SJODIN COMMUNICATIONS

The State of
Sales Presentations

Research Study Results
Phase Three

An exploration of the most common mistakes sales professionals make when presenting in-person, via video conference or in hybrid environments

Now Includes Phase Three Supplemental Report Summary

TABLE OF CONTENTS

INTRODUCTION

The State of Sales Presentations 2023
Phase Three Study on the Most Common Mistakes Professionals
Make When Presenting In-Person, via Video Conference or in Hybrid Environments

Exploring what makes a winning presentation is a passion and a mandate for Sjodin Communications as we consult with sales organizations on how to expand their reach while adapting to the ever-changing marketplace.

This national study builds on our previous work in the area of sales presentations and is the third installment of a three-part research project to further examine the art and science of crafting an effective presentation to move a transaction forward. Our new findings are already helping people avoid critical presentation pitfalls and improve their results. We are pleased to present this important research for your review.

Phase Three examines the efficacy of in-person, virtual and hybrid sales presentation opportunities and explores the most common presentation mistakes sales professionals make.

PROBLEM STATEMENT

This research was born from a simple yet significant question:

Q: *Does making a sales presentation mistake, regardless of platform, impact the outcome or the ability to move a transaction forward?*

A: *Our research says...Yes*

ABOUT PHASE ONE OF THE STUDY

The first phase of this study, released on March 4, 2020, examined the habits of more than 2,500 sales professionals whose livelihoods depended on their ability to build and deliver persuasive presentations. This research helped clarify the different types of presentation mistakes made and their relevance in today's professional sales environment. The findings provide empirical support for twelve common presentation mistakes professionals make and their implications for buyers and sellers. Additionally, this data reflects an entirely pre-pandemic work environment.

ABOUT PHASE TWO OF THE STUDY

Shortly after the release of the Phase One report, due to the impact of the coronavirus pandemic, we observed that video platforms were emerging as the dominant presentation tool, and deserved exploration. We designed a second phase of the study, and the objective was to gain a greater understanding of the impact of the most common presentation mistakes made within a predominantly virtual work environment. Over almost two years, Sjodin Communications held persuasive presentation skills workshops and seminars and collected data from 1,038 sales professionals working remotely via a video conferencing platform. This installment, released August 19, 2022, also looked at comparisons between Phase One and Phase Two findings.

PHASE THREE STUDY OBJECTIVES

Phase Three of the research is a crucial continuation of the preceding two phases, forming a comprehensive examination of sales presentation mistakes and their consequences. Phase Three investigates the twelve sales presentation mistakes most often committed by sales professionals and the efficacy of sales presentations across in-person, video conference and hybrid (in-person and virtual) environments.

In this study, video conferencing is defined as meetings made possible with online technology that allows users in multiple locations to hold face-to-face meetings without having to occupy the same physical space, and a hybrid meeting involves a mixture of in-person and remote attendees. Remote attendees join the meeting via a virtual meeting platform, such as Microsoft Teams or Zoom. In-person attendees sit together in a dedicated meeting room.

NOTE: See New 2025 Phase 3 Supplemental Report Summary on pages 15-17

WHAT MAKES THIS RESEARCH UNIQUE?

PARTICIPANTS

The research solely targeted business professionals whose livelihoods depend on their ability to build and deliver persuasive presentations, whether they promote a product, service, or cause.

NARROW FOCUS AND TRANSPARENCY

The entirety of the data collected was self-reported by business and sales professionals about delivering and observing sales presentations. The survey results were shared with the organization hosting the event and a post-event Q&A/review was held to discuss the findings, including the nuances of the current selling presentation environment.

TIMING

The sales presentation landscape has changed. The timing of this study is unique because it analyzed changes in the reported behaviors of sales professionals over time — from 2018 to 2023 — specifically the incorporation of in-person, virtual and hybrid presentations into the sales process.

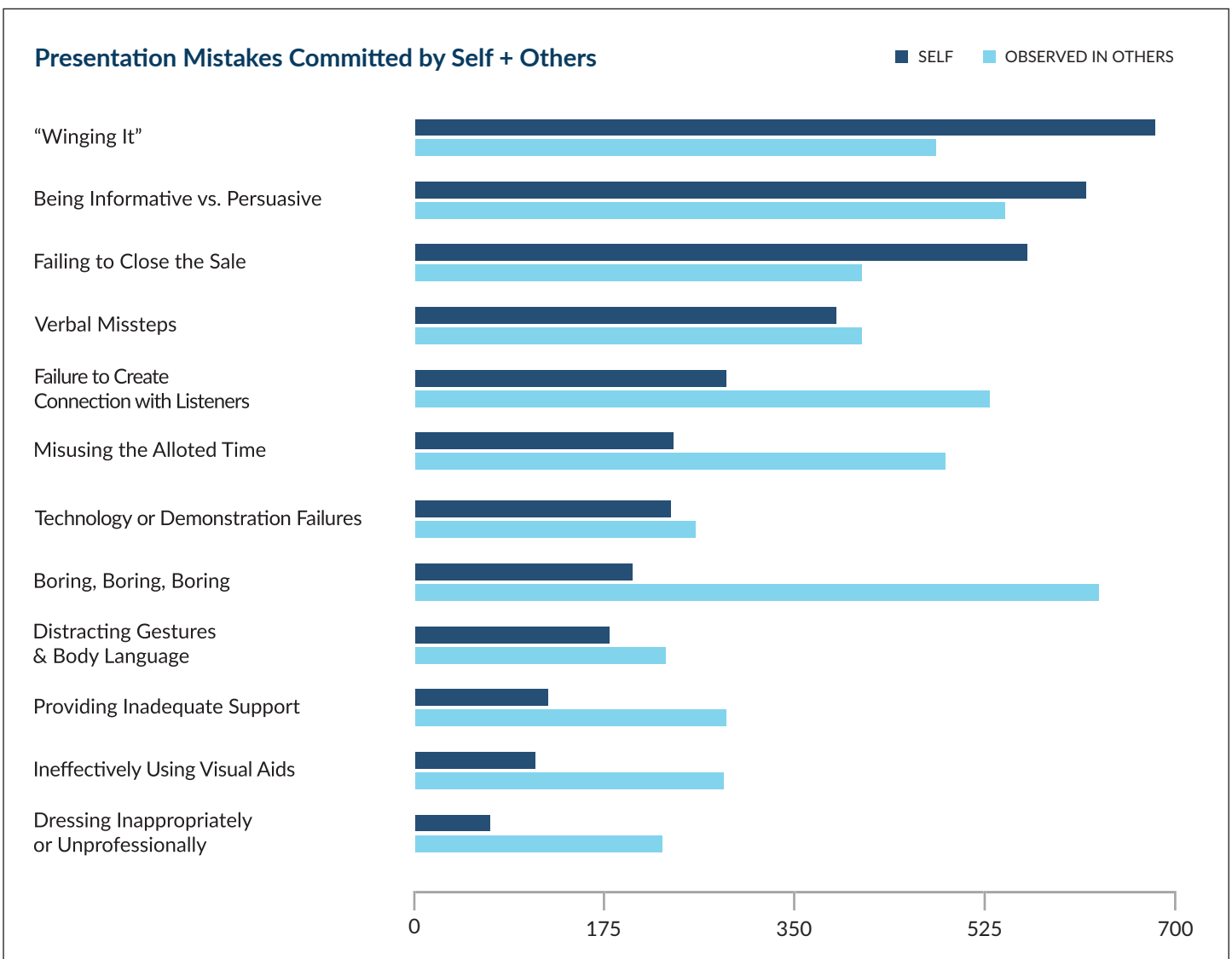### LEADERSHIP AND PARTICIPANT REFLECTION

This report uses member reflections, a qualitative tool which allows researchers to share results with participants and provide a space to discuss emerging themes and issues from the analysis. This process, combined with data observations, allowed this report to identify key discussion points listed on the following pages.

KEY FINDINGS

SELF-REPORTED PRESENTATION MISTAKES

A total of 1,075 individuals completed the Phase Three survey. Participants were asked to self-report which of the twelve presentation mistakes they recalled making over the last six months. Participants were allowed to choose as many or as few options as they had experienced. How often participants self-reported committing each of the Presentation Mistakes is as follows:

NOTE: This graph presents a comparative analysis of how sales professionals perceive their own mistakes in addition to those they recognized in their peers.

Presentation Mistakes Committed by Self + Others

■ SELF   ■ OBSERVED IN OTHERS

- "Winging It"
- Being Informative vs. Persuasive
- Failing to Close the Sale
- Verbal Missteps
- Failure to Create Connection with Listeners
- Misusing the Alloted Time
- Technology or Demonstration Failures
- Boring, Boring, Boring
- Distracting Gestures & Body Language
- Providing Inadequate Support
- Ineffectively Using Visual Aids
- Dressing Inappropriately or Unprofessionally

0   175   350   525   700

This comparison highlights the gap between mistakes individuals *admitted committing* to in self-reports and those they *observed others committing*. One plausible explanation for this phenomenon is rooted in a psychological theory called attribution theory, which posits that individuals tend to attribute their flaws to external factors and the flaws of others to internal factors. For instance, participants self-identified Being Overly Informative Versus Persuasive as being a top three common presentation mistake versus identifying their peers as Being Boring, Boring, Boring.

Throughout all three phases, a pattern emerged where sales professionals consistently reported committing the same top three mistakes. These mistakes are:

1. "Winging It"
2. Being Overly Informative Versus Persuasive
3. Failing to Close the Sale

In comparison, a set of three presentation mistakes were consistently observed in others, yet they differed from those self-reported. The top three presentation mistakes observed in others, ranked by frequency are:

1. Being Boring, Boring, Boring
2. Being Overly Informative Versus Persuasive
3. Failure to Create Connection with Listeners

Across all three phases **THE TOP THREE MISTAKES REMAINED THE TOP THREE**, regardless of the delivery platform, gender, generation, years of experience or whether the presenter was selling a product, service, or cause.

88%

of study participants reported that seeing someone make a presentation mistake impacts their wanting to work with that person.

- The Phase Three research confirmed that sales professionals have continued to make all twelve mistakes—regardless of their delivery platform, gender, generation, or whether they were selling a product, service, or cause.

- One participant reported making zero mistakes.

- 92% of participants reported feeling that making a presentation mistake has, or probably has, impacted moving a transaction forward or achieving their goal.

- 55% of the study participants reported receiving little to no presentation skills training over the course of their careers.

- 88% of study participants reported that seeing someone make a presentation mistake impacts their wanting to work with that *person.*

- 86% of study participants reported that seeing someone make a presentation mistake impacts their decision to buy or move forward with that *company.*

- Based on regression analysis of sales presentation mistakes and their impact on the transactional process, two significant findings were identified and are described below:

a) Failure to Create Connection with Listeners was identified as having the highest negative impact on whether a person wanted to work with the presenter, to buy or move forward with the company.

b) Ineffectively Using Visual Aids was identified as having the lowest negative impact on whether a listener wanted to work with the presenter, to buy or move forward with the company.

NOTE: These findings suggest that being able to create meaningful connections and rapport with an audience is critical for achieving positive outcomes. Additionally, although skillful use of visual aids can improve presentations, it is considered less vital when compared to other presentation mistakes.
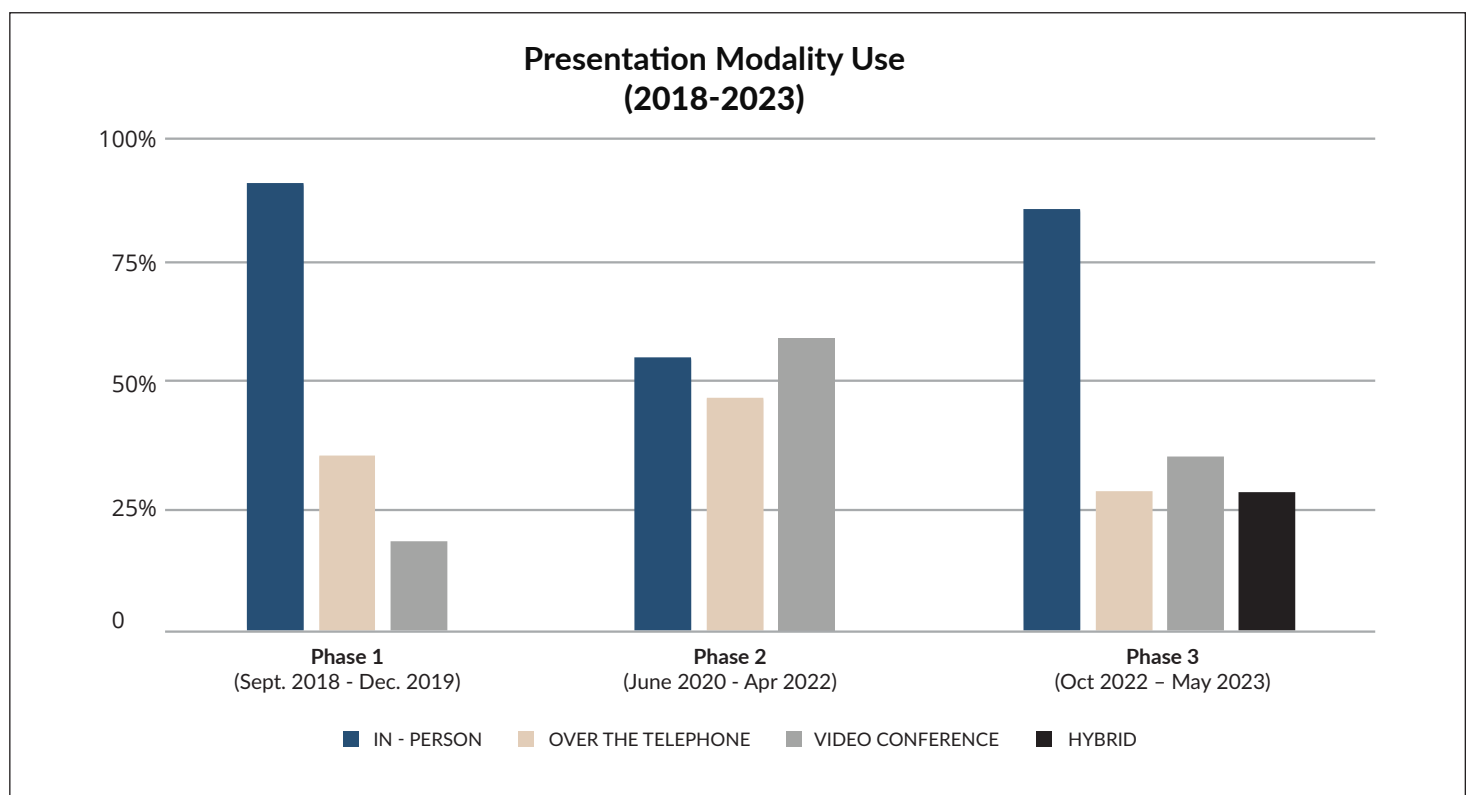
DATA ON PRESENTATION MODALITY

Participants reported their use of presentation modalities as follows:

- 925 reported presenting in-person
- 308 reported presenting over the telephone
- 384 reported presenting via video conference
- 307 reported presenting via Hybrid

DATA ON HISTORICAL USE OF PRESENTATION MODALITY

The chart below illustrates the historical trends of different presentation modalities utilized by sales professionals across each phase of this report, over a span of five years.

**Presentation Modality Use
(2018-2023)**

(Chart with y-axis labeled 0, 25%, 50%, 75%, 100%)

Phase 1 (Sept. 2018 - Dec. 2019), Phase 2 (June 2020 - Apr 2022), Phase 3 (Oct 2022 – May 2023)

Legend: IN - PERSON, OVER THE TELEPHONE, VIDEO CONFERENCE, HYBRID

- Hybrid opportunities, uncommon before the pandemic, have now become as prevalent as traditional telephone and video call presentations. This shift signals a significant change in the tools utilized by sales professionals and the expectation that the presenter is proficient at using them. This has created a transformative impact on the work environment for business development professionals.

- While there is incremental growth across each presentation modality, the trend indicates a pendulum shift back towards sales professionals primarily preferring in-person sales presentations.

OBSERVATIONS & REFLECTIONS

Sales organization leaders participated in a post-event call aimed at sharing study results, facilitating discussions about emerging themes, issues, questions, and opportunities for collaboration. During these reflections, the following discussion points were identified:

1. **WHERE YOU ARE IN THE SALES PROCESS MAY DETERMINE YOUR PRESENTATION MODALITY**

   Today, a business transaction can easily progress from a phone call to a video call to an in-person meeting before reaching the desired outcome. Virtual and hybrid meetings have also become an important step in the sales presentations process and are serving to enhance formal interactions, advancing the professional relationship and transactional process.

2. **A LISTENER'S PREFERENCE FACTORS HEAVILY INTO CHOOSING A PRESENTATION MODALITY**

   Recognizing the preferences of clients and prospects holds significant importance. Even with the widespread adoption of video conference platforms, sales professionals noted varying receiver preferences, ranging from viewing them as inclusive to perceiving them as intrusive. This sentiment was echoed by sales organization leaders, who often expressed a preference for either in-person, virtual or hybrid meetings. For instance, one participant remarked, "Sometimes I just want a good old-fashioned phone call." As a result, grasping and acknowledging the audience's preferences are essential, prompting presenters to prioritize these preferences over their own.

3. **SALES PROFESSIONALS ACKNOWLEDGED THE NEED FOR PROFICIENCY ACROSS ALL MODALITIES**

   Participants shared instances where they might have a strength with video conferencing but struggled with hybrid presentations, ultimately signaling the need to be proficient in all modalities. Sales professionals reflected that they tend to play to their strengths.

4. **PEOPLE WERE MORE FORGIVING OF PRESENTATION MISTAKES DURING THE PANDEMIC, BUT THAT IS NO LONGER THE CASE**

Study participants shared observations and perceptions of a significant leniency for presentation mistakes made during the pandemic, and our research validates these observations with data. In **Phase One, 94 percent** of study participants said making a sales presentation mistake, regardless of platform, impacts the outcome or the ability to move a transaction forward. In Phase Two — a study conducted during the height of the pandemic and the remote-work trend — **78 percent** of study participants said making a sales presentation mistake impacted the outcome or ability to move a transaction forward. However, in **Phase Three, 92 percen**t acknowledged that making a presentation mistake impacts the outcome or ability to move a transaction forward, indicating that presenters now consider the impact of presentation mistakes on transaction progress and goal attainment as comparable to the pre-pandemic period and marking the end of the leniency period.

5. **GAINING ACCESS TO DECISION MAKERS REMAINS CHALLENGING**

Gaining access to key players has always been a hurdle, but today it's challenging for new reasons. The post-pandemic world has brought about the decentralization of decision-makers, and sales professionals are simply not always able to make contact as they once did. On the upside, hybrid meetings provide a workaround, allowing people in multiple locations to meet via video conferencing and in-person at the same time. Although this report doesn't provide a complete list of virtual and hybrid presentation benefits, it's worth noting that sales organization leaders recognize hybrid work's potential to enhance transactional progress through improved connection and convenience. They listed two main benefits as:

Connection

- Video conference presentation opportunities bridge access to key decision-makers. Internal meetings have the potential to spur employee engagement while external and client-facing meetings offer geographical flexibility.

Convenience

- Virtual and hybrid presentations reduce travel time and costs, improve scalability, and provide sales continuity.

6. **ALL PRESENTATION MODALITIES CAN WORK IN TANDEM**
    While each option offers unique advantages, they are most effective when used in tandem. This strategic approach equips sales professionals to excel across a spectrum of presentation scenarios.

7. **YOU CAN'T COURSE CORRECT WHAT YOU DON'T RECOGNIZE AS A PROBLEM**
    All sales professionals rely on their ability to present well; however, success requires preparation. Phase Three reinforces the importance of quantifying common presentation mistakes across modalities, giving sales professionals a checklist to prepare more effectively moving forward.

CONCLUSION

A chief benefit of this research is that readers can learn vicariously through the mistakes and reflections of others. We intentionally used the word "common" mistakes in the subtitle of this research. These mistakes were consistently acknowledged by almost 5,000 business development professionals over a five-year period, demonstrating a shared experience. You are not alone. While recognizing common mistakes serves as a foundational step, it does not offer solutions on its own.

ABOUT THE PARTICIPANTS

SALES EXPERIENCE

The majority of participants (63%) had over 10+ years of sales experience, with the sales breakdown as follows

- 30+ Years 16.3%
- 0-10 Years 36.7%
- 21-30 Years 19.9%
- 11-20 Years 26.5%
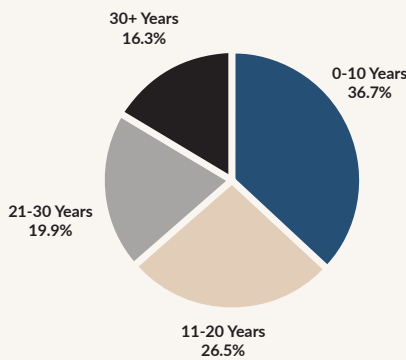
SALES CLASSIFICATIONS

The study's participating sales organizations were classified based on whether the organization sold a product, service, or cause

Product (242, 23%)
Service (744, 69%)
Cause (89, 8%)

GENDER

Participants identify their gender as follows

Female (556, 51.7%)
Male (510, 47.4%)
Other (1, .1%)
Preferred not to respond (8, .7%)

SALES PROFESSIONALS AUDIENCE SIZES

Participants reported presenting to audiences ranging from one-on-one to 26 or more people. The breakdown is as follows

- 17% 6-25 PEOPLE
- 35% ONE-ON-ONE
- 39% 2-5 PEOPLE
- 9% 26 OR MORE PEOPLE
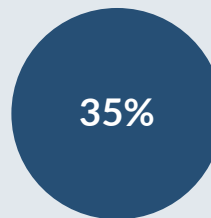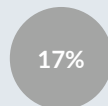
METHODOLOGY

This study used a mixed methodology to examine the extent to which sales professionals commit the twelve presentation mistakes on moving a transaction forward, whether in-person, virtual or hybrid. A survey, previously used for the Phase Two report, was modified to include a hybrid presentation format (in-person and virtual) and implemented using Survey Monkey. Participants were recruited using non-random convenience sampling through workshops and seminars for organizations hosting Sjodin Communications programs from October 2022 to May 2023. Eleven organizations participated in twelve persuasive workshops and seminars during this time frame. When the company administrators were willing to share the link with their employees via e-mail, the Survey Monkey link was sent before, during and/or after the Sjodin Communications lecture. Otherwise, the survey link was provided via QR codes, and Bitly links were made available to audiences at the lecture's conclusion. A total of 1,075 participants completed the Phase Three survey.

A post-event call was conducted with Sjodin Communications and the organization's leaders that sponsored the event. Organizational leaders received and reviewed a detailed summary report of the survey findings, followed by open-ended discussion to explore member reflections on the report. The results from these discussions clarified the data collected and offered unique insights into specific themes discussed above.

The data in this report reflects the self-reported responses of those participants. Given the large, non-random sample, statistical interpretations required the confidence level for determined significance to be 99% confident to infer a meaningful relationship. All findings reflect that level of confidence.

DATA ANALYSIS

The survey results were analyzed by researchers at San Diego State University and the University of Miami for this study. The primary data analyst for the Phase Three project was Giuliano McDonald, a Ph.D. student in the School of Communication at the University of Miami.

OVERVIEW

The Phase Three Supplemental Report had two primary aims. The first was to confirm the emerging patterns identified in previous reports by surveying a new group of sales professionals from previously unexamined companies. The second aim was to explore the sales presentation mistakes most frequently identified and observed by Gen Z, an area of research not adequately addressed in prior reports. Using the adapted survey established in previous reports, data were collected from 1,652 new sales professionals across 20 companies. The findings provide new insights and reinforce several key trends identified in the Phase Three report. Specifically, they highlight three important takeaways for ongoing research on sales presentation mistakes.
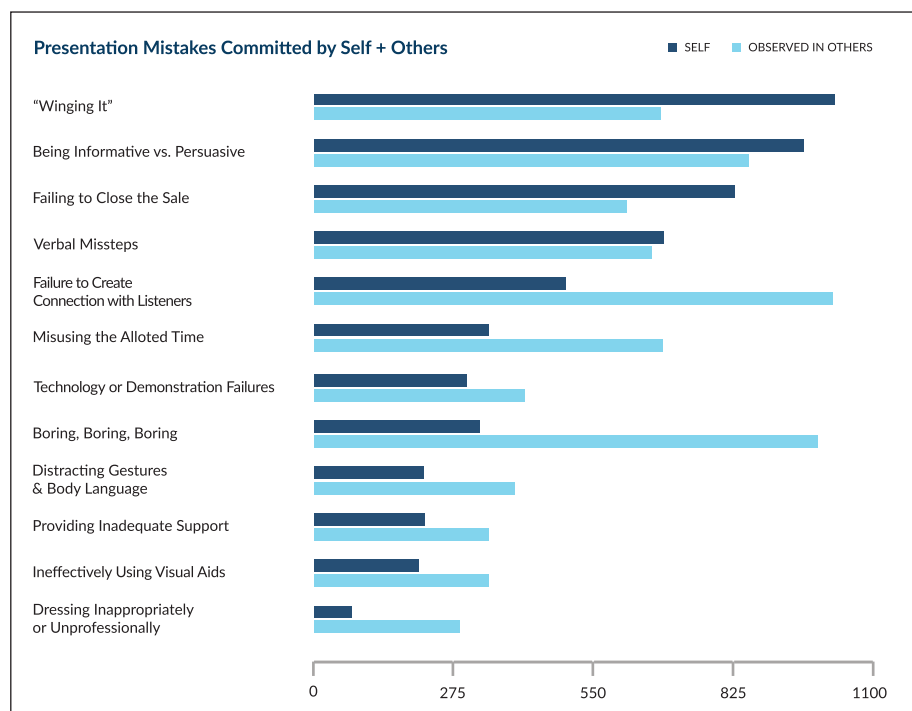
1. TOP SALES MISTAKES REMAIN UNCHANGED

This supplemental report confirms that sales professionals continue to identify the same top three mistakes, either committed by themselves or observed in others. The consistency of these top three mistakes since the report's inception in 2018 demonstrates the stabilization of these findings. This persistence highlights the strength and reliability of these reports in providing a roadmap for sales professionals to improve their presentations. (See graph)

SELF-REPORTED PRESENTATION MISTAKES

Participants were asked to self-report which of the twelve presentation mistakes they recalled making and observing over the last six months. Participants were allowed to choose as many or as few options as they had experienced.

NOTE: This graph presents a comparative analysis of how sales professionals perceived their own mistakes in addition to those they recognized in their peers.
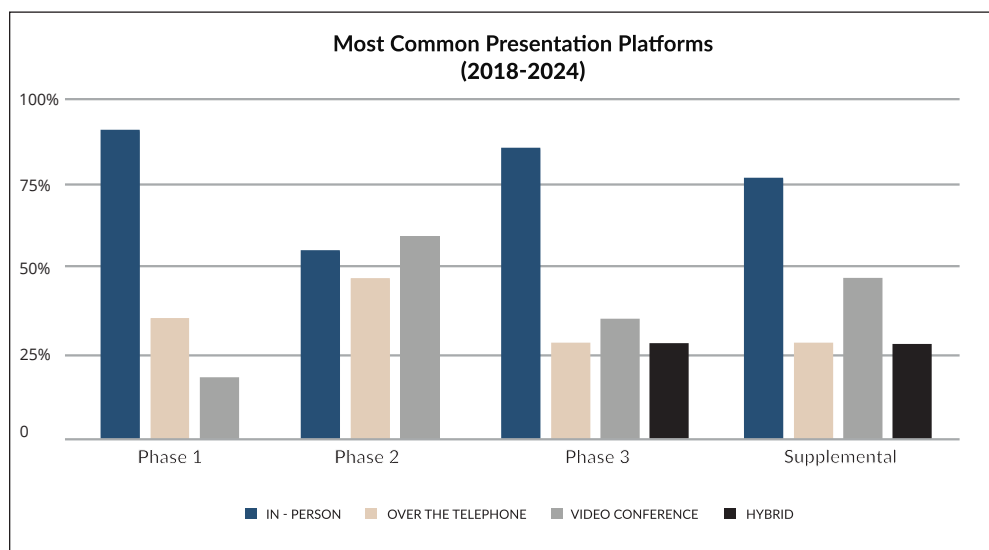
Presentation Mistakes Committed by Self + Others

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- Providing Inadequate Support
- Ineffectively Using Visual Aids
- Dressing Inappropriately or Unprofessionally

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2. PRESENTATION MODALITY

The inclusion of hybrid presentation modalities in Phase Three and this supplemental report marks the first longitudinal analysis of hybrid sales presentations. While presentation formats (in-person, telephone, video conferencing) fluctuated before, during, and after the pandemic, these trends are now stabilizing, including the use of hybrid formats. Notably, video conferencing, which initially declined post-pandemic during Phase Three, has recently increased. This shift is significant, providing longtudinal evidence that supports the continued use of video conferencing over telephone presentations, replacing our initial findings from the Phase One report. These results indicate a clear preference for face-to-face interactions among sales professionals, with in-person presentations being the most preferred modality, followed by video conferencing. (See graph)

DATA ON HISTORICAL USE OF PRESENTATION MODALITY

The chart below illustrates the historical trends of different presentation modalities utilized by sales professionals across each phase of this report, over a span of six years.

**Most Common Presentation Platforms
(2018-2024)**

Legend: IN - PERSON | OVER THE TELEPHONE | VIDEO CONFERENCE | HYBRID

NOTE: This graph shows the stabilization of presentation modalities, with Phase Three and the supplemental report reflecting the new preferred order for sales professionals.

3. GREATER GEN Z INCLUSION

This analysis included only 30 Gen Z participants and no representation from the Silent Generation, reflecting the "changing of the guard" as the Silent Generation exits and Gen Z enters the workforce. However, this limited Gen Z sample size is not substantial enough to draw meaningful conclusions about this population. Therefore, a future Phase Four report will include a larger Generation Z sample to identify trends within this group and compare them to other generations as they establish themselves in the workforce.

SUMMARY

In summary, this supplemental report reconfirms the findings of the previous State of Sales Presentations Reports, further validating the most common presentation mistakes and modality preferences among sales professionals. The consistent results provide sales professionals with actionable areas for improving their presentation effectiveness. Moreover, this report identifies a need for further research to fully understand the evolving sales presentation landscape, particularly regarding Gen Z. To address this, additional data will be collected from a larger sample of Gen Z sales professionals over the next few years, culminating in a new report to be released at a later date.

ABOUT THE RESEARCHERS

Founded in 1990, Sjodin Communications is a public speaking, sales training, and consulting firm, based in Newport Beach, California. Our mission is to provide clients with training and development programs that help them to deliver more polished, creative, and persuasive presentations that generate results.

TERRI L. SJODIN

Principal & Founder of Sjodin Communications

Terri Sjodin is an award-winning speaker who has specialized in helping people build and deliver more effective presentations for over 30 years. She is the author of six books, including *Scrappy* and the New York Times Best Seller, *Small Message, Big Impact*. Her new book, based on this research content, *Presentation Ready*, was published by McGraw-Hill in 2024. Terri earned her bachelor's degree in Speech Communication from San Diego State University.
(Research Projects: Phases One, Two, and Three)

HEATHER E. CANARY

PhD, Arizona State University

Dr. Heather Canary is a professor and director of the San Diego State University School of Communication. Prior to this role, she served on the faculties at Arizona State University and the University of Utah.
(Research Projects: Phases One, Two, and Three)

RACHAEL A. RECORD

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Dr. Rachael Record is a Professor in the School of Communication at San Diego State University and an Associate Director of the Thirdhand Smoke Resource Center in San Diego, CA.
(Research Project: Phase One)

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MA, San Diego State University

Giuliano McDonald is currently a Ph.D. Candidate and lecturer in the School of Communication at the University of Miami. He has a bachelor's degree in communication from Chapman University and a master's degree from San Diego State University.
(Research Projects: Phases Two and Three)

WHAT'S NEXT?

Phase One
Published March 2020
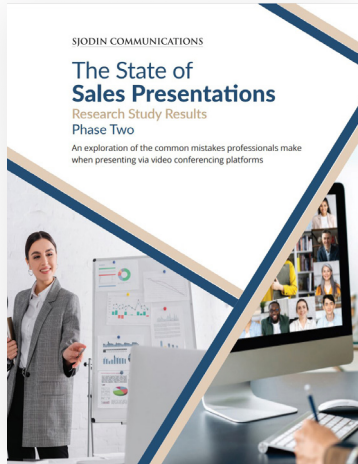
Phase Two
Published August 2022

Phase Three
Published September 2023

*Supplemental Report Summary Added March 2025

■ **NEW BOOK: PRESENTATION READY (MCGRAW-HILL, 2024)**

It's official! We are pleased to announce that Terri Sjodin's new book based on this research content, *Presentation Ready*, is now available in bookstores nationwide.

■ **WATCH THE LINKEDIN LEARNING COURSE**

Terri partnered with LinkedIn™ Learning Studios to design a beginner level persuasive presentation skills course titled "Sales Skills: 12 Common Mistakes to Avoid in Your Next Persuasive Presentation" (now available).

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