



Old Dominion Trust Company

TEACHING NOTE

Purpose of Case Study

1. To introduce students to the topic of developing business presentations.
2. To encourage students to think about the issues involved in giving a successful business presentation.
3. To help students recognize the importance of excellent verbal communication skills in furthering the strategic business objectives of a company.
4. To encourage students to think about the impact of strong verbal communication skills on their own careers.

This case study lends itself best to classroom discussion and is useful for highlighting the preparation needed to give a successful presentation and how important solid verbal communications skills are to the success of many business endeavors.

Identify the Business Problem

Old Dominion Trust spent the last six months working on a federally funded mortgage program. Much time and energy had been expended. In order for this program to work, Old Dominion would need to gain the trust and confidence of the potential homeowners in this underserved area. As a representative of Old Dominion Trust, Rob Leonard's task is to present this program in terms the audience can understand and in a manner that will encourage them to apply. Getting this constituency's "buy-in" at the beginning of this initiative is crucial to its success.

This teaching note was prepared by Cynthia Maciejczyk under the direction of James O'Rourke, Concurrent Professor of Management, as the basis for class discussion rather than to illustrate either effective or ineffective handling of an administrative situation.

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Forecast the Most Desirable Outcome

The most desirable outcome for Old Dominion would be for the targeted low-to-middle income, first-time home buyers to apply to the program. Not only will the program serve the needs of this group, it will also go along way toward enhancing Old Dominion's public image.

Identify the Critical Issues

These are the main issues involved in this case:

- Old Dominion's business goals for this program
- The needs of the target audience group
- Preparation needed to make this speech a success
- Ways to tailor a message to a specific audience group

Stakeholder perspectives include:

- Potential homeowners
- Government agencies involved
- Old Dominion
- The public
- Rob Leonard

Identify and Discuss Possible Solutions to the Problem

The solution to this case is for Rob to give a successful presentation based on his knowledge of the material, his assessment of his audience, his ability to use the technology available to him, and his skill at delivering his message.

Teaching the Case

Because this case does not involve complex facts or events, you can distribute the case at the beginning of the class period in which it will be discussed. Give the students 10 minutes to

read the case and ask them to think about the following issues:

- What preparation could be accomplished in the limited time frame;
- Old Dominion's business goals for this program;
- Rob's goals for this presentation;
- The audience for this presentation (who are they and what are their information needs);
- How the location for this presentation will affect Rob's delivery.

For the remainder of the class

Have the students discuss the issues listed above. Some points for consideration may be:

How can Rob get more information about the physical location and audience. Rob has the number of the woman who is to introduce him. Perhaps a call to her should be the first on his to-do list. By calling this woman, he can collect more information about his target audience, their frame of mind (whether they will be open to Rob's message, or skeptical), whether the gathering is formal or informal (thus, a clue as to how he should dress and the tone of his message), how many people the organizers expect, what, if any, technology, would be available to him, and the layout of the room.

What techniques can he use to grab and hold their attention at the beginning of the presentation. How can Rob relate this program to the lives of these people?

The ideal outcome for the presentation. What are Rob's goals for this presentation? Is he persuading or simply informing?

Tailoring the message. Rob must know something about his audience before he can craft his message. What are they likely to know and not know about buying a home, securing a mortgage, working with government agencies. How long should the presentation be?

The possibility of the media attending. Rob must consider the possibility that the local media will be present. What implications does this have for Old Dominion?

Identify the stakeholders in this case and their separate interests and concerns:

Potential homeowners. These are low-to-middle income, first-time home buyers. Some safe assumptions that Rob could make might be that many of them will be younger families just starting out, that the level of education is probably not college graduate, that they are motivated to purchase a home if they are present at this gathering. These people might be skeptical of Old Dominion's motives (what does the company get out of this?)

and uncomfortable dealing with “bankers.” Rob will need to tailor his message to an unsophisticated audience, one who may not be familiar with all of the technical terminology associated with mortgage programs. He will also need to establish credibility with them at the beginning of his speech.

Government agencies. The state and local agencies that are helping Old Dominion put together this program may have representatives at this meeting to answer questions. Perhaps Rob should see if anyone is planning to attend the meeting from the involved agencies. This group has a vested interest in the program as well. They want Rob’s presentation to succeed in getting the word out to their constituents.

Old Dominion. Management at Old Dominion is counting on Rob to present the details of the program in such a way as to encourage participation. Not only does Old Dominion increase the number of mortgages it will hold, but it will reap the positive public relations benefits of such a service.

The public. Society at large will be interested in this program. If successful, this program could encourage other institutions to develop similar programs, thus benefitting a much wider population than in the Northern Virginia and D.C. areas.

Rob Leonard. Rob is a stakeholder here as well. This is an opportunity for him to be recognized by his superiors. If he does a good job at delivering his message to these people, his stock will almost certainly go up within Old Dominion. Not only will he further Old Dominion’s business goals with a successful presentation, but he can also enhance his own career. Have the students also think about the implications for Leonard’s career of a poorly prepared and poorly delivered presentation.

Last 5 minutes of class

Conclude the discussion.

The key to this case, as with nearly all other management communication cases, is to let the students speak freely, but guide their comments toward the situation facing Rob Leonard and the communication issues the case presents.