



Six Crucial Tips for Presenting with Confidence

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Thinking through a presentation is every bit as important giving it. It is imperative that you communicate who you are and sell others on your objectives or ideas. Whether motivating an employee in a one-to-one conversation or presenting to a \$25-million prospect, here are six keys to confident and clear presentations.

The why

Before you present any material, take a few minutes to document the “Why?” What’s the desired outcome for this interaction? Why is this presentation happening now — why not six months ago, or three weeks from now? What’s significant about this timing?

Any of the following could be desired outcomes: Inform. Sell. Persuade. Motivate. Get commitment. Figure out what your desired outcome is for *this* particular presentation with *this* particular audience, and then structure your presentation with this in mind.

For example, if you have prospective clients coming in for a third meeting, think about why they need this meeting. What would their goal be at this stage of the process? What might they know already and need to know next? Why is this meeting important to them? You will approach the meeting and set expectations differently depending on your expected outcomes.

The who

Figure out what you know about the person or people to whom you will be presenting. What do they care about, and what is their level of topic knowledge? This is the “Know Your Audience” approach to delivering information.

While you might have the same general information to present to your boss, staff or investment partner, knowing your audience will dictate what pieces of information are important and how you want to share them. Chances are, you’ll decide to focus on one area more than another, so it’s crucial that you know whom you are talking to and what they care about. Depending on the level of understanding and the preferences of the audience, an advisor should modify material to meet the needs of the listener. Also, consider your com-



munication *approach*. You may want to present digitally using an iPad or PowerPoint to some people, but stick with a paper-based pitch book for others.

Create flow

Create an introduction. Outline what you're going to tell your audience and in what segments or categories you will share information. That way the listener knows what information to pay attention to in each category, so it won't all roll together as an endless stream of information. Review all of the information you hope to present and chunk it into manageable pieces. You can easily do this by answering the following questions:

- (a) What's our general topic or subject?
- (b) What groupings of information can we make?
- (c) What's the three most important pieces of information within each segment?

For example, if you present capabilities, chunks could be (1) firm culture, (2) investment philosophy, (3) team members and (4) the client experience. Instead of giving random information, you will categorize and present it in a logical flow.

Provide context

As you chunk your material, ask yourself the "So What?" — "Why does or should this matter to my audience?" Keep asking yourself the "Why?" question: Why does this concern your audience, why does it help them, why do they need to know it? Don't assume your audience knows what you mean. Make the link between information and its importance clear to the listener. If you can't give context and clarify the meaning of what you are presenting, consider whether you need the information to be included at all.

Behavior mapping

Excellent presenters naturally and unconsciously modify their approach in response to their audience's reaction, but unfortunately the rest of us have to work at it. Watching someone else's style and then modifying your communication approach is a great way to connect with them. This is called "mapping" or "mirroring."

Watch your prospect. If they lean forward, lean forward yourself. If they look up when they are thinking, look up when you're thinking. This can apply to the way they walk, talk, sit, or any number of things. Be subtle, because if this looks too obvious it becomes annoying. If you take the time to practice, you'll be able to mirror very subtly. If your prospect or client is a slow, thinking type and you are a fast-talking fast mover, slow down. If they are somewhat informal, and you are not naturally that way, be aware of your formal demeanor and work to be less so. We all like people who appear to be like us.



Bring closure

Once you get to the end, go back to the beginning. Recap what you've told the audience, and remind them of any specific data they need to take away from what you've presented.

This is also where you want to indicate any next steps or takeaways you want the audience to remember. If you need something from the audience, be clear what it is you need, when you need it, and how you want it delivered. If you need a decision from your listeners, ask them when they feel they could make a decision and what else they need from you. If you're closing, this step is especially important — many sales have disappeared simply because the sales professional didn't ask for the business.

"We talked about four segments of information you would need to make a decision. Have I adequately explained all of them to you? Are we able to count you as our newest client and open paperwork?"

Conclusion

These six tips apply whether you are making a sales pitch, welcoming a new employee, speaking to a large room filled with people, or closing a \$10 million deal. They can be modified to meet your specific presenting needs and applied to just about any venue. Get practicing!

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