



# HOW TO MASTER THE BUSINESS PRESENTATION

Tim Calkins

# The business world revolves around presentations.

When it comes time to make a decision, people sit down to review the analysis, discuss the issues and reach agreement. Later, executives communicate the strategy to employees with presentations. When there are issues to wrestle with and bumps in the road, people create presentations. While emails and text messages are now ubiquitous, they rarely replace the presentation. It is hard to debate and discuss in depth in a text message.

As a result, if you are going to be a successful business lead, you have to know how to create and deliver presentations that are tight, logical and convincing.

This article reviews the importance of presentations and provides four concrete recommendations for creating strong, convincing presentations and then delivering them with confidence.

## Why Business Presentations Matter

Creating and delivering compelling presentations is important for two reasons. First, it is essential to have an impact. If you want your idea to take hold and desire your recommendations to turn into actions, you have to bring them forward in a way that people can understand and believe. You can have the best business ideas in the world, but they won't translate if you are not able to present them in a logical manner.

Big data opens a world of opportunities for business transformation, but it also makes it easier to get caught up in a mass of numbers and calculations.

Second, presentation skills have an enormous impact on one's personal brand. If senior executives think that you are smart, strategic and gifted, you will receive promotions and opportunities. If you create and deliver presentations that are tight, logical and convincing, people will tend to think that you are smart and strategic. You have leadership potential. You look the part. If you come up with a jumbled presentation that makes little sense, people will question your leadership ability and your reputation will suffer.

When you present to senior executives, you have an opportunity to shine. Everyone looks at you; you have the floor, the spotlight. This is unique chance; most days you probably don't interact extensively with the senior folks. You can't really make an impact.

Unfortunately, many struggle when it comes to presenting. When I surveyed my students at Northwestern University's Kellogg School of Management, I found that most of them didn't like presenting and didn't think they were very good at it. Even more striking, students had very different attitudes about presenting. While some were confident and enjoyed the experience, many of them were the opposite: they dreaded presenting and found it to be a terrifying experience.

It all can become a bit circular. People who think they are good presenters seek out opportunities to present, get more experience and become better and more confident. They then seek out opportunities, creating a positive cycle. People who don't like presenting try to avoid it, procrastinate, struggle, are nervous, and don't do well.

I believe that everyone can become an effective presenter. The principles are not complicated. For example, here is one good rule: always have these five things in a presentation. You should have a title page, an objective page, an executive summary, an agenda, and a conclusion or next steps page. Simply having these five pages is a good start.

Everyone can become a stronger presenter. We can all be better. Developing a tight, compelling recommendation is not an easy task, and there is always room for improvement. But how?

## Not a TED Talk

When it comes to presentations and speaking, people often watch TED talks for inspiration and guidance. These short, engaging presentations have taken the world by storm. It is easy to find TED talks with millions of views. When I ask my MBA students how they learn about presenting, many of them mention TED.

Be careful! While there are certainly things to learn about presenting from TED talks, a business presentation and a TED talk are very different things. What works for a TED presenter will often not work in a company meeting.

The classic TED talk features a person standing on a small carpet, in the spotlight, talking earnestly to an audience. The crowd listens silently and intently to the dramatic delivery. After fifteen minutes or so, the speaker wraps up and everyone cheers.

This is simply not how business presentations tend to go. In most companies, your audience will not be sitting in a dark room listening with great focus. People will wander in, many of them

late. Within three minutes, some people will pull out their phones. Someone will be munching on a donut, someone else will spill their coffee.

Your audience won't be silent, either. You will get questions. People will say, "Wait, that analysis looks funny. How did you calculate that?" and "I don't think that ship date is feasible. Jessica, what did your latest report say?"

The meeting will go on for an hour or more. People will come and go. At the end, there will be no applause. Instead, people will dash off, late to their next meeting.

Here are four recommendations for doing effective business updates.

## **Recommendation #1: Be Clear on the Purpose**

The single easiest way to improve your business presentations is this: only present when you are clear on the purpose. A presentation with a clear recommendation will allow you to have focus and energy. You can start by clarifying the goal and this will orient your audience and start off your presentation well.

I recently had a discussion with a business executive about presenting. She was struggling with her presenting skills—nervous and not getting her points across.

I asked her about her recent experiences. She noted that often she was giving business updates to the board, a five or ten minute look at the numbers.

As I talked with her, I realized that there was a simple problem: she shouldn't be doing these presentations at all. You don't need to do a presentation if you are just showing people some numbers. You can just send an email. More important, it is almost impossible to do a thorough, robust presentation on a business in five or ten minutes.

One of the keys to becoming a great presenter is to only present when there is a clear purpose. If you have a clear reason to give a presentation, your audience will understand what you are hoping to achieve.

A clear purpose will also help you create a powerful presentation. If your goal is gain approval for a new product launch, you will build your presentation to support that point. If your task is to explain why you need more R&D resources on a product, you can write a presentation arguing that.

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## Recommendation #2: Consider Your Audience

Every presentation is written for someone in particular. You don't write a presentation for general consumption. There is a person you are trying to reach. Before creating a delivering a presentation, then, it is important to consider who it is and what that means.

On occasion, you may end up creating a series of different presentations for the same project, each one tailored to a different audience. The presentation you create for a meeting with the head of sales will be different than one you create for the head of finance.

In most cases, your most important person will be the most senior executive. If the CEO will be there, you will probably focus on the CEO. However, this isn't always the case. If you are presenting to your MBA summer interns, they will be your key audience, even if the CEO is attending the meeting.

There are three particularly important things to consider: preferences, priorities, and perceptions.

### Preferences

People like to act and communicate in different ways. I saw this when I was at Kraft Foods. At one point, I had a manager who loved to entertain a group. Most days, he would gather the team and we would all head down for lunch, where he would entertain us with jokes and funny stories. A good meeting for this manager included a big group where he could perform, ask questions, and provide witty commentary.

I later had a manager who preferred very small groups. In a large meeting, he would get very quiet and ask few questions. You couldn't really determine what he was thinking. In a smaller setting, however, he would engage and share. A good meeting for this manager was a small, quiet affair.

Early on, you should consider your audience. What do they prefer? Will this be a large meeting or a small meeting? Will they read the document in advance or not? Will they want two meetings, one to review the information and one to make the actual decision?

Little things can play a role. One of my managers hated slides with many builds; he wanted to see all the points at once. It was important to know this, because if you presented a slide with builds he would be annoyed right from the start, pained each time a point flew onto the page.

It is also worth considering who the person trusts. Most people have a core group of people they can count on. Identifying these people to be included in the meeting is important.

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## Priorities

It is important to think deeply about the person you will be talking to, and what is important for them.

The goal is to connect your recommendation to their priorities. If your recommendation is in line with their priorities, you might get approval. If it conflicts, you probably won't. For example, if you know a senior executive is under a lot of pressure to deliver short-term financial results, a recommendation that will boost short-term financial results will probably be well received. A recommendation to invest in the long-term health of a brand will be a much more difficult sell.

## Perceptions

It is also important to think about perceptions. What does this person think about my business or project as we begin this discussion? One reason this question matters is because it will shape where you start your story. If they know a lot about your business, you don't need to spend much time on background. If they don't, you might need to devote quite a bit of time to laying the groundwork.

The perceptions will also shape how you build the presentation. If you are presenting to someone who is excited about your business and eager to build it, you can present with an upbeat tone. You can move quickly. You know people will be nodding along, eager for more. You don't need to spend a lot of time on supporting data.

If you are presenting to someone with a lot of concerns, you'll need to build a very different type of presentation. You'll need to provide more supporting points and more information. You will have to carefully build a case and prove your points. Be ready for challenges and tough, probing questions!

## Recommendation #3: Find the Story

Humans communicate best by telling stories. When you ask someone about their recent vacation, they don't recite a list of facts: "Three flights, 8,567 miles, four nights, two meals in two star hotels, 36 holes of golf, 8 games of tennis." They will tell you a story: "We had such a great trip. We started by flying to Frankfurt, where we spent two days exploring the old city. Then we headed on to ..."

A good presentation will build off this insight. It isn't a list, or a collection of facts, or a series of analyses. It is a story, a sequence of points and insights that build to a conclusion.

When developing a presentation, then, the challenge is to find the story. For this reason, it is useful to start by focusing on key points—the headlines. What is important? What comes next? Ideally one headline will flow to the next headline.

A storyboard is a useful technique. Simply take a piece of paper and create nine boxes by drawing three vertical lines and three horizontal lines. Each box represents a page. Then write a

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headline in the upper left box. This will be page one of your presentation. Then write another headline, representing page two, and then page three. Each headline should flow one to the next.

Some people like to use post-it notes for this task. Each post-it represents a page, so you can easily move around the pages and rework the order. You can create new pages and drop out old pages.

It is best to use a pencil at this point, because you will almost certainly need to make changes. You might find there is a gap in the logic, or you might need to split one page into two pages. Jim Kilts was CEO of companies including Kraft Foods, Nabisco and Gillette. When constructing a presentation he would go through fifty or sixty versions, refining the flow and tightening the story.

Spend some time thinking about the starting point. Where does this story begin? Starting the story at a logical spot, whether that is your last business update or last year's financial results, be sure that those attending the meeting understand your starting point.

Once you have the overall flow ready, you can start constructing the actual pages. At this point, you can begin adding the supporting analyses, charts, graphs, and calculations.

Remember that the information on the page should support the headline. You don't want to add extraneous information at this point. Limit your supporting points to information that will back-up the headline.

Sometimes you will find that the information doesn't quite work. It may be that you don't have great support for the point you are trying to make, in which case you have to step back and look at the overall story once again. You may find that there is too much data to fit on a page, so that it would be better to split the page into two.

Once you have the headlines basically worked out and the supporting information in place, you can polish the pages, making sure that each one is tightened and focused.

One step is reviewing the headline. When polishing headlines, be sure to keep them short, no more than two lines. Also, be sure to use parallel construction. If you have subjects and verbs, use them consistently. Don't have headlines like, "We launched the new product in 2017" then "Initial results" then "Gaining distribution." This fragmented approach makes the presentation seem unpolished. Better to have "We launched the new product in 2017" then "Initial results were positive" then "Strong retail executive drove our success."

Nothing damages your credibility more than incorrect information. If you are using a fact, be sure you are clear on where the fact comes from and what it means. If you are showing a calculation, check the figures. Someone will probably do this during your presentation so you should check it first. Always check your data!

## Recommendation #4: Prepare with Care

All too often, people think that after they have written the deck and scheduled the room, they are basically done. That is the hard work, right?

The reality is that preparing for a presentation takes time and focus. Finishing the presentation and reserving the room are just the first steps.

## Pre-Sell

It is always best to pre-sell your recommendation. In the time leading up to the presentation, you should go and meet with key people and take them through the recommendation.

Pre-selling has multiple advantages. When you take someone through a recommendation in advance, you learn where they stand. You will find out if they support the recommendation, if they have questions or if they are against it. All of this input will help you. If people are on board, you can move forward with confidence. If they have questions you can address the issues and revise the deck. If they are against the recommendation, you can try to understand why. You might be able to change their opinion. If not, you won't be surprised. You can note, "Now some people have issues with this recommendation, but the logic behind it is ..."

Another advantage is that meeting with people will make your recommendation stronger. In most business situations, there are many difficult dynamics to consider. When launching a new product, for example, there are operational start-up issues, retailer stock challenges, and advertising production headaches. By meeting with key cross-functional people, you will find out what needs to happen. You don't want to learn about a production snafu during a presentation to the CEO.

Pre-selling also builds support. If you take someone through a recommendation, address their questions and respond to their concerns, they will likely support it when it comes forward. Building support and assembling a coalition is essential to get things approved in a large organization.

When pre-selling a recommendation, there are several things you should do. First, you want to meet well in advance, so that you have time to respond to questions and make changes. If you meet with someone a day before the big presentation, you don't have time to change things or do new analysis. You won't be able to respond to the input. This is worse than not meeting at all!

Second, you should bring a document that is clearly not finished. You might put on the front page “ROUGH DRAFT” or “WORKING DRAFT” so that nobody thinks the recommendation is done. Bringing a finished document suggests that you aren’t planning to change it, and their input isn’t going to impact the final document. This turns the meeting from a discussion or work session into a clear “sell” meeting. This is not the optimal tone for the discussion.

Third, be sure to take notes so you can keep track of the input. If someone suggests reordering the presentation, you should probably reorder the presentation. If someone finds a typo, you should be sure to fix it. Responding to input, even small suggestions like fixing a typo, sends a positive signal: you care about the advice, and, in turn, the person. Failing to fix the little suggestions sends a very different signal.

On occasion, you won’t be able to meet with a particular senior executive in advance. People are busy and it can be tough to get on a calendar. If that is the case, you could perhaps meet with someone on their staff. This way, you can say, “I had the opportunity to meet with Susan, from your team, and have incorporated her insights.”

If you practice, you will know what is coming and will be able to connect one point to the next, your transitions will be smooth and your story will have a hook.

If you pre-sell a recommendation, you will start the meeting with a great deal of confidence. Some people might be on board, and if they aren't you know the concerns.

### Practice with Your Notes

When it comes to presenting advice, one of the most common suggestions is to practice. If you practice, you will know what is coming and will be able to connect one point to the next, your transitions will be smooth and your story will have a hook.

It is important to consider how you practice. One way is to write out your talk, and then spend time memorizing it. I do not recommend this approach. Memorizing a presentation can come off as stilted. While presenting, you want to tell someone an engaging story. Being too focused on remembering your exact wording, you may fail to tell a story naturally.

Another problem with memorizing your talk is that it is difficult. It is exceptionally hard to memorize a 25-minute speech. This is not something most people can pull off. If you are running a complex business, it is unlikely that you have the time to memorize.

Memorizing is also risky. When you forget your talk—and you probably will—you can look lost and hesitant. A better approach is to simply click through the presentation slide by slide several times in advance. On each page, you consider the message. What is the point of the page? What will you highlight? Will you point to the numbers? If so, which ones? Will you spend time on the page or move quickly to the next one? Then you consider the transitions. What page is coming next? How will you introduce this point? If you are very familiar with the flow of your presentation, the delivery will be natural. You might say, “Now, you are probably wondering ...” or “The issue with this situation is that ...”

Have a few and precise facts that you know but don't put in the presentation. With this approach, when you arrive at a certain page, you can drop in additional knowledge.

## Set the Room

Before you begin a presentation, you should spend some time familiarizing yourself with the space. There are several things to consider.

Start off with the basics, things like the light and sound. Check the projector. Consider how light or dark the room is. You want it to be dark enough so that people can easily see the slides, but not so dark that people can't take notes.

You also want to be able to see people in the audience. During a presentation, it is important to always look at the people in the audience, to assess what they are thinking. If people look confused, for example, you know to slow down. If people are nodding, you know to carry on. If people are flipping ahead or looking at their phones, it is time to speed up.

Second, consider the layout. When presenting, you want to move around in a natural fashion. You want to walk forward when that seems natural, and then walk away when that seems natural. This movement is only possible if you have the space. If the tables are pushed close to the projector, you will be blocked.

It is always useful to have access to something to write on, either a flip chart or white board. Even if you aren't planning to use it, you may need it as you respond to a particularly challenging or complicated question. You might want to write the key points on it. The only way this will be possible is if the writing surface is available.

In most cases, you will want a place for your notes, if only to remind you of some key facts—but you don't want to carry around your notes. You should put them down so you seem natural and confident. You can always wander over to look at your notes to remind yourself of a

particular fact or figure, but you won't want to carry them all the time. This means that you'll have to think about where you are going to put them.

If you have a podium in the room, it is tempting to put your notes there, but podiums are rarely optimal; a podium provides a sense of gravitas but puts clear distance between you and your audience. It looks like you are hiding behind something. It weakens your connection with your audience.

If you are very familiar with the space, you will be more comfortable when presenting. Your movements will seem natural.

## The Delivery

People stress about delivering a presentation. Some people worry they will say "ah" too much. Some people worry they will forget what they are supposed to say. Other people simply get profoundly nervous.

This is all natural and you should not worry about it.

It is important to always remember three things. First, you should be nervous. Remember, presentations really matter. They are critical to have an impact and build your personal brand. I would be more concerned if you weren't feeling nervous. That is when you might make some significant mistakes. A casual approach isn't likely to go over well.

Being nervous is important to give you energy and focus. When you are scared, your body shifts into gear. You are alert. You are energized. You are focused. All of these things are good when it comes time to deliver the presentation.

Second, remember that you are the expert. In most cases, you will know more about the topic than anyone else in the room. The division general manager is certainly a smart person, but she is managing many different products and trying to stay up to date on many different projects. You, however, spend most of your time working on this particular project. You are closer to the details. You know the ins and outs. This doesn't mean you should speak in a dismissive manner or operate with a grand swagger, but it should give you a bit of confidence.

Third, if you've done your advance work, the delivery really isn't too important. If you have a tight recommendation, a story that makes sense and solid data, if you've pre-sold your presentation and addressed concerns, if you've set up the room properly, things are almost certainly going to work out. If you end up saying "ah" too much, it simply won't matter. The presentation will still be a success.

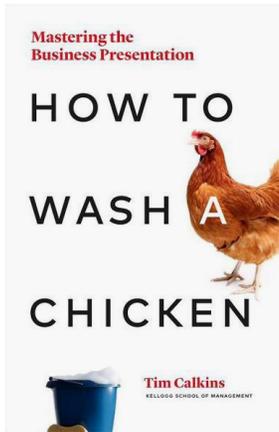
When I used to work at Kraft Foods, I recalled how on several different occasions I would work with my team to create an important recommendation, and we would send a very junior person up to present it. The move wasn't actually very risky because I know the presentation was tight and logical, and people were largely on board.

This approach actually made me more impactful. I could sit back and jump in with supportive comments, like "John has a really important point here. We really have to respond to the competitive threat."

Presenting is a core skill for any business executive. **By following some simple recommendations, you can be confident your presentations will go well.** 📌



# Info



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### About the author

Tim Calkins is a business writer, marketing consultant, and an award-winning clinical professor at Northwestern University's Kellogg School of Management, where he teaches Marketing Strategy and Biomedical Marketing. Through his firm Class 5 Consulting, he works with leading corporations around the world, including Eli Lilly, Roche, Novartis and PepsiCo. He also founded and leads the popular Kellogg Super Bowl Advertising Review, an annual event that has generated more than five billion media impressions. His previous books include *Breakthrough Marketing Plans* and *Defending Your Brand*, which was named 2013 Marketing Book of the Year by *Expert Marketer Magazine*.



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