



OSB® Eloqui Template for Client Anecdotes

The OSB is a highly compressed, three act play. The narrative form and conversational format is easy to remember, and embeds the tale into listeners' memory. When told well, the Eloqui OSB becomes portable, and insures others will tell your story. Mental simulation is built into the template, allowing your audience or client to simulate the experience of working with you, which facilitates promoting your services and setting yourself apart.

OBSTACLE:

Without windup or too much context, focus on the most compelling aspects of the obstacle or challenge a client or customer faced. Make sure your description is colorful and brief.

Increase the tension and interest by adding two elements:

1. What was at stake (e.g. if the firm didn't make their numbers, they would go under)
2. Time sensitivity (e.g. the pitch was in three days)

SOLUTION: (Each Act is discrete, so only include Obstacles in Act 1 and Solutions in Act 2)

Using active verbs, describe three concrete actions you took on behalf of the client.

Make it more compelling by adding what you or the client discovered, revealed, or didn't expect.

Note: This section is vital because it demonstrates how you do business that sets you apart, and makes you critical to the success of your clients. Delivering this section well means you never have to read your resume or list your services.

BENEFIT:

In business, there is always an expected benefit, such as: "They won the contract..." or "We saved our client \$50k...", etc.

Begin with that, but then add the kicker, which is the *unexpected* benefit—to them, not to you. The unexpected benefit can be an epiphany; e.g. the realization of how the client can do business more efficiently, pitch bigger firms, or expand their client base. To discover the unexpected benefit, finish the phrase "Going forward..."

Notes: After learning this template, there is no need to say "The obstacle was..., the solution was..., or the benefit was...." Don't let the stitching show. Strive to make the OSB a seamless, brief story which is logical and concise.

Action Verbs

Use action verbs abundantly in elevator speeches, presentations and cover letters to promote achievements. They create strong impressions by suggesting visual images. Always include action verbs in solution statements.

Management	Communication	Research	Technical	Teaching
achieved	addressed	clarified	analyzed	adapted
administered	arbitrated	collected	assembled	advised
analyzed	arranged	conceived	built	clarified
assigned	authored	critiqued	calculated	coached
attained	communicated	detected	computed	communicated
conceived	corresponded	diagnosed	designed	coordinated
consolidated	counseled	disproved	devised	defined
coordinated	developed	evaluated	engineered	developed
decided	defined	examined	fabricated	enabled
delegated	directed	extracted	inspected	encouraged
developed	drafted	identified	maintained	evaluated
directed	edited	inspected	operated	explained
encouraged	enlisted	interpreted	overhauled	facilitated
evaluated	formulated	interviewed	programmed	guided
executed	influenced	investigated	remodeled	informed
implemented	interpreted	organized	repaired	initiated
improved	lectured	researched	solved	instructed
incorporated	mediated	reported	trained	instructed
increased	moderated	reviewed	upgraded	lectured
inspired	motivated	searched		persuaded
launched	negotiated	studied		presented
led	persuaded	summarized		set goals
motivated	promoted	surveyed		stimulated
organized	publicized	systematized		taught
outlined	reconciled	wrote		trained
oversaw	reunited			updated
prioritized	renegotiated			
produced	reported			
recommended	researched			
reevaluated	summarized			
reported	spoke			
reviewed	translated			
scheduled	wrote			
strengthened				
supervised				
united				

Financial

adjusted
administered
allocated
analyzed
appraised
audited
balanced
budgeted
calculated
compared
computed
developed
estimated
forecast
forecasted
managed
marketed
planned
projected
reevaluated
reconciled
researched
sold

Creative

acted
applied
composed
conceived
conceptualized
created
designed
developed
directed
established
evaluated
fashioned
formed
formulated
founded
illustrated
instituted
integrated
introduced
invented
molded
originated
perceived
performed
planned
presented
produced
refined
rewrote
updated

Partnering

advised
aided
assessed
brought
clarified
coached
coordinated
counseled
dealt
demonstrated
diagnosed
educated
encouraged
enlisted
expedited
facilitated
familiarized
guided
inspired
maintained
modified
performed
referred
rehabilitated
represented
supported
upheld

Clerical or Detail

activated
altered
assembled
approved
arranged
catalogued
classified
collected
compiled
described
dispatched
edited
estimated
executed
gathered
generated
implemented
inspected
listed
maintained
monitored
observed
operated
organized
overhauled
prepared
processed
proofread
published
recorded
reduced
retrieved
screened
specified
streamlined
systematized

Additional Action Verbs

anticipated	experimented	lifted	received	scheduled
arbitrated	explained	listened	recommended	selected
charted	expressed	logged	reconciled	sensed
checked	extracted	maintained	painted	separated
classified	filed	made	perceived	served
collected	financed	managed	performed	sewed
completed	fixed	manipulated	persuaded	shaped
conducted	followed	mediated	photographed	shared
conserved	formulated	memorized	piloted	showed
consolidated	founded	modeled	predicted	sketched
constructed	gathered	monitored	prepared	solved
controlled	gave	motivated	prescribed	sorted
coordinated	generated	navigated	presented	summarized
counseled	guided	negotiated	printed	supervised
created	handled	observed	processed	supplied
defined	hypothesized	obtained	produced	symbolized
delivered	identified	offered	programmed	synergized
detailed	illustrated	operated	projected	synthesized
detected	imagined	ordered	promoted	systematized
determined	implemented	organized	protected	talked
devised	improved	originated	provided	taught
diagnosed	improvised	painted	publicized	tended
directed	increased	perceived	purchased	tested
discovered	influenced	performed	recorded	trained
dispensed	informed	persuaded	recruited	transcribed
displayed	initiated	piloted	reduced	translated
disproved	innovated	planned	referred	traveled
dissected	inspected	played	rehabilitated	treated
distributed	installed	predicted	related	troubleshoot
diverted	instituted	prepared	rendered	tutored
dramatized	instructed	prescribed	repaired	typed
drove	integrated	presented	reported	unified
eliminated	interpreted	printed	represented	united
empathized	interviewed	processed	researched	upgraded
enforced	invented	produced	resolved	used
established	inventoried	programmed	responded	utilized
estimated	investigated	questioned	restored	verbalized
evaluated	judged	raised	retrieved	warned
examined	led	realized	reviewed	washed
expanded	learned	reasoned	risked	weighed



| PUBLIC SPEAKING |

The Voice of Technology

Making PowerPoint your equal



Deborah Shames

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Deborah Shames is co-founder, with David Booth, of Eloqui, a communication and presentation training company based in Calabasas. Their clients include Mattel, Fisher-Price, Chubb, and Wells Fargo, as well as small to mid-sized law, accounting, insurance, and financial firms. Prior to this, Deborah was an award-winning TV and film director. She founded the only female-owned production company in the San Francisco Bay Area, which she ran for 15 years. On camera, Deborah has directed luminaries including Wendie Malick, Rita Moreno, Danny Glover, and Angela Lansbury. Specializing in working with female executives on presentation and communication skills, Deborah is frequently engaged prior to national sales meetings or product launches, and for leadership development training. She was recently honored as "Consultant of the Year" by the San Fernando Business Journal. With David Booth, Deborah wrote *Own the Room: Business Presentations That Persuade, Engage, and Get Results* (McGraw-Hill; now in its third printing).

In our technologically advanced world, we are always connected. Everything is touch-screen, high tech, and virtual. Our communication with other human beings is increasingly via text, tweet, and email.

Unfortunately, this tendency to put a barrier between ourselves and an audience can create a serious impediment when delivering business presentations. Today, many speakers will only address an audience with PowerPoint, Prezi, or Keynote.

This dependence on PowerPoint creates a challenge. To an audience, visuals take precedence over a speaker. But PowerPoint doesn't have a voice, perspective, or the capacity to engage.

Making matters worse, PowerPoint has become the presenter's script. Why do we need you if your script is on the screen? Let's face it; presenters use PowerPoint as a crutch or cueing device. But with slides featuring massive amounts of data and text, you are literally asking the audience to look past you and absorb what's on the screen.

Before training presentation and communication skills, I was a television and film director. Talking heads alone never made for an engaging movie. Effective productions require variety: arresting visuals, compelling storylines and action sequences. When used correctly, PowerPoint is also a visual

medium. That's what the program was initially designed for, replacing overhead projectors and graphic art. PowerPoint has the ability to showcase relationships or snapshot concepts and ideas that take many words to describe. Effective slides are visual—photos, the trajectory of revenue growth, or a simple organizational chart.

And like any good movie director, the slide sorter view is invaluable when constructing PowerPoint. Use it as a storyboard to assess the visual flow. Edit slides to keep the pacing and momentum moving forward.

But how can a speaker compete with the big screen? It's simple. The PowerPoint is your partner. Stand next to it—not downstage where you have to turn and face the image to emphasize a point. Show the audience one key takeaway per slide. Point to it, or use the highlight or circle feature. And most important, be the interpreter. Translate key phrases, pictures, or data to make the information come alive. Remember, you are the lead actor. The PowerPoint is your backup; not the other way around.

At Eloqui, we've coached hundreds of executives who give presentations as part of their job and to advance their careers. We appreciate how difficult it is to make technical information compelling or easily understandable. However,

with a dose of creativity and an enjoyment of the process, every presentation will be enhanced.

Consider how your topic can be relevant to the audience... Is there a metaphor, simile, or analogy to bring your concepts or ideas to life? ... To be persuasive, add "I" statements (your perspective) that reflect your experience, opinion, or belief. And use the silver bullet of all master speakers – storytelling. Examples are essential for achieving buy-in and influencing decisions.

But first, hit the "B" button so the screen goes black and you can move freely. Then step out in front and connect with the audience. Avoid using PowerPoint for your open, close, or storytelling, unless you have a visual that supports your content.

And change the channel to keep an audience engaged. Utilize high and low tech. Draw on a whiteboard or flip chart. Come up with interactive exercises, breakout sessions, or questions to activate thinking.

Actors would never go on set without rehearsing their lines. Neither should you. Practice with your PowerPoint in the space where you will present, or as close to the actual setup as possible. Whenever you employ technology, at some point it will fail. Be prepared to deliver your presentation whether you have PowerPoint or not. The more bulletproof you are, the less you will feel anxious or overwhelmed.

And if the audience, client, or customer needs the information in your PowerPoint, there is an alternative. Develop a lean presenter version, and

a richer leave-behind. You are being considerate of your audience, without handcuffing your ability to connect.

Technology and speakers can co-exist. Special effects can't carry a movie without well developed characters and a strong narrative. Don't be an extra in your own movie. Be the star!

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Why do we need you if your script is on the screen?

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| PRESENTATIONS |

The Performance of Speaking

Lights, Camera, Action to engage any audience

To develop a book of business, or be seen as thought leaders in their respective fields, professionals need to deliver compelling presentations. And like it or not, you are judged by the same standards as a performer. Yet few business executives know the techniques performers use to captivate an audience. From the perspective of a former Director of film and television, here are tips from the inside the Entertainment Industry.

Focus on Your Intention

Every actor worth his salt identifies his intention before going on stage or appearing on camera. It is the only way to make the "script" or material his own, especially when the wording cannot be changed. For example, an actor playing Macbeth is desperate for one thing: to be king. Shakespeare never wrote this phrase for the character to say, but Macbeth's actions make it clear.

It is the same in business. Before a client meeting, pitch, or networking event, you need to know your intention, or what you want more than anything else. Never say your intention out loud—but keep it top of mind for laser beam focus. An intention will keep you from rambling, over-educating, or going off course. Examples of intentions are "they will see me as the go-to person in my field"; "I will prove our services are critical to their success"; or "I will persuade her to sign off on my

proposal." Before speaking, remind yourself of your intention to reduce your anxiety.

Have Your Opening Down Cold

Since your opening sets the tone and frame for everything that follows, don't wing it. Like any A-list performer, rehearse what you will say, and each time, change up the wording and phrasing just slightly so that you sound natural and spontaneous.

Speaker anxiety plagues amateurs and professionals alike. Anxiety tends to spike just before and in the first few minutes of any performance. When you have a clear, strong intention, and know your opening, the rest is easier.

Rather than giving the traditional welcome or obligatory remarks, share something colorful about your perspective or experience with the subject. Be specific and use concrete language. Your descriptive opening should be brief and connected to the topic. Make the audience see your content in a new way. As a default, you can describe a news item and link it to your topic. Here is how President Obama opened the dedication to the 9/11 Memorial. Notice his use of concrete language, visual snapshots and brief sentences.

"In those awful moments after the South Tower was hit, some of the injured huddled in the wreckage of the 78th floor. The fires were spreading. The air was filled with smoke. It was dark, and they could barely see. It seemed as if there was no way out.

“And then there came a voice -- clear, calm, saying he had found the stairs. A young man in his 20s, strong, emerged from the smoke, and over his nose and his mouth he wore a red handkerchief...

“They didn’t know his name. They didn’t know where he came from. But they knew their lives had been saved by the man in the red bandana...”

It was only after these remarks that the President gave his obligatory thank you’s. But the audience was hooked.

Call to Action

When we see a great performance, we feel the actors’ pain, excitement, or sadness. It is the same in business: Decisions are emotive. Move your audience to take an action. If you educate people, you get them to think. But if you persuade them, you get them to act.

Performers know that to persuade an audience, they need to invest themselves in the material. Speakers are often more concerned with being polished and getting every word right, than connecting with their audience. This emphasis is wrong. Give us your perspective. Tell us why you care, and reveal your skin-in-the-game.

Being on the Ice

Great performers must be in the moment to deliver a message effectively. It is the same in business. Eliminate all distractions and focus on your message. Then put your attention out on your audience. There is no better way to quiet the annoying, critical voice in your head. Worrying about your performance or that someone may not be paying attention only detracts from your presentation. And the audience can tell. One way to regain focus is to tell yourself, “They need what I have to deliver.”

Own the Room

Actors don’t stand still during a performance, and neither should speakers. Make the space your own. Move out from behind the lectern and physically connect with the audience. However, movement must be justified and have purpose. For example, cross downstage on an angle, when making an important point. Walk back and forth on a parallel plane when delivering a list. And stand in the center of the space for your open and close.

Finale

If the opening sets the tone and frame, the ending is what the audience will remember

most. Rather than rushing through their lines, performers know this is the time to commit, invest themselves in their material, and make it more important to them, not the audience. Take a page from the actor’s playbook. Pause before launching into your close. Make eye contact around the room. Keep your sentences short. And with total confidence, “bring the curtain down.”

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