



Introduction

Times are rapidly changing in the presentation field in the early twenty-first century. Travel constraints, budget concerns, and the advent of new technology have mandated that many individuals who might have in the past addressed their audiences directly and personally need to do so electronically, across large distances.

In addition, the instantaneous nature of the Internet has made it possible for individuals and businesses to connect with each other in new and amazing ways, forging online communities and networks that comingle personal and professional issues.

The software and technology that enables this process is continually changing and is quite complex. While Fortune 500 corporations may still avail themselves of proprietary broadband networks that support sophisticated and expensive videoconferencing, more and more organizations are using reasonably priced software over the Internet to reach out to customers, clients, colleagues, students, constituencies, and other audiences.

But how to make sense of this varied and vast assortment of tools and feature sets?

In this book we discuss the technological, logistical, and thematic requirements of reaching out to a world that sees a presentation or a communication in an entirely new way: as a video, an e-mail, a slide show, a real-time broadcast, a Twitter update or “tweet,” or even something not yet conceived. We provide an overview of the latest trends and programs, demonstrate proven and popular software, and take the reader through many possible scenarios of presenting, communicating, and learning in the new social media universe.

Web 2.0—a term used to designate the collection of information-sharing and collaboration tools available on the World Wide Web—breaks the oligarchy of the expert and the power grip of corporations and institutions on the individual's access to information and ability to influence opinion and behavior. As blogging, Facebook, Twitter, and other evolving applications find their user bases, end users are building communities of trust with one another to get their information needs filled and are no longer relying on old business models through which they seek support from or trust corporations or other institutions.

At the same time, savvy corporations are leveraging these communities as active participants in their businesses so that they can learn from these user communities and let users' experience enhance and build their brands.

So how are the fields of communication, training, and learning affected by the next generation of end users and the social tools that are proliferating?

With individuals' short attention spans (witness the 140-character limit of an update or tweet on Twitter) and the ubiquity of mobile devices and video, communication between institutions and individuals will not be anything like the old single-event PowerPoint presentations in an auditorium or boardroom. And with the growth of Web conferencing and webinars, location is of secondary importance; anyone can meet anywhere, any time. In addition, a meeting will not be a single disconnected event but will result from a series of prior relationship-building events held within the social media space.

Tools of Engagement is not a book devoted directly to social media—there are many of those already in print, some are referenced in the coming pages. Instead, we investigate how the new social tools and programs interface, influence, and inform the presentation and training landscape that currently exists and to address a key issue: how to convey an important message in the most effective way in the current environment.

HOW THIS BOOK IS ORGANIZED

The chapters that follow cover the following landscape:

In Chapter Two, we take the reader through an overview of how presentation has changed and has been influenced by the new social media landscape in the early twenty-first century.

Then, in Chapter Three, we concentrate on the nature of social media as a game changer as it shifts the focus of training, learning, and marketing from

selling to building relationships of trust and establishing an effective identity in this new world.

We discuss in Chapter Four how to implement some of the more popular social media tools and strategies with an overview of representative programs and Web sites; in Chapter Five we focus on two of the major social networks (Twitter for everyone, Ning for targeted networks), all with an emphasis on training and communication.

In Chapter Six, we begin to integrate the new trends with more familiar communication tools and go into some detail in how to leverage existing skills in graphics and PowerPoint (and its new online cousins) to deliver a visual message.

The very nature of meetings as part of an ongoing conversation with an audience is a theme throughout the book, so in Chapter Seven we address various scenarios for conveying information at a specific venue—particularly when the venue is virtual—or in a Web page. We cover the steps necessary to get an online meeting scheduled, plan its contents, rehearse and prepare, deliver meaningful content over the Web, and follow up with a strategic plan to take full advantage of all aspects of the event going forward as the presenter or trainer continues the conversation.

In Chapter Eight we speculate about what is likely to come next and about the meaning of the incredible changes that are taking place in how we present, communicate, and learn.

Throughout the book, case studies and scenarios are used to demonstrate the various ways to communicate across many platforms effectively and for a variety of purposes. We also present specific examples of representative programs and tools and how they can be implemented. None of these examples are meant to be endorsements; the landscape changes so rapidly we discuss current programs that perform specific tasks and concentrate on their intent and focus.

To demonstrate the most important features and benefits of these tools, screen shots are provided as illustrations throughout the book.

For your reference while reading, a Glossary has been included at the end of this book.

In keeping with the theme of engaging in an ongoing dialogue, the material in the book will be supplemented after publication by a Web site that includes an introduction to the new features in PowerPoint 2010 presented as a visual guide with screenshots and tips and techniques; contributions to an active blog; and the delivery of webinars and updates in the coming year.

WHO WILL BENEFIT FROM THIS BOOK?

I was amazed when I returned to Tech TV's *Call for Help* for a second appearance that the target audience for learning about PowerPoint had expanded well beyond busy executives. In addition to being used in the boardroom and the auditorium, PowerPoint had become a staple for communication in universities, middle and elementary schools, philosophical and denominational institutions, as well as in the consumer world among families (creating videos or photo histories), and literally anyone with an interest in digital media.

On the Internet today, the influence of PowerPoint is everywhere: photo-hosting programs feature slide shows, consumer slide show programs inhabit the “cloud” (a constellation of programs that interact and reference each others' content on Web servers), and video has become a staple of blogs and social networks.

The popularity of PowerPoint has expanded dramatically by the need to use its capabilities online and reach a much wider audience in a Web conference, blog, Facebook page, YouTube video, or a format as yet unknown. However, while PowerPoint can be vital as the visual focus of a Web conference or online seminar (“webinar”), and its slides and narration can be used to create a YouTube video, the new world of social media has all but left PowerPoint behind as the presentation program of choice.

Instead, younger business users in particular favor the immediacy and ubiquity of social networking tools like Facebook and LinkedIn, and for presentations new online tools like SlideRocket, with its ability to “mash up” content from sources like YouTube and Google Docs, are opening a brave new world of online communication. Many of these new tools communicate directly not just with users but with each other. YouTube video, for example, is linked directly to blogs and e-mail, allowing its users to find audiences that an ordinary PowerPoint file could never reach.

Everyone has a visual story to tell, regardless of the technology of choice.

Trade shows like InfoComm and the Consumer Electronics Show in Las Vegas have replaced the COMDEX convention because the point is not about the technology anymore. It's about how to use the myriad of platforms and tools and integrate them to sell, persuade, inspire, teach, or perform any of a wide range of presentation tasks.

Our primary audiences for the information covered in the coming pages are managers in traditional corporations who need to create and sustain a

high-performing team or organization; executives who seek to create a participative and innovative corporate culture; sales and marketing organizations that thrive on customer feedback and loyalty; and customer service and public relations organizations that seek to improve customer relationships.

Other audiences include:

- Human resource (HR) managers and training professionals who want to expand the reach and impact of their material using today's Internet tools and reaching current Web users
- Executives and managers who need to reach colleagues and prospects without travel
- Small business users and professionals (including doctors, dentists, attorneys) who need the competitive advantage of educating and training others electronically
- Technical professionals with detailed financial or strategic messages who need to convey information to large and small groups without leaving their desks

As our economy transforms, the audience for this book broadens. Our secondary audience includes the growing number of small-business entrepreneurs and independent business owners as well as consultants and small businesses who need to reach wider audiences to educate their clientele as they market themselves.

Also included:

- Educators and students who want to use digital media to more effectively communicate beyond the classroom
- Organizations that want to combine video, imagery, and audio to inspire their members over the Internet
- Individuals with important messages to deliver online to expand their influence and businesses, like consulting and training

The audience for this book is growing vastly as potential communicators, educators, and indeed presenters (which includes almost everyone in business, education, law, or other institutions or organizations) realize that a combination of tools and skills can enable them to reach larger audiences across oceans, time zones, and other geographic and physical barriers.

IMPACT ON TRAINING AND DEVELOPMENT

Perhaps the biggest impact of social media is on education, in the broadest sense of the word. With the complexity of modern life, from the woman who reads blogs to learn about the best formula for her baby (and affects the company that makes and distributes the product) to the financial planner who must absorb and then convey complex ideas (and build trust among his clients), the integration of social tools with issues of learning and communication has become critical for nearly everyone.

And of course, the landscape for organizational education, training, and development of institutional learning programs is also changing dramatically. In corporate human resources departments, there is an increasing focus on the need for alignment with a company's strategic visions. Increasingly, HR departments are expected to provide more than just administrative or training services—they need to support all phases of the company's goals and to maximize efficiency and profit. Traditional HR training sessions generally require time away from work; an online event can have high impact in one hour without employees leaving their desks. By fostering stronger connections among top executives, middle management, and staff, strategic HR online initiatives can add significant value by effectively communicating and facilitating the organization's strategic plans.

Integrating social media into the unstructured activities that comprise the organization's learning initiatives can also yield tremendous and unexpected benefits. In the customer service area, social networks like Best Buy's Blue Shirt Nation have galvanized a workforce and created energetic alignment with the company's goals by engaging the sales staff and listening carefully to their input and concerns.

As more and more people adopt social technologies and become connected, these platforms become critical in the initiatives of any individual or group to reach customers and employees with information, training, or any important message.

Consequently, in a blended scenario of traditional and unstructured approaches to training, the inclusion of research, connections, partnerships, and other resources gleaned through social technologies will become a key in successful implementation. For example, coaching and skill building will not occur in a vacuum; levels of trust and engagement will be required for maximum efficacy. The holistic nature of these varied practices will create a need to understand and implement the most effective tools for maximum impact on the widest audience.

Instructor-led traditional training has also been affected by the new Web technologies. With the changing nature of today's workforce and student population, the issue of a "backchannel"—the trend toward communication and criticism among audiences during an event—is just one of many new factors in how training and presentation professionals are perceived and evaluated. With instant and potentially unmonitored feedback, for example, even the common civility and attentiveness with which presenters are received by an audience has become a matter of concern for organizations, educators, and presentation professionals.

Whether information or training is delivered traditionally by an instructor or facilitator, directly within a designed course, through a Web-based program, or through a live online learning event, preparation with and integration of social technologies will greatly affect the relevance, retention, and overall success or failure of any presentation initiative.

Understanding and mastering the new concepts and social tools, as well as online delivery scenarios, will become paramount for anyone in the business of training development and education.

SOCIAL MEDIA'S IMPACT ON THE BOTTOM LINE

While we present a number of case studies and examples in the coming pages, the jury is still out in many areas on how to best use social media in a communications strategy. The key word here is *strategy*. As we will see, blogging for no reason is not a recipe for success in marketing, training, or any other endeavor. Just as an effective presentation in the sales arena ends with a call to action, social tools must have a clearly defined purpose in their implementation to realize a return on investment—and that is why the coming chapters use real-world examples as well as creative scenarios to demonstrate their effective integration with more traditional communication tools.

Examples of companies that are effectively using social tools to expand markets include Bill Marriott's popular blog for the hotel chain, a sales boost reported by Southwest Airlines from its social media efforts, \$3 million garnered by Dell Outlet from its initiative on Twitter, and the 90,000 customers the Wiggly Wiggles blog has gained among photo enthusiasts.

Social media blurs the lines between marketing and training in many ways for large organizations and particularly for small businesses and entrepreneurs

who need to deliver a message that doesn't directly sell but that needs to result in more than just good will.

Another interesting aspect of this trend toward a convergence between marketing and training or education is that these movements toward relationship and engagement, along with the tools that support them, have resulted in social change as well as a transformation in how organizations and individuals communicate and learn. Key factors like trust, credibility, and attention are no longer taken for granted but must be earned by those seeking to communicate and influence.

TOOLS MATTER IN A SOCIALLY CONNECTED WORLD

In the pages that follow, we will see how a current movement in social media is breathing the life of humanity back into technology and corporations and other organizations by fostering greater connection and community among users of the Internet.

In their seminal book, *Trust Agents: Using the Web to Build Influence, Improve Reputation, and Earn Trust*,¹ Chris Brogan and Julien Smith (2009) avoid getting caught up in the “hows” of social media and only tangentially mention some key tools. In *Tools of Engagement*, we take things a bit further and empower the reader with a broad overview of how social media informs and supports effective communication: the key element of commerce, education, worship, family, and much more.

In the emerging marketplace of commerce and ideas, a meeting will never again be an isolated event but will result from a matrix of prior interactions in the social media space.

In the sales environment, the call to action will not be a single “close,” but instead the result of a facilitated set of communications (perhaps still including slides but probably many images and video in lieu of bullets, based on numerous prior relationships and communications), and the signed contract will not happen so much by manipulation but rather through a tacit understanding and acceptance of a win-win scenario.

In the persuasion, training, and educational areas in which static presentations have been used at large venues, universities, and other institutions, or in motivational settings, the same type of evolution is taking place. In the near future, few speakers of any substance who have not already connected and listened to their

audience prior to an event via Twitter or Facebook will be taken seriously. Authority in the world of social media is not automatic; it is a precious commodity.

The key to communications success is to blend the various social media technologies into a coherent strategy, using each for its unique ability to build story and community rather than as a piece of software (like simply learning how to use one program such as PowerPoint and relying on that to carry the show).

In this effort, we do not cover many programs or platforms in great depth; many of the tools covered in the coming pages could—and some do—have entire books as well as online tutorials devoted to them. Instead we illuminate trends and relationships as the exchange of information and learning among humans is changing from one of *broadcast*, where those with power and purported knowledge distribute it as they see fit, to building *relationships of trust and community*, where everyone is empowered to participate and influence and one's reputation and credibility are earned on the basis of tangible contributions and human interaction.

Some of the tools, like Microsoft PowerPoint, covered in this smorgasbord of communication and learning are familiar, but they contribute to the overall strategy of exchange of information in new and dynamic ways. Others are just emerging—like the applications that inhabit the cloud and share information among themselves in new and exciting ways.

What follows is a study of how these new technologies are evolving in the emerging Internet world, with tips and insights and some speculation. It just may be that the tools and the concepts of this cresting wave, groundswell, or movement are deeply influencing and affecting the evolution of mankind's most important technology of all: ourselves.

QUESTIONS TO PONDER

1. How do you feel when someone uses a PDA (personal digital assistant) or cell phone in your presence, breaking away directly or indirectly from their attention on you? Can you see the benefits of an “always connected” audience for your message, or is it a threat in your mind?
2. Is training and development your main focus, or do you see it as a secondary aspect of your communication needs? How has the explosion of information

in the world today affected how you communicate? Which aspects of your message involve education in some way?

3. What tools are you currently using, or would you like to learn, to reach out and communicate more effectively with others in your field?

Note

1. Chris Brogan and Julien Smith, *Trust Agents: Using the Web to Build Influence, Improve Reputation, and Earn Trust*. Hoboken, NJ: Wiley, 2009.

<http://www.pbookshop.com>