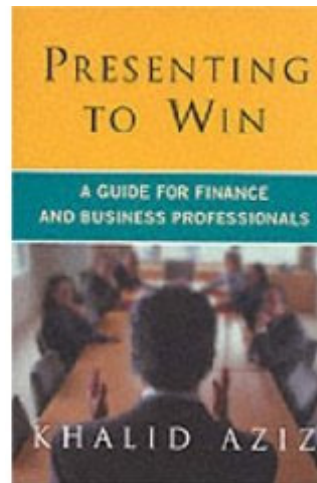


# Presenting to Win

A Guide for Finance and  
Business Professionals



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## About Khalid Aziz



Born in Pakistan, **Khalid Aziz** enjoyed a first career in the media, working initially for the BBC and then ITV and Channel 4. He founded The Aziz Corporation in 1983 and the company has grown to be Britain's leading specialist in spoken communications. Khalid himself has tutored hundreds of senior business people and politicians and the methodology he created is now applied extensively by Aziz Corporation consultants. He is a holder of the BP/Industrial Society Journalist of the Year Award. In 1997, he was appointed a Lieutenant of the Royal Victorian Order (LVO) for his services to The Prince's Trust. He is married and lives in Hampshire, England where he is a Deputy Lieutenant (DL). "Presenting to Win" is his tenth book.

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## ■ The Big Idea

The average business presentation made in the English-speaking world today is woeful. It is little wonder then that when graduates find themselves in business, they struggle to make themselves understood.

The trouble is that many people delude themselves about their real abilities. The trouble with business is that everyone knows how to drink; therefore everyone thinks they know how to run a pub. It is the same with speaking. The ability to open one's mouth and talk does not automatically mean that one is a brilliant speaker.

This book takes the mystique out of presentation. It is designed for those who know they need to present more effectively. Whether you make presentations every day or have never presented in your life but know the fateful day is coming, this book is for you.

## ■ Why You Need This Book

This book will help you become an excellent communicator using effective presentation skills tips from a person who has had many years of experience presenting to some of the world's most demanding audiences. It not only offers presentation fundamentals but also provides important tips on making presentations to both external and internal audiences.

## ■ Part One – Presentation Fundamentals

### ***THE THEORY OF EFFECTIVE SPOKEN COMMUNICATIONS***

When embarking on any kind of presentation, there are three key elements that must be borne in mind: first, the message that you want to get across; secondly, the audience to whom you want to get the message across; and finally, the medium.

#### **The Audience**

It is important that your communication is such that you get action from the audience and, in particular, that action must be in your favor.

#### **The Message**

Develop a clear idea of how you will measure the success of your communication, remembering that you are trying to get them to do something in your favor that they would not have done had you not spoken to them. Once you have done that, you will be well on the way to starting your communication.

#### **The Medium**

In terms of normal presentations, when you speak of the medium, you are actually talking about the environment in which you are giving your presentation. This is dependent on the numbers of people who make up the audience. The medium is more often dictated by those who have invited you to present. If you can, inquire in advance about the layout of the room so that it does not come as a total surprise.

#### *Key Points to Remember*

1. There are four basic questions to ask yourself before any type of presentation:
  - Who will you be speaking to?
  - What do they want to hear?
  - What is it you want to say?
  - Where is the overlap?
2. Hold your audience's attention through interactivity.
3. Speak with impact and passion.

4. Mirror the audience, gradually tipping the agenda towards your message.

### ***THE IMPACT FACTOR***

Style, image, body language, tone of voice, choice of language, speed of delivery and a host of other factors serve to make up the majority of the impact of face-to-face spoken communications.

It is therefore critical to maximize these factors if you are to have any hope of achieving the desired outcome of your spoken communication – namely to effect change in your audience.

### **Style**

Below is a range of characteristics. Choose two that you feel are most important to you personally and are therefore likely to best represent the way in which you want to be perceived by the audience:

- |                 |                |                |
|-----------------|----------------|----------------|
| • Educated      | • Conservative | • Confident    |
| • Successful    | • Professional | • Consistent   |
| • Youthful      | • Mature       | • Approachable |
| • Authoritative | • Creative     | • Dynamic      |
| • Quality       | • Credible     | • Experienced  |

Dress in something that you feel makes you look good. This will add to your confidence when you come to do the presentation proper. Once you have created the right image, you are ready to travel to your audience.

### **The Arrival**

Plan well in advance your journey to the venue. Give yourself plenty of time, aiming to arrive at least an hour before your performance, longer if you are unfamiliar with the venue. You should allow enough time to familiarize yourself with the layout of the venue.

### **The Stress of it All**

No matter how polished you become in presentations, there is always an element of "butterflies in the stomach" as you approach the appointed hour. The trick is not to try but instead to get the butterflies flying in formation. Use that nervous energy – channel it to get yourself animated, and get the audience interested in you and what you have to say.

### **Breathe – You'll Feel Better and Live!**

It is vital that you get your breathing correct in advance of going onto the platform. In essence, you will be using as little as a third of the total potential capacity of your lungs. All the main elements of effective voice rely on having adequate reserves of air. You simply will not achieve the full potential of the performance if you do not maintain enough air in your lungs.

### **Don't Twitch!**

Now you need to control your muscles. Think of nothing else; shut all other things out. This will give the effect of calming your brain and promoting a sense of well-being after just two or three minutes.

### **Grasp the Technology**

So many people assume that the technology will all be sorted out for them at any formal presentation. Do not rely on it. Even the smallest glitch can make you a laughingstock and detract from your message. If you want to ensure that you are not to be defeated by the technology, it is important that you understand and become involved in what goes on.

### **Getting on Stage**

Your performance proper starts the moment you get up from your seat and walk to the area from which you are to make your presentation. If you are making a semiformal presentation, then your performance starts the moment you enter the room. When it is your turn to speak, do not be in too much of a hurry.

### **Venue**

Some people, particularly in professional firms, like to make presentations to prospects on their own business premises rather than those of the prospects. This has advantages and disadvantages. The advantages are that you will know the equipment and will feel relaxed in the environment. The main disadvantage is that you will become too relaxed and fail to treat the presentation as the performance it truly is. You need to guard against this if you are to be successful.

### **Be Positive**

When you finally open your mouth, remember that you have very few words to play with in terms of the receiving time when compared to the written word. It is therefore important to stress the positive rather than the negative. Above all, this means using extremely positive language.

### **Look Them in The Eye!**

Eye contact is vital during any successful presentation. The definition of eye contact is looking at someone in the audience for not less than two seconds and not more than five seconds. Eye contact is critical at three key points in your presentation: the beginning, when you are seeking to engage the audience; the end, when you want to

leave them with a lingering message from you; and at any other point of passion within the presentation.

### **Action**

It is important to come across as animated; this is because humans are sentient beings. Their brains are stimulated by action. But you must get it right: the action must support what you are saying.

### **Timing**

Timing is critical in a presentation. Another key element of timing is the power of the pause. In short, use pauses throughout your presentation to add weight to what is trying to say.

## ***ON YOUR FEET: DELIVERING A STUNNING PRESENTATION***

Here are some key points to remember on how to get on your feet and work well with your presentation:

- You must "break the ice" with the audience from the start.
- Smile.
- Use eye contact.
- If you are nervous and find yourself shaking, consciously try to control your twitching.
- Use your breathing to keep calm and paced.
- Organize your prompt cards in two piles; be prompted from the left-hand card, while moving the right-hand one gradually across when you are finished.
- If you are to use any tool, make sure you are completely familiar with its operations.
- If your flow of words dries up, take stock and look at your prompt cards. When you are sure of yourself, look up and start again.
- Monitor audience feedback and reaction throughout your speech.
- Anticipate hecklers and interruptions by preparing well and knowing your audience's expectations.
- Do not get carried away in your efforts to empathize with the audience.
- Keep questions until the end.
- Keep your cool at all times.
- Do not overrun your allotted time.
- If previous speakers have overrun, cut your speech short.
- If you do not know the answer to a question, then say so.
- If you do not want to answer a particular question, then say why.
- Thank the audience for their questions.

## ■ Part Two – External Presentations

### *The Credentials Presentation*

Despite the availability of faster electronic means of communication, in business life people increasingly seek face-to-face communication with potential customers. Only with such contact do you have the opportunity of spelling out in person what you have to offer. And of course, if you are a good communicator you can do this with an impact and passion that would otherwise be hard to achieve with a written or telephoned communication.

#### **Key Points to Remember**

- A credentials presentation should always be treated as an opportunity to create sales.
- Keep in mind the brand values of your organization, but do not over-rely on these.
- Use the preparation of standard credentials presentations to highlight differences of perception between senior members of a firm about what is important in the organization.
- Standard credentials presentations should be used only as a backbone to any presentation, which should then always be tailored to the needs of each audience.
- Review your standard credentials presentation regularly.
- As in all presentations, offer clear up-front headlines emphasizing what's in it for the prospect.
- Research the prospect company well in advance, and show in your presentation that you know what they want.
- Select a balanced team with a good leader and strong back-up.
- Be wary of changed circumstances for the prospect company, which might alter your chances of success for better or worse.
- Stay alert for obvious "buy" signals from the prospect.
- Be flexible.

### *The Sales Presentation*

Sales presentations or direct pitches for business differ from credentials presentations in as much as they focus on specific sales opportunities. Often such opportunities will have arisen from a credential presentation. It may well be that several months have elapsed since the original presentation and now the prospect has come back to you and asked you to present on a specific business proposition. Although the proposition may be specific in the mind of the prospective client, you may find that it is often less well-defined than you would like. Indeed, when making sales presentation, the proposition can range from a very tightly defined tender through to a vaguely worded "what if" invitation to pitch.

**Key Points to Remember**

- Try to get as much information as possible from the client before the presentation.
- Always show your keenness to have the prospect's business.
- Choose the appropriate people for the presenting team.
- Allow two-thirds of the time for questions and answers.
- Rehearse likely questions.
- Establish a clear time frame for placing the business.
- Summarize your key selling points at the end of the session.
- Follow up with a letter of thanks, clarifying any points where necessary.

*Presenting to Bankers and Financiers: Raising Finance*

Presentations to bankers and financiers fall into two broad categories. The first is to raise the initial money for a business venture; the second is to report progress and ensure that your financial support remains in place and indeed, where appropriate, that you have paved the way to raising further funds should they be required.

**Key Points to Remember**

- When presenting to financiers, look at the proposition from their point of view.
- Understand their need to involve others within their organization and outside if you are seeking large funds which need to be syndicated.
- Be prepared to go over the ground several times.
- Consistency is vital.
- Be realistic when predicting figures, especially profit.
- Give a clear time frame for debt repayments.
- Finance directors must demonstrate their integrity.
- Summarize the key points and ensure you indicate the time scale for the next steps.

*Presenting to Bankers and Financiers: Presenting Financial Information*

In addition to submitting written reports and providing regular figures on business performance, companies are increasingly required from time to time to present periodic financial information to their bankers and financial backers in verbal form. This gives the financiers an opportunity of questioning and testing the figures and the business performance underlying the figures.

**Key Points to Remember**

- Expect what you say to be treated with the same credibility as any written information.
- Make sure everyone is "singing off the same hymn sheet".

- The chairman's job is to direct questions and buy time for the respondents.
- The question-and-answer session should last no longer than the presentation.
- Keep the overall time to under an hour.
- Prepare separate presentations for journalists.
- Guard against hype.

### *Seminar Presentation*

Presenting at seminars is an increasingly popular way of showcasing one's organization to a broader audience. Seminars provide an opportunity for people with common interests to come together and exchange ideas in both formal and informal settings. A well-organized seminar or conference ensures that there is a good mix of both types of activity, allowing a number of opportunities for delegates to interact with each other.

### **Key Points to Remember**

- Prepare early – take advantage of the time between the initial request to speak and the conference or seminar.
- Ensure that you are fully conversant with the various constituent elements of the audience – the delegates, potential employers, the media and the conference organizers.
- Ensure you will not be fazed by the auditorium. Arrange to view it when it is not in use.
- Get to grips with the technology - delegate someone in your organization to mastermind the liaison.
- Make sure you get the technical cares, including the Autocue operator, on side.
- Try to ensure that handouts are given to the audience at the end of your speech, not before.
- Treat the performance as a piece of music - there should be a clear crescendo at the end and you must leave them wanting more.
- Take advantage of your "celebrity status" after you have spoken and target key influencers.

## **■ Part Three – Internal Presentations**

### *Presenting to Superiors*

Remember when presenting to superiors to keep it simple. Fillet out the key messages but be prepared to go into detail if required. Remember that superiors are often looking for insight and not just information.



### **Key Points to Remember**

- Leave out the detail; present the essential facts, but be prepared to back up with the detail if requested.
- Mention any cash resources that will be required up front.
- Try to keep questions until the end.
- Don't play politics.
- Offer insight, not just information.

### *Presenting Research Findings*

Remember that, as with all successful presentations, when presenting research you will want your audience to take action as a result of what you have told them. The challenge is to make sure the action is what you want to happen. If you have planned your presentation correctly, the last person to be surprised by the outcome will be you, because you will know exactly what to expect.

### **Key Points to Remember**

- Make sure your presentation is relevant.
- Pick out the key headlines to the research.
- Don't load your presentation with piles of meaningless data.
- Take soundings in advance of potentially difficult areas.
- Confront potentially controversial issues early on.
- Offer insight and not just information.
- Pause for feedback every ten to fifteen minutes.
- Be prepared to be challenged on some of your findings.
- Don't run the risk of losing your presentation impact through leaking early results.
- Your findings will probably imply some element of organizational change, to which people are often averse. Be sensitive to this.
- Ensure you address the commercial implications of your findings.
- Don't present in such a way that the audience is disenfranchised from the decision-making process. Leave it open to them to take action decisions.
- Make use of "killer information" which will spur the audience on to take action.
- Try to ensure that you approve of the action taken.

### *Presenting at Annual General Meetings (AGMs)*

Facing shareholders at AGMs constitutes an important part of every board director's working life. But it is an activity few approach with relish. If you know you will be required to speak at an imminent AGM or results presentation, it can be a daunting

prospect. AGMs offer the prospect of facing shareholders eyeball to eyeball. Often the shareholders, particularly those with small holdings of stock who have no other opportunity of talking back to the directors, see this as their one chance in a year of getting their own back.

**Key Points to Remember**

- As your company's representative at an AGM, it is important to take an honest stance with the shareholders.
- Don't create unreal expectations. Everything must be grounded in fact.
- Rehearse with colleagues beforehand.
- Be prepared to answer difficult questions on controversial issues.
- If you don't have the answer to a question, ensure the questioner that you will find out as soon as possible after the presentation.
- Remember that AGMs can create positive publicity and enhance your company's reputation if they are handled well.

*Inspirational Presentations*

Having got your audience on your side by celebrating how well they have done despite a difficult situation, you can then move on to how you believe it will be good for them to change behavior in a certain manner. A good leader is someone who, even when addressing large groups of people, talks to them as individuals so that when they leave the presentation they each feel a one-to-one bond with the leader.

**Key Points to Remember**

- Respect your audience.
- Celebrate your audience's achievements.
- Don't let your presentation become didactic and one-sided.
- Resist the urge to squash Smart Alec questioners. Let your audience deal with them.
- Leave your audience on a high with some clear and inspirational calls to action.
- If you intend to use video or satellite treat it as a television appearance; television is a much more intimate medium than a large conference hall.

## ■ The Golden Rules

1)	Give yourself time to prepare
2)	Research your audience
3)	Consult your colleagues
4)	Play to the overlap
5)	Prepare bullet point notes
6)	Use prompt cards
7)	Follow the Rule of Five
8)	Allow one minute per card
9)	Emphasise benefits, not features
10)	Avoid acronyms and jargon where possible
11)	Explain on first use if you need to use jargon
12)	Use plain English
13)	Use active not passive verbs
14)	Avoid double negatives
15)	Jokes — if in doubt, cut it out!
16)	Visual aids must be "visual" and must be "aids"
17)	Apply the necessary and sufficient test /the Fresh Fish Rule
18)	You must rehearse
19)	Arrive early and check the room and equipment
20)	Project the right image for you and your organisation
21)	Use de-stressing exercises if necessary
22)	Ensure that your hands are in the home position
23)	Start confidently — pause, eye contact, smile
24)	Hit the ground running
25)	Don't apologise, unless absolutely necessary
26)	Be interactive
27)	Respond to feedback
28)	Choose appropriate gestures
29)	Be yourself
30)	End positively — summary, "what that means to you", call to action.