

SUMMARY

- ◆ Defines basic sales terms
- ◆ Explores ways to use text and illustrations to create engineering marketing slides
- ◆ Examines six methods of strengthening the persuasiveness of engineering marketing slides

Creating Marketing Slides for Engineering Presentations

ANN JENNINGS

INTRODUCTION

Technical communicators who create engineering marketing presentations face a unique challenge. They must prepare slides that support a project proposal that seeks a contract between their engineering firm and another corporation or a government agency. For an engineering firm whose bid has been short-listed, a presentation is an important interim step toward securing a contract (Porter-Roth 2002, 221). An internal presentation also serves a marketing function if its purpose is to win management's support for expenditures or projects (Vincler and Vincler 1996, 256). In meeting their unique challenge, technical communicators may wish to consider creating slides that feature sentence headlines (Alley and Robertshaw 2004b; Alley and others 2006; Atkinson 2005, 26; Doumont 2005, 69) and visual evidence, a combination that reinforces ideas and increases the audience's retention of the information on the slides (Alley 2003a; Alley and Neeley 2005). Slides designed this way can incorporate marketing techniques and related means of persuasion not commonly discussed in technical communication literature. The result is a series of slides distinguished by headlines that make claims that are individualized for particular customers and by visual material that reinforces those claims.

Texts on oral presentations in the field of technical communication (Gurak 2000, 191–205) and on “technology proposal” presentations (Harner and Zimmerman 2002, 156) provide general rather than focused advice that could be useful for marketing presentations. Because technical marketing presentations have not been widely written about within the field, this tutorial offers pertinent ideas gathered from a variety of disciplines. The ideas include sales terminology, typeface personas, slide layout, slide text and illustrations, principles of human motivation, and several means of persuasion that are particularly valuable in marketing situations.

BASIC SALES TERMS DEFINED

Certain terms appear frequently in marketing material and sales presentations in many fields. A clear understanding of these terms is important if they are to be represented

appropriately on presentation slides. Three key terms that will be used in this tutorial are features, benefits, and advantages.

A study conducted by international sales training firm Huthwaite yielded the following definitions, derived from “more than 35,000 sales calls, over a period of 12 years . . . by 10,000 sales people in 23 countries” and applied with an “average increase in sales volume of 17 percent” (Rackham 1988, ix–x).

- ◆ Features—“facts, data, or information about your products or services”
- ◆ Benefits—[statements regarding] “how a product or service meets an Explicit Need expressed by the customer”
- ◆ Advantages—[statements regarding] “how a product or service can be used or can help the customer” (Rackham 1988, 100–103)

In the features-benefits-advantages triad, features are the simplest to write about. They are easy to identify: color of paint. They are factual: amount of voltage. They are stable: dimensions of drilling rod. They exhibit no emotional content: annual percentage rate (APR). In addition, they are usable for all customers because they are the same for all customers. Features are important, but they do not address the real motives of customers for making a purchase or awarding a contract.

Benefits, which are more difficult and time consuming to identify and write about, address the individualized needs that cause a particular customer to buy a product or service (Alessandra, Wexler, and Barrera 1987, 145; Buzzotta and Lefton 2005, 50; Pugh and Bacon 2005, 35, 39, 163). In the case of an engineering firm seeking a contract, the explicit need would have been stated by the prospective customer in its request for proposal (RFP) to which the engineering firm responded earlier.

Needs are related to emotions, and marketing typically appeals to emotions. For instance, if a customer's need is an investment that will prevent the loss of capital, the

Manuscript received 16 March 2007; revised 23 May 2008; accepted 13 June 2008.

benefit could be stated as “the certainty of knowing that funds will be available when they are needed” or “the comfort of being able to sleep at night without worrying about the loss of your savings.”

Benefits are also the most influential factor in closing sales, particularly large sales. Benefits maintain high value throughout a lengthy sales process, right up to the closing. Over the course of such a process, advantages drop significantly in conviction value, and features have a low value throughout (Rackham 1988, 104–108, 110). This observation applies to engineering presentations tied to proposals, because the presentations (and the related proposals) are part of a lengthy sales process that commonly involves large amounts of money.

An advantage may be thought of as a nonindividualized, secondary benefit that provides generic good to any customer without addressing the “Explicit Need” identified specifically by a particular customer (Rackham 1988, 100–102, 108; 1996, 131). For example, if the customer’s stated need is to stop emitting harmful fumes into the air during the production of electricity, the benefit could be stated as “protecting the environment from industrial pollution.” If the product solution to this problem is solar panels, several advantages—benefits that the customer did not request—could be stated as “low maintenance” and “flexible configuration.”

BASIC SALES TERMS APPLIED TO PRESENTATION SLIDES

Even relatively simple, quick sales transactions typically incorporate features, benefits, and advantages. For example, suppose a prospective buyer states an explicit need for the growth of funds to pay for a child’s college education. The wise salesperson will word an individualized benefit on the basis of this need, explain how product features make the benefit possible, and possibly add advantages (secondary, generic benefits) characteristic of the ways the product operates for all prospective customers.

For example, “You can count on the *growth of your \$5000 to help pay for your daughter’s college education* (benefit) because the *interest on our certificates of deposit is compounded monthly* (feature). If you save *\$2000 a year for 10 years at 4%* (feature), you’ll have \$32,000 available to help with college expenses. For convenience (advantage), the contributions can be withdrawn automatically from your checking account.”

In this example, the growth of the prospective customer’s money designated for the child’s education is the benefit—it meets the explicit need that the customer has stated is crucial. The compounded interest rate is the product feature that makes the benefit possible. Convenience is the advantage or unrequested secondary benefit made possible by automatic withdrawals from the prospective customer’s checking account. This advantage/secondary benefit is

the same for all customers, whether they are saving for a child’s college education, planning a vacation in Tahiti, or anticipating retirement.

As shown in Figure 1, a traditional slide might list the features and benefits as bullet points. The slide lacks both particularized wording for the individual customer and a pertinent visual component. The decorative border conveys no content of its own or in support of the verbal content.

As shown in Figure 2, a slide laid out with a sentence headline and visual evidence has a very different look. Figure 2 makes a claim (the benefit) directly related to the prospective customer’s need for the growth of savings, and it provides visual evidence that helps the customer understand and accept the claim. A prospective customer viewing the table in Figure 2 learns the connection between the benefit and the main feature, compounded interest. For a customer who later reviews the slide, the sentence headline presents a clear reminder of the presenter’s assertion about the certificates of deposit. The photo in the slide offers an emotional connection to the daughter and the growth of money meant to support her college education (benefit) and to the idea of a parent putting a child through college (advantage).

The prospective customer would also notice that Figure 2 addresses the customer benefit immediately in the headline, thereby confirming the customer focus of the slide. At the end of the presentation—the close—that benefit will prove to be a more powerful persuader than the product features (Rackham 1988, 104–108, 110), so the benefit is stated in the prominent sentence headline.

Figure 1, on the other hand, lists the product features first and fails to state their relationship to the customer benefits. The benefit is stated generically (advantage) rather than tailored to the individual customer (benefit). The customer-declared need for growth of savings is missing from the slide.

Just as the bank officer must do, the creator of an engineering presentation must state features and must differentiate clearly between primary benefits tied to a customer’s explicit needs and useful advantages (secondary benefits) not requested by the customer as explicit needs. The creator must also adapt to slide format the ideas that appear in the related proposal and must select illustrations that depict the benefits and features—and possibly some advantages.

Figure 3 shows the following benefits and features found in a hypothetical engineering proposal (underlined). “To assure *2-day delivery of your lumber* (benefit tied to an explicit need stated by the customer in the RFP), our railway system provides *high-speed, low-maintenance engines* and *heavy-load track* (features that make the benefit possible). This combination enables *reliable, efficient* de-

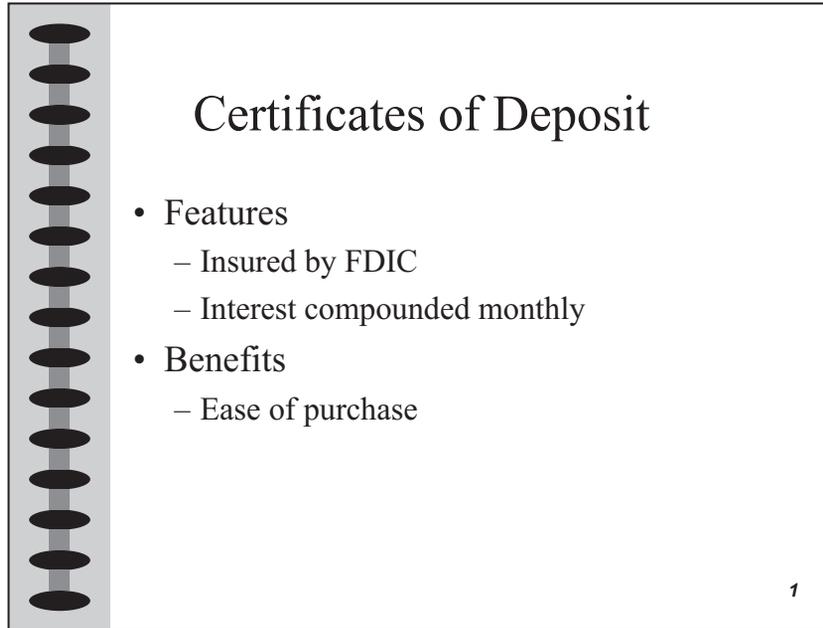


Figure 1. This slide does not mention the customer’s need or how the product features produce a benefit for the customer. A buyer who looks at the slide later will not know what assertion (claim), if any, was made by the presenter. The border serves no function.

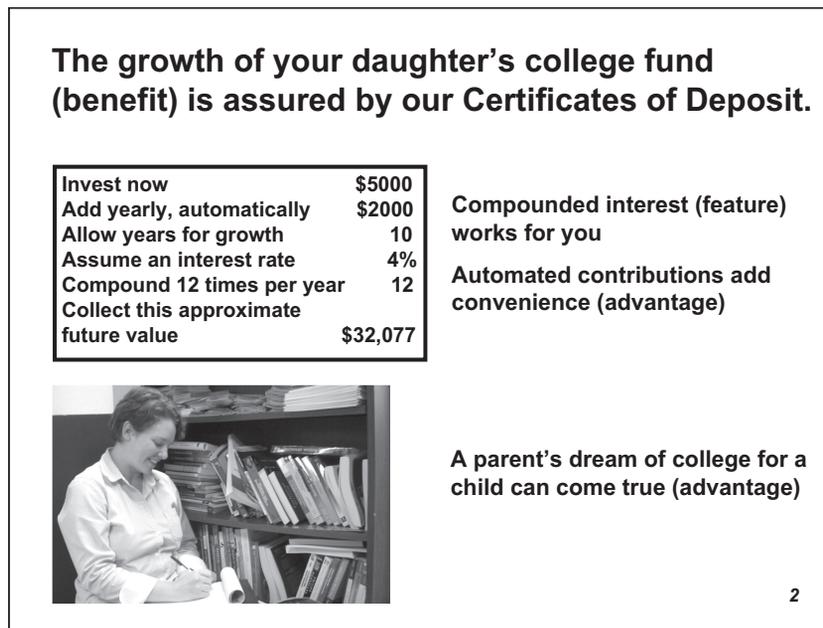


Figure 2. The sentence headline makes a claim and states the customer benefit. The table, photograph, and callouts support the claim. Photo ©Ann Jennings 2008.

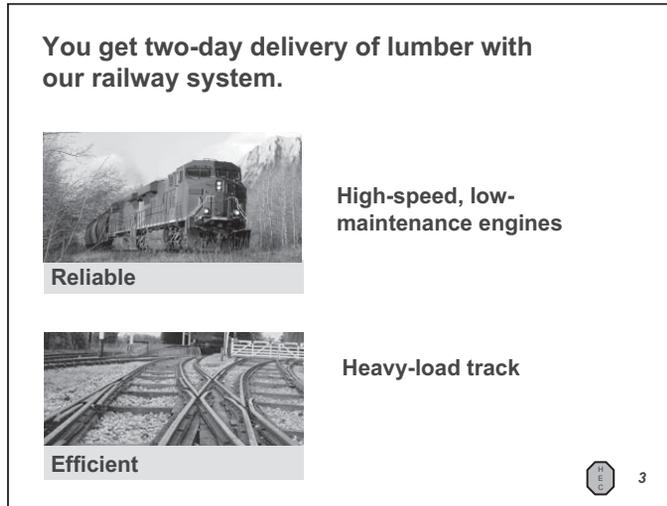


Figure 3. This slide emphasizes the customer's need and states it as a benefit that is made possible by the product's features and advantages. Top photo ©iStockphoto.com/Randy Mayes. Bottom photo ©2006 JupiterImages and its Licensors. All Rights Reserved.

livery of your product (advantages or secondary benefits made possible by the features of the railway system)."

SLIDE TEXT

The creators of technical marketing slides can benefit from the results of studies of typography, headlines and body text, and the quantity of information on a slide.

Typography

One study of typefaces on presentation slides found that both serif and sans serif fonts can be "comfortable-to-read, interesting, and attractive" as well as "professional" (Mackiewicz 2007, 300, 302) and that perceptions of professionalism vary—some serif fonts score higher than some sans serif fonts (301–302). This study found the serif font Souvenir Lt and the sans serif font Gill Sans to be equally effective at 24 points (301). Generally, sans serif fonts scored higher on all four factors than did serif fonts (302); boldface style was not studied.

Technical communicators who desire the strong contrast offered by boldface type and the readability of text for viewers sitting at angles to the screen may wish to use the sans serif font Arial bold, which is recommended by other researchers with extensive presentation experience (Alley and Robertshaw 2004a, 2; 2004b, 3). In a study of typefaces in printed documents, Arial was identified as possessing the persona of "directness" (Brumberger 2003, 214), a characteristic that is suitable for marketing presentations.

Numerous other typeface personalities have been examined, including those that convey professionalism, formality, and technical qualities, which are pertinent to technical marketing presentations. Other personalities seem inappropriate, including those that convey friendliness, elegance, drama, and futurism (Mackiewicz and Moeller 2004, 308).

Another issue to consider is the structure of fonts whose letters and numbers vary in thickness. This characteristic can cause misreadings by the audience when text in such a font is projected. For instance, the "B" and "8" of Times New Roman have been found to be "indistinguishable" from each other (Mason 1997, 68). Sans serif fonts, many of which have unvarying thickness (monoweight), are thus more suitable for presentations.

Specific recommendations include left-justified sentence headlines typed in a bold sans serif font such as Arial, preferably at 28 points, and callouts and captions that identify illustrations in bold, 18–24 point sans serif typeface (Alley and Neeley 2005, 420).

Creators of engineering marketing presentations can increase the likelihood of the success of those presentations by adopting the research on typography. As shown in Figure 3, for instance, the monoweight sans serif typeface Arial, boldface style, left-justified sentence headline, and 28- and 20-point type used in the headline and callouts help create an easily read slide. The benefit (28-point type) and features and advantages (20-point type) are sized to indicate their relative importance to the customer audience.

Headlines and body text

A sentence headline is preferred to a phrase headline. In its role as the most prominent text on a slide, the headline informs audiences of the presenter's position on the subject matter of a slide, "orients the audience . . . to the role of the slide in the presentation . . . and forces the presenter to come to grips with the purpose of the slide" (Alley and Robertshaw 2004b, 3). A sentence is a statement, and a complete statement can present "the message" (Doumont 2005, 69) or advocate the presenter's position, whereas a phrase is less able to do this (Alley and Robertshaw 2004b, 1–3). Sentence headlines also help assure the relevance of the visuals on the slides and thus the cohesiveness of the presentation (Atkinson 2005, 116). Left justification of the headline speeds up the audience's reading chore (Alley and Robertshaw 2004b, 4).

Sentence headlines and body text limited to two-line blocks encourage the audience to read the information rather than skip it (Alley and Robertshaw 2004a, 3–4). In addition, a two-line limit helps "to maintain consistency in the presentation, to leave ample room for visuals, and to challenge yourself to be as concise as possible" (Atkinson 2005, 86).

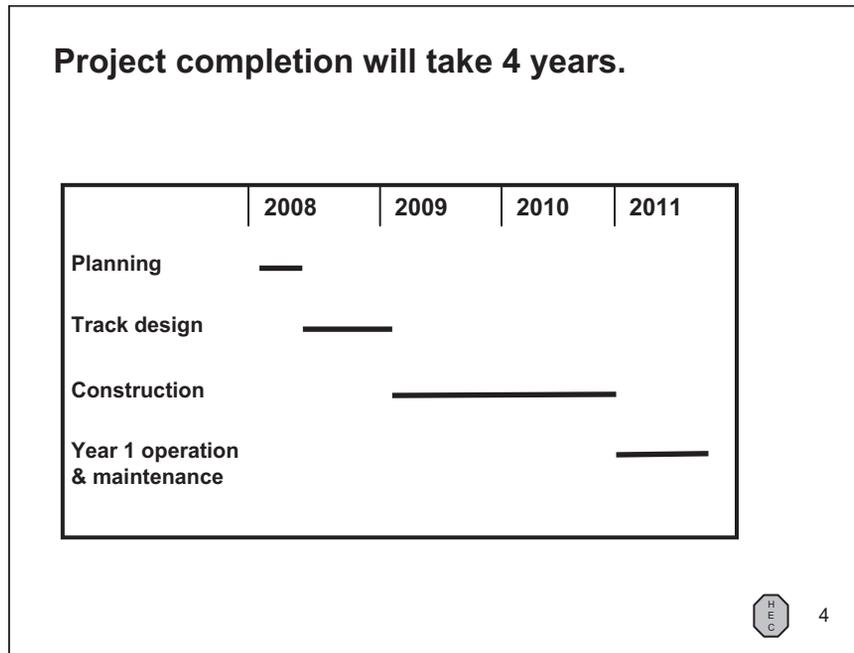


Figure 4. This section slide exemplifies how a simple graphic and minimal text can provide a sentence headline and visual evidence.

When creating engineering marketing presentations, technical communicators would do well to use sentence headlines, for example, those shown in Figures 2–5 and 7–12. Such headlines immediately convey a message/claim that is fully thought out, yet brief enough at two lines to engage the attention of the customer audience. Simultaneously, the succinctly stated claims leave adequate space for supporting visuals pertinent to the engineering project. The brief callouts reinforce the claims made in the headlines.

Quantity of information on a slide

A technical communicator who adopts the practices recommended above will effectively abandon PowerPoint templates. One of the features of those templates that will disappear is bullets. Paragraph-length information will also disappear, leaving body text. Preferably all text below the slide headline will state benefits, features, and advantages, content that will support the assertion made in the headline and assure a cohesive slide. This type of content will prevent the body text from confirming that “Bullets allow us to skip the thinking step,” an accusation made against bullets used to present business plans (Shaw, Brown, and Bromiley 1998, 42). Other reasons to avoid using traditional bullet points in slide presentations are that bullets plus a traditional “category heading” (slide title) deny the audience a streamlined main point of emphasis in the slide (Atkinson 2005, 6); “Bullet



Figure 5. This slide serves two functions: arousing the audience’s emotions and addressing the technical buyer’s question, “Do the proposed approach and qualifications meet our specifications?” Photos ©2006 JupiterImages and its Licensors. All Rights Reserved.

lists are not necessarily as synthetic or thoughtfully organized as they may look” (Doumont 2005, 68); and “bulleted lists . . . do not show the connections among the listed items” (Alley and Neeley 2005, 420).

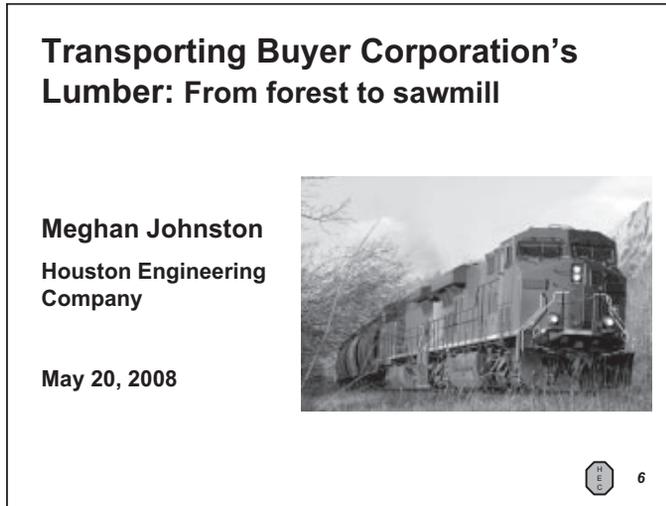


Figure 6. The title slide announces the content of the presentation and provides a pertinent image. Photo ©iStockphoto.com/Randy Mayes.

Thus, a slide will contain at a minimum a sentence headline that makes a claim and a visual that supports that claim. Additional verbal material/body text may appear, but not in bulleted form, as the figures in this tutorial show. If the number of listed items on each slide is limited to a maximum of four (Alley and Neeley 2005, 420), there is room for white space, and the tendency of some presenters to overwhelm the audience with verbal details is averted.

If the principles discussed in this section are applied to engineering marketing presentations, the results may look like the slides in Figures 2–12. Bullets appear nowhere, text is minimal, and typically bulleted information has been translated into callouts that add verbal impact to visual evidence and that support the claims made in the sentence headlines. Such tightly cohesive visual–verbal information focuses the customer audience on the sales story that the engineering firm wants to tell.

Time-saving templates that support the layout and typography described above are available at <http://writing.engr.psu.edu/slides.html> (Alley 2003b). These templates offer a choice of dark text on a light background or light text on a dark background.

ILLUSTRATIONS

Illustrations must attract and hold the attention of the customers by showing them what the engineering firm can accomplish. Several studies of illustrations by technical communication researchers are applicable to technical marketing presentations. For instance, one analysis of tables and figures pinpoints the ideal uses of various categories of illustrations:

When data is sufficiently complex . . . tables are a clear choice over words. . . A line or bar graph should be chosen over a table only when . . . the relationship of the data is more important than the individual data themselves. Exactness is sacrificed in any line or bar. Circle graphs . . . should be chosen only for visual impact on the general reader [because the material is generally so simple that it can be conveyed in words]. . . Photographs should be chosen for evidence or identification. . . However, when clarity is a primary importance [sic]. . . line drawings are the illustration of choice. (Gross 1983, 52)

Applying this information and the insights of other researchers to technical marketing presentations yields interesting lessons for technical communicators who are preparing engineering marketing slides. Features, which are primarily factual, may be depicted in a variety of ways that emphasize facts, for example, “charts, graphs, diagrams, and tables” (Manning and Amare 2006, 195), which emphasize information and “relevant details” (204), and “line drawings” (Walsh 1998, 209 and 212) or “drawings” from photographs (Dumont 2002, 222), which allow the presentation of abstract qualities. These types of visuals are informative. They enable viewers to “actually extract the statements or ideas required to match their thoughts to the author’s” (Manning and Amare 2006, 210). Figure 4 shows a chart whose extreme simplicity makes it easy for an engineering firm’s customer audience to view and recall minimal data.

Cropped and labeled photos that focus on designated aspects of a product can also serve this function. An example is a slide containing a photo that focuses on the landing surface of the helideck of an offshore drilling platform plus a callout that states the dimensions and other features of the helideck. This combination of illustration plus relevant verbal commentary exemplifies what has been called “the genuine integration of verbal and visual display” (Dragga 1992, 62).

These types of visuals as well as “motion graphics (video and animation sequences) . . . equations, quotations, and other key text elements” have been referred to as “exhibits,” that is, “substantive” graphics whose “communication function cannot be fulfilled through the oral channel” (Farkas 2005, 316). These visuals appeal to the logic of the audience, which in a technical marketing presentation is the potential customer.

The depiction of benefits is different because benefits (and advantages, which are generic benefits) are tied to emotions rather than to logic. Emotions are particular to individuals and individual situations, such as recommending a specific product or service to meet a certain customer’s need. Visuals such as photographs “focus on traits of an individual case,” which makes them inappropriate for making generalizations (Manning and Amare 2006, 203) but ideal for inclusion in marketing slides. That is because the factor most responsi-

This talk discusses achieving your transportation goal with our railway system.

You get two-day delivery of lumber with our railway system.



Reliable



Efficient

Speed that meets your demands

Project completion will take 4 years.

	2008	2009	2010	2011
Planning	[Progress bar]			
Track design	[Progress bar]			
Construction	[Progress bar]		[Progress bar]	
Year 1 operation & maintenance			[Progress bar]	

Realistic 4-year time line

The contract requirement for railway design experience is exceeded by our engineers.

Engineers Tom Burns and Agnes Grover



32 years of rail system engineering experience


7

Figure 7. The overview slide presents images of the section slides that the audience will see later in the presentation. Top inset: Top photo ©iStockphoto.com/Randy Mayes; bottom photo ©2006 JupiterImages and its Licensors. All Rights Reserved. Bottom inset: Photo ©Ann Jennings 2008.

The contract requirement for railway design experience is exceeded by our engineers.

Engineers Tom Burns and Agnes Grover



Freight rail and mass transit design: 32 years

Co-managers of the Brazil BF-01 project

Co-managers of the MetroCity project


8

Figure 8. This section slide introduces the project leaders. Photo ©Ann Jennings 2008.

Completed joint projects foretell the desired collaborative atmosphere.



Project BF-01
Brazil 2001



Project DV-05
Desert View 1995



9

Figure 9. Demonstrating successful past projects with a customer can increase your firm’s competitiveness for a new contract. Top photo ©2006 JupiterImages and its Licensors. All Rights Reserved. Bottom photo ©iStockphoto.com/Adrian Beesley.

Rail Trends Journal verifies our systems’ compatibility with natural settings.

Switches and tracks co-exist with the forest.



10

Figure 10. The sentence headline transfers the customer’s trust from the presenter to a credible third-party “proof source.” Photo ©iStockphoto.com/MegapixelMedia.

Cost containment over the life of your project results from our team's experience.



Our engineers know the local terrain.



Our managers know the local politics.

 11

Figure 11. The engineering firm offsets its higher bid by offering expertise that will help control overall project costs. Top photo ©2006 JupiterImages and its Licensors. All Rights Reserved. Bottom photo ©iStockphoto.com/Mike Bentley.

In summary, your project goals are satisfied fully by our railway system.



Two-day delivery of your lumber



Collaboration that overcomes challenging terrain





Project follow-through from forest to sawmill

Questions?  12

Figure 12. This conclusion slide makes the final claim in the presentation and restates three benefits that match the explicit needs stated by the customer in the Request for Proposals. Top photo ©iStockphoto.com/Randy Mayes. Center and two bottom photos ©2006 JupiterImages and its Licensors. All Rights Reserved.

ble for closing a sale is benefits. Benefits are individualized to the prospective customer, and benefits appeal to the prospective customer's emotions. In Figure 2, the table appeals to the prospective customer's logic, and the photo of the female student appeals to the emotions. In an engineering marketing presentation, photos such as those in Figure 5 can arouse the audience's emotions.

According to a firm that is a national leader in training and consulting on proposal writing, photographs are a top choice of illustrations for proposals (Newman 2001–2003). This preference is applicable to technical marketing presentations, which often are outgrowths of proposals. Major reasons for favoring photos are that they “convey realism and authenticity,” and they can “make the benefits seem real. The reality of a photograph emotionally reinforces your message” (Newman 2001–2003, 111). Because benefits are the factor that closes sales, it seems sensible to use emotion-stimulating illustrations to bolster the power of the verbally stated benefits.

Preferred photos include those of existing processes or products proposed for use in a particular contract. Such photos present persuasive evidence of actual accomplishments. Examples are photos of work teams, steps in construction, and projects in their original and finished conditions. Substitutes are photographs of “models or prototypes.” Sources of illustrations include your own firm, your present customers, and your prospective customers (Newman 2001–2003, 111–113, 183–184). In addition, “the visual richness of a photograph can more easily convey an atmosphere” (Doumont 2002, 222).

A powerful argument for using emotionally gripping visuals can be applied to engineering marketing presentations:

It doesn't matter how technical your topic is. It doesn't matter how dense the ideas are. If you really and truly are trying to sell people, you must do it with simple, emotional, memorable images. If the audience can't remember what you had on the screen without looking at their notes, you have failed. (Godin 2004, 217)

ADDITIONAL WAYS TO STRENGTHEN MARKETING SLIDES

Although features, benefits, and advantages have earned a prominent place in sales situations, other techniques and studies can bring freshness to technical marketing slides. To show this, the remainder of this tutorial presents highlights of a customer-oriented presentation with slides created specifically to exemplify particular points. The slides incorporate sentence headlines and visual evidence, and they display benefit statements that assure a potential customer that the engineering firm has identified and understood the explicit customer need(s) stated in the RFP.

Because bidders may also converse with customers during the preparation phase of a proposal or presentation, explicit needs may also have been confirmed that way.

Some of the slides use additional means of persuasion that complement features, benefits, and advantages and that translate easily into sentence headlines and visual evidence. These slides persuade by appealing to prior business dealings, asserting knowledge and establishing credibility, transferring trust, referencing the RFP, making a negative seem desirable, answering buyer-role questions, and satisfying unspoken buyer motivations.

HIGHLIGHTS OF AN ENGINEERING SALES PRESENTATION

This section reviews five major categories of slides in a presentation: title, overview, section, body, and conclusion. Readers are referred to Alley and Neeley (2005) and Farkas (2005) for additional information on the roles of categories of slides.

Title slide

A key to engaging a customer's attention is a strong, pertinent title slide, such as Figure 6. This slide performs four functions. First, it sets a customer-focused tone by displaying prominently the name of the customer, “Buyer Corporation,” and it does this before mentioning the name of the engineering firm. Second, it identifies the presenting firm and the speaker, “Houston Engineering Company” and “Meghan Johnston,” in a smaller font than that used for the name of the customer; it also displays the firm's logo. Some presenters may also show the customer's logo. Third, it announces the content of the presentation by stating the objective of the contract: to transport the customer's lumber from the logging site to the milling site. Finally, it shows the forthcoming slide format by incorporating a strong image that will appear later in the presentation. This slide omits a sentence headline because the purpose of the slide is simply to announce an event rather than to make and illustrate a claim.

Overview slide

The overview slide states the purpose of the presentation and displays images that correspond to the main sections of the presentation. Each of the images will appear again on the first slide of the appropriate section. Figure 7 presents an example of an overview slide.

If your customer has specified the contents of your presentation, you will naturally fulfill the customer's wishes. Otherwise, you may want to choose one of the traditional patterns for organizing presentations as advocated by major proposal consultants and use that pattern beginning with the overview slide: “order of importance, time, cause and effect, or spatially” (Newman 2001–2003, 116). Figure 7 exemplifies a presentation organized from

most important (project goals and customer benefits) to least important (time line and personnel).

Section slides

Section slides divide the presentation into logical segments and introduce groups of body slides. The first slide in a section repeats the appropriate image from the overview slide. Figure 3, the first slide in its section, repeats the top image from Figure 7, the overview slide.

The headline of Figure 3 uses the pronouns “you” and “our.” This practice sets a tone that encourages audience receptivity, and it humanizes (Pugh and Bacon 2005, 157) and personalizes the presentation in a way that using the formal names of the engineering firm and the customer cannot. There is no confusion about who the two entities are: the customer (“you”) has selected the engineering firm (“our”) to make the presentation. In addition, the engineering firm’s logo appears discreetly on the slide. Just as the title slide did, the section slide emphasizes the customer (“you”) by naming it before the engineering firm (“our”).

The use of pronouns avoids the stilted tone that would result if “Buyer Corporation” and “Houston Engineering Company” appeared on the slides instead of “you,” “your,” “we,” and “our.” Because they are short words, pronouns also free up space on slides for other information.

Figure 4 is the second section slide. It introduces the time line for the project. Note that milestones are depicted in a simple image and in minimal text. Additional details, which already appear in the related proposal, would clutter this slide. If details so complex as to require a spreadsheet are deemed necessary for a presentation, they can be distributed in a handout.

Figure 8 is the third and final section slide of this presentation. The slide presents the faces of the team that will lead the contract work. As in earlier slides, the customer’s need is stated first: “The contract requirement for railway design experience (need) is exceeded by our engineers.” Presumably, full résumés were included in the engineering company’s response to the customer’s RFP. The slide presents only pertinent highlights.

Body slides

Body slides convey verbal and visual information intended to convince your customer to award a contract to your engineering firm. Here, in the longest portion of the presentation, you can educate the customer about the project, as well as about your firm’s capabilities. Here, too, you can appeal to customer motivations through one or more of the six techniques described below. The body slides must also continue to prove the initial claim shown in Figure 3 that the engineering firm can satisfy the customer’s need for a railway system.

Appeal to prior business dealings. One of the ways to prove your claim is to emphasize prior business relationships between your firm and your customer. Because major engineering contracts are often made between parties that are acquainted with each other, a slide such as the one shown in Figure 9 can establish the necessary credibility.

This slide appeals to the engineering firm’s successful past ventures with the prospective customer. The appeal is stated in the sentence heading as a benefit (the buyer’s explicit need for a collaborative atmosphere) that is supported by visual evidence (photographs of two prior joint projects). This tactic exemplifies the principle of “relational exchange” from the buyer’s and seller’s lengthy knowledge of each other, a relationship that “virtually precludes other primary exchange partners who could provide similar benefits” (Miles, Arnold, and Nash 1990, 21, 25). Reinforcing this principle is a statistic offered by the proposal firm Shipley Associates: “Incumbents win approximately 80% of all re-competes” in the world of successful proposals, assuming successful past projects with a customer (Newman 2001–2003, 185).

Assert knowledge and establish credibility. In the case of an engineering firm and prospective customer that have not worked on previous joint projects, the speaker’s knowledge of the customer and of the engineering needed for the project is particularly important. The writer’s responsibility is to help the speaker earn the trust of the prospective customer. One way to do this is to show photos of industry awards. Photos of credentials, certifications, guarantees, and warranties are also useful (Alessandra, Wexler, and Barrera 1987, 151).

Transfer trust. Another way to establish trust is to use the technique of “trust-transference.” It enhances the credibility of an engineering firm’s presentations to both new and established customers by “transferring trust from the salesperson to another source [a ‘proof source’] that is perceived as trustworthy” (Milliman and Fugate 1988, 3 and 6).

Figure 10 shows an example of trust-transference to a “proof source,” in this instance, a trade publication. The photo verifies the engineering firm’s concern for the environment.

Reference the RFP. Another technique for convincing an audience that the speaker knows what he or she is talking about is to repeat wording carefully selected from the RFP (Pugh and Bacon 2005, 61–64), for instance, the main goal of the contract. If a slide focuses on a benefit that satisfies the buyer’s self-stated, explicit need, as in Figure 3, the speaker will seem well informed about the customer. The key is for the technical communicator to be perceptive enough to identify the customer’s needs and confident enough to focus the presentation’s text and visual evidence on those needs and the benefits that satisfy them, rather than focus on the features of the engineering firm’s services and products.

Make a negative seem desirable. If a speaker presents a two-sided, rather than one-sided, view of a service or product, audience members pay more attention to the message and analyze it more closely than they would a one-sided presentation. In processing the unexpected negative information, audience members retain the message longer and are persuaded better by it. The two-sided presentation exhibits “disconfirmation of expectations” (Smith and Hunt 1987, 11–16).

A situation ideal for treatment as a disconfirmation of expectations occurs when the engineering firm’s bid is higher than those of the firm’s competitors. In such a case, the engineering firm may point to the importance of “lowest total cost or lowest cost of ownership, the initial price being but one data point in a much larger calculation.” As shown in Figure 11, the bidding firm can acknowledge and offset its higher bid by stressing the firm’s pertinent capabilities (Pugh and Bacon 2005, 32–33).

This unexpected approach topples the customer’s expectations that the engineering firm has only its profits as a motivation in recommending a course of action. The approach shows that the engineering firm is presenting an unbiased and thus credible view of its products or services.

Answer buyer-role questions and satisfy unspoken buyer motivations. The members of a customer audience play certain roles, three of which are easily identified and can be addressed in a presentation: technical buyer, economic buyer, and user buyer. The technical buyer is a screener who asks, “Do the proposed approach and qualifications meet our specifications?” The economic buyer scrutinizes the business side of a proposal, “give(s) final approval to buy,” and asks, “What will be the overall performance improvement and return on this investment?” The user buyer evaluates the way the seller’s product or service will affect “operational performance” and asks, “How will the project affect my job and those I manage?” (Freed, Freed, and Romano 2003, 84–90).

These spoken or unspoken questions imply underlying motivations as defined in Maslow’s well-known “pyramid of [personall] needs” (Buzzotta and Lefton 2005, 39–41; Maslow 1943, 394). Among the human motivations identified by Maslow, those most applicable to sales presentations are safety and esteem. An updated list of customer motivations worded from the point of view of sales professionals mentions “Fear, vanity, desire for gain (keep up with the Joneses), security, love of family, personal pleasure, desire to succeed, comfort or luxury, self-preservation, and prevention of loss” (Futtrell 2006, 117). All these motivations affect the way that the prospective customer’s employees handle the all-important “Explicit [corporate] Need” (Rackham 1988, 100–102, 108; 1996, 131) that the contract is supposed to fulfill.

These motivations can be used by technical communicators to heighten customer receptivity to a bid. In a presentation that incorporates dozens of slides, it is reasonable to include at least one slide that addresses each of the buyer-role questions and satisfies the associated motivations. Figure 5, for instance, exemplifies an appeal to a technical buyer, assuring that person that a contract specification—concern for environmental and social impact—will be met by the engineering firm. This specification corresponds to the motivations of esteem and prevention of loss.

The photographs in Figure 5 also suggest that “Vivid information tends to overwhelm information presented in abstract or technical language and to be given more weight that a coldly rational analysis would justify . . . such images . . . work through prompting the viewer to develop associations rather than through building linear, rational arguments” (Hill 2004, 120–121). Statistics on village size and condition or on crop yields lack the emotional appeal of the benefit of social and environmental responsibility.

Conclusion slide

The final slide supplies the presenter with the opportunity to close the sale by asking for the order, a concept familiar to sales people and customers. In the case of an engineering presentation, the presenter may not be the official who will formally ask for the order, but the presenter can certainly prepare the way for the closer by summarizing the reasons that the prospective customer should award the contract to the engineering firm.

These reasons are the customer benefits discussed earlier in the presentation. An extensive study conducted at Xerox Learning Systems concluded that “the most powerful way to close a sales call involves a summary of benefits that interest the customer” (Futtrell 2006, 431). This study corroborates Rackham’s statement concerning the power of benefits to persuade buyers right up to the close of a sale (1988, 104, 108–110).

Figure 12 shows a conclusion slide that summarizes customer benefits. In restating the benefits, the slide emphasizes that the engineering company will solve the problems and fulfill the needs of the prospective customer. The writer thereby grooms at least “55 percent of the audience . . . [to] draw the appropriate conclusion.” Presenting a clear conclusion to the customer is crucial because “speakers who fail to state conclusions for their listeners can expect only about 12 percent of them to arrive at those conclusions on their own . . . [and] 30 percent will draw some conclusion the speaker did not intend” (Warlum 1992, 221).

To stimulate discussion, the conclusion slide also displays the word “Questions?” (Alley and Neeley 2005, 422).

CONCLUSION

Benefits accrue to the technical communicator who experiments with the recommended slide design and content, as well as the marketing insights discussed here. A primary benefit is the credibility gained from the suitable use of benefits, features, advantages, and common human motivations. Another benefit is an expanded repertoire of persuasive techniques, including ones that allow a technical communicator to emphasize an engineering firm's strengths and find salable points in its weaknesses. And if the situation demands, technical communicators can point to authoritative sources of information regarding slide design, slide content, and techniques of persuasion. **TC**

REFERENCES

- Alessandra, A. J., P. S. Wexler, and R. Barrera. 1987. *Non-manipulative selling*. New York, NY: Prentice Hall.
- Alley, M. 2003a. *The craft of scientific presentations: Critical steps to succeed and critical errors to avoid*. New York, NY: Springer-Verlag.
- . 2003b. Design of presentation slides. <http://writing.engr.psu.edu/slides.html>.
- , and K. A. Neeley. 2005. Rethinking the design of presentation slides: A case for sentence headlines and visual evidence. *Technical communication* 52:417–426.
- , and H. Robertshaw. 2004a. Rethinking the design of presentation slides: Creating slides that are readily comprehended. Paper 61889 presented at the International Mechanical Engineering Conference and Exposition, Anaheim, CA, November 13–19, 2004, <http://www.writing.engr.psu.edu/speaking/IMECE2004-61889.pdf>.
- and ———. 2004b. Rethinking the design of presentation slides: The importance of writing sentence headlines. Paper 61827 presented at the International Mechanical Engineering Conference and Exposition, Anaheim, CA, November 13–19, 2004, <http://www.writing.engr.psu.edu/speaking/IMECE2004-61827.pdf>.
- , M. Schreiber, K. Ramsdell, and J. Muffo. 2006. How the design of headlines in presentation slides affects audience retention. *Technical communication* 53:225–234.
- Atkinson, C. 2005. *Beyond bullet points: Using Microsoft PowerPoint to create presentations that inform, motivate, and inspire*. Redmond, WA: Microsoft Press.
- Brumberger, E. 2003. The rhetoric of typography: The persona of typeface and text. *Technical communication* 50:206–223.
- Buzzotta, V. R., and R. E. Lefton. 2005. *Dimensional selling*. New York, NY: McGraw-Hill.
- Doumont, Jean-Luc. 2002. Verbal versus visual: A word is worth a thousand pictures, too. *Technical communication* 49:219–224.
- . 2005. The cognitive style of PowerPoint: Not all slides are evil. *Technical communication* 52:64–70.
- Dragga, S. 1992. Evaluating pictorial illustrations. *Technical communication quarterly* 1:47–62.
- Farkas, D. 2005. Understanding and using PowerPoint. In *Proceedings of the STC annual conference*. Arlington, VA: Society for Technical Communication, pp. 313–320.
- Freed, R. C., S. Freed, and J. D. Romano. 2003. *Writing winning business proposals: Your guide to landing the customer, making the sale, persuading the boss*. New York, NY: McGraw-Hill.
- Futrell, C. M. 2006. *Fundamentals of selling: Customers for life through service*, 9th ed. New York, NY: McGraw-Hill Irwin.
- Godin, S. 2004. *Free prize inside! The next big marketing idea*. New York, NY: Portfolio.
- Gross, A. G. 1983. A primer on tables and figures. *Journal of technical writing and communication* 13:33–55.
- Gurak, L. 2000. *Oral presentations for technical communication*. Needham Heights, MA: Allyn & Bacon.
- Harner, S. W., and T. G. Zimmerman. 2002. *Technical marketing communication*. New York, NY: Pearson Education.
- Hill, C. A. 2004. Reading the visual in college writing classes. In *Visual rhetoric in a digital world: A critical sourcebook*, Ed. C. Handa. Boston, MA: Bedford/St. Martin's, pp. 107–130.
- Mackiewicz, J. 2007. Audience perceptions of fonts in projected PowerPoint text slides. *Technical communication* 54:295–307.
- , and R. Moeller. 2004. Why people perceive typefaces to have different personalities. In *Proceedings of the 2004 IEEE international professional communication conference*. Piscataway, NJ: IEEE, pp. 304–313.

- Manning, A., and N. Amare. 2006. Visual-rhetoric ethics: Beyond accuracy and injury. *Technical communication* 53:195–211.
- Maslow, A. H. 1943. A theory of human motivation. *Psychological review* 50:370–396.
- Mason, L. D. 1997. Design issues for producing effective multimedia presentations. *Technical communication* 65:65–71.
- Miles, M. P., D. R. Arnold, and H. W. Nash. 1990. Adaptive communication: The adaptation of the seller's interpersonal style to the stage of the dyad's relationship and the buyer's communication style. *Journal of personal selling & sales management* 10:21–27.
- Milliman, R. E., and D. L. Fugate. 1988. Using trust-transference as a persuasion technique: An empirical field investigation. *Journal of personal selling & sales management* 8:1–7.
- Newman, L. 2001–2003. *Proposal guide: For business development and sales professionals*, 2nd ed. Farmington, UT: Shipley Associates.
- Porter-Roth, B. 2002. *Request for proposal: A guide to effective RFP development*. Boston, MA: Addison-Wesley.
- Pugh, D. G., and T. R. Bacon. 2005. *Powerful proposals: How to give your business the winning edge*. New York, NY: Amacom.
- Rackham, N. 1988. *SPIN selling*. New York, NY: McGraw-Hill.
- . 1996. *The SPIN® selling field book: Practical tools, methods, exercises, and resources*. New York, NY: McGraw-Hill.
- Shaw, G., R. Brown, and P. Bromiley. 1998. Strategic stories: How 3M is rewriting business planning. *Harvard business review* 76:41–50.
- Smith, M. F., and J. M. Hunt. 1987. Disconfirmation of expectations: A method for enhancing the effectiveness of customer communications. *Journal of personal selling and sales management* 7:9–19.
- Vincler, J. E., and N. H. Vincler. 1996. *Engineering your writing success: How engineers can master on-the-job communication skills*. Belmont, CA: Professional Publications.
- Walsh, T. 1998. Illustrations in oral presentations: Photographs. *IEEE transactions on professional communication* 41:209–212.
- Warlum, M. F. 1992. Improving oral marketing presentations in the technology-based company. In *Writing and speaking in the technology professions: A practical guide*, Ed. D. F. Beer. New York, NY: IEEE Press, pp. 219–222.

ANN JENNINGS, PhD is a senior member of STC. She is a Professor of English and Coordinator of the Master of Science in Professional Writing and Technical Communication at the University of Houston-Downtown. Her background includes 13 years in the financial services industry, where she sold financial products and wrote and edited sales training material for securities brokers. In addition to her university teaching and administrative responsibilities, she provides editing services in the field of forensic psychiatry and training workshops on writing and presentation skills for engineering and oil firms. She has spoken at the meetings of professional societies in the fields of engineering, proposal writing, and technical communication.