

# Framing Strategy Worksheet

Designed to help you organize your thoughts as you prepare for a presentation.

**STEP 1**  
Identify Your Goal

**STEP 2**  
Assess Your Audience

**STEP 3**  
Name Their Current Situation

**STEP 4**  
Organize Your Agenda

**STEP 5**  
Identify Benefits to Your Audience



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## STEP 1: Identify Your Goal

Complete this sentence:

At the end of my presentation, I want my audience to (do, think, or feel):

### **In persuasive situations:**

Make a recommendation for your audience to do something.

### **With informative presentations:**

Emphasize how you want your audience to think or feel about the information you're delivering.

### **Keep in mind:**

- Be as **specific** as possible.
- Be as **persuasive** as possible.

Even if you're delivering a lot of new information, avoid simply stating that you want your audience to "understand" or "know" something.

It is better that they "**buy,**" "**accept,**" "**believe,**" "**agree to,**" "**accept the usefulness of,**" or "**buy in**" to something.

## STEP 2: Assess Your Audience

Take a step back and think about the people in your audience:

**Who** is your audience, and what is their **relationship** to you?

Who are the **key people** in your audience?

What are your audience's **pain points**?

Is the audience a cohesive group with **similar needs**? If not, how do they differ?

What tensions exist within the group and the organization as a whole?

Consider your audience's perspective:

How much do they **understand** about your topic?

How much do they **care** about your goal? Is it important to them?

Do some audience members understand or care about your topic **more than others**?

Will they be **difficult to persuade**?

**What else** is important to know about your audience?

### Consider:

These are by no means the only things you should consider when thinking about your audience. These questions should get you started, though.

## STEP 3: Name Their Current Situation

Use the insight you have about your audience (from Step 2) to describe **what's going on with them** at the beginning of your presentation.

My audience's current situation is:

### **With Persuasive Presentations:**

The current situation is often the **opportunity, problem, or obstacle**.

For example:

- A retailer wants to increase sales or market share.
- A process isn't working, and it's frustrating everyone.
- A buyer is looking for the best product or service.

### **With Informative Presentations:**

The current situation states the fact that the group needs the information.

- They need an update on the project you're working on.
- A new process has been put into place, and the audience needs to understand what it is.
- They need the information you have to make a decision.

The current situation could also acknowledge their **state of mind**:

- They're frustrated by a setback of some kind.
- They're uncomfortable with changes taking place.

## STEP 4: Organize Your Agenda

Given:

1. Your presentation's purpose or recommendation (from Step 1)
2. What you know about your audience (from Step 2)
3. Your audience's current situation (from Step 3)

List the information they will need to hear from you:

- 
- 
- 
- 

Questioning how to order your agenda and the corresponding body information?

**Consider:**

Does the information follow a natural order of its own (chronological, regional, problem-solution, cause-effect, and so on)?

**Yes:**

Organize your agenda (and body) accordingly.

**No:**

Organize your agenda (and body) from most important to least important from your listeners' perspective. To help with this, imagine your listeners just heard the introduction to your presentation. Then, imagine the questions they might have.

- What would they want to know to convince them to do what you want them to do?
- What would they want to know more about?
- How much background information would they want?

Rank their questions from most to least important, from their perspective, and then organize the information in this order.

## STEP 5: Identify Benefits to Your Audience

What will your audience gain from your presentation?

### **With Persuasive Presentations:**

The benefits will be realized when they take your recommendation.

For example:

- Higher sales, greater profit, less waste
- Lower turnover, happier employees
- Satisfied customers

### **With Informative Presentations:**

The benefits come when they understand what you have to say.

For example:

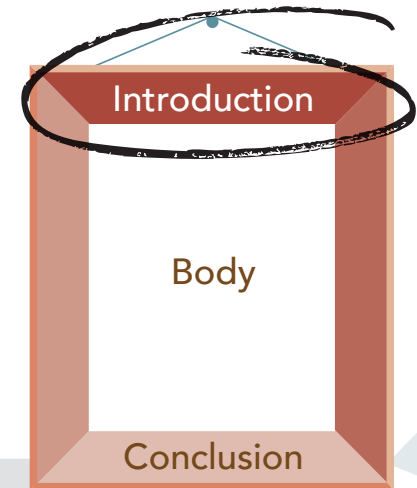
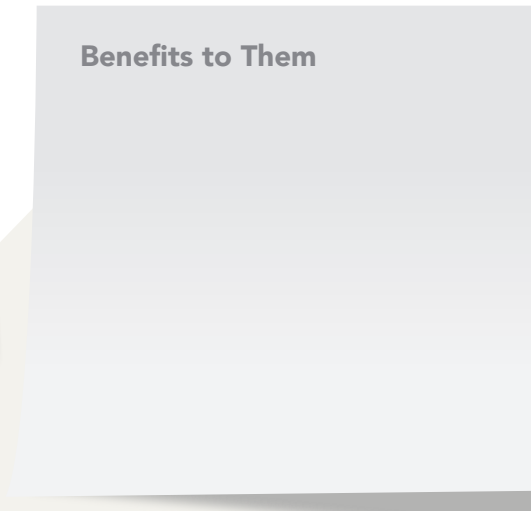
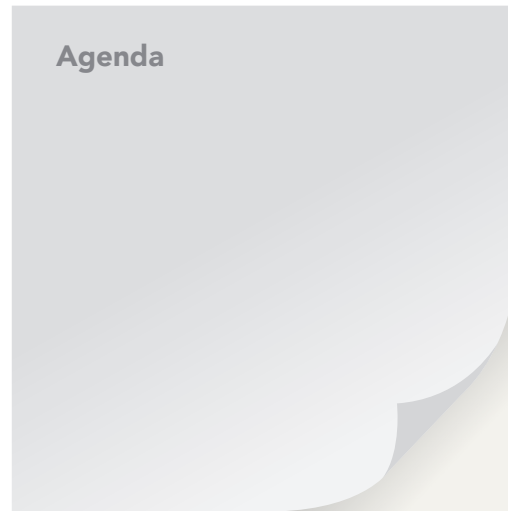
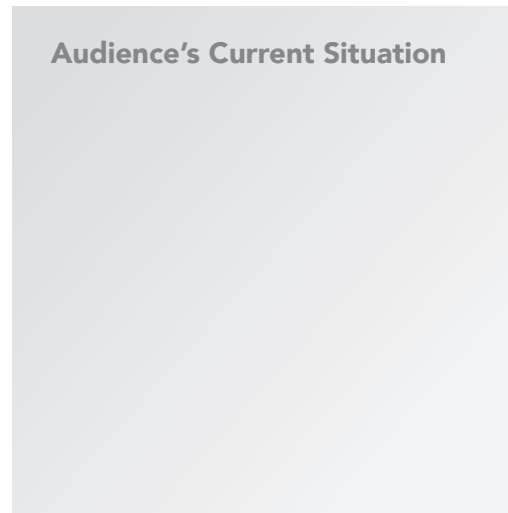
- Informed enough to make a decision
- Clear up confusion
- Know how to function after reorganization

► Now it's time to think about creating visuals.

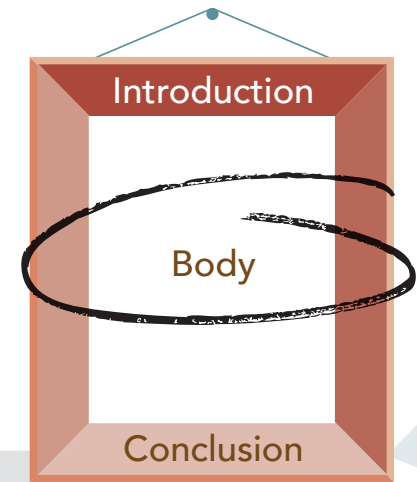
# Introduce the Conversation with Framing Slides

Your introduction should be concise, and it should give your audience:

- A sense of direction
- A sense of purpose
- A reason to participate



Body Slides are  
Content Slides and are the  
subject of the conversation



Agenda Point 1 or Expand  
Current Situation

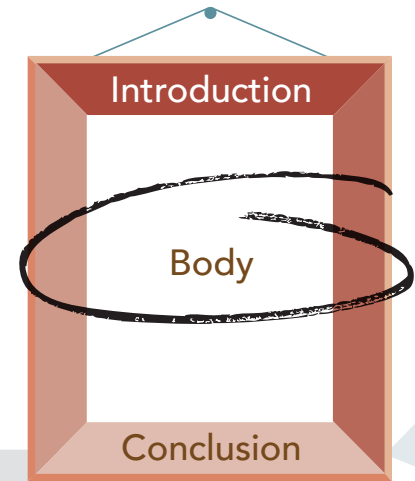
Agenda Point 2

Agenda Point 3

Agenda Point 4



# Body Slides (continued)



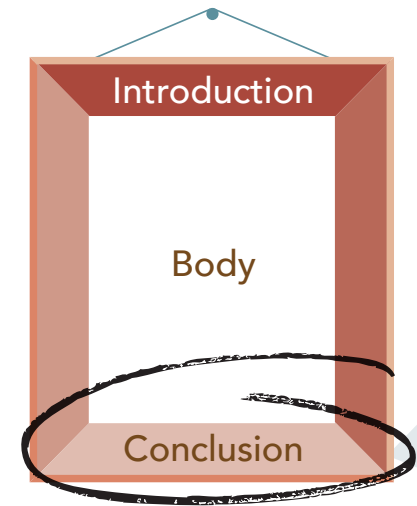
Agenda Point 5

Agenda Point 6

Agenda Point 7

Agenda Point 8

# Conclusion Slides are Framing Slides used to wrap things up



**Summary**

*The summary is just a short recap and should contain no new information.*

**Next Steps**

*Keep your next steps focused on the specific actions that need to happen next.  
Keep your conclusion concise.*

# About Turpin Communication

Turpin Communication's Founder, Dale Ludwig, and EVP, Greg Owen-Boger, are the co-authors of *The Orderly Conversation: Business Presentations Redefined*, which challenges conventional thinking about what it means to present and facilitate in today's business environment and replaces it with something better. The book has been called "groundbreaking" and "eminently practical." Their second book, *Effective SMEs: A Trainer's Guide for Helping Subject Matter Experts Facilitate Learning*, was published in 2017 by ATD Press. Both books are available at amazon.com. They have also contributed to a number of books

published through ATD Press. When the pandemic hit, they took the opportunity to write a companion piece to their first book. It is entitled *The Virtual Orderly Conversation* and may be downloaded at [www.turpincommunication.com](http://www.turpincommunication.com).

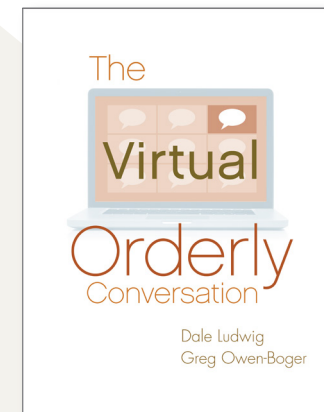
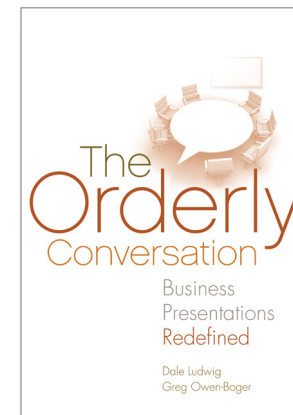
Dale and Greg both hold the Bates ExPI (Executive Presence Index) Coaching Certification. In their spare time, they run Turpin Cares, NFP, the philanthropic arm of Turpin Communication.



**Dale Ludwig** is the Founder and President of Turpin. Over the past 26 years, he and his partners have developed methodologies that challenge much of the conventional wisdom in the field. Working with presenters, facilitators, and trainers, Turpin's work (1) focuses on The Orderly Conversation® that must take place, (2) acknowledges the Default Approach that every presenter and facilitator brings to that process, and (3) helps communicators develop the skills they need to engage listeners in a productive interaction. Dale has a Ph.D. in Communication from the University of Illinois at Urbana-Champaign. He is a frequent blogger and the author of the white paper "Getting Past 101," which can be downloaded at [www.turpincommunication.com](http://www.turpincommunication.com).



**Greg Owen-Boger** is the EVP of Learning and Business Development. Schooled in management and the performing arts, Greg brings a diverse set of skills and experiences to the organization. He joined Turpin in 1995 as a cameraman and quickly worked his way up. He now serves as a communication trainer and executive coach for Turpin's largest clients. He was the 2015 President of the Chicagoland Chapter of the Association for Talent Development. Like Dale, he is a frequent blogger and has made guest appearances on a variety of learning & development podcasts, radio shows, and webinars.



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