

Certification Panel Preparation

Facilitator Guide



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Please note: Company name and all proprietary information has been removed from this document.

XYZ Certification Panel Preparation

Facilitator's Notes

Purpose The purpose of this lesson is to prepare participants for the Certification Panel Assessment – the final step in their certification training.

Materials The facilitator will need:

- Power Point Presentation for this lesson
- White board for use by facilitator
- Flip chart for use by facilitator
- 1 white board or flip chart for each group of 3 participants to use during practice presentations
- Breakout rooms to use for practice presentations, if needed, to accommodate large number of groups
- Timer for practice sessions
- Handouts for participant
- 2 practice scoring sheets per participant
- Case studies A, B, and C

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Facilitator’s Notes, Continued

Materials,
(continued)

The student will need:

- Participant Materials (Participant Guide)
- Pen or pencil
- Paper for taking extra notes during presentation scoring

Prerequisites

Participants must have completed the following:

- The XYZ Certification Program pre-test with a passing grade
or
- Required courses in the XYZ Certification Program curriculum

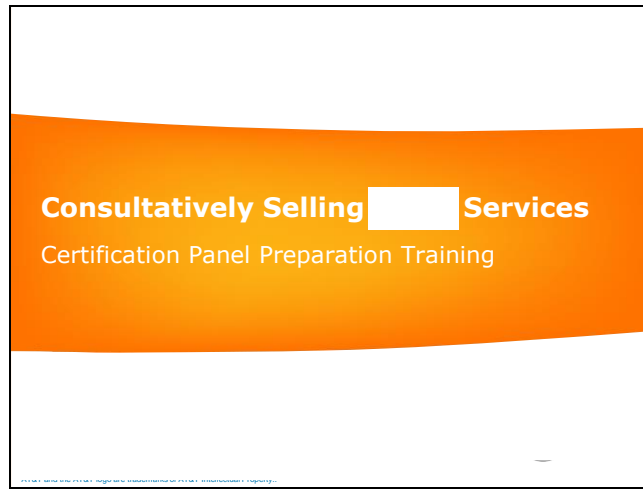
Timing

This lesson will take approximately 4.5 hours to complete.

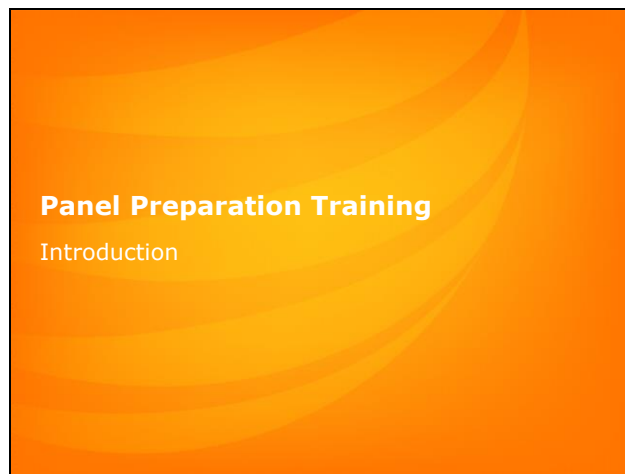
11:30 – 12:00	30 min.	Review panel process and scoring document
1:00 – 1:10	10 min.	Introduce mock panel, break into groups, and distribute case studies.
1:10 – 1:40	30 min.	Participants prepare presentations
1:40 – 1:50	10 min.	Facilitator distributes problem/solution documents for first case study, instructs scorers, and gives scorers time to review documents
1:50 – 2:10	20 min.	First participant in group presents
2:10 – 2:20	10 min.	Panel gives feedback to first participant
2:20- 2:35	15 min.	Break
2:35– 2:45	10 min.	Facilitator distributes problem/solution documents for second case study, instructs scorers, and gives scorers time to review documents
2:45 – 3:05	20 min.	Second participant in group presents
3:05 – 3:15	10 min.	Panel gives feedback to second participant
3:15 – 3:30	15 min.	Break
3:30 – 3:40	10 min.	Facilitator distributes problem/solution documents for third case study, instructs scorers, and gives scorers time to review documents
3:40 – 4:00	20 min.	Third participant in group presents
4:00 – 4:10	10 min.	Panel gives feedback to third participant
4:10 – 4:30	20 min.	Debrief
4:30 – 5:00	30 min.	Conclusion and Participant Feedback Survey

Lesson Introduction

Consultatively Selling XYZ Services



Introduction



Explain:

As you know, the Certification Panel Assessment is the final step in the Certification process. You have already completed the Web-based Panel Preparation course in which you learned about the purpose, structure, and evaluation criteria for the assessment.

As you remember from that course, the assessment includes two parts: a Question & Answer session, and an opportunity for you to prepare and give a solution presentation using the XYZ methodology.

In this module, we will focus on helping you prepare for the second part of the assessment: your solution presentation.

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Lesson Introduction, Continued

Module Overview



Module Overview

This module will prepare you for Part 2 of the Certification Panel Assessment by helping you:

- Review the : presentation structure.
- Practice the : methodology in a safe environment.
- Receive feedback from your peers to increase the effectiveness of your sales presentations.

Explain:

In this module we will review the XYZ structure that you will use for your solution presentation.

We will also give you a chance to practice preparing and giving your panel presentation to a small group of your peers.

You will also receive feedback from your peers to help you increase the effectiveness of your presentation.

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Lesson Introduction, Continued

Module Objectives



Module Objectives

After you have completed this module, you will be able to:

- Describe the presentation structure.
- Evaluate the presentations of your peers using a standardized presentation coaching document.
- Give a panel presentation in a mock panel environment.

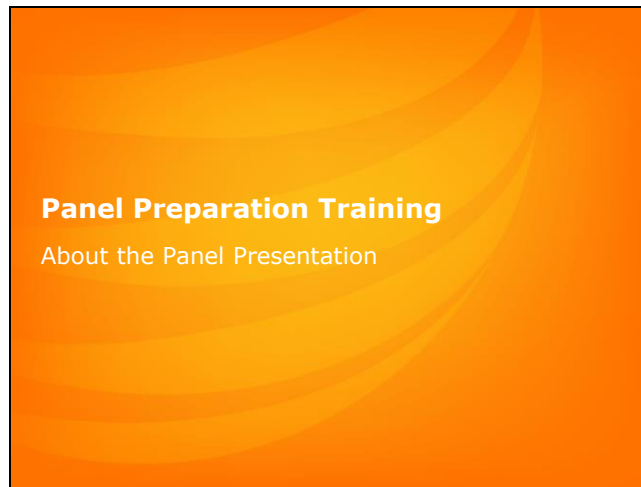
Explain:

After you have completed the lesson, you will be able to:

- Describe the XYZ structure that you will use for your panel presentation.
 - Use a standardized scoring document to evaluate the presentations of your peers.
 - Give a panel presentation in a mock panel environment.
-

About the Certification Panel Assessment

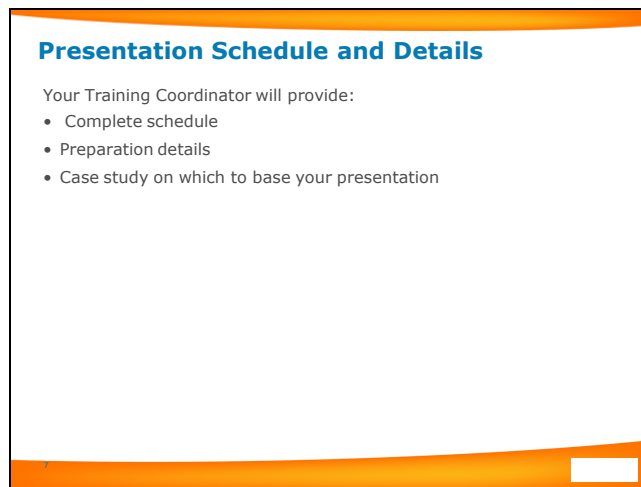
Panel Presentation



Explain:

First, we'll do a quick review of the implementation, approach and structure of the panel presentation.

Presentation Schedule and Details



Explain:

The Training Coordinator for your sales center will give you the exact time and location of your panel assessment as well preparation details and the case study on which you will base your presentation.

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About the Certification Panel Assessment, Continued

Solution Presentation Approach



Solution Presentation Approach

Approach:

- Assume you previously met with client to gather data.
- Now you are presenting what you have learned and solutions.
- There are multiple titles in room: CEO, CIO, and IT Director. (Balance consultative business conversation with technical.)
- Client executive team has limited time. Target 20 minutes for presentation.

Note:

- This is a one-way presentation of your proposed solution. (Not a discovery session.)
- However, panelists may ask for clarification or respond to questions you ask during your presentation.

Explain:

You should approach your presentation as if you had previously met with the client to gather data. You are now coming back to present what you have learned and provide solutions to your customer.

Assume that there is a CEO, a CIO, and an IT Director in the room. This means you will need to balance consultative business conversation with technical information.

You should target 20 minutes for your presentation.

Again, this is not a discovery session. It will be a one-way presentation of your solution. The panelists have been asked not to give you non-verbal cues like nodding their heads or other indications of how you are doing. You probably will not even receive a lot of eye contact from them because they will be busy tracking what you are saying and checking off items on their scoring documents.

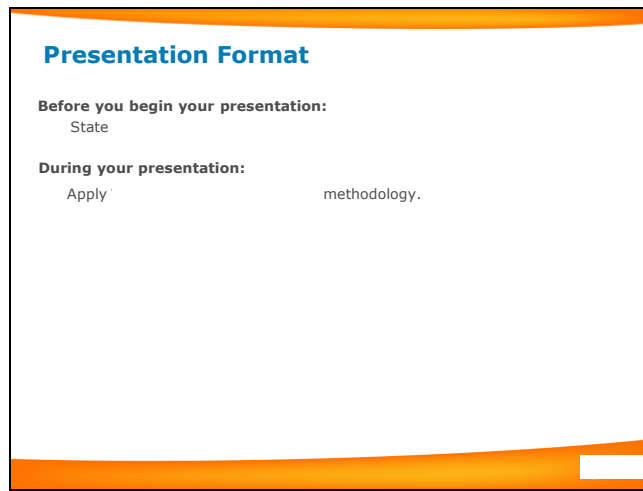
However, panelists may interact with you to:

- Ask you to clarify something you have said.
- Respond with simple answers such as “yes” or “no” to questions you might ask the customer – for example, you might ask them to verify your understanding of their business issues or you might use a question to close.

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About the Certification Panel Assessment, Continued

Presentation Format



Explain:

Now let's review the presentation format.

Before you begin your actual presentation – it is important that you state, to the panel, [Proprietary information removed.]

Once you begin your presentation, you should follow the XYZ methodology.

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About the Certification Panel Assessment, Continued

The XYZ Presentation Flow



[Review of presentation flow.
Proprietary information removed.]

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About the Certification Panel Assessment, Continued

Network Diagram



Diagram

Use | diagram to:

- Reinforce key points from your presentation
- Illustrate current and proposed

May use:

- Power Point slides
- Other available media such as a whiteboard or easel sheets*

*Note: Maximum of four sheets of easel paper may be used

Diagrams:

- Are not required to be detailed design
- Should accurately represent
- Visually illustrate benefits of

Draw diagrams:

- Before you begin your presentation and/or during your presentation

Explain:

In your panel presentation, you are required to present a diagram to reinforce key points and illustrate the current and proposed solutions.

You may present your diagram using Power Point slides or other media that may be available in the presentation room such as a whiteboard or easel sheets. Please note that you may use a maximum of four easel sheets for your diagrams.

The diagrams are not required to be a detailed design, yet they should accurately represent the current and proposed solutions.

You can either draw your diagrams before you begin your presentation, during your presentation, or a mixture of both. Either way, diagramming is required for this presentation.

Global Segment only:

Most panel presentations for the Global segment will be conducted using Telepresence or videoconferencing. As a result, we recommend PowerPoint slides for Global participants as opposed to whiteboards or easel paper.

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About the Certification Panel Assessment, Continued

Q&A



Ask:

What questions do you have about the implementation, approach, and structure of the Panel Presentation?

Scoring the Practice Presentation

Practice Presentation



Explain:

As I mentioned earlier, in this module we'll give you a chance to practice preparing and giving a presentation. We'll divide you into groups where you will take turns presenting and scoring presentations for each other.

I want to assure you that the goal of this exercise is not for each of you to give a perfect presentation. Our time during this class is so limited that it will not be possible to do so. However, what we would like each of you to walk away with today is an overall understanding of how your presentation will flow, as well as what it will take to prepare and present a successful presentation during your panel assessment.

Also, the experience of scoring presentations for others in your group will help deepen your understanding of the required criteria and presentation structure.

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Scoring the Practice Presentation, Continued

**Practice
Presentation,**
(continued)

You will use a standardized scoring document to score the presentations of others in your group. These documents are very similar to the rating sheets that panelists will use to score your presentation during your panel assessment.

I'll give you two of these documents since you will be scoring presentations for two of your peers. Then I'll go through each section of this document and explain how to use it.

[Proprietary information removed.]

Practice Presentation Exercise

Practice Presentation Exercise



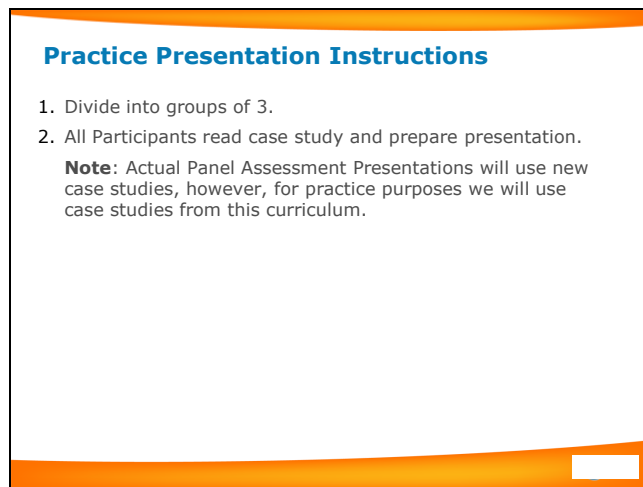
Explain:

Now it's your turn to practice giving and scoring a panel presentation.

Group Activity



Practice Presentation Instructions



Explain:

For our practice we'll follow these instructions:

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Practice Presentation Exercise, Continued

**Practice
Presentation
Instructions,
(continued)**

1. First, we'll divide into groups of 3.
(If there are extra people, do not create a group of 4. Simply make two groups of two.)

Here's how the practice will work.

After you are in your groups, I'll hand out practice case studies. Everyone in your group will get a different case study. You will use these to prepare your presentation.

As we mentioned earlier, the case studies you will use for these practices may be similar to the ones you used during the courses in this curriculum so you will be familiar with them. But when you take the actual Panel Assessment, you will use new case studies that you have not seen before.

2. Next, I will give you time to read the case study and prepare your presentation.
3. After you have prepared, each of you will have a chance to give your presentation while the other members of your group will score your performance.
4. When you are finished or time is up (whichever comes first) the panelists will share scores and feedback with the presenters. Remember, the goal is to help them take their skills to the next level.
5. After the first round, we'll repeat the process until everyone has had a chance to present.

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Practice Presentation Exercise, Continued

Practice Presentation Schedule



1. Preparation for Presentation	30 minutes
2. Panel Presentation	20 minutes
3. Panel Feedback	10 minutes

Repeat steps 2 and 3 until all participants in your group have presented.

Explain:

Here is the timing for each segment:

- You'll have about 30 minutes to prepare your presentation.
- You will be allowed 20 minutes to present to the panel. This is the same amount of time that you'll have during the actual Assessment.
- The panel will have 10 minutes to give feedback and comments to the presenter.
- We'll repeat steps two and three until everyone in your group has had a chance to present.

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Practice Presentation Exercise, Continued

Group Activity



Practice Session



Practice Session:

Practice Session		
	All participants read case study and prepare presentation	30 minutes
	First participant in group presents	20 minutes
	Panel gives feedback to first participant	10 minutes
	Second participant in group presents	20 minutes
	Panel gives feedback to second participant	10 minutes
	Third participant in group presents*	20 minutes
	Panel gives feedback to third participant	10 minutes

* If you are in a group of 2, during the third presentation, please serve as a panel member for another group.

Do:

Follow the steps below. During the Practice Presentation session, use the Practice Session slide to track your progress.

A blue arrow will display next to each step as you click.

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Practice Presentation Exercise, Continued

Step	Action
1	<p>Have participants divide into groups of 3. Remind them that if there are extra participants, they should create two groups of two rather than a group of four.</p>
2	<p>Hand out case studies:</p> <ul style="list-style-type: none"> • Ask participants to take out their case studies, then have each group number off: one through three. <p>Assign the following case studies on which participants will base their presentations.</p> <p>[Proprietary information removed.]</p> <p>*Note: Use case studies that are most relevant to the participant’s business segment.</p>
3	<p>Preparation:</p> <ol style="list-style-type: none"> 1. Remind participants that they will have 30 minutes to prepare their presentation. 2. Tell participants to begin. 3. Set your timer for 20 minutes 4. Click the Practice Session slide to display the blue arrow next to the appropriate step. 5. Circulate through the classroom to answer any questions participants might have during preparation. 6. When the timer sounds, ask participants to stop.

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Practice Presentation Exercise, Continued

Group Activity, (continued)

Step	Action
4	<p data-bbox="553 449 1401 512">Hand out Problem/Solution documents to scorers and instruct scorers.</p> <ol data-bbox="602 520 1414 1199" style="list-style-type: none"><li data-bbox="602 520 1414 625">1. Participants with A case studies will present first. Give each person who will be scoring the presentation a copy of the Case Study Problem/Solution document. Note: Give only to scorers. Presenters should not see the problem/solution before they give their presentations.<li data-bbox="602 701 1414 806">2. Ask scorers not to share the problem/solution document with presenters who are using this case study before they give their presentation.<li data-bbox="602 814 1414 877">3. Ask scorers to write the presenter's name and their own name at the top of the scoring document.<li data-bbox="602 886 1414 1062">4. Instruct scorers in the following:<ul data-bbox="667 919 1414 1062" style="list-style-type: none"><li data-bbox="667 919 1414 1062">– During the presentation, the information tends to come fast so, if needed, they can use a separate piece of paper to jot down notes to enter on the scoring document after the presentation is over.<li data-bbox="602 1071 1414 1199">5. After you have instructed the scorers, give them five minutes to quickly review the problem/solution document, scoring document, and case study from which the presenter will be working.

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Practice Presentation Exercise, Continued

Group Activity, (continued)

Step	Action
5	Instruct presenters and begin presentations. <ol style="list-style-type: none">1. Remind presenters to state their solution before the presentation begins.2. Remind presenters that they will have 20 minutes to give their presentation.3. Tell participants to begin.4. Set your timer for 20 minutes.5. Click the Practice Session slide to display the blue arrow next to the appropriate step.6. Circulate through the classroom to observe presentations.7. When the timer sounds, ask participants to stop.
6	Ask scorers to give feedback to participants. <ol style="list-style-type: none">1. Remind groups that scorers will have 10 minutes to give feedback to the presenters.2. Set your timer for 10 minutes.3. Click the Practice Session slide to display the blue arrow next to the appropriate step.4. When timer sounds, tell participants to stop.

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Practice Presentation Exercise, Continued

Group Activity, (continued)

Step	Action
7	<p data-bbox="553 447 1403 512">Hand out Problem/Solution documents to scorers and instruct scorers.</p> <ol data-bbox="602 520 1403 1203" style="list-style-type: none"><li data-bbox="602 520 1403 625">1. Participants with B case studies will present second. Give each person who will be scoring the presentation a copy of the Case Study Problem/Solution document. Note: Give only to scorers. Presenters should not see the problem/solution before they give their presentations.<li data-bbox="602 701 1403 806">3. Ask scorers not to share the problem/solution document with presenters who are using this case study before they give their presentation.<li data-bbox="602 814 1403 877">3. Ask scorers to write the presenter's name and their name at the top of the scoring document.<li data-bbox="602 886 1403 1058">4. Instruct scorers in the following:<ul data-bbox="667 919 1403 1058" style="list-style-type: none"><li data-bbox="667 919 1403 1058">– The information tends to come fast so, if needed, they can use a separate piece of paper to jot down notes to enter on the scoring document after the presentation is over.<li data-bbox="602 1066 1403 1203">5. After you have instructed the scorers, give them five minutes to quickly review the problem/solution document, scoring document, and case study from which the presenter will be working.

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Practice Presentation Exercise, Continued

Group Activity,
(continued)

Step	Action
8	<p>Instruct presenters and begin presentations.</p> <ol style="list-style-type: none"> 1. Remind presenters to state their solution before the presentation begins. 2. Remind presenters that they will have 20 minutes to give their presentation. 3. Tell participants to begin. 4. Set your timer for 20 minutes. 5. Click the Practice Session slide to display the blue arrow next to the first step. 6. Circulate through the classroom to observe presentations. 7. When the timer sounds, ask participants to stop.
9	<p>Ask scorers to give feedback to participants.</p> <ol style="list-style-type: none"> 1. Remind groups that scorers will have 10 minutes to give feedback to the presenters. 2. Set your timer for 10 minutes. 3. Click the Practice Session slide to display the blue arrow next to the appropriate step. 4. When timer sounds, tell participants to stop.
10	<p>Break</p>
11	<p>Hand out Problem/Solution documents to scorers and instruct scorers.</p> <ol style="list-style-type: none"> 1. Participants with C case studies will present last. Give each person who will be scoring the presentation a copy of the Case Study Problem/Solution document. Note: Give only to scorers. Presenters should not see the problem/solution before they give their presentations. 4. If you have groups of two, ask participants from these groups to join a group of three to serve as a panel member.

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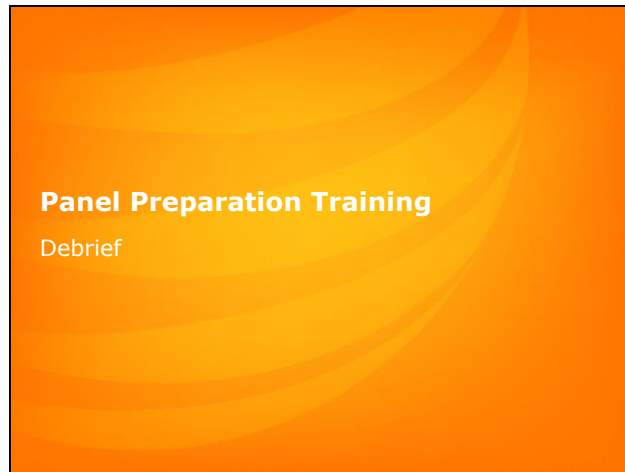
Practice Presentation Exercise, Continued

Group Activity, (continued)

Step	Action
	<ol style="list-style-type: none">5. Ask scorers not to share the problem/solution document with presenters who are using this case study before they give their presentation.6. Ask scorers to write presenter's name, and their name at the top of the scoring document.7. After you have instructed the scorers, give them five minutes to quickly review the problem/solution document, scoring document, and case study from which the presenter will be working.
12	<p>Instruct presenters and begin presentations.</p> <ol style="list-style-type: none">1. Remind presenters to state their solution before the presentation begins.2. Remind presenters that they will have 20 minutes to give their presentation.3. Tell participants to begin.4. Set your timer for 20 minutes.5. Click the Practice Session slide to display the blue arrow next to the first step.6. Circulate through the classroom to observe presentations.7. When the timer sounds, ask participants to stop.
13	<p>Ask scorers to give feedback to participants.</p> <ol style="list-style-type: none">1. Remind groups that scorers will have 10 minutes to give feedback to the presenters.2. Set your timer for 10 minutes.3. Click the Practice Session slide to display the blue arrow next to the appropriate step. <p>When timer sounds, tell participants to stop.</p>

Debrief/Conclusion

Debrief



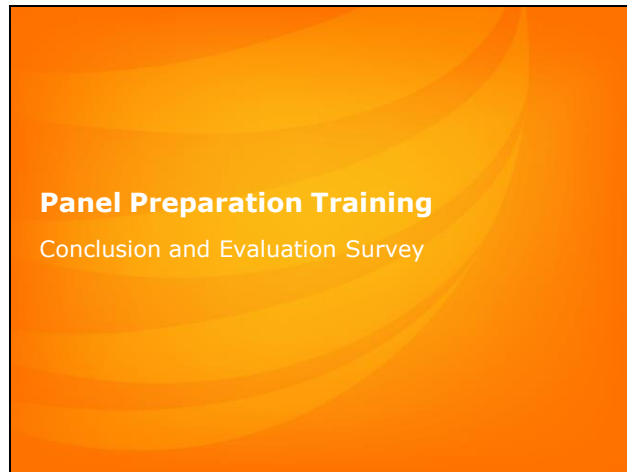
Do:

After presentations are finished, bring the class back together and facilitate a discussion about the participants' experiences presenting and scoring presentations. Sample questions include:

1. What questions do you have about your presentations or about scoring the presentations?
 2. What comments or feedback do you have about your experience as a presenter?
 3. What comments or feedback do you have about your experience as a panelist?
 4. What are some things that you liked in the presentations you saw?
 5. What is your biggest take away from this experience?
-

Conclusion and Evaluation Survey

Conclusion and Evaluation Survey



Do:

Conclude the course and ask participants to complete the evaluation survey before they leave.
