

## Operations Training Presentation Skills

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**Purpose:** Effectively present yourself, an idea, or product to a client or colleague.

**Preparation:** Plain piece of paper and a pen.

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**Facilitator:** The word presentation can sometimes intimidate people. You don't have to be an amazing speaker or gifted communicator to clearly and concisely share an idea or concept. Presenting can be done in a simple, systematic way. The purpose of our meeting today is to share with you a framework that you can use when presenting an idea or product. While the framework is helpful, you always need to prepare and practice. The ultimate goal is to have clear and concise "conversations".

Four Steps to Presenting an Idea/Product:

### **P-R-E-S**

- Define the **PROBLEM** - What is the issue or opportunity?
- State the current **RESPONSE** – How your firm is uniquely responding to this problem/opportunity?
- Share an **EXAMPLE** - Give a real life situation of how we, as an organization, have dealt with this problem/opportunity in the past.
- Provide **STEPS** - How will you, your service or product solve the problem or realize the opportunity and how do they get started?

**EXAMPLE:** *Personal Property Inventory* (can also be modified to address small business)

**PROBLEM:** Most homeowner's do not have an accurate or any inventory of the personal property in their home. At a time of loss, they will not have any documentation to provide to the claims adjustor that will support the proper settlement of their loss.

**RESPONSE:** We believe insurance is only as good as the information and documentation available when a claim occurs. We help our clients determine the best strategy to detail and understand their personal property through a concierge tool. No matter what

resource/strategy our clients decide to use, we make sure “something is in place” to give our clients the best chance of having a claim paid if that time occurs.

**EXAMPLE:** A client had a total fire loss and all of their personal property was destroyed. When the claim was assigned to an adjustor, our firm sent a copy of the clients Personal Home Inventory. The client did not need to complete any type of inventory loss worksheet and was able to get the adjustment of their personal property quickly and was not delayed in getting a settlement.

Another example is our “Personal Home Inventory Service”. This service will provide a professional videographer to document your entire home inventory. We will also record special and high value items that deserve extra attention and documentation, up to and including copies of appraisals and a description in subtitles on the tape. A copy of the video is kept at our office, the videographer’s online portal, and given to you. Once we complete the insurance placement of your program we will have the videographer come to your home within two weeks.

**STEPS:** The first step is to understand what our client currently has in place for inventory of all assets. Step two is to ask for a balance sheet of our client (this identifies potential assets to include in the inventory). Step three is determining the level of investment someone desires to have in inventory (simple spreadsheet form, video, digital, outsource, or other). Step four is to assist the client in the execution of the chosen strategy.

### **GROUP EXERCISE**

- Take your piece of paper and write P-R-E-S down the left hand side.
- Leave space in between.
- Pick a product or service (doesn’t have to be in insurance) that you really appreciate or value (fills a need or is an opportunity to do something better).
- Write that product/service on the top of your paper.
- Fill out the Problem, Response, Example and Steps for the product/service.

Once you are completed.

- Break up in to groups of two and present your product/idea using the PRES system to your partner.
- Then switch roles.
- Make sure you give feedback to each other.

**Facilitator:** Ask a few people to “present” their PRES.

## **ALTERNATIVE or ADDITIONAL EXERCISE**

Ask participants to think of something they are personally passionate about and/or a hobby they love and have special expertise. Have them do a PRES presentation on that hobby.

### **Example: Swimming as a fitness exercise**

**PROBLEM:** Many people who want to swim as a workout tend to go straight to the pool and start swimming laps. They find that they can't swim very long and they are reaching for the wall at each lap end hoping to keep from drowning. They believe the problem is being out of shape. Therefore, they end up having very short sessions and never seem to make progress.

**RESPONSE:** Swimming is a very technical sport. Proper head position reduces the drag in the water. Proper hand position and stroke movement creates great efficiency during the swim. Ultimately, breathing is the biggest culprit. People have to hold their breath when they are swimming because they don't know proper breathing techniques. So, they workout "holding their breath". This will cause anyone to potentially drown! I believe the best thing someone can do is get swimming lessons to begin the process of swim training as a workout.

**EXAMPLE:** I started swimming a few years ago because it was a low impact method of working out. I swam to the other end of the pool and was reaching for the wall after one lap. I couldn't breath and thought I would not be able to get back to the other end of the pool. A friend of mine came over and asked if he could give me some advice. He spent the next 15 minutes giving me training on breathing and stroke efficiency. When I applied his training, I was immediately able to swim multiple laps and control my exhaustion levels! I continued training with him for the next few months and now I can swim for over an hour and maintain a solid heart rate.

**STEPS:** I highly recommend your first swim day be with an instructor. Find someone who will spend two or three sessions with you teaching you proper swimming techniques for swimming laps. Then, have someone look at you monthly to continue to improve your efficiency. You will be able to swim longer and increase your fitness... and have fun!

### **SUMMARY:**

Hopefully you can see how powerful this process is for giving presentations. The PRES model allows for a comfortable and convincing method of presenting anything. It works in business, personal, and it even works when you are trying to convince your kids!