Presenting Technical Recommendations to SaaS Customers

Public workshop · Live online

Tuesday 17 November 2026 · 09:30–14:30 GMT · 4 training hours

NEWSKILZ GLOBAL CONSULTING



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Workshop focus

- **Lead with the decision**
- **Explain a trade-off**
- **Answer customer questions**
- **Ask for a clear decision**

Technical Presentation Skills

Practical people skills for tech teams

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Workshop overview

Present a recommendation about your own solution, explain the trade-off to a customer and answer their questions. Deliver it again after feedback on what the customer understood.

Workshop focus

- Lead with the decision
- Explain a trade-off
- Answer customer questions
- Ask for a clear decision

Workshop practice

In a group of up to four, you take turns practising situations agreed during your training needs analysis. A peer or your facilitator gives you feedback on what they saw and heard. You try the difficult part again.

Preparation and follow-up

Before the workshop

For a manager-sponsored place, we first ask your manager what they want the training to help you do. In a short, private training needs analysis (TNA), you tell us about your product or solution, the people you work with and a conversation or task you want to handle better. You and your facilitator agree what the group can use for practice.

Allow 15–20 minutes to prepare a three-minute recommendation about your solution and one likely customer question. Use up to three shareable slides if they help.

Bring · Your agreed recommendation brief and any approved evidence, slide or sketch you plan to use.

After the workshop

Submit your revised opening, outline and key visual or sketch. Choose two presentation changes to try at your next customer meeting.

Your individual report comments on the written or visual materials separately from the delivery and Q&A observed during the workshop. It identifies 2 presentation priorities and a workplace review prompt.

Workshop agenda

09:30–10:00	**Open with the decision you need** Present the first minute of your own recommendation. Ask a peer playing your customer what they think you are asking them to decide. **Feedback** · Your customer repeats the decision and why it matters to them. Revise the opening sentence and deliver it again.
10:00–10:45	**Make the case for your recommendation** Explain the option you recommend, a relevant alternative and the trade-off for this customer. Invite them to challenge your reasoning. **Feedback** · An observer identifies the evidence that supported your choice and any assumption the customer had to accept.
10:45–11:30	**Make technical detail usable** Explain one aspect of your solution using a sketch, slide or spoken example. Ask the customer to describe what it would change for their team. **Feedback** · Your customer explains it back in their own words. Rework the detail they missed or interpreted differently.
11:30–12:30	**Lunch break** Optional 10-minute 1-to-1 video check-in with your facilitator to review feedback and focus your afternoon practice.
12:30–13:15	**Deliver a three-minute recommendation** Present your recommendation to peers taking the roles in your brief. Invite a question and answer it as you would in a customer meeting. **Feedback** · Peers identify the clearest link between evidence and recommendation, and the point where the audience needed a clearer explanation.
13:15–14:00	**Handle the question that stopped you** Replay one section with a change from the feedback. Take the customer's question again, explain what you can confirm and agree who will check anything outstanding. **Feedback** · Your customer tells you what the answer resolved. The observer checks whether any outstanding point has a clear owner.
14:00–14:30	**Ask the customer for the next decision** Close in one minute. Restate your recommendation, ask for a decision or an agreed test, and check what the customer needs before committing. **Feedback** · Your customer says what they would do next and why. Refine the request if the action or decision owner is unclear.

Free workshop resources

Use the checklist to prepare your recommendation, the evidence behind it and the trade-offs the customer needs to consider.


Technical Presentations & Recommendations checklist


Technical Recommendations e-learning

Browse all checklists