SE Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Manager Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The Beginning – Composure

# Open

**+ O -** Open To Audience

**+ O -**  Weight Balanced

**+ O -** Arms, Hands & Knees Relaxed

**Focus**

**+ O -** Gather Thoughts / Silence

**+ O -**  Breathing & Pace

**+ O -** Remove Filler & Clichés

**Connection**

**+ O -** Conversations with individuals

**+ O -**  One thought per sentence

**+ O -** Eye Contact

The Delivery – Energy

# Movement

**+ O -** Motion with purpose

**+ O -**  Motion for attention

**+ O -** Look ; Move ; Stop

**Gestures**

**+ O -** Natural Arm Position at Rest

**+ O -**  Balance of Gestures

**+ O -** Avoid Fidget/Clasp/Point

**Animation**

**+ O -** Smile

**+ O -**  Vary VSP (Volume, Speed, Pitch)

**+ O -** Arms, Hands & Knees Relaxed

The Preparation – Planning

# Opening

**+ O -** Entry (how it started)

**+ O -**  Position (why I’m here)

**+ O -** Action (what we’re going to do)

**+ O -** Benefits (why you care)

**Organization**

**+ O -** Preview

**+ O -**  WWHFY (Discovery Review)

**+ O -** Powerful Ideas / Key Points

**+ O -** Transitions

**Closing**

**+ O -** Position

**+ O -**  Benefits

**+ O -** Action Required

**+ O -** Exit & Wrap

The Result – Impact

# Audience Engagement

**+ O -** Stories & Internalization

**+ O -**  Interaction 2-Way

**+ O -** Humor & Engagement

**Visuals**

**+ O -** Quantity

**+ O -**  Relevance & Quality

**+ O -** Use (No Bullets etc)

Discovery (attach Key Issues Worksheet to this form)

# Key Issues Worksheet

**+ O -** Prioritized Key Issues

**+ O -**  Problem & Results Evidence

**+ O -** Problem & Results Impact

**+ O -**  Timing

**+ O -** Budget

What Went Well / Areas To Improve

**Explanation Of Assessment Sheet**

Use for basic scoring of skill.

|  |  |
| --- | --- |
| **+** | Excellent ; Strong and appropriate usage of this skill |
| **O** | Acceptable : uses this skill |
| **-** | Needs improvement. Does use skill or is used inappropriately |

In the boxes next to the scoring, cite specific examples of behavior that point out and support the +/O/- ratings as feedback to the presenter.

Notes:

You can change the individual measurement items within each section to fit your particular industry. (Some clients have re-arranged the sections themselves to more closely resemble the different stages of a sales call and the preparation required. So they may place Discovery first and Delivery last.