

Towards a Comprehensive Inventory of Efficiency in Business Presentations¹

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While workplace communication is a well-established field in communication studies, empirical research based on samples of communication processes taking place in actual organisations is still scarce. Although a distinct line of research on meetings has recently emerged and established itself as “meeting science”, another ubiquitous communication setting, regarding business presentations have received far less attention. In this paper, we argue that a general-purpose theory and a corresponding measuring instrument for the evaluation of the impression made by a presentation on the audience would greatly enhance our understanding of the factors that determine the efficiency of presentations. We present the theoretical framework and the indicators in such an inventory, which we have developed based on the educational literature on public speaking. The construction of this instrument also generated a set of hypotheses about how a speaker’s personality traits may be related to various aspects of the impression made by the speaker.

Keywords: workplace communication, business presentations, impression, ethos, personality, Big Five

1. Introduction

For the past decade, in surveys conducted among employers, communication skills have been consistently listed among the most important attributes employers look for in a graduate applicant. One notable example is the Annual Job Outlook Survey, which is carried out in the US by the National Association of Colleges and Employers, showing year after year that employers generally regard communicative efficiency as one of the most valuable skills (NACE, 2015). In Hungary, similar results were obtained by Kiss (2010) in a survey conducted among young career-starter graduates, indicating

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that communication skills were perceived as one of the most important competences required in their jobs, ranked as fourth in a list of twenty competence areas (p. 116). In sharp contrast to the profound importance attached to communication skills in the labour market, if one wishes to explore the question “What makes an effective communicator?”, or more specifically: “What makes an effective communicator in an organisational setting?”, it appears that we currently have little objective, evidence-based knowledge on these topics because empirical research in the area is surprisingly scarce.

The purpose of the present paper is to explore the possibilities of delineating the construct of business communication skills, focussing on the context of business presentations and proposing a framework for the operationalisation of the construct. In developing an instrument for measuring a range of facets of presentation skills, our long-term goal is to identify a set of characteristics of presentations and presenters which contribute to creating positive impressions in the audience. In broad terms, we are targeting the research questions: “What makes a successful business presentation?” and “What makes a successful business presenter?” The development of a valid and reliable measure encompassing various aspects of presentation skills will enable researchers in the area to find correlation patterns between a presenter’s efficiency and a range of possible determining factors, such as the presenter’s beliefs, attitudes, value system, motivations, preparation strategies, educational background, and so forth. In particular, we propose that the impression created by a presenter may largely be determined by the presenter’s personality features. The rationale for this hypothesis is given in detail at the end of the present paper.

2. Previous research on communication patterns in business contexts

The vast majority of literature on business communication competences consists of a wide selection of popular books on management skills, which are written for a general, non-academic audience, containing various “tips and tricks” on how to become successful in one’s career, often giving advice on aspects of communicative behaviour as well. Due to their non-academic nature, such sources are not cited specifically here: a lengthy list can be readily obtained by searching terms like “business communication”, “workplace communication”, “negotiation skills”, or “presentation skills” in any library catalogue or online bookstore. Further literature on the subject is provided by some influential textbooks which instructors use at colleges and universities for general communication skills development courses, or more specific courses on public speaking (e.g. Osborn et al. 2012). What is common in popular management books and college textbooks is that they often give highly specific recommendations on what to do if one intends to become an efficient communicator or

public speaker; however, those pieces of advice are very rarely backed up by solid empirical evidence. The authors of such books typically support their claims by their own professional experience, anecdotes, examples selected non-systematically, often “hand-picked” with the specific purpose to demonstrate the author’s claims. University textbooks also tend to make references to principles of classical rhetoric, which is an essayist tradition belonging to the field of humanities, and is therefore primarily speculative (rather than empirical) in nature.

Recently, however, new lines of research have emerged which attempt to find support for relationships between message attributes and objective measures of personal or organisational success. A notable example of such research efforts is the line of studies conducted by Kauffeld and Lehmann-Willenbrock in Germany. Their research focuses on business meetings. In one of their studies (Kauffeld – Lehmann-Willenbrock, 2012), for instance, they contacted 20 medium-sized organisations, and asked for their permission to make video recordings of actual team meetings at those companies. Altogether, they examined 92 teams. Their analysis of the recordings revealed that messages (or “sense units”) in meetings can be classified into four major categories: (a) problem-focussed statements (e.g. describing a problem, contributing a solution), (b) procedural statements (e.g. clarifying, summarising, prioritising), (c) socioemotional statements (e.g. expressing feelings, lightening the atmosphere, offering support), and (d) action-oriented statements (e.g. action planning, expressing interest in change, taking responsibility for action). Each of these main categories comprise a set of specific positive and negative message types, yielding a total set of 44 message types. The authors used this taxonomy of message types to develop a highly reliable instrument for group interaction analysis, called the *act4teams* coding scheme. Using this instrument, they were able to show that the frequency of certain message types in meetings significantly correlates with measures of team productivity, as well as objective measures of organisational success, such as changes in turnover, number of employees, or market share. Many of the correlations reported are highly significant ($p < .001$) and indicate strong effects ($.5 < r < .7$). For instance, they showed that if “criticising/running someone down” or “expressing no interest in change” are common in meetings, that has a strong negative impact on the whole organisation’s performance. Conversely, higher frequencies of elaboration on problems and solutions (e.g. naming the causes/effects of a problem and naming the advantages of a possible solution) were both associated positively with organisational success. The pattern of results obtained in this study also reveal the fact that the usefulness of certain message types is sometimes restricted to certain aspects (or levels) of goal-achievement. For example, frequent references to organisational knowledge and to particular persons with specialist knowledge (a message type labelled “knowing who”) were found to contribute positively to the performance of the given team (placing it ahead of

other teams in the organisation), yet this positive effect did not manifest significantly at the higher level of overall organisational success (pp. 152–153).

In a subsequent study, Lehmann-Willenbrock and Allen (2014) examined the relationship between the frequency of humour patterns (i.e. recurring sequences such as *humour–laugher–humour* or *humour–humour–humour*) in meetings and team performance (as rated by the team’s supervisor). The results indicate that the frequent occurrence of such humour patterns is associated with significantly higher team performance scores, but this effect disappears in organisations in which the employees feel insecure and tend to worry about the possibility of losing their job. The interaction between the frequency of humour patterns and job insecurity climate was found to be significant even after controlling for a range of variables, such as the team members’ average age, the proportion of women in the team, the size of the team, or the length of the meeting. Through lag sequential analysis, the authors were also able to identify a set of communication patterns which may be responsible for the advantageous effect of humour on team performance (provided that job insecurity is low). A distinct set of positive procedural, socio-emotional and problem-solving statements occurred significantly more frequently directly after humour patterns than in other positions, suggesting that humour patterns may directly trigger useful message types such as summarising, offering praise, or offering a new solution.

The series of studies conducted by Kauffeld and Lehmann-Willenbrock’s research group have provided novel insights into the nature of communicative behaviour in meetings, which contribute greatly to our understanding of patterns of workplace communication and their role in promoting success at various levels. There is no doubt that it would not have been possible to obtain such findings without the use of the systematic, rigorous research methodology or the development of the research instrument that enabled the group to code the message types that occur in meetings in a reliable manner. It is evident that meetings play a fundamental role in organisational communication, and therefore the authors’ motivation for focusing on this particular communication setting is clear. It has been estimated that around 11 million meetings take place on an average workday in the US (Newlund 2012; cited by Lehmann-Willenbrock – Allen 2014) with approximately 125 million full time employees. Assuming that a similar proportion holds for the European Union with about 220 million employed persons, that means nearly 20 million meetings in the EU daily. In other words, meetings are undoubtedly one of the most common communication contexts that an average employee encounters in the modern workplace.

Organisational communication, however is not all about meetings. Another important communicational setting which has received even less attention in empirical research is business

presentations. It is obvious that business presentations are ubiquitous, and serve a wide range of important purposes such as persuading investors or customers, recruitment, reporting on projects, establishing common identity, proposing solutions, or evaluating a team's or an organisation's performance. Empirical research on business presentations, however, is currently confined to a handful of studies dealing with a limited range of highly specific aspects.

One of the most widely cited paper that seeks to establish links between certain attributes a business presentation and its impression on the audience is Chen et al. (2009). The authors conducted a controlled experiment as well as a field study to find out what factors influence venture capitalists' decision about investment upon listening to a business plan presentation. Two different characteristics of the presentations were taken into account: (a) the affective passion displayed by the presenter (through non-verbal cues such as energetic body movements, animated facial gestures expressing strong emotions, lively eyes, and a wide intonation), and (b) the preparedness of the presenter, which comes across through explicit verbal elements such as being coherent and logical, supporting one's views by citing facts, demonstrating careful consideration and thorough understanding of market needs, market segments, competition and other anticipated difficulties, as well as a realistic idea of the expected financial rewards of the proposed venture. In Study 1, both of these variables were experimentally manipulated: two levels of passion (high vs. low) were crossed by two levels of preparedness (high vs. medium), yielding a two-by-two factorial design. Passion was manipulated by providing detailed instructions for the actor performing the presentations, while preparedness was manipulated by selecting the first-ranked (high-quality) and the eighth-ranked (medium quality) business plan from previous year's business plan competition organised by a public university. The audience were MBA students playing the role of venture capitalists. Study 2 was a field study replication of the experiment in a more naturalistic setting. A larger number (thirty-one) real business plan presentations were rated by panels of judges that came from venture capitalist firms, banks and financial companies. The presenters' levels of passion and preparedness were thus not directly manipulated but varied naturally, and the audience consisted of people who had considerable experience in making investment decisions in real life. In both studies, the audience were asked to rate the presentations for the perceived level of passion and the perceived level of the preparedness, as well as to make a decision about investing in the plan (yes/no). Both studies brought the same – somewhat counterintuitive – result: despite the widespread belief in the importance of emotional appeal in persuasion, investment decisions were significantly related to the (actual and perceived) preparedness of the presenter, but were unrelated to the (actual and perceived) level of passion displayed by the presenter. In other words, the audience invested in plans

that had substance, seemed logical and well thought-out, and was not influenced by the presenter's enthusiasm or lack thereof.

The importance of Chen et al. (2009) lies in the fact that it was the first study which developed valid and reliable quantitative measures for different aspects of the impression created by business presentations and linked those variables to a specific behavioural response triggered in the audience. Furthermore, the level of psychometric methodological rigour employed in the development of the passion and preparedness scales is rarely found in communication research: The 11 items in the two scales were selected from a preliminary pool of 239 candidate items. An initial categorisation and pre-selection stage was followed by two cycles of data collection and exploratory factor analysis (removing items with high cross-factor loadings in each cycle), and the process was completed by yet another cycle of data collection and confirmatory factor analysis, which provided evidence for the two-factor structure of the 11 items. However, perceived passion and perceived preparedness are two specific aspects of the general impression created by a presentation: in fact, as Chen et al. (2009) point out, it may be argued that passion and preparedness are the affective and cognitive components of a *single* construct, *passion* in a more general sense. Therefore, we cannot assume that this scale would be capable of capturing all the characteristics that contribute to the overall efficiency of a presentation. If we need an instrument that measures all important aspects of the quality of presentations in a comprehensive manner, the scale developed by Chen et al. (2009) – or an adaptation thereof – will not be adequate for our purposes: the passion/preparedness-scale was not constructed with this general idea in mind.

3. Operationalising the impression created by a business presenter

This means that if we wish to widen our perspective and set up a range of criteria that encompasses all aspects of quality, we need to turn to other sources. To our best knowledge, however, no general theory or measuring instrument of presentation quality exists with a solid empirical basis comparable to Chen et al.'s (2009) scale. The available literature on the general issue of "What makes a good speech/presentation?" is speculative, educational and normative in nature.

For the purposes of developing the first version of our measuring instrument, we decided to focus on Osborn et al. (2012), which is a widely used, standard university textbook on public speaking.

Although the text is no exception to the above generalisation – typically citing no empirical studies to support the efficiency of the recommendations that the authors make –, the normative literature still appears the best starting point we currently have, and it is reasonable to assume that sources like

this synthesizes a wide range of common experience and observations about what makes a successful speech or presentation.

A particularly valuable feature of Osborn et al. (2012) is that the authors offer a very clear theoretical framework, which breaks down the classical rhetorical concept of *ethos* into four basic components (pp. 40–43). In the authors' interpretation, the Aristotelian term *ethos* refers to the totality of impressions made by the speaker on the audience, and propose that it is determined by the speaker's perceived (1) competence, (2) integrity, (3) goodwill, and (4) dynamism. It is worth noting at this point that not all rhetoricians would agree with Osborn et al.'s general interpretation of the term *ethos*, since Aristotle's *Rhetoric* differentiates between three means of persuasion: *ethos* (the appeal of one's character), *pathos* (the appeal of emotions), and *logos* (the appeal of reason). In Aristotle's own words:

Persuasion is achieved by the speaker's personal character when the speech is so spoken as to make us think him credible. We believe good men more fully and more readily than others: [...] Secondly, persuasion may come through the hearers, when the speech stirs their emotions. [...] Thirdly, persuasion is effected through the speech itself when we have proved a truth or an apparent truth by means of the persuasive arguments suitable to the case in question. (Roberts, 1954)

Within this framework, Osborne et al.'s competence would correspond –by and large – to *logos*, integrity and goodwill to *ethos*, and dynamism to *pathos*. These conceptual correspondences between ancient and modern terminology are, however, no coincidence; regarding Aristotle's *Rhetoric*, Larson (1992: 61) notes that “These ancient descriptions of what is or is not likely to persuade seem remarkably contemporary [...] We could argue that most contemporary persuasion research is derived from the work of Aristotle in some way or another.” Nevertheless, because of the potential ambiguity of ancient terminology, we recommend the use of the contemporary term *impression* (or *perception* when emphasizing the mental processes in members of the audience) to refer to the totality of effects the speaker induces in the listeners.

The impressions created by business presentations are highly variable in terms of the four components listed by Osborn et al. (2012):

- (1) Competence: Some presenters can create the impression that they are highly knowledgeable, well-informed and well-prepared; some presentations, on the other hand, raise doubts in audience regarding the speaker's competence.
- (2) Integrity: Some presenters look honest, reliable and ethical; other presenters cannot successfully create this impression in the audience, who may view them as dishonest or unreliable.

- (3) Goodwill: Some presenters communicate that they have good intentions very effectively; the audience sees such a presenter as a nice and friendly person, who is deeply concerned with the interests of others. Not all presenters can achieve this, and in the worst case, the audience may even become suspicious about the speaker's motives and view them as selfish or even hostile.
- (4) Dynamism: Some presenters appear to be full of energy, enthusiasm, and (affective) passion for their topic, while other presenters create the opposite impression: lack of interest or boredom.

Therefore, it appears reasonable to conceptualise these components as four distinct – but probably, to some extent, correlated – latent variables. In order to operationalise these variables, we need to establish a set of manifest (i.e. directly observable) indicators for each. Osborn et al. (2012) provide a set of highly specific recommendations about what a speaker should do to create a good impression in terms of each of these four components. We have found that many of these normative statements can be readily converted to descriptions of listener's impressions, which could be used in a scale as indicators. For instance, when the textbook recommends that in order to create the impression of goodwill, the presenter should smile and keep eye-contact, such instructions can be rephrased as descriptions or questions of the listener's perception and complemented with a set of choices so that it can function as an item in the "goodwill" sub-scale; for instance: "How often did the presenter smile? Never / once or twice / several times / very often / almost continuously." We found that – due to the nature of the content of the questions/statements, and in the interest of reliability – it is often desirable to provide the explicit meaning of each option, rather than use a general 1-to-5 Likert-type scale, as in the latter case the meaning of each rank may be ambiguous. In some cases, Osborn et al.'s recommendations concern behaviours which are not directly observable by the audience. In such cases, the recommendations were transformed in such a way that the scale item focuses on the listener's corresponding impression rather than the behaviour itself. For instance, Osborn et al. suggest that in order to demonstrate competence, one should do research and prepare thoroughly for the presentation. In such a case, it is obvious that the audience have no information about how much time and work the presenter devoted to preparation, but they still have an *impression of well-preparedness* which the item can target.

After removing redundancies, a total of 54 indicators were constructed based directly on Osborn et al. (2012), particularly on sections pp. 40–43, where the four components of *ethos* are defined and illustrated, pp. 70–78, where critical listening skills are discussed and the criteria for evaluating presentations are provided, and pp. 254–266, a section on using one's voice and body language. In

these latter two sections, the recommendations are not explicitly linked to the four-component model, and in many cases the matching was achieved by careful consideration of the context in which a recommendation occurs and the definition of the corresponding component. The full 54-item scale currently exists only in Hungarian and cannot be reproduced here in full due to length constraints. Figure 1, however, provides a concise summary of the indicators used for each subscale.

Figure 1. Indicators of the four components of the impression made by a presenter

<p>COMPETENCE</p> <p>knowledgeability preparedness clear purpose clear structure interest-provoking introduction previewing subsequent content use of transitions chronological ordering of events/phases clear summary of main points at the end clear concluding statement thorough rehearsal citing experts and/or credible sources naming experts/sources referring to recent data/facts citing personal communication with experts referring to professional experience supporting views by relevant examples correct use of vocabulary and grammar clear/unambiguous wording clear separation of facts from inferences and opinions</p>	<p>GOODWILL</p> <p>expressing concern for common interests smiling laughing (but not sarcastically or in embarrassment) eye contact with the audience mentioning of emotions personally experienced:</p> <ul style="list-style-type: none"> • joy • sadness • disapproval • interest • fear • anger • surprise • trust <p>admitting to one's mistakes friendly/informal tone mentioning common experiences with the audience mentioning views shared with the audience natural/unaffected facial expressions natural/spontaneous gesturing with hands/arms/head</p>
<p>INTEGRITY</p> <p>impression of honesty impression of reliability sharing all relevant information raising ethical issues expressing disagreement tactfully/respectfully discussing issues from multiple viewpoints</p>	<p>DYNAMISM</p> <p>impression of self-confidence enthusiasm liveliness/energy (as opposed to tiredness) volume/loudness careful and clear articulation natural/appropriate rate/rhythm (with pauses) varied (as opposed to monotonous) intonation relaxed (but not sloppy) posture extemporaneous style (no/little reading aloud) unobtrusive (if any) use of notes</p>

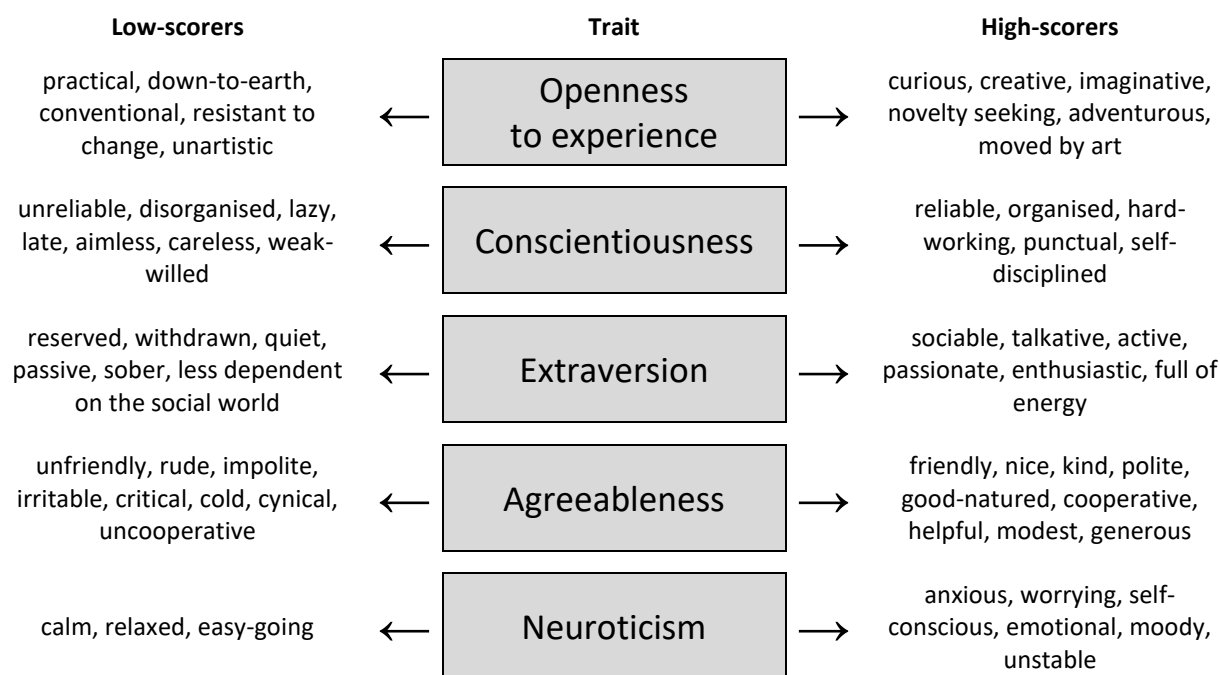
Source: author, based on Osborn et al. (2012)

How can this comprehensive evaluation scale for presentations be put to use in the future? First, when used by a panel of raters, averaging individual raters' scores, it can be used to provide fairly nuanced (relative) measures of a set of presenters' strengths and weaknesses. Second, it is our intention to use the scale in order to seek empirical support for – or, if necessary, refine – the four-component model advanced by Osborn et al. (2012) through confirmatory factor analysis. Third, and most important, a comprehensive measure of presentation quality will enable researchers to conduct correlational studies to find the key factors that explain the variability in impressions that presentations leave in the audience. For instance, we are currently using the instrument in an on-going research project to find out whether the presenter's personality features are associated with each of the four perception dimensions.

4. Personality domains as possible predictors of communicative efficiency

It seems reasonable to assume that a speaker's personality characteristics come across in a presentation and influence the audience's perception of the speaker to some extent. Even more specific hypotheses about this process can be formulated, if we compare the four-component model of *ethos* proposed by Osborn et al. (2012) to the list of dimensions in one of the most influential models in contemporary personality psychology. The history of personality research is rather complex, but since the mid-1990's a new consensus has emerged in personality psychology about the main dimensions of human personality. A new model has taken the leading role, called the *Big Five* model, and – as the name implies – the model suggests that the core of human personality is determined by five central traits. It is not easy to determine who should be given credit for the development of the Big Five model because at least four different research groups were simultaneously working on the same problem for decades, and they all identified the same five dimensions of personality using factor analysis. Nevertheless, the two researchers most widely cited as responsible for the final breakthrough are Robert McCrae and Paul Costa (1999). Figure 2 provides a list of the five broad personality dimensions in the Big Five model as well as some common adjectives associated with each pole of each dimension. A more complete list of adjectives – with full results of a factor analysis – is provided by Saucier and Goldberg (1996).

Figure 2. Big Five personality traits with commonly associated adjectives/expressions describing low-scorers vs. high-scorers along each dimension



Source: author, based on Robert McCrae and Paul Costa (1999).

If we reconceptualise these adjectives as *impressions of personality* created in people observing a given individual's behaviour, it is easy to notice some conceptual overlaps between Osborn et al.'s (2012) components of *ethos* and the five broad traits in the Big Five model. We hypothesise that there are direct correlations between these personality dimensions and the four aspects of Osborn et al.'s *ethos*:

- Open and conscientious people will enjoy the research process, take the presentation task seriously and devote much time and work to preparation. As a result, they will tend to create the impression that they are competent.
- Conscientiousness and agreeability appear to be two key components of what people view as an ethical character: ethical people are dependable and have deep concern for others. For this reason, we hypothesise that conscientious and agreeable speakers will appear to have integrity.
- Agreeability is practically synonymous with the goodwill component in Osborn et al.'s (2012) model. Therefore, we expect a positive correlation between these two variables.
- Extraverted people are often viewed as enthusiastic, and full of energy and passion. Therefore, it is reasonable to expect extroverted speakers to appear to have dynamism.

- Finally, neurotic people may show deficits in all components due to communication anxiety as a mediating variable.

We expect to find support for these hypotheses by collecting a sample of video recordings of real business presentations from a set of companies located in a region of Hungary called Central Transdanubia. Each presentation will be assessed by a panel of raters using the evaluation scale presented in this paper. At the same time, personality data will be collected from the presenters by a self-report personality inventory, which is a Hungarian adaptation of Maples et al.'s (2014) 120-item questionnaire consisting of public domain items. The bivariate correlations between personality and impression measures will enable us to determine whether we have evidence for each of the hypotheses posited above.

5. Conclusions

Workplace communication (or organisational communication) has established itself as one of the major topics in communication studies, which is reflected in the fact that influential, general-purpose textbooks on human communication (such as Pearson et al. 2011, or DeVito 2012) devote a separate chapter to the topic. In sharp contrast to apparent importance of the subject, very little empirical research has been conducted which is based on the systematic analysis on real data collected from actual organisations. One notable line of research – which has recently established itself as the field of “meeting science” (Allen et al. 2015) – focusses on coding sense units in video recordings of team meetings, identifying recurring sequential patterns, and linking them to indicators of success. Another common communication setting, business presentations have received even less attention: empirical research on presentations is restricted to a handful of studies, often dealing with fairly specific issues (such as slide design, Kosslyn et al. 2012).

The present paper proposes that in order to expand our understanding of qualitative differences between presentations and their relationship to personal and organisational success, we need a theoretical framework which encompasses all aspects of the impression made by the presenter and a corresponding measuring instrument which operationalises each component of the theory. We present the outline of such an instrument, which we have developed for the purposes of an ongoing study. The indicators that make up this evaluation scheme originate from an analysis of normative statements located in various sections of Osborn et al. (2012), a widely used educational textbook on public speaking, assuming that such recommendations – despite the lack of empirical support – represent a synthesis of professional experience in the field.

We see the value of such a general, multi-faceted measure of presentation quality in its potential use in further studies targeting the general question “What makes a successful business presentation?” The potential factors that may affect efficiency in this communication setting are numerous, including the presentation’s thematic structure, the presenter’s self-perception/self-image, presentation anxiety, the speaker’s beliefs or attitudes concerning the topic, the audience, or presenting in general, the presenter’s education level and family background, the presenter’s preparation strategies, such as visualisation, rehearsal, and so on. In the present paper, we argue – based on theoretical arguments – that specific components of the impression made by the presenter may be closely related to the presenter’s personality traits, and put forward five hypotheses concerning this relationship, for which we hope to find support in an on-going study. Such results would point to the crucial importance of selecting the right person for an important presentation.

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