

Delivery Method

Group Live or
Group Internet Based
Duration: One and one-half (1.5) Days

Program Description

Many financial professionals do not communicate effectively. They overwhelm their audiences with complex content, leaving them confused. The ability to connect with an audience is vital to the success of both the practitioner and the organization. In this program, audiences will learn from an FP&A practitioner, Second City- and Improv Olympic-trained performer and award-winning speaker, blending humor and professional delivery with cognitive science and data-rich content.

Learning Objectives

Attendees will learn:

- How to establish rapport and maintain credibility
- Subtle and not-so-subtle ways to captivate audiences and inspire them to act
- A variety of communication techniques to help better create engaging presentations, stay focused, and have a lasting impact on audiences.
- How to immediately recall all audience members by name

Prerequisites

Participants should possess a general understanding of business concepts.

Advance Preparation

Access to a laptop with Microsoft Office 2013 or later and program files provided.

Delivering Effective Live and Virtual Financial Presentations

Key Modules:

- Financial presentations and communication approaches
- Connecting with financial and non-financial audiences
- Structuring data-driven presentations
- Establishing trust and maintaining credibility
- Engaging financial audiences
- Dynamics for Live In-Person and Virtual Presentations
- Financial storytelling as a presentation technique
- Displaying visuals during presentations
- Going off-script and managing interruptions
- Involving decks and reports in financial presentations

Who should attend this program: Financial professionals and non-financial professionals responsible for data-driven, technical and financial presentations and communication

Program Level: Basic, Intermediate

CPE Credits: 12.0 Total (12.0 Communications & Marketing)



Delivering Effective Live and Virtual Financial Presentations

Detailed Curriculum:

Financial Presentations and Communication Approaches

- The purpose of financial and data-driven presentations
- Effective communication in financial and data-driven presentations

Connecting with Financial and Non-Financial Audiences

- Grabbing and keeping attention in meetings and presentations
- Identifying and assessing the audience and ultimate end-users of information
- Identifying the audience's mandates/objectives and the insights needed to achieve the mandates/objectives
- Designing and delivering presentations based upon the make-up, style, character, and mandates/objectives of the audience and ultimate end-users of information
- Simplifying complex financial concepts into easy-to-understand elements and demonstrating connections to non-financial contexts

Structuring Data-Driven Presentations

- Assessing pre-conceived opinions and positions, perceived areas of risk and lack of confidence, expectations and concerns
- Selecting the right methods of delivering information across in person meetings, emails, reports, presentations, phone calls, and virtual face-to-face meetings
- Organizing pre-presentation, presentation, and post-presentation logistics and flow of information

Establishing Trust and Maintaining Credibility

- Approaches for influencing audiences resistant to recommendations
- Connecting with people who are not interested in participating
- Engaging and re-engaging people who are inattentive
- Strategies for connecting with people faster and deeper
- Building trust for greater collaboration and sharing ▲



Delivering Effective Live and Virtual Financial Presentations

Engaging Financial Audiences

- Offering information and transparency about assumptions, uncertainty, and possibilities
- Approaching presentation with awareness of language, psychology, and physicality
- Providing an appropriate balance of data, visuals, and language

Dynamics for Live In-Person and Virtual Presentations

- The dynamics of cognition and information synthesis
- Engaging different types of audiences through alternating visual, auditory, and kinesthetic means
- Designing presentation flow for maximum retention using mind, state, and module changes
- Building in elements of subtle reinforcement and action items

Financial Storytelling as a Presentation Technique

- Balancing data and logic with emotion and storytelling
- Using the storyline technique for presenting financial findings and proposing decision-making recommendations
- Using the pyramid structure technique, employing economic background, most important points, data assumptions, synthesis, and supporting information
- Building a presentation using deliberate tension and unanswered questions
- Using proven linguistic techniques to reduce ambiguity and enhance believability

Displaying Visuals During Presentations

- Practical charting and graphics to be: 1) usable, 2) intuitive, 3) perceptive, 4) honest, 5) complete, 6) aesthetic, and 7) engaging
- Effective titling and footnoting to convey logic and emotion, objectivity and subjectivity
- Best practices for column charts, bar charts, pie charts, donut charts, waterfall charts, line graphs, and combo charts ▲



Delivering Effective Live and Virtual Financial Presentations

Going Off-Script and Managing Interruptions

- Maintaining control of conversations and presentations
- Alleviating skepticism, defusing hostility, and preventing tangent interruptions
- The difference between stable and unstable presentation and meeting performance
- Effectively managing Q&A in business presentations and meetings using a Q&A framework
- How to encourage questions or inspire further discussions
- How to address questions without confident answers by using framing and bits
- How to use physical body language, vocal volume and tone to effectively manage presentations and meetings

Involving Decks and Reports in Financial Presentations

- How do decks and reports serve different objectives that presentations
- How to effectively use physical materials to supplement or reinforce presentations

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