you are able to about the invited audience members long before you hit the stage. Go to the organizers first as they may be the best resource to gain this intelligence. Is it the AICPA or your State Society office? Following are some of the critical questions you may want to ask:

1. How large will the group be?
2. Who are they?: Age, gender, ethnicity, culture, profession, income, education level.
3. What "bent" might they have about the CPA profession or about your subject matter?
4. What are their personalities, their attitudes?
5. Are they CPAs, accountants or finance people themselves?
6. Why are they coming? What is their specific interest in your topic?
7. What is their relationship to you?
8. What do you share in common with them? (Hometown, affiliations, goals, skills)

If you have any say in the matter, it is typically better to have either all peers (professionally, that is, ...CPAs) or all non-experts. If they are professional peers, you can craft your messages in a way that sounds like "inside baseball." In other words, start on a higher technical plain and impress them with your knowledge. If the audience is not "insiders" of the accounting profession, you can still move or motivate them, but your messages need to be wider in scope and should assume little or no technical foundation.

Drafting the Talking Points

Now that you have analyzed your audience, ask yourself these critical questions in order to draft effective talking points: What is the purpose of your talk *for this particular audience*? Are you there to simply inform? Come to a certain agreement? Perhaps you are there to solve a problem. Maybe you are there to persuade or sell? Once you have answered these questions, you can determine the scope and depth of the information you are providing.

Next, refer to CommCore's Message Pyramid model to craft your message. This technique will help you develop a tailored talking point. What is the statement you want to make and underscore? Make it succinct and clear. Then support it with the necessary data and statistics to "prove" your point. Be sure to provide an illustrative element to further support the statement. This can be an anecdote, vignette, analogy, picture on a PowerPoint slide or third party endorsement. This is your opportunity to tailor your message. Make sure your illustrative support has a strong connection to your audience.

For example: Your talk is on Financial Literacy and one of your main messages is "Fail to Plan and you Plan to Fail." Your audience analysis reveals that most of the group is young professionals just out of college who are in non-accounting professions. You should provide all of the startling statistics to support how most Americans struggle when they don't have a financial plan in place. However, that is not enough to customize this message for this particular audience. Tell them a story of another 22-year-old you know who has started a 401k plan. Show them a chart of how small investments now will compound and what it might look like in 2046 when they reach retirement age. Perhaps put up the logos of the colleges they just graduated from and show how much they need to save to send *their* kids there in 25-30 years. The graphic will be retained in their memory and they will feel as if you've crafted your whole talk with them in mind.

Conclude with an Action Step

Now that you know who they are, what they care about and have customized the main messages to them, give your audience something specific that they should *do* with this information. In the above mentioned example, you might ask these young professionals to go home and make a wish list of when they want to buy a car, a house, take an exotic vacation. Give them a resource to show them how they can calculate the affordability of it all. The best scenario is if you are sending them to your organization's website, to the AICPA website or to the State Society offices. If your presentation is on financial literacy, send them to www.360financialliteracy.org for all kinds of valuable information for every stage of their lives. Perhaps the action step is to follow a stock or a mutual fund to become familiar with securities in advance of an investment. Maybe it's an on-line investment game. These action steps leave the audience feeling like the presenter understands the world they live in and many of their concerns.

Prepare for Questions

The customization of your talk should not end with your conclusion. As you prepare for questions, list those most likely to be asked based on the make-up of the audience. Peers are going to ask nit-picky, detailed questions about a law, a formula or a model. College students are going to ask why they need to know something *now*. Older folks in a town hall meeting may want things repeated, clarified and simplified.

In any group, there will likely be contrarians who are determined to challenge your facts.

Regardless of the tact of the question, your answers should contain the following whenever possible:

1. Acknowledgement that you understand where they are coming from
2. A clear, truthful, but concise answer
3. Transition (bridge) to one of the main messages from your presentation
4. Reminder to an action step

Do not simply answer a question and then move on to another. Assess each question for the possibility to make a connection, answer it, add a message and point to an action. For example, if a young, working adult asks about saving for retirement: "How can I save now when my company won't match anything yet?" Your answer shouldn't be limited to "Put away 10% until the matching kicks in." Instead, acknowledge: "So, your company has a mandatory waiting period before you can participate in 401k?" Provide the answer: "Just take 10% out of your paycheck and put it in savings." Transition to a main message. "But, the important lesson here is that if you fail to do this, your plan will be to fail in saving money for retirement." Then, end with an action recommendation. "Check out our website to find an affordable formula to put a little aside each month." There, you've done more to customize and build a rapport with that questioner than just stating the answer.

Practice, practice, practice!

Experienced presenters know that rehearsing a tailored talk is as important as the content that has been developed. What is written on the page **MUST** be tested in a rehearsal to know if it will be on target and effective for this particular audience.

Better still, find a small group of people who roughly represent the same kind as those you will be addressing in your formal speech and try out your presentation on them. Ask for candid and comprehensive feedback. Go back and incessantly edit your content until it's a perfect fit. Rehearse again. Try to do so on-camera or in front of that sample group again, or both!

Transforming your talk from a generic to a tailored one that connects with the audience takes time, research, editing and rehearsal. Make the commitment and your audience will thank you! And even ask you back!

Have a suggestion on a topic? E-mail Carmen Encarnacion at cencarnacion@aicpa.org

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