

Meeting and Presentation Skills

Unit: Legal Research and Communication

Problem Area: Verbal Communication Skills

Lesson: Meeting and Presentation Skills

■ **Student Learning Objectives.** Instruction in this lesson should result in students achieving the following objectives:

- 1** Describe the preparation and planning involved with a meeting/presentation.
- 2** Describe effective meeting and presentation delivery styles.

■ **Resources.** The following resources may be useful in teaching this lesson:

E-unit(s) corresponding to this lesson plan. CAERT, Inc. <http://www.mycaert.com>.

Asher, Spring, and Wicke Chambers. *Wooing & Winning Business: The Foolproof Formula for Making Persuasive Business Presentations*. Wiley, 1997.

Kinlaw, Dennis. *Facilitation Skills: The ASTD Trainer's Sourcebook*. McGraw-Hill, 1996.

National Association of Legal Assistants, Inc. *NALA Manual for Paralegals & Legal Assistants*, 5th ed. Cengage Learning, 2010.

Sisco, Michael, "Effective Status Meetings Lead to Successful Projects," *TechRepublic*®. Accessed Feb. 3, 2013. <http://www.techrepublic.com/article/effective-status-meetings-lead-to-successful-projects/1038880>.

Statsky, William P. *Introduction to Paralegalism: Perspectives, Problems, and Skills*, 7th ed. Cengage Learning, 2009.

Tulgan, Bruce. "Get in the Habit of Managing Your Boss Every Day," *Monster.com*. Accessed Feb. 3, 2013. <http://career-advice.monster.com/in-the-office/workplace-issues/one-on-one-boss-meetings/article.aspx>.

Zelazny, Gene. *Say It with Presentations*, 2nd ed. McGraw-Hill, 2006.



■ **Equipment, Tools, Supplies, and Facilities**

- ✓ Overhead or PowerPoint projector
- ✓ Visual(s) from accompanying master(s)
- ✓ Copies of sample test, lab sheet(s), and/or other items designed for duplication
- ✓ Materials listed on duplicated items
- ✓ Computers with printers and Internet access
- ✓ Classroom resource and reference materials

■ **Key Terms.** The following terms are presented in this lesson (shown in bold italics):

- ▶ body language
- ▶ disengagement
- ▶ facilitator
- ▶ meeting
- ▶ pitch
- ▶ presentation

■ **Interest Approach.** Use an interest approach that will prepare the students for the lesson. Teachers often develop approaches for their unique class and student situations. A possible approach is included here.

Present the following to your students: You have three assignments pending, one of which is very time-sensitive. Your supervising attorney has been in court all morning. The attorney comes into the office and asks for you to come in and meet with her before she leaves for a 2 p.m. court call. You grab a pad and go in thinking you will have a chance to get your questions answered.

As soon as you get in, the attorney asks about the status of the Smith interrogatories. You have not looked at those for two days. You try to remember how close you are to being finished. During your pause, the attorney says, "Well, I need to leave in 45 minutes. I have some letters, memos, and more for you." She hands you some items with sticky notes on them. Then she says, "Any questions?" Bewildered and burdened, you shake your head. As you walk out, you think to yourself, "What just happened?"

CONTENT SUMMARY AND TEACHING STRATEGIES

Objective 1: Describe the preparation and planning involved with a meeting/presentation.

Anticipated Problem: What preparation and planning are involved with a meeting/presentation?

I. Communication basics

- A. Paralegals need to meet with or present information to the attorneys with whom they work often to gather feedback and gain insights, receive direction, learn of new information and/or updates, ask questions, and obtain explanations and clarifications.
- B. Paralegals gain access to a wealth of information by communicating with their supervising attorneys. Paralegals must learn to be skilled speakers.
 - 1. Information exchanges often take the shape of regularly scheduled meetings.
 - a. These meetings are typically mutually facilitated by the attorney and the paralegal.
 - b. First, the attorney will share information and assignments for the paralegal, providing opportunities for follow-up questions.
 - c. Next, the paralegal will share updates on previously assigned tasks and will seek answers to questions regarding next steps.
 - d. More complex questions and topics will require more supportive information.
 - 2. A **meeting** is a conference that occurs whenever two or more select people get together to work toward a specific outcome. Typically, a meeting will emphasize content and teamwork. There is usually a mutual exchange of information for a common good.
 - 3. A **presentation** is the act of showing and explaining the content of a topic to an audience or learner for the purpose of informing, persuading, or building good will. Presentations emphasize content and delivery style. They are often more one-sided, as one is sending large amounts of information and the other is receiving information.
 - a. Sometimes paralegals need to meet with and present to the attorneys for whom they work. Paralegals must be prepared to participate and facilitate the roles involved with the communication exchanges that occur during meetings and presentations.
 - b. Full-scale presentations are not common, but the ability to succinctly present accurate information—often with visual or other support in an engaging delivery style—is a must in the law office.

- C. Paralegals must be ready, organized, and brief to glean the information they need from busy, assertive, multi-tasking, and highly distractible attorneys.
1. Often attorneys will schedule meetings with paralegals where they serve as meeting facilitators. A **facilitator** is a person who manages the meeting process (including the agenda) and is the keeper of details, outcomes, and next steps.
 2. Paralegals can schedule meetings with attorneys to receive specific guidance, information, and clarifications. During this type of meeting, paralegals do the facilitating.
 3. When more complex questions or topics have to be discussed, a presentation is more effective than a meeting. A presentation is an explanation of information in a manner that helps the receiver better understand the topic and the nature of the question. Generally, a presentation is helpful when busy attorneys have full agendas and need quick refreshers as to pertinent case details. Typically, paralegals offer a body of information often supported by visual aids, supporting material, and/or a summary. This action serves to set the context for more complex questions from paralegals.
 4. Paralegal meetings can be led by attorneys and paralegals, obviously not simultaneously. Typically, the attorneys facilitate their lists of agenda items, and then the paralegals facilitate their lists of agenda items. Presentations are used when necessary. This type of meeting is the most common.
 5. Especially when meeting in pairs (one-on-one meetings), it is important to connect, communicate, and meet the needs of participants. This technique helps keep the meeting encounter helpful and pleasant for each person.
 6. After the meeting, all parties should have more of what they need to complete the job and accomplish a specific outcome.
- D. Meeting/presentation preparation and planning
1. Before the meeting with the attorney, the purpose of the meeting or presentation should be clarified via self-reflection. The following questions are helpful to consider:
 - a. What is the aim of this meeting? What questions do I need to have answered? What information must I share to present the most accurate state of a situation and to generate the most informed decision from the attorney?
 - b. Who am I speaking to, and what is his or her attention level and communication style? For example, does this person typically ask questions that reflect he or she prefers a case summary? Does this person have an acute sense of detail and want a summary of details or hard copy documents? How do the answers to these questions change the approach?
 - c. What types of questions should I expect?
 - d. What are the main questions and points I need to make? In what order should I present them?

- e. What, if anything, do I need the attorney to do after the meeting/presentation?
 - f. Does my preparation reflect my work ethic and professionalism?
- 2. The paralegal must gather and organize notes, cases, files, and questions.
- 3. It is necessary to organize for impact by prioritizing the most important or time-relevant questions first.
- 4. An agenda should be prepared (even if it is only used as a speaking list).
- 5. The presentation and/or meeting agenda.
- E. Executing via a meeting launch and wrap-up session
 - 1. The paralegal must provide a quick summary of the items on the prepared list and conduct a time check. For example, the paralegal could say, “We have 30 minutes, so I want to cover the following three items first. If we have time, perhaps we can chat about the Jones interrogatories.” The paralegal should be aware of how much time the attorney will have for the meeting and must make sure the questions are timed to fit that availability.
 - 2. The paralegal should start with the itemized questions or updates. Questions and points should be concise and precise. At the halfway point in the agenda, the paralegal should share with the attorney that the halfway point has been reached.
 - 3. When finished with the agenda, the paralegal should offer a brief summary of the take-away points, follow-up, or next steps to clarify that there is a mutual understanding for the presenter and the listener.
 - 4. A paralegal must be prepared to punt. For instance, a call may come in that the attorney must take. As a result, the attorney may look at the paralegal and say, “You have 60 seconds. What is your question?” The paralegal must be ready with the most important question or have the wisdom to say, “My question is regarding the Jones vs. Smith pre-trial memo that needs to be filed by Thursday. It is more than a 60-second question. Can I come in and talk with you after this call?”
 - 5. Meetings should be effective for all those in attendance. If the current meeting framework is not meeting the needs of the attorney and the paralegal, it is a failure.
 - a. It is essential to work together to make an effective framework.
 - b. It is realistic to change the process and configurations of meetings, agendas, and presentations to make meetings enjoyable and productive.

Teaching Strategy: Use VM–A. As a class, spend time researching and reviewing meeting agendas and basic meeting agenda frameworks. Take time to develop a simple draft agenda with a follow-up checklist that can be used in the workplace. Share the drafts in class.

Objective 2: Describe effective meeting and presentation delivery styles.

Anticipated Problem: What are effective meeting and presentation delivery styles?

II. Effective meeting/presentation delivery styles

- A. Effective meeting/presentation delivery styles maximize the presenter's presence, vocal skills, and use of creative content.
- B. Presence
 - 1. When meeting with others, it is important to use eye contact to make a connection.
 - 2. Gestures should be used effectively. They should support but not distract from the information.
 - 3. Excellent posture is essential while sitting or standing, especially in the presence of others because it conveys confidence and professionalism. If standing, it is best to move strategically to maintain attention but not to distract from the message.
 - 4. It is critical to demonstrate and exude confident energy during a meeting.
 - 5. Projecting professionalism is essential.
 - 6. It is necessary to be on the lookout for distracting or contradictory body language. **Body language** (non-verbal communications skills) sends silent messages via eye contact, facial expressions, posture, movements, and gestures. These cues speak loudly.
- C. Vocal skills
 - 1. While speaking or asking questions, it is important to pay attention to the pace of speech. Generally, a lower tone and a somewhat slowed, not drawn out, pace are most effective. The pace should be varied as needed to maintain attention and interest.
 - 2. Voice **pitch** (tone) and pauses must be used effectively and should remain enthusiastic.
 - 3. Appropriate language is essential, including terms and abbreviations.
 - 4. Unnecessary content and filler words should be omitted.
 - 5. Words should be enunciated and pronounced correctly.
 - 6. The volume should be loud enough to be heard clearly but not too loud to annoy.
- D. Organized and interesting content
 - 1. It is essential to smile, greet, and get the attention of the other people.
 - 2. A signal should be created that signifies the beginning of the meeting/presentation.
 - 3. The listeners should be offered some choice. For example, the paralegal may ask the listeners which questions they prefer to tackle first.
 - 4. It is important to watch for **disengagement** (detachment from involvement) from the listeners and to diplomatically attempt to reengage them.

5. Feedback from the listeners and their faces should be used to develop effective content and delivery methods.

Teaching Strategy: Use VM–B. As a class, spend some time researching and reviewing presentations skills, especially vocal skills and body language. Ask the students how poor organization, weak vocal skills, and negative body language could damage their communication efforts. Display their answers on a whiteboard. Assign LS–A.

- **Review/Summary.** Use the student learning objectives to summarize the lesson. Have students explain the content associated with each objective. Student responses can be used in determining which objectives need to be reviewed or taught from a different angle. If a textbook is being used, questions at the ends of chapters may be included in the Review/Summary.
- **Application.** Use the included visual master(s) and lab sheet(s) to apply the information presented in the lesson.
- **Evaluation.** Evaluation should focus on student achievement of the objectives for the lesson. Various techniques can be used, such as student performance on the application activities. A sample written test is provided.

■ **Answers to Sample Test:**

Part One: Matching

1. c
2. a
3. f
4. e
5. b
6. d

Part Two: True/False

1. F
2. F
3. T
4. T
5. T
6. F

Part Three: Short Answer

1. Answers will vary but should include the following steps: clarify the purpose of the meeting or presentation; gather and organize your notes, cases, files, and

questions; prioritize the most important or time-relevant questions first; organize for impact; prepare an agenda; and rehearse the presentation and/or meeting agenda in your mind.

2. Answers will vary but should include three examples from each of the three categories listed below:
 - a. Presence: eye contact, gestures, posture, energy, professionalism, and body
 - b. Vocal skills: pace, pitch, appropriate language, omit unnecessary content, enunciate and pronounce words correctly, and volume
 - c. Organized and interesting content: smile, greet, and grab their attention; signal the beginning; offer the listener some choice; watch for disengagement; and use feedback (verbal and non-verbal) to develop effective content and delivery methods

Meeting and Presentation Skills

► Part One: Matching

Instructions: Match the term with the correct definition.

- | | |
|------------------|-----------------|
| a. body language | d. meeting |
| b. disengagement | e. pitch |
| c. facilitator | f. presentation |

- _____ 1. A person who manages the meeting process and is the keeper of details, outcomes, and next steps
- _____ 2. Non-verbal communications skills
- _____ 3. The act of showing and explaining the content of a topic to an audience or learner for the purpose of informing, persuading, or building good will
- _____ 4. Tone
- _____ 5. Detachment from involvement
- _____ 6. A conference that occurs whenever two or more select people get together to work toward a specific outcome

► Part Two: True/False

Instructions: Write *T* for true or *F* for false.

- _____ 1. Delivery style is not important; only the facts are relevant.
- _____ 2. In a good meeting, one person does all the talking.
- _____ 3. When preparing for a meeting, anticipating potential questions is vital.
- _____ 4. Body language can contradict the verbal message.
- _____ 5. The meeting and presentation are good ways to maintain and build good will.
- _____ 6. Meetings should only serve the needs of the person calling the meeting.



► Part Three: Short Answer

Instructions: Answer the following.

1. Explain what steps a paralegal should take to prepare for a regularly scheduled meeting with the supervising attorney.
2. Effective meeting/presentation delivery styles maximize the presenter's presence, the presenter's vocal skills, and the presenter's use of creative content. Give three examples from each of these categories.

MEETING/PRESENTATION PREPARATION AND PLANNING

Paralegals need to meet with or present information to the attorneys with whom they work often to gather feedback; gain insights and direction; learn of new information and updates; ask questions; and gain explanations and clarifications. Paralegals gain access to this wealth of information by conversing with their supervisor attorneys. Paralegals must be skilled communicators.

Getting Ready—Preparation and Planning

- ◆ Clarify the purpose of the meeting or presentation.
- ◆ Gather and organize your notes, cases, files, and questions.
- ◆ Prioritize the most important or time-relevant questions first.
- ◆ Organize everything for impact.
- ◆ Prepare an agenda.
- ◆ Rehearse the presentation and/or meeting agenda in your mind.

Executing—Meeting Launch and Wrap-Up Session

- ◆ Give a quick summary of the items on the agenda, and do a time check.
- ◆ Start itemized questions or updates; notify others at the halfway point.
- ◆ Summarize at the finish, including a follow-up and next steps.
- ◆ Be prepared to punt.
- ◆ Change the meeting structure (if needed) for maximum effectiveness.

EFFECTIVE MEETING/ PRESENTATION DELIVERY STYLES

Effective meeting/presentation delivery styles maximize the presenter's **presence**, **vocal skills**, and **use of creative content**

◆ Presence

- Eye contact
- Gestures
- Posture
- Energy
- Professionalism
- Body

◆ Vocal Skills

- Pace
- Pitch
- Appropriate language
- Omission of unnecessary content
- Enunciating and pronouncing words correctly
- Volume

◆ Organized and Interesting Content

- Smiling, greeting, and grabbing their attention
- Signaling the beginning
- Offering the listener some choice
- Watching for disengagement
- Using feedback (verbal and non-verbal) to develop effective content and delivery methods

Preparing a Presentation

Purpose

The purpose of this activity is to practice your understanding of how to prepare and execute a meeting using an effective delivery style to update and secure information from another person.

Objectives

1. Prepare, execute, and end a meeting/presentation with a partner who serves as a listener, with a certain expertise from whom the presenter will require some information.
2. Practice effective meeting/presentation delivery styles.

Materials

- ◆ computer with Internet capability
- ◆ paper
- ◆ writing utensil
- ◆ library

Procedure

1. Work with a partner (assigned by the instructor).
2. Brainstorm on paper, and then discuss topics of expertise for each of the pairs. The topics do not need to be mutually shared by both partners. These topics may be towns and neighborhoods of origin, sports interests, pets, fashion, movies, literature, etc.
3. Each partner should select one topic. The selected topic becomes the research topic for the other partner. For example, if Joe knows a lot about Illinois history and Sue knows a lot about the Chicago Blackhawks hockey team, Joe will research the Blackhawks and present to Sue, and Sue will research Illinois history and present to Joe.



4. Research your assigned topic using the Internet and other resources.
5. Prepare a 10-minute meeting/presentation agenda on the topic. The agenda should include at least three points and some questions for the expert to help the presenter better understand the item.
6. The presenter must take notes that reflect the expert's new information in response to the presenter's questions.
7. The presentation should follow the guidelines given in class for effective preparation and planning as well as execution and wrap-up sessions.
8. Presentations should be given using an effective delivery style, following the guidelines given in class.
9. Listeners should offer effective feedback at the conclusion of the presentation.
10. Partners should switch roles at the appropriate time.