The Authenticity Code™

Executive Presence & Storytelling Skills



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The Authenticity Code™

Executive Presence & Storytelling Skills

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PROGRAM INFORMATION

PROGRAM EXECUTIVE SUMMARY

PROGRAM AGENDAS

FACILITATOR BIOS

THE AUTHENTICITY CODE™ PROGRAM SUMMARY

Your Presence

Executive Presence Qualities
Warmth *Clarity* **Integrity** Polish/Poise *Thoughtfulness*
Sincerity Inspiration *Confidence* **Trustworthiness**
Openness *Passion* **Respect** Authentic Executive Brand
Body Language Non-Verbal Communication
Virtual Presentation Tips

+

Your Audience

Know Your Audience – Audience Understanding Matrix
Tailor Your Message to Your Audience – Style Recognition

+

Your Presentation

Formula for Presentation & Storytelling Success
Attention-Getting Opening
Executive Summary *Agenda with Storytelling Frameworks*
Clear Body Message Finish Strong
Creating Compelling Slides
Completion & Practice of Actual Presentation
Video Taping *Feedback* **Final Video Review**

=

Your Success

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WHAT?

- To learn key executive presence, storytelling, and presentation skills, tools, and techniques.

WHY?

- To help you excel as a leader and professional.
- To improve authentic executive presence.
- To get to YES faster in any presentation, including winning business.
- To exceptionally deliver any presentation you give.

WANT?

- To learn and apply:
  - How to take your executive presence to your next level.
  - Audience understanding tools for tailoring your message to your audience.
  - A proven Formula for Presentation & Storytelling Success that guarantees your presentations will be better than your past best.
  - Apply the tools you learn today to deliver exceptional presentations.

PROGRAM AGENDAS

AGENDA: DAY 1 - YOUR PRESENCE

8:00 AM	Program Introduction
	Executive Presence Qualities
	The EPQ Challenge
	Virtual Presentation Tips
	Stretch Break
	Non-Verbal Communication
	Authentic Executive Brand Statement
	Close with Homework
11:00 AM	End

HOMEWORK: DAY 1

- Finish creating EPQ Development Plan
- Take Style Recognition Assessment
- Play the EPQ Game

AGENDA: DAY 2 - YOUR AUDIENCE & YOUR PRESENTATION

8:00 AM	Kickoff and EPQs
	Formula Overview
	Audience Understanding Matrix
	Stretch Break
	Style Recognition
	Attention-Getting Opening
	Executive Summary
	Agenda
	Close with Homework
11:00 AM	End

HOMEWORK: DAY 2

- Create slides for audience description, AGO, Executive Summary, and Agenda.
- Prepare to present to small group for next program.

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PROGRAM AGENDAS

AGENDA: DAY 3 - YOUR PRESENTATION

8:00 AM	Kickoff and EPQs
	Giving and Receiving Feedback
	Participant Practice
	Clear Body Message
	Stretch Break
	Finish Strong
	Creating Compelling Slides
	Close with Homework*
11:00 AM	End

HOMEWORK: DAY 3

* Homework will vary for participants in Core Program vs. Full Program

Attendees of the Core Program

- Apply feedback to AGO, Executive Summary, and Agenda and revise slides
- Create slides for rest of presentation (Clear Body Message and Finish Strong)
- Schedule time (done in Breakout Group) to present your full presentation to your Accountability Group and give each other feedback
- Optional: watch the full example videos online before presenting to your group
- Extra Credit: video tape yourself delivering the presentation and complete the self-evaluation form. Send the video and the completed evaluation form to [customer POC] for a prize!

Attendees of the Full Program

- Apply feedback to AGO, Executive Summary, and Agenda and revise slides
- Create slides for rest of presentation (Brand Statement, Clear Body Message, and Finish Strong)
- If not yet completed, Send Aleah, Aleah@insideoutlearning.com, a 5-minute clip of you presenting in the past
- Attend two coaching sessions (Presentation and PowerPoint)
- Meet with Accountability Group to practice
- Attend presentation day and receive immediate expert and peer feedback
- Attend final video review session with expert facilitator

- Optional: watch the full example videos online before presenting to your group
- Extra Credit: video tape yourself delivering the presentation and complete the self-evaluation form. Send the video and the completed evaluation form to [customer POC] for a prize!

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DR. SHARON LAMM HARTMAN

Founder, Owner & CEO of

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Sharon@insideoutlearning.com

Dr. Lamm-Hartman is an award-winning global executive and presentation coach, leadership development consultant, speaker, writer, and educator. She is the CEO and founder of Inside-Out Learning, Inc., specializing in leadership and personal development. Inside Out Learning is an active member of WBENC and the global Women's President Organization which only 3% of women owned businesses meet their requirements for membership.

With over 25 years of global experience, Sharon has worked across the United States and Europe as well as Beijing, Hong Kong, Singapore, and Thailand for clients such as Boeing, American Express, GE's Leadership Development Center, Exxon, E*TRADE, ARCO Chemical Company, Mobil Oil Corporation, Berlex Pharmaceuticals, Fannie Mae, Arizona Society of CPA's, Volvo Corporation, and the National Reconnaissance Office. She has designed and delivered over 3,000 innovative programs, including many executive presence and presentation skills programs. Dr. Lamm-Hartman has coached thousands of CEO's, executives and entrepreneurs worldwide.

She worked internally at ARCO Chemical in International Training and Development. She knows what it is like to work internally and has a strong client partnership philosophy. For the past 18 plus years, Dr. Lamm- Hartman has been a preferred executive coach for hundreds of Boeing executives with exceptional results, including promotions, developmental job assignments, and saving E-Series. Dr. Lamm-Hartman has also designed and is teaching The Authenticity Code™ Programs, team development programs, and culture-change offsites to thousands of professionals and leaders world-wide. Up to 80% of employees who participated in these programs have achieved a promotion. Sharon has her Top-Secret Security Access and helps executive clients and customer relationships in classified environments. Sharon has consulted on several corporate change efforts, training change agents, and developing effective strategic implementation and communication plans.

In addition to her private practice, consulting, and being on the global lecture circuit, she is widely published. Dr. Lamm-Hartman has served with the Fresh Start Women's Foundation and Arizona State University's Dean's Board of Excellence Mentoring Program. She was the co-founder and first Director of Central Phoenix Women, a networking organization for women business leaders, and wrote a regular column for Phoenix Woman Magazine. She is a regular instructor for WBENC's WeTHRIVE program.

Dr. Lamm-Hartman holds a doctorate from Columbia University in Leadership and Organization Development, a Masters in Industrial and Labor Relations from Cornell University, and two Bachelor degrees. Dr. Lamm-Hartman also trained as a Life Coach with world-renowned author and life coach teacher, Dr. Martha Beck. Dr. Lamm-Hartman is a Certified Executive and Presentation Coach and is certified in the Myers Briggs Type Indicator.

Dr. Lamm-Hartman is an Adjunct Professor of Leadership at Columbia University where she has taught Leadership classes to Doctorate Level students. She also worked as an Adjunct Faculty member at The Center for Creative Leadership teaching courses on Developing Leadership Talent.

Dr. Lamm-Hartman has been quoted on her views of coaching in numerous publications including, Forbes, CEO Magazine, The New York Times, MORE magazine, and Oprah's magazine, 'O' magazine. Dr. Lamm-Hartman has been honored and received awards from the Center for Creative Leadership and the Academy of Human Resource Development for her work and research on personal transformation and leadership development.

Dr. Sharon recently became a best-selling author in the Wall Street Journal, USA Today and Amazon with her book release of The Authenticity Code™. Her book just received the Axiom GOLD Medalist award for best 2022 Business Fable. WBENC buys her book for all WeTHRIVE participants. She has been named as one of the top 100 Women to KNOW Across America by the KNOW Women Group.

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THE AUTHENTICITY CODE™: YOUR PRESENCE + YOUR AUDIENCE + YOUR PRESENTATION = YOUR SUCCESS

WHAT IS AUTHENTICITY?

- Your most powerful way of adding value by expressing your unique gifts and talents for your chosen audience.

WHAT IS THE AUTHENTICITY CODE™?

- Your Presence + Your Audience + Your Presentation = Your Success

YOUR PRESENCE +

- What is Executive Presence?
  - How you affect others by the impression you make through your character, your physical presence, your demeanor, your presentation of thoughts, and general mode of conversation you have with others.
- What are the 12 Executive Presence Qualities?

Clarity	Confidence	Inspiration	Integrity
Openness	Passion	Polish/Poise	Respect
Sincerity	Thoughtfulness	Trustworthiness	Warmth

YOUR AUDIENCE +

- Audience Understanding Matrix
- Tailor Your Message to Your Audience

People People - Personal	Party People - Humor
Planning People - Data	Point People - Bottom Line

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THE AUTHENTICITY CODE™: YOUR PRESENCE + YOUR AUDIENCE + YOUR PRESENTATION = YOUR SUCCESS

YOUR PRESENTATION =

- Follow our proven Formula for Presentation and Storytelling Success
  - Attention Getting Opening
    - Story
    - Image
    - Analogy
    - Question
    - Quotation
  - Executive Summary
    - Presentation Purpose (e.g., educate, program update, proposal)
    - What's in it for the audience (e.g., business or technical impact)
    - Action you want from the audience (e.g., buy-in, input, resources, decision)
  - Agenda with Storytelling Frameworks
    - Outlines main points
    - Organize the Agenda using Storytelling Frameworks:
      - 3-Act Structure (Setup, Confrontation, Resolution)
      - PAS (Problem, Agitate, Solution)
      - CAR (Content, Action, Results)
      - PSH (Problem, Solution, Help Needed)
  - Clear Body Message
    - H=Highlight the Point (Hottest Topic Starts)
    - O=OK, So What
    - R=Relevant Information/Data
    - S=Summarize the Point (Optional)
    - E=Ease to Your Next "H" or Finish Strong)
  - Finish Strong
    - Summarize key points
    - Repeat what you want from the audience
    - Strong close
- Practice and Video Tape – Ask for feedback
- Eliminate Non-verbal Distractions – Understand the Importance of Non-verbal Communication
- Know How to Make the Best Use of the Presentation Environment

YOUR SUCCESS

- The accomplishment of your aim or purpose

HOW TO STAY CONNECTED

1. Join our Community of Practice on LinkedIn: https://www.linkedin.com/groups/13841506/

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YOUR PRESENCE

EXECUTIVE PRESENCE QUALITIES

VIRTUAL PRESENTATION TIPS

COMMUNICATION: VERBAL AND NON-VERBAL

AUTHENTIC EXECUTIVE BRAND

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EXECUTIVE PRESENCE QUALITIES

Clear Page

Please fill out this self-assessment by rating your Executive Presence Qualities (EPQs). How well do you demonstrate each EPQ? Rate yourself on a scale from 1-5 (1–Needs Improvement; 3–Average; 5–Amazing). Once complete, fill in the blanks below to identify your two lowest and your two highest rated EPQs.

		NEEDS IMPROVEMENT AMAZING
Clarity	The ability to communicate your message in an intuitively clear and compelling way.	1 2 3 4 5
Confidence	The air of assurance, such that others know you have the required strength and resolve.	1 2 3 4 5
Inspiration	Feeling passionately about the vision and mission of the organization. The ability to communicate that passion, purpose, and meaning establishes the inspirational culture of the organization. Breathing life into others.	1 2 3 4 5
Integrity	Your beliefs, words, and actions are aligned and demonstrated through the willingness and skills to constructively share your point of view and follow through on your commitments.	1 2 3 4 5
Openness	No prejudging; the willingness to consider another's point of view.	1 2 3 4 5
Passion	The expression of commitment, motivation, and drive that shows people you really believe in what you do.	1 2 3 4 5
Polish/Poise	The look of sophistication, conveying a background of education and experience.	1 2 3 4 5
Respect	Values the thoughts and opinions of others and openly considers these as viable options and opportunities.	1 2 3 4 5
Sincerity	The conviction of believing in and meaning what you say.	1 2 3 4 5
Thoughtfulness	The projection of thinking or having thought through something before responding.	1 2 3 4 5
Trustworthiness	Models true positive character qualities and top-level competence of their profession.	1 2 3 4 5
Warmth	The willingness of being accessible to others and of being interested in them.	1 2 3 4 5

LOWEST RATED EPQ'S:

_____ _____

HIGHEST RATED EPQ'S:

_____ _____

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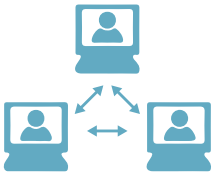
TOOL: EXECUTIVE PRESENCE QUALITIES (EPQs)



Executive Presence Definition: How you affect others by the impression you make through your character, your virtual presence, your engagement, your communications, and general mode of conversation you have with others.

Clarity	The ability to communicate your message in an intuitively clear and compelling way.
Confidence	The air of assurance, such that others know you have the required strength and resolve.
Inspiration	Feeling passionately about the vision and mission of the organization. The ability to communicate that passion.
Integrity	Your beliefs, words, and actions are aligned and demonstrated through the willingness and skills to constructively share your point of view and follow through on your commitments.
Openness	No prejudging; the willingness to consider another's point of view.
Passion	The expression of commitment, motivation, and drive that shows people you really believe in what you do.
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Trustworthiness	Models true positive character qualities and top-level competence of their profession.
Warmth	The willingness of being accessible to others and of being interested in them.

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EXAMPLES OF HOW YOU CAN DEMONSTRATE EXECUTIVE PRESENCE QUALITIES

CLARITY
- Flex to others communication style while not losing your own authenticity
- Listen to and watch your recordings while in a virtual meeting

CONFIDENCE
- Practicing for an effective delivery
- Being prepared to address even the most difficult questions

INSPIRATION
- Motivating a stalled team to move forward
- Believing people can achieve the project and helping them believe they can

INTEGRITY
- Follow through on your commitments or renegotiate
- Living the within your values and ethical standards

OPENNESS
- Listening to another's point of view
- Considering all options for the best possible outcome and not just your way

PASSION
- Enthusiastic tone in communicating
- Getting the project done with a positive attitude

POLISH/POISE
- Checking your background and camera set up
- Dressing appropriately for the event and audience

RESPECT
- Good eye contact when speaking virtually
- Acknowledging that diverse opinions & experiences have value

SINCERITY
- Walk your talk; live by example
- Not saying something just to be accepted

THOUGHTFULNESS
- Reconsidering a position after hearing a colleague's stance
- When offended, calm down before responding

TRUSTWORTHINESS
- Repeatedly performing at a high quality
- Following through on your commitments

WARMTH
- Acknowledging someone for a job well done
- Learning & speaking about what you know is special to someone



EPQ BREAKOUT GROUP INSTRUCTIONS

With your group

- Align the Executive Presence Qualities that support the demonstration of the Boeing How We Act Values, Executive Capabilities, or Seek, Speak, Listen practices.
    - For the Boeing leaders group, name an individual at Boeing who exceptionally demonstrates the Executive Presence Qualities.
- Discuss and be prepared to describe how the Executive Presence Qualities align or how your selected individual demonstrates the EPQs.
- Elect a spokesperson who will share this information with the main group.

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BOEING “HOW WE ACT” VALUES

LEAD ON SAFETY, QUALITY, INTEGRITY AND SUSTAINABILITY

In everything we do and in all aspects of our business, we will make safety our top priority, strive for first-time quality, hold ourselves to the highest ethical standards, and continue to support a sustainable future.

FOSTER A JUST CULTURE GROUNDED IN HUMILITY, INCLUSION AND TRANSPARENCY

Rooted in transparency, fairness and learning, a Just Culture creates an environment where everyone feels free to report errors and are treated fairly for making mistakes while being held accountable for negligence or malicious behavior. The intent is to help all of us learn from mistakes to improve as individuals and as a company.

IMPORT BEST LEADERSHIP PRACTICES

As we strive for continuous improvement in ourselves and our company, we will seek insights from one another, as well as external thought leaders and companies with demonstrated excellence. Discovery and assimilation of these best practices will empower us to solve our most difficult problems.

EARN STAKEHOLDER TRUST AND PREFERENCE

By committing fully to our values, communicating with transparency, and delivering results with excellence, we will earn and retain the confidence of our customers, suppliers and investors; our team members; and everyone who uses our products and services.

RESPECT ONE ANOTHER AND ADVANCE A GLOBAL, DIVERSE TEAM

We will incorporate and amplify a wide range of ideas and global perspectives while building diverse teams, appreciating one another’s differences as assets, and holding ourselves accountable to equitable processes that promote trust and transparency.



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CAPABILITIES OF BOEING EXECUTIVE LEADERS

DRIVES OPERATIONAL EXCELLENCE

- Handles complex situations decisively
- Creates stability through key focus on Quality & Communications
- Courageous change leadership to govern operations
- Makes difficult decisions with confidence to change course

ASTUTE VISIONARY TO REINVENT THE FUTURE

- Dynamic and focused disrupter, leading the path forward with passion, confidence and conviction while maintaining strong respect for legacy
- Translates innovation into reality and brings forward sustainable progress
- Anticipates/addresses market realities, driving execution of business as a reality-based optimist

EMBEDS CUTTING-EDGE DIGITAL TECHNOLOGY

- Implements digital technology by using and modeling digital technology
- Creates an environment for digital dexterity to thrive
- Champions development of digital dexterity in employee competencies

NAVIGATES GLOBAL GEOPOLITICAL LANDSCAPE

- Builds and manages a global mindset and culture
- Broad understanding of the industry's emerging trends across global markets, competitive forces and adjacent industries within geo-political affairs

DECISIVE IN A COMPLEX, LARGE-SCALE PORTFOLIO

- With stamina, navigates through ambiguity and pressure with a determined ease
- Identifies interdependencies that drives integration and collaboration to achieve exceptional results
- Breadth and depth of financial, industry and emerging market knowledge

BUILDS EQUITABLE, DIVERSE AND COHESIVE TEAMS

- Champions multiple perspectives through building an inclusive team
- Focuses on essential priorities, realized through talent with a growth mindset
- Intentionally develops talent through key experiences
- Model character promoting respectful and inclusive environment

EMPATHETIC AND INSPIRING LEADER ENERGIZING EMPLOYEES

- Creates energy and enables people in mind and heart through clarifying purpose and modeling behavior congruent with integrity, principles & values
- Authentic, humble, transparent and accountable
- Demonstrates resilience, deals constructively and candidly with setbacks

SKILLED AT OPTIMIZING STAKEHOLDER INTERESTS

- Builds and sustains relationships and trust across the Government, airline industry, supply chain, and flying public
- Displays confidence in the organization's ability to overcome challenges
- Serves as the face of the Boeing Company

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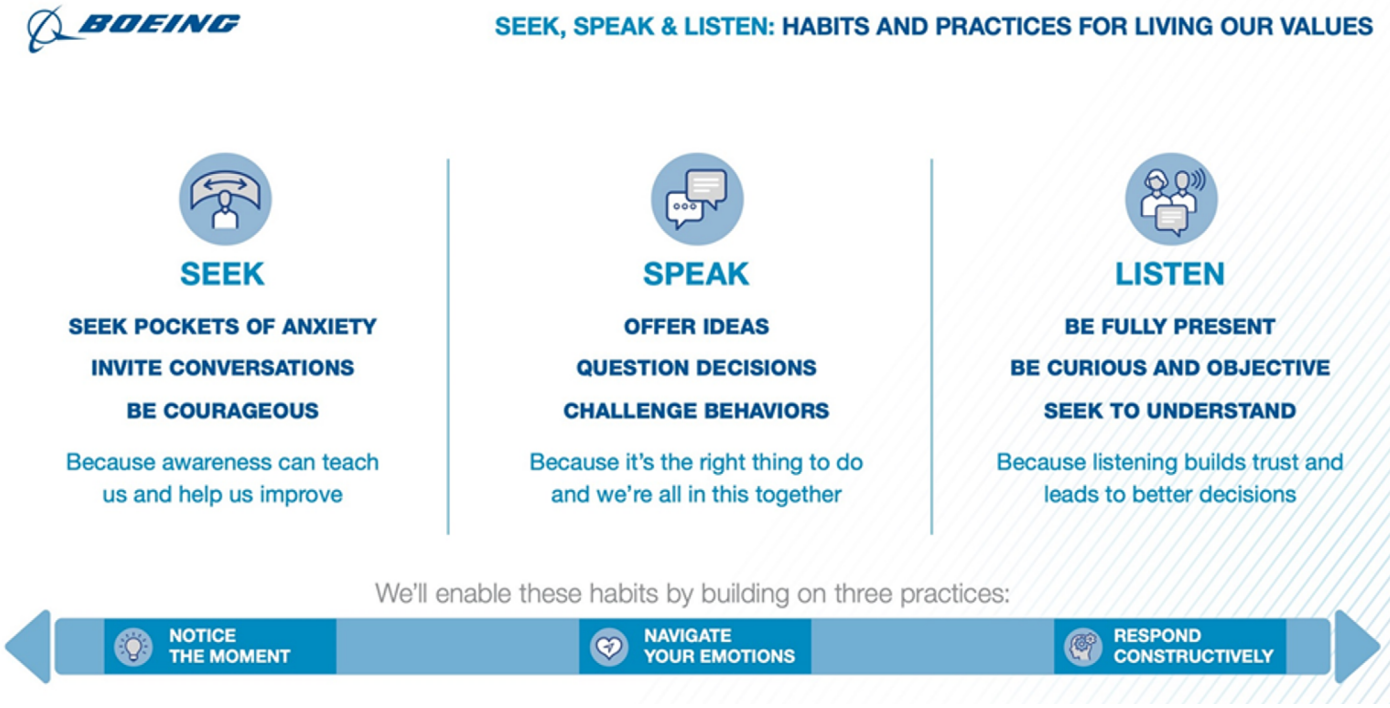
SEEK, SPEAK, AND LISTEN



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EXECUTIVE PRESENCE QUALITIES (EPQ'S) DEVELOPMENT PLAN

Clear Page

Which two will you work on?

1. 2.

Why?

What actions will you take to develop your EPQs?

EPQ

-
-
-
-
-
-
-

EPQ

-
-
-
-
-
-
-

Identify people who can help you work on these qualities and give you feedback over time.

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WHAT DOES YOUR AUDIENCE SEE?

- Adjust your webcam at or near eye level.
  - » Practice eye contact using the camera
  - » Be mindful of your facial expressions
- Lighting should be even or brighter on your face than the background.
  - » Use desktop lamps is necessary.
- Remove any distracting items from your background.

WHAT DOES YOUR AUDIENCE HEAR?

- Use a headset when possible to avoid echo or feedback.
- If using speakerphone, place padding under your phone to reduce desktop noise.
- Dial into your meeting as a back-up.

PRESENTING WHILE STANDING IN A VIRTUAL MEETING

- Better vocal projection
- Allows for more movement and energy
- More engaging to your audience
- Raise camera to eye-level
- Use an external mic
- Use headphones with an extension or wireless

ENGAGEMENT TIPS & IDEAS

On camera

- Ask for a show of hands
- Thumbs up/down
- Show & Tell or Props
- Hat day
- Fun background day



Screen share

- Collaborate on a shared document
- Share a picture, video, webpage
- Share a best practice

Other

- Solve a problem using things at your desk
- Find 3 things in your office to solve X
- Roll the dice to decide X
- Create a story with random word generator
- Continuum story
- Illustrate with annotations



BREAKOUT GROUP INSTRUCTIONS

In your group, discuss the following question:

- What are some of the best practices you use when presenting in a virtual environment?

Be prepared to share with the rest of the group.

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BODY LANGUAGE AND NON-VERBAL COMMUNICATION



Key thoughts to keep in mind:

- All eyes turn toward you
- You are visible before you are heard
- While you're speaking, what is your body saying?

A significant percentage of your impact as a speaker depends upon your body language.

STANCE

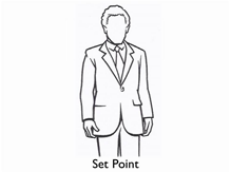
Choose a central spot with your feet pointing straight ahead into the middle of the audience. Lean slightly forward into the audience. This drives the energy towards the listeners. Do the same if seated at a table.

FACE YOUR AUDIENCE

Remember why you are giving this presentation. The audience is there for a purpose and it is up to you to fulfill that purpose. Unfortunately, many speakers seem to focus their attention on their visual aids instead of the audience.

GESTURES





- Gestures can often speak louder than words
- Add variety to your movements for emphasis
- Deliver your gestures with authority and conviction
- People have a tendency to trust their eyes more than their ears
- Create a natural set point – arms hanging naturally

BE LIBERATED FROM THE LECTERN

There are presentations in which the speaker is required to stay behind the lectern for an assortment of reasons, usually involving audio/visual requirements. If this is not the case, do your best to separate yourself from this barrier between you and the audience.

MAKE YOUR GESTURES FIT THE AUDIENCE

The larger the audience, the larger your gestures need to be. Imagine that the people furthest away from you need to be able to benefit from your non-verbal communication just as much as those that are closest.

FACIAL EXPRESSIONS

Your eyes, mouth, and facial muscles assist in building a connection with your audience. Eye contact is the most important element of facial expressions. A gracious smile is the quickest way to connect with an audience according to Daniel Goleman, *Emotional Intelligence at Work*.

EYE CONTACT

Eye contact is an incredibly powerful way to develop rapport with audience members. Effective, positive eye contact between the speaker and the audience is both a skill-set and a mind-set. It takes practice, but once you master it, you will find that you are able to do it unconsciously.

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TOOL: AUTHENTIC EXECUTIVE BRAND

What do you want to be known for?

How do you want to be seen?

Who are you as a leader?

QUESTION	EXAMPLE	ANSWER
1. What is the ONE leadership role I most want to hold?	*e.g., Executive, CFO, Vice President, Author, Tech. Fellow, Sr. Vice President, Program Manager, Catalyst, Role Model Leader, etc.*	
2. What is the ONE THING I most want to do/accomplish as I work in my desired leadership role?	*e.g., successfully lead a new program, empower employees to turn around a failing program/ product, invent a new product/ service, help change a corporate culture, etc.*	
3. What is the ONE THING I most want to change as I work in my desired leadership role?	*e.g., Financial loss – turn a company around, My presence – become calm & peaceful; Negative relationship – Foster healthy workplace relationships, etc.*	
4. What is the ONE THING I most wish my parents would have given me growing up?	*e.g., seeing and celebrating my unique gifts and talents, modeling a healthy relationship, listening to my point of view, etc.*	
5. What is the ONE THING I know I have as a leadership strength that comes naturally to me?	*e.g., providing a safe environment for everyone to speak their truth, inspiring people to give their 100%, setting a clear vision that many follow, etc.*	

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QUESTION	EXAMPLE	ANSWER
6. What is the ONE THING I most want to see as a leader?	*e.g. My mentees all get promoted, my organization transforms into my vision, to sell a big program, etc.*	
7. What is the ONE THING I most want to hear as a leader?	*e.g. "You helped me transform my life," "Without you we would have failed," "You are the best boss," "You helped increase profits by 50%," etc.*	
8. What is the ONE THING I most want to experience as a leader?	*e.g. Going to bed & waking up on a daily basis knowing I am making a difference, leading a high performing team, being recognized as a leading expert in my field, complete fulfillment in my work, etc.*	
9. What is the ONE THING I most want to say as a leader?	*e.g. "I have made the difference I wanted to make & have no regrets," "Listen I have something important to say," "I am the happiest I have ever been," "We need to pull together & get this done," "I balanced a great career & personal life," etc.*	
10. What is the ONE THING I want to feel as a leader?	*e.g. Proud of the life I have lived and the legacy I have left, happy and fulfilled in my life, confident that I gave my all, satisfied with the business results I achieved, etc.*	

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MY AUTHENTIC EXECUTIVE BRAND IS...

I am a		#1
who		#2
I		#3
I give this by		#4
		#5

MY SUCCESS CRITERIA - As a leader, I commit to:

1		See	#6
2		Hear	#7
3		Experience	#8
4		Say	#9
5		Feel	#10

AUTHENTIC EXECUTIVE BRAND EXAMPLE

I am a role model leader (#1) who teaches others how to be better leaders through leading by example (#2). I interact without judging or becoming defensive (#3). I give this by understanding individual choices, making wise decisions and meeting my commitments (#4 and #5).

I commit to:

1. See people become great leaders because they modeled me. (#6)
2. Hear people say that I was the best leader they ever had. (#7)
3. Experience a great big party with a room full of people who thought I made a difference in their lives. (#8)
4. Say “Wow I balanced a great career and personal life with no regrets of either.” (#9)
5. Feel I would not have changed a thing regarding career and personal life balance. (#10)

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BREAKOUT GROUP INSTRUCTIONS

- Share Your Authentic Executive Brand Statement (# 1-5, top of page 21).
- Share how it feels to read your statement aloud.
- Provide constructive feedback and identify ways to refine/ improve your Brand Statement.
- If you have more time, share your Success Criteria.

"ONE THING" FOR TODAY

Inspire you to take your brand to your next level and connect with it more deeply than you ever have before.

UTILIZING YOUR EPQ'S AND AUTHENTIC EXECUTIVE BRAND

- Every morning, read your brand statement out loud
- Place a copy of your brand statement by your computer or on your desk
- Add it to the device you use most often
- Continue to improve and adjust your brand statement – what you focus on you become
- Continue to practice your EPQ's – they help you focus on giving to others & get the most authentic "you" out of "yourself"

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PLEASE COMPLETE THE FOLLOWING REFLECTION ABOUT DAY 1 OF THE PROGRAM.

What are the key learnings I'm taking away?

How will I start to implement these?

DAY 1 HOMEWORK

- Finish creating EPQ development plan (page 16 in workbook)
- Take Style Recognition Assessment (Pages 29 - 31 in workbook)
- Play the EPQ Game

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The Authenticity Code™

Executive Presence & Storytelling Skills

INSIDE-OUT LEARNING INC
Transformative Learning That Lasts

YOUR AUDIENCE + YOUR PRESENTATION

KNOW YOUR AUDIENCE / AUDIENCE UNDERSTANDING MATRIX

STYLE RECOGNITION

ATTENTION-GETTING OPENING

EXECUTIVE SUMMARY

AGENDA

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TOOL: IDENTIFYING THE KEY DECISION MAKERS IN A MIXED AUDIENCE

WHO MATTERS THE MOST AND WHY

What is the goal of my presentation?

Is there a hidden agenda?

PRIORITIZE THE TARGET

Who is the leader?

What is the background of the person you are presenting to?

- For example, a senior leader wants bottom line up front and key takeaways on what they need to know

Translate so they understand it

Who are the followers?

Who does the leader listen to?

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TOOL: AUDIENCE UNDERSTANDING MATRIX ACTIVITY FOR YOUR PRESENTATION

- Think of your presentation you are working on in this program.
- Who is your key audience; within that who is/are your key decision maker(s)?
- Complete the matrix for your presentation before you start writing it.

	1	2	3	4
What is most important to them?				
What hooks them?				
What details do they need?				
What are they willing to compromise?				

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AUDIENCE UNDERSTANDING MATRIX EXAMPLE

TYPICAL SENIOR LEADERSHIP TEAM EXAMPLE	
What is most important to them?	• Coordination on key areas requiring their decision and engagement. • Clarity of assignment and/or task. • Facts and data to support your decision. • Support their Business Goals and Objectives (BG&O's). • Meet your commitments.
What hooks them?	• A compelling business case when you are trying to sell an idea (facts, supporting data, risks and mitigation plans). • Engagement - Each LT member wants to be involved in shaping strategies/solutions which personally impacts them or their organizations.
What details to they need?	• Sound rationale (Qualitative and Quantitative Data) which supports your position. • Industry position on bullet 1 (particularly competitors and elite companies-Fortune 500). • Feedback form from other key stakeholders. • Cost impacts (go/no-go).
What are they willing to compromise?	• In all cases it's mixed across the group: • Some choose cost and schedule over quality. • Making the hard decision vs. following the status-quo. • Teamwork vs. individual contributor (team first vs. me first).

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BREAKOUT GROUP INSTRUCTIONS

With your Accountability Group:

- Share an overview of the presentation you will give
- Share key insights about your Key Decision Maker

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TOOL: STYLE RECOGNITION

STYLE RECOGNITION ASSESSMENT

Clear Page

For each pair of statements below, distribute three points between the two alternatives (A and B), depending on how characteristic of you the statement is. This means that your answers for any pair of statements will add up to three. So in IA and IB, you might give yourself a 2 for 1A and a 1 for 1B, which would add up to a total of 3 for that pair set. Although some pairs of statements may seem equally true for you, assign more points to the statement that is more representative of your behavior most of the time.

Examples:

- If A is very characteristic of you and B is very uncharacteristic, write “3” next to A and “0” next to B.
- If A is more characteristic of you than B, write “2” next to A and “1” next to B.
- Please base your answers on how you actually behave, not on how you think you should behave.
- The total points for each question should always equal “3.”

1A	___	I’m usually open to getting to know people personally and establishing relationships with them.
1B	___	I’m not usually open to getting to know people personally and establishing relationships with them.
2A	___	I usually react slowly and deliberately.
2B	___	I usually react quickly and spontaneously.
3A	___	I’m usually guarded about other people’s use of my time.
3B	___	I’m usually open to other people’s use of my time.
4A	___	I usually introduce myself at social gatherings.
4B	___	I usually wait for others to introduce themselves to me at social gatherings.
5A	___	I usually focus my conversations on the interests of the people involved, even if that means straying from the business or subject at hand.
5B	___	I usually focus my conversations on the tasks, issues, business or subject at hand.
6A	___	I’m usually not assertive, and I can be patient with a slow pace.
6B	___	I’m usually assertive, and at times I can be impatient with a slow pace.
7A	___	I usually make decisions based on fact or evidence.
7B	___	I usually make decisions based on feelings, experiences or relationships.
8A	___	I usually contribute frequently to group conversations.
8B	___	I usually contribute infrequently to group conversations.
9A	___	I usually prefer to work with and through others, providing support when possible.
9B	___	I usually prefer to work independently or dictate the conditions in terms of how others are involved.
10A	___	I usually ask questions or speak tentatively and indirectly.
10B	___	I usually make emphatic statements or directly express opinions.

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11A	___	I usually focus primarily on ideas, concepts or results.
11B	___	I usually focus primarily on people, interactions and feelings.
12A	___	I usually use gestures, facial expression and voice intonation to emphasize points.
12B	___	I usually do not use gestures, facial expression, and voice intonation to emphasize points.
13A	___	I usually accept others points of view (ideas, feelings and concerns).
13B	___	I usually don't accept others points of view (ideas, feelings and concerns).
14A	___	I usually respond to risk and change in a cautious or predictable manner.
14B	___	I usually respond to risk and change in a dynamic or unpredictable manner.
15A	___	I usually prefer to keep personal feelings and thoughts private, sharing only when I wish to do so.
15B	___	I usually find it natural and easy to share and discuss my feelings with others.
16A	___	I usually seek out new or different experiences and situations.
16B	___	I usually choose known or similar situations and relationships.
17A	___	I'm usually responsive to others' agendas, interests and concerns.
17B	___	I'm usually directed toward my own agendas, interests and concerns.
18A	___	I usually respond to conflict slowly and indirectly.
18B	___	I usually respond to conflict quickly and directly.

After responding to the 18 questions, review your scores in the table below.

O - OPEN SCORE	G - GUARDED SCORE	D - DIRECT SCORE	I - INDIRECT SCORE
1A ____	1B ____	2B ____	2A ____
3B ____	3A ____	4A ____	4B ____
5A ____	5B ____	6B ____	6A ____
7B ____	7A ____	8A ____	8B ____
9A ____	9B ____	10B ____	10A ____
11B ____	11A ____	12A ____	12B ____
13A ____	13B ____	14B ____	14A ____
15B ____	15A ____	16A ____	16B ____
17A ____	17B ____	18B ____	18A ____
Total ____	**Total** ____	**Total** ____	**Total** ____

Compare the O and G scores. Write the higher score in the blank below and check the box with the corresponding letter:

Score: ☐ ☐ O or ☐ G

Compare the D and I scores. Write the higher score in the blank below and check the box with the corresponding letter:

Score: ☐ ☐ D or ☐ I

Plot your results on the next page.

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PLOTTING YOUR RESULTS

Score: Open or Guarded

Score: Direct or Indirect

Plot your score below and check mark the box for your preferred style.

- ALL CAPS: Primary Style
- Upper and Lower Case: Secondary Style

OPEN

☐ People PEOPLE	☐ Party PEOPLE		☐ People PARTY	☐ Party PARTY
☐ Planner PEOPLE	☐ Point PEOPLE		☐ Planner PARTY	☐ Point PARTY
☐ People PLANNER	☐ Party PLANNER		☐ People POINT	☐ Party POINT
☐ Planner PLANNER	☐ Point PLANNER		☐ Planner POINT	☐ Point POINT

27 26 25 24 23 22 21 20 19 18 17 16 15 14 14 15 16 17 18 19 20 21 22 23 24 25 26 27

INDIRECT **DIRECT**

GUARDED

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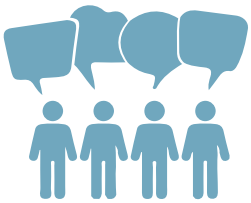
TOOL: STYLE RECOGNITION








	○ PEOPLE PEOPLE	○ PARTY PEOPLE	○ PLANNER PEOPLE	○ POINT PEOPLE
Pattern	Open/Indirect	Open/Direct	Guarded/Indirect	Guarded/Direct
Pace and Orientation	Slower/People Oriented	Faster/People Oriented	Slower/Task Oriented	Faster/Task Oriented
Their Goal	Steadiness	Influencing Others	Compliance	Dominance
Work Area	Casual, Conforming	Stylish, Interesting	Formal, Functional	Busy, Structured
Wants to	Build and Maintain Relationships	Interact and Be Recognized	Gather Information and Know Process	Get to the Bottom Line and Decide Quickly
Fear	Conflict	Loss of Prestige	Embarrassment	Loss of Control
Aggravated by	Insensitivity	Routine	Surprises	Indecision
Makes decision by	Considering Options	Spontaneity	Deliberate Action	Decisiveness
Decisions are	Careful	Impulsive	Planned	Steadfast
Measures success by	Compatibility, Depth of Relationships	Recognition, Applause, Compliments	Precision, Accuracy, Activity	Results, Track Record, Progress

Which style best represents you?

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VERBAL CLUES

Listen carefully in a virtual setting to the words used.

SPEED READ PEOPLE—READING OTHERS' STYLES

Verbal clues: If you meet someone, especially for the first time, and they come on strong, they are likely either a **Party** or **Point Person**.

If they are quiet and soft-spoken, they are probably a **People** or **Planner Person**.

NEXT CLUES: *WHAT* THEY SAY.

	STYLE	TYPICAL STATEMENTS	NOTES
	Point Person	"Tell him I want to talk to him ASAP!" "Let's get this settled right now!" "What's the bottom line?" "Cut to the chase; what are the options?" "Here's how we'll proceed…" "I want to win this – no ifs ands or buts." "Tell me what the goal is." "You handle it, but keep me informed."	
	Party Person	"Hey! Here's an idea! Whattaya think?" "Why don't you noodle on that for a while?" "I feel this is the way we ought to go." "Tell me what you think about…" "Spare me the details. Just give me the drift." "I think we're making progress. Now let's…" "My sense is that…" "Let's try it a different way, just for kicks."	
	People Person	"I'd like to go kind of slow on this. Is that okay?" "Have we determined the impact of this on the staff?" "I really enjoy working with you." "I'd like to help you however I can." "We can work this out, I'm sure." "How do you really feel about this?" "How's this likely to end up? I'd like to know first."	
	Planner Person	"Now, let's look at this logically." "Is that really the right thing to do? Can we justify that?" "Let's take this first step. Then we can decide step two." "Give me all the facts first." "What guidelines make sense for this project?" "Precisely what do you mean?" "I don't want any surprises." "Have we touched all the bases?"	

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ADAPTING TO OTHER STYLES

- Think about someone you have trouble communicating with.
- Determine which style best represents that person.
- Click on the boxes for the tips you plan to use when communicating with that person.
- Plan your next interaction with that person and used the tips.
- Use the tool again to plan a conversation with another person.

☐ To adapt to People People

Be warm and sincere by:

- ☐ supporting their feelings by showing personal interest when possible
- ☐ assuming they'll take things personally
- ☐ allowing them time to trust you
- ☐ discussing personal feelings – not facts when you disagree
- ☐ moving along in a slower, informal, but casual steady manner
- ☐ showing that you're actively listening

☐ To adapt to Party People

Show interest in them by:

- ☐ supporting their opinions, ideas and dreams when possible
- ☐ being upbeat, stimulating and fast-pace
- ☐ tolerating digressions and not hurrying a discussion
- ☐ trying not to argue – you'll seldom win
- ☐ being enthusiastic, spontaneous and casual
- ☐ explaining how action can enhance their image
- ☐ sparing them the details

☐ To adapt to Planner People

Show yourself to be thorough:

- ☐ supporting their organized, thoughtful approach when possible
- ☐ showing commitment through your actions, not just words
- ☐ being detailed, accurate and logical
- ☐ listing advantages & disadvantages of any plan organized
- ☐ providing solid, tangible evidence
- ☐ adhering to established procedures
- ☐ giving assurances that decisions won't backfire on them

☐ To adapt to Point People

Be efficient and competent by:

- ☐ supporting their goals and objectives when possible
- ☐ keeping your relationship businesslike
- ☐ using facts – not personal feelings – if you disagree
- ☐ being precise, effective and well organized
- ☐ recommending alternate actions with brief supporting analysis
- ☐ getting to the point quickly
- ☐ stressing competitive results and growth opportunities

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BREAKOUT GROUP INSTRUCTIONS

With your Group of 4:

- Decide who will role play the Point/People interaction and who will role play the Party/Planner interaction
- When you're not role playing, you should observe and keep time
- Read through the scenario below
- Act out the interaction using the adapting techniques on page 34 (2 minutes)
- Debrief the role play, observers give feedback on the interaction (2 minutes)
- Repeat with the second scenario (5 minutes)

PEOPLE / POINT ROLE PLAY

You're helping coordinate a major project and you're a People Person.

You get an email from a customer who is upset about the slow progress on the project.

You're meeting them for lunch and you think the customer is a Point Person.

How would you plan on talking to the customer?

PLANNER / PARTY ROLE PLAY

You're managing a major project and you're a Planner Person.

You get an update from your team sharing that the project is now over budget due to a supplier issue.

There's a project update meeting scheduled for this week and the senior leader is a Party Person.

How would you plan on sharing the project update to your leader?

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TOOL: ATTENTION-GETTING OPENING

KEY THOUGHTS TO KEEP IN MIND

- What's Your Point?
- Begin with the End in Mind.
- All effective communicators start crisply.
- You only have one chance at a first impression... In your first 90 to 120 seconds, your audience is making their decision about you and your presentation.
- What will intrigue those in my audience?

The beginning has to rivet the interest of the audience. More than any other part of the presentation, every detail should be planned. This is the time to set their expectations and establish your credibility.

OPENING TYPES

- **Open with a Quote:** A short relevant insightful quote, ideally by a notable person, will seize the attention of your audience and add sparkle to your total presentation.
- **Open with a Story:** A crisp, concise, and relevant story will engage your audience and set the tone for your presentation. Most everyone loves a story because from our earliest memories, we are hardwired to learn life lessons in this way. Stories are quite possibly the most powerful delivery tool for information.
- **Open with a Question:** Opening with a thoughtful question is a great way to captivate your listeners immediately as well as establish the theme of your presentation. This will arouse their curiosity and get them involved. Your audience will begin to contemplate the question and formulate their answers.
- **Open with a Statement:** Entice your listeners by stating something interesting and/or fascinating. Perhaps something that will generate a smile.
- **Open with a Statistic or Image:** The use of a dramatic comparison, shocking statistics or an eye-opening illustration.

ATTENTION-GETTING OPENING (CHOOSE ONE)	
Quote	
Story	
Question	
Statement	
Statistic or image	



BREAKOUT GROUP INSTRUCTIONS

With your group:

Share your idea for your Attention-Getting Opening (AGO).

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TOOL: EXECUTIVE SUMMARY

COMPONENT 1

What is the purpose of your presentation?

- Educate
- Project/Program Update
- New Project/Program Proposal
- The Value of a Product or Service

COMPONENT 2

Why does your audience want to listen?

- The technical, business, or global bottom-line impact of your topic:
  - Cost savings
  - Market share increase
  - Time and efficiency savings

COMPONENT 3

What action do you want the audience to take?

- A decision
- Input/Feedback
- Additional resources
- Help solving a problem
- Buy in to go to the next step
- Education to move forward to the next step

EXECUTIVE SUMMARY	
WHAT— "Purpose" What is the purpose of the presentation?	
WHY— "Value Proposition" What is the benefit to the audience?	
WANT— "Desired Outcome" What is the action that you want your audience to take?	

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TOOL: AGENDA WITH STORYTELLING FRAMEWORKS

AGENDA EXAMPLE

- Where we have been
- Where we are today
- Where we are going

AGENDA FOCUS

- A Short, Clear Outline of the Main Points

AGENDA STORYTELLING FRAMEWORKS

- 3-Act Structure (Setup, Confrontation, Resolution)
- PAS (Problem, Agitate, Solution)
- CAR (Content, Action, Results)
- PSH (Problem, Solution, Help Needed)

AGENDA	
Simplified outline of the presentation	
1st Topic	
2nd Topic	
3rd Topic	
Last Topic	

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PLEASE COMPLETE THE FOLLOWING REFLECTION ABOUT DAY 2 OF THE PROGRAM.

What are the key learnings I'm taking away?

How will I start to implement these?

DAY 2 HOMEWORK

- Finish (if not already) the Audience Understanding Matrix (page 26) on the audience for the presentation you are working on. NOTE: You will not be presenting this matrix.
- Create slides for and be prepared to present:
    1. Your Audience Description: single, simple slide with the following information:
        - 1-3 word meeting description
        - Key decision-maker(s)
        - Audience (Number of people and their primary Style)
        - Venue (Virtual / In-Person / Location)
    2. Attention-Getting Opening (page 36)
    3. Executive Summary (page 37)
    4. Agenda (page 38)
- Prepare to present to small group for next program.
- Play the EPQ Game

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YOUR PRESENTATION

GIVING AND RECEIVING FEEDBACK

FORMULA FOR PRESENTATION AND STORYTELLING SUCCESS WORKSHEET

PRESENTATION EXAMPLES

CREATING COMPELLING SLIDES

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GIVING AND RECEIVING FEEDBACK

GIVING FEEDBACK

- Check your intention – do I want to help or hurt?
- Use “I” statements and focus on behavior – “When I saw you…”
- Be specific – give examples
- Do not comment on behavior that the individual has no control over
- Use the Presentation Feedback Forms (a link will be shared in chat during the presentations)

RECEIVING FEEDBACK

- Listen only – don’t evaluate
- Ask clarifying questions, if needed
- Avoid withdrawing from or dismissing the process
- Take what feels right, discard what doesn’t and be honest with yourself
- Show appreciation

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	COMMENTS
PART 1—KNOW YOUR AUDIENCE	
Audience Understanding Matrix	
Personality Understanding: *(People, Planner, Point, Party, or Mixed)*	
PART 2—TELL THEM WHAT YOU ARE GOING TO TELL THEM	
Attention-Getting Opening *(story, quote, question, etc.)*	
Executive Summary	
» Sentence describing what you will present	
» Sentence describing what is in it for the audience to listen	
» Action you want from the audience (e.g., decision, input, etc.).	
Clear and Crisp Agenda	
PART 3—TELL THEM	
Body: The main points with transitions: "H" = Highlight the Point (Hottest Topic Starts)	
"O" = OK, So What	
"R" = Relevant Information/Data	
"S" = Summarize the Point (Optional)	
"E" = Ease to Your Next "H" or Finish Strong	
PART 4—TELL THEM WHAT YOU TOLD THEM	
Finish Strong: *(review objective, what we know now, finish strong)*	
PERSONAL APPEARANCE	
Dress & Clothing: *(style, color, appropriateness for situation)*	
BODY LANGUAGE / POSTURE	
Relaxed professional posture	
Unnatural posture	
Slouching	
Good range of proximity to audience	
Relaxed leg position	
Fixed, rigid position	
Unnatural arm positions	
Spontaneous arm movements	
Relaxed hand positions	
Positive hand gestures for emphasis	
Unnatural use of hands	

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	COMMENTS
HEAD & FACIAL MOVEMENTS	
Affirmative head nods	
Unnatural continual nodding	
Appropriate positive smiling	
Too little smiling	
Unnatural continual smiling	
Continual frowning	
Calm, expressive facial movements	
Cold, distant expression	
Extraneous facial movements	
Overly emotional reactions	
Rigid face	
EYE CONTACT	
Spontaneous eye contact and eye movement	
Abrupt breaking of eye contact	
Staring too intensely	
Continually looking down	
Looking away from audience	
Speaking to PPT slides	
Speaking to flip chart	
Staring blankly	
VOCAL QUALITY	
Simple, precise language	
Complex jargon	
Fluid speech	
Sporadic context	
Pleasant intonation	
Unpleasant voice quality	
Appropriate loudness	
Too loud	
Too soft	
Good variation on rate of speech	
Monotone	

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	COMMENTS
DISTRACTING PERSONAL HABITS	
Jiggling pocket change and/or keys	
Fiddling with pen/pencil/jewelry	
Nervous pacing back and forth	
Tapping fingers or feet	
Playing with hair	
Chewing gum	
Other *(please specify)*	

GENERAL COMMENTS

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BREAKOUT GROUP INSTRUCTIONS



With your Accountability Group:

- Take turns presenting (go in alphabetical order by first name).
- When not presenting, listen to the presentations and complete the feedback form (use the “Save As” feature to create another copy).
- Provide 2 suggestions per category (2 positives and 2 items to consider).

For each person (6 minutes each):

- 2-3 minutes:
  - Briefly state your presentation topic and your audience.
  - Share your screen (if slides are done) and present your Attention-Getting Opening, Executive Summary, and Agenda.
- 3 minutes:
  - Receive feedback from the other members of your accountability group.
  - Repeat until each member has presented.

Wrap up (2 minutes):

- Exchange email addresses in chat so you can send each other the feedback forms.
- Agree upon a date when you all can meet virtually to deliver your final presentations to each other and give feedback.

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TOOL: CLEAR BODY MESSAGE

"H" Hottest Topic/Highlight the Point	• Hottest topic starts (most important point) unless utilizing a storytelling framework
"O" Ok, So What?	• Share the key meaning of your point (why does it matter) • Choose whether to verbally state it or show it visually

"R" Relevant Info/Data	• Essential data supporting your point:
	  • Your findings/results
	  • Resource requirements

"S" Summarize the Point	• If you have presented a longer point, summarize key takeaways
"E" Ease to the next topic	• Create transition statement • Can use agenda as transition slide

CLEAR BODY MESSAGE		
1st Topic	**"H"** Hottest Topic	
	"O" Ok, So What?	
	"R" Relevant Info	
	"S" Summarize the Point	
	"E" Ease to the next topic	
2nd Topic	**"H"** Highlight the Point	
	"O" Ok, So What?	
	"R" Relevant Info	
	"S" Summarize the Point	
	"E" Ease to the next topic	
3rd Topic	**"H"** Highlight the Point	
	"O" Ok, So What?	
	"R" Relevant Info	
	"S" Summarize the Point	
	"E" Ease to the next topic	
Last Topic	**"S"** Summarize the Point	
	"E" Ease to Finish Strong	

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TOOL: FINISH STRONG

KEY THOUGHTS TO KEEP IN MIND

- What do you want the audience to do, think or feel?
- Close every presentation strongly.
- Don't leave your audience with the thought, Now What?
- A powerful close is specific, concise and with a call for action.

The closing is your final opportunity to make your magic. There is nothing more important than your attention-getter to capture their attention during your presentation. However, it is your close that drives their action after your presentation has been completed. With this being what they remember, your closing should include a recap of your main points.

You will want to leave your message ringing in the ears of everyone present. Make your final words unforgettable. Know exactly what you want to say and say it with absolute confidence.

CLOSING TYPES

- **Close with a quote:** A powerful, relevant quote that is practiced and delivered with confidence, can add the perfect crescendo to your presentation.
- **Close with a Story:** Conclude with a pertinent story to captivate your audience. Dramatic, humorous, surprising, or allegorical stories leave a lasting impression.
- **Close by Emphasizing or Completing an Earlier Point:** Conclude by answering a question that you asked earlier in your presentation, or by repeating a particularly important point. This is an excellent way to reinforce your message. Repetition can be overdone. Based on the importance of something, it may well be worth repeating a number of times.
- **Close with a Question and/or a Startling Statistic:** By asking questions and allowing a pause for time to reflect, you engage your audience by programming a thought pattern.
- **Close with a Challenge:** If you want the audience to do something, give them a call to action.

FINISH STRONG
Summarize the benefits and actions you want your audience to take. Finish Strong with a summary, quotation, image, repeat phrase, bookend to match the opening, or a challenge.

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Clear Page

PRESENTATION PREPARATION WORKSHEET

Name:

Topic of Presentation:

PROCESS TO PREPARE FOR A PRESENTATION

PRESENTATION AUTHOR

- Complete the Presentation Checklist and Audience Understanding Matrix below.
- Outline Presentation using the Formula for Presentation Success Worksheet (page 49-50).
- Create the presentation and get feedback from appropriate stakeholders.

PRESENTATION CHECKLIST

A data gathering tool to help strategize the best approach to a presentation.

What is the purpose?	
What is the desired outcome/what does success look like?	
When and where is the presentation?	
Who is delivering the presentation?	
Who needs to review before it is delivered?	
AUDIENCE UNDERSTANDING	
Who is the audience/decision maker?	
What is most important to them?	
What hooks them?	
What details to they need? What should be in the main presentation? What should be in backup?	
What are they willing to compromise?	
What is their primary style (People, Party, Point, Planner)?	

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FORMULA FOR PRESENTATION & STORYTELLING SUCCESS WORKSHEET

Clear Page

1. Know Your Audience
2. Attention-Getting Opening
3. Executive Summary
4. Agenda with Storytelling Framework
5. Clear Body Message
6. Finish Strong

ATTENTION GETTING OPENING (CHOOSE ONE)
Story Image Analogy Question Quote
EXECUTIVE SUMMARY
WHAT—What is the purpose of the presentation? (Educate, Update, Program Proposal, Value of Product/Service)
WHY—What is the benefit to the audience? (Bottom-line Impact—cost savings, market share, time/efficiency savings)
WANT—What is the action that you want your audience to take? (Decision, Buy-in, Approval, Additional Resources, Input/Feedback, Help Solving a Problem)
AGENDA WITH STORYTELLING FRAMEWORK

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THE AUTHENTICITY CODE™

Clear Page

AGENDA	
Simplified outline of the presentation.	
1st Topic	
2nd Topic	
3rd Topic	
Last Topic	

CLEAR BODY MESSAGE	NOTE: "S" is optional. Use for longer points.
1st Topic	
"H" Hottest Topic	
"O" Ok, So What?	
"R" Relevant Info	
"S" Summarize the Point	
"E" Ease to the next topic	
2nd Topic	
"H" Highlight the Point	
"O" Ok, So What?	
"R" Relevant Info	
"S" Summarize the Point	
"E" Ease to the next topic	
3rd Topic	
"H" Highlight the Point	
"O" Ok, So What?	
"R" Relevant Info	
"S" Summarize the Point	
"E" Ease to the next topic	
Last Topic	
"S" Summarize the Point	
"E" Ease to the next topic	

FINISH STRONG
Summarize the benefits and action your want your audience to take. Finish Strong with a summary, quotation, image, repeat phrase, bookend to match the opening, or a challenge.

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PRESENTATION EXAMPLES

EXAMPLE 1

BOEING

Philadelphia Design Center
Dynamic Systems Engineering

Risk Management

Cynthia Ramirez
The Authenticity Code

05/4/2023

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Boeing Philadelphia Design Center
Dynamic Systems Engineering

Audience Makeup

- Location: In-Person (Medium size room) & Virtual
- Audience: Diverse Group (Planner/Point)
- Attendance: 15 in-person & 5 virtual

Customer	SMEs	Engineers
• Decision Maker • Internal & external	• Housing • Lubrication • Bearings • Gears	• Stress • Material & Process • Tool Eng. • Designers

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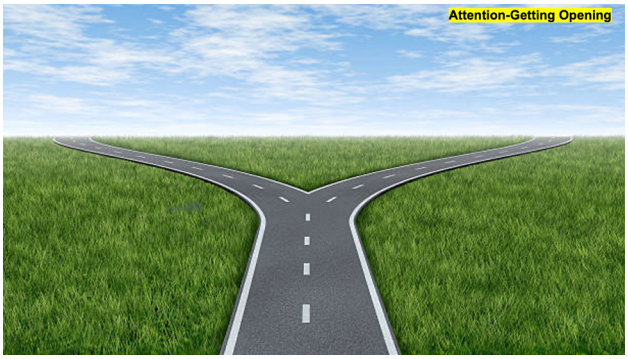
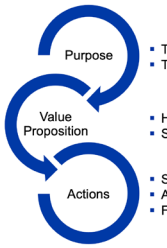
Attention-Getting Opening



Boeing Philadelphia Design Center
Dynamic Systems Engineering

Executive Summary

Executive Summary



- To inform and identify of a potential risk
- To prevent a potential system failure
- Highlight risk avoidance approach
- Showcase a tailored risk mitigation strategy
- Select an optimal solution
- Adapt best practices
- Foster a culture of risk management

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Boeing Philadelphia Design Center
Dynamic Systems Engineering

Agenda

Agenda

- **Identify the risk**
- **Explore solutions**
- **Path forward**

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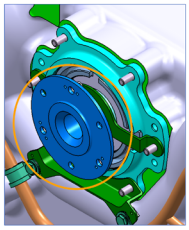
Boeing Philadelphia Design Center
Dynamic Systems Engineering

H – Highlight the Point,
O – OK So What,
R – Relevant Information,

Identify the risk



Isometric View

- Power Take-Off Shaft can **fall out** during transport and operation
- Does **not** conform to clearance best practices
- Can cause **damage** between rotating and stationary components
- No formal written requirement in Performance Spec

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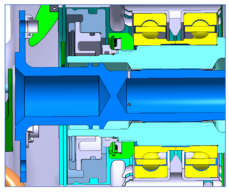
Boeing Philadelphia Design Center
Dynamic Systems Engineering

O – OK So What,
R – Relevant Information

Identify the risk



Side View

- Power Take-Off Shaft can **fall out** during transport and operation
- Does **not** conform to clearance best practices
- Can cause **damage** between rotating and stationary components
- No formal written requirement in Performance Spec

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Boeing Philadelphia Design Center
Dynamic Systems Engineering

E – Ease to Next Point

Agenda

- Identify the risk
- **Explore Solutions**
- Path Forward

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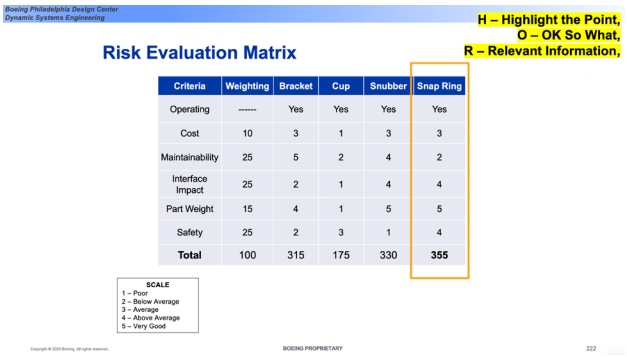

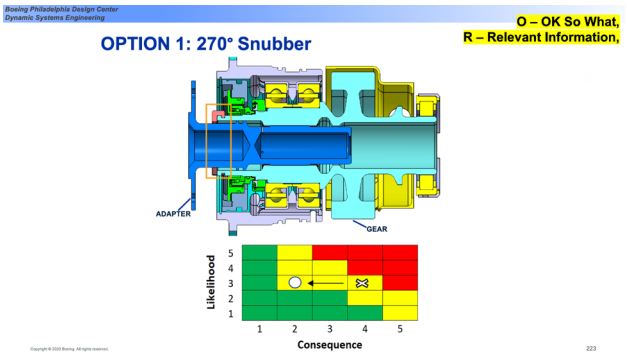

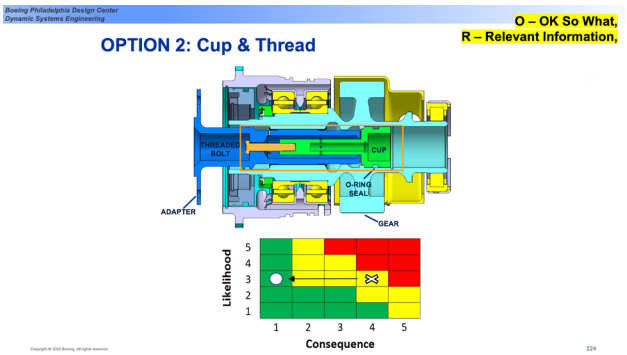

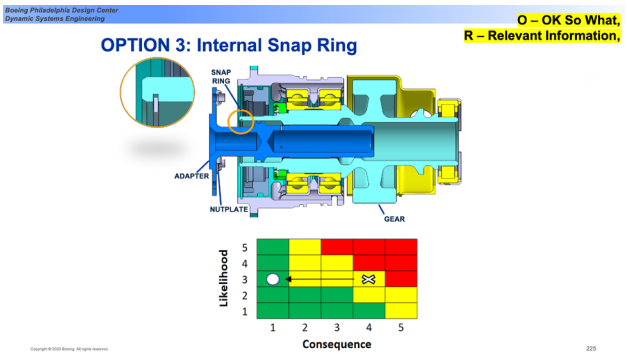

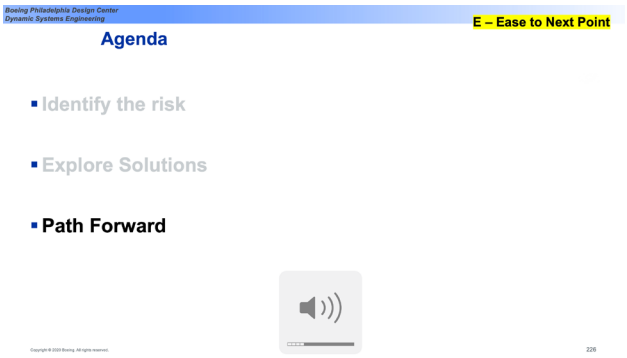

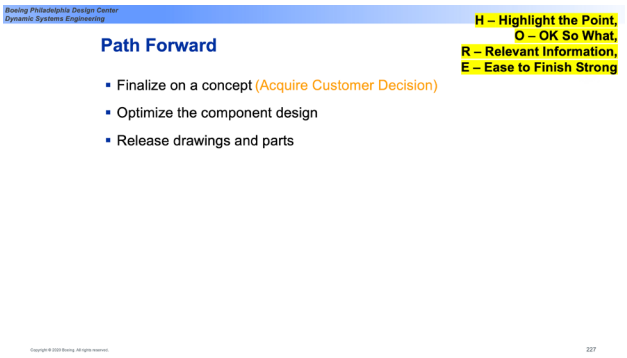



Note for Attendees of Full Program:

In addition to your presentation slides, please state your APQ's and insert your brand statement on a slide before your audience description.

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PRESENTATION EXAMPLES

EXAMPLE 2

AUDIENCE

Audience Description

BWIL
BOEING WOMEN INSPIRING LEADERSHIP

- THOUGHT LEADERS
- DEI ADVOCATES
- CHANGE AGENTS

PONDER THIS

Attention-Getting Opening



"Yes, the planet got destroyed. But for a beautiful moment in time we created a lot of value for shareholders."

The New Yorker
26 Nov. 2012
Cartoon by Tom Toro

EXECUTIVE SUMMARY

Executive Summary - Overall

Purpose
- Educate on aspects of social sustainability

Value Proposition
- Connect your work to sustainability
- Increase attraction and retention as top employer of choice
- Prevent turnover
- Change culture

Actions
- Commit to adopting best practices
- Advocate for change and speak up – use your voice
- Practice inclusion

AGENDA

Agenda

- **Why social sustainability matters**
- **Best practices**
- **Speaking up**

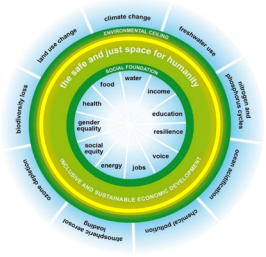
WHY SOCIAL SUSTAINABILITY MATTERS

H – Highlight the 1st Point
O – OK So What
R – Relevant Information
E – Ease to 2nd Point

Social foundation

Environmental ceiling

Safe and just operating space for humanity



Courtesy of Villanova University & Oxfam

BEST PRACTICES

H – Highlight the 2nd Point
O – OK So What
R – Relevant Information

- Form equity, diversity & inclusion councils, taskforces, boards
- Implement Chief Diversity Officer roles
- Partner with ETAs to diversify and develop talent pipeline
- Promote employee participation in BRGs
- Encourage discussions on allyship, unconscious bias, inclusive practices
- Improve employee development using continuous learning

Gender Equality | Racial Equality | LGBTQ+ Support | Veterans & Disabled Individuals

Ever-evolving & constantly changing

BEST PRACTICES

R – Relevant Information
E – Ease to 3rd Point

- Form equity, diversity & inclusion councils, taskforces, boards
- Implement Chief Diversity Officer roles
- Partner with ETAs to diversify and develop talent pipeline
- Promote employee participation in BRGs
- Encourage discussions on allyship, unconscious bias, inclusive practices
- Improve employee development using continuous learning
- **Perform annual global pay equity & pay gap reviews and provide data**
- **Require all-employee, annual, mandatory diversity, equity & inclusion training**
- **Practice Seek, Speak and Listen**

Gender Equality | Racial Equality | LGBTQ+ Support | Veterans & Disabled Individuals

Ever-evolving & constantly changing

SO WHEN DOES BOEING 'SPEAK UP'?

H – Highlight the 3rd Point
S – Summarize
E – Ease to Finish Strong

"Boeing Statement on Coronavirus" 3/4/20

"Boeing CEO Message on Confronting Racism" 6/10/20

"Boeing CEO Condemns Intolerance and Harassment in Note to Employees" 6/1/20

"Boeing CEO Message Against Hateful Acts" 3/18/21

STOP ASIAN HATE

"Boeing Statement on Political Action Committee Contributions" 1/13/21

"Boeing and Allen University Partner to Establish the Boeing Institute on Civility" 11/11/20

"Boeing CEO Outlines Racial Equity Action Plan" 6/28/20

Finish Strong

"We cannot solve our problems with the same level of thinking we used when we created them"

Albert Einstein



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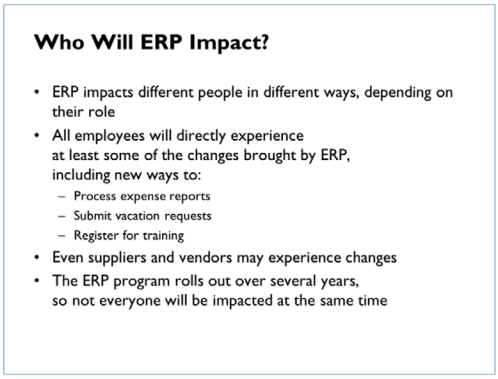
BEST PRACTICES

1. 3-5 Second Rule
2. Background
3. Colors
4. Images
5. Composition

BEFORE & AFTER







BREAKOUT GROUP INSTRUCTIONS

With your Breakout Group:

- Each person open the Sandbox file (or use the presentation you're working on for this program)
- Practice applying 1-2 of the tools covered in the demonstration
  - More advanced? There are some extra tools to try in the Sandbox Bonus Material Slides!
- Everyone will be at different comfort levels; help each other out!

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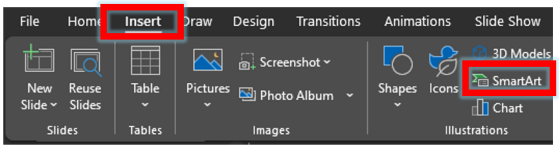
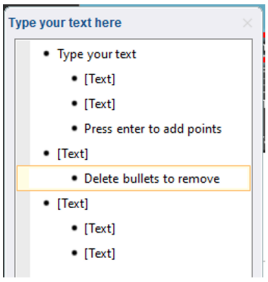
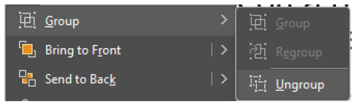
HOW-TO GUIDES

How to: Smart Art







1. Click Insert
2. Select Smart Art
3. Choose a template and click ok
4. Type text in the window that appears
5. Click on a blank area of the slide to hide the entry box
6. To customize colors or animation, right-click on the outer border and select “Ungroup” – repeat until all objects are ungrouped

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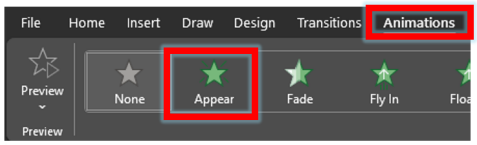
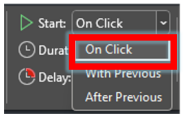
How to: Animation





1. Highlight the text or select the object(s)
2. Click Animation
3. Select “Appear” (keep it simple!)
4. Select “On Click”

To animate items to come in with another, select “With Previous”

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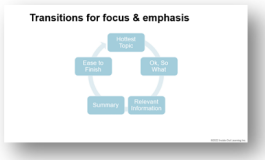
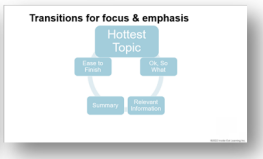
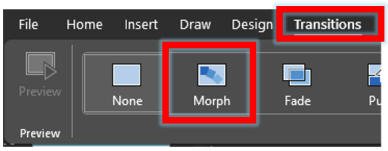
How to: Morph Transition

Original slide to duplicate



Duplicated slide with slight change





1. Duplicate the starting slide (right click and select Duplicate slide or copy/paste)
   - Duplicate starting slide as often as needed
2. Make slight adjustments to size and position of objects on duplicated slide
   - Make adjustments to other slides as needed
3. With the duplicated slide selected, go to Transitions and select “Morph”

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Morph Transition Continued

- Think of your original slide as an “anchor” – in order for the morph to work, all of the objects on the original slide need to be **somewhere**** on the next slide

  ****somewhere** could mean off the page too! See slides 16 and 17 for an example of how you can use the off-slide area to morph objects onto and off of the slide
- Things that can “break” your morph:
  - Re-ordering objects on the slide without also changing the order on the original/duplicated slide
  - Changing the text in a text box without also changing the order on the original/duplicated slide
- If your morph “breaks,” try re-duplicating the original slide, making your changes, and re-adding the morph transition

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PLEASE COMPLETE THE FOLLOWING REFLECTION ABOUT THE PROGRAM.

How will I apply the presentation and storytelling techniques I learned today?

What are my top three take-aways from the whole program, and how will I start to implement them?

HOMEWORK: ATTENDEES OF THE CORE PROGRAM

- Apply feedback to AGO, Executive Summary, and Agenda and revise slides
- Create slides for rest of presentation (Clear Body Message and Finish Strong)
- Schedule time (done in Breakout Group) to present your full presentation to your Accountability Group and give each other feedback
- *Optional*: watch the full example videos online before presenting to your group
- *Extra Credit*: video tape yourself delivering the presentation and complete the self-evaluation form. Send the video and the completed evaluation form to [customer POC] for a prize!

FINAL 7–10 MINUTE PRESENTATIONS

Apply Feedback for:

1. Audience & key decision maker(s)
2. Attention-Getting Opening
3. Executive Summary
4. Agenda

Create slides of:

1. Clear Body Message (at least one topic area or as many that will fit within 10 min time period)
2. Finish Strong

Remember to use your Formula for Presentation and Storytelling Success Worksheet.

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HOMEWORK: ATTENDEES OF THE FULL PROGRAM

- Apply feedback to AGO, Executive Summary, and Agenda and revise slides
- Create slides for rest of presentation (Clear Body Message and Finish Strong)
- If not yet completed, send Aleah, Aleah@insideoutlearning.com, a 5-minute clip of you presenting in the past
- Attend two coaching sessions (Presentation and PowerPoint)
- Meet with Accountability Group to practice
- Attend presentation day and receive immediate expert and peer feedback
- Attend final video review session with expert facilitator
- *Optional*: watch the full example videos online before presenting to your group
- *Extra Credit*: video tape yourself delivering the presentation and complete the self-evaluation form. Send the video and the completed evaluation form to [customer POC] for a prize!

FULL PROGRAM PRESENTATION DAY: 7–10 MINUTE PRESENTATIONS

Apply feedback for:

- Audience & key decision maker(s)
- Attention-Getting Opening (page 36)
- Executive Summary (page 37)
- Agenda (page 38)

Create slides of:

- Authentic Executive Brand Statement (page 21) with 2 EPQs (page 16) listed. This will be the first slide in your presentation, followed by your audience description.
- Clear Body Message (page 46). Include at least one topic area or as many that will fit within 10 min time period.
- Finish Strong (page 47)

Remember to use your Formula for Presentation and Storytelling Success Worksheet (pages 49-50) and reference the examples provided (pages 51-53).

On Presentation Day:

- Prepare and test your camera
- Wear the clothing you would wear for your actual presentation
- Pull up your PPT file and have it ready to share. The Moderator will pass you control so you can share your slides when it is your turn to present
- Read your Authentic Executive Brand Statement and State Your 2 EPQs: First slide

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NOTES

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HOW TO STAY CONNECTED

1. Join our Community of Practice on LinkedIn Groups. https://www.linkedin.com/groups/12136775/

Join the Inside-Out Learning Community of Practice!

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(480) 822-9939

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