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AFP Speaker Guide



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Introduction

Approximately 35 million PowerPoint presentations are given each day and research says, unfortunately, most people tune out within the first ten minutes. When asked, 79% of those on the receiving end of PowerPoint presentation agree with the statement, “most presentations are boring.” How, then, can you avoid the common presentation pitfalls and then go a step further and make your presentation great? This guide will help answer those questions with simple tactics you can implement immediately to give presentations that have people wondering when your next presentation will be.



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Creating the Content

“One of the big lessons from behavioral economics is that we make decisions as a function of the environment that we’re in.”

– **DAN ARIELY**

Professor of Psychology and Behavioral Economics
Duke University

Creating the Content

Use a Structured Approach — Principles, Not Templates

Use Story Structures

One of the best ways to make your presentation more engaging is to put your audience in an environment that captures their attention. A story is one way of doing this. Science teaches that stories change our mental environment. They make us feel as though we've been pulled into a different setting and that affects how we process information.

The simplest story structure has a hero (the main point discussed in your presentation), conflict, and resolution. The hero doesn't have to be perfect, so don't try to look for, or create, a perfect hero. *Breaking Bad* was a popular television series that featured a relatable yet complicated anti-hero that captured audiences around the country. Your audience must relate to you and the way you make that happen is through building rapport with them. Without rapport, you're talking at the audience, not supporting their learning and development.

For a simple example of how you can implement this story structure, let's use a project you want to get approved. The *hero* might be the project sponsor. The *conflict* is the process of getting your project approved and how you overcome the objections and problems along the way. The *resolution* is finally getting the project approved and moving forward to implement it. Focus on the resolution and how it will benefit your audience to understand what it took to get from point A to point B.

CLEARLY DEFINE THE PURPOSE OF YOUR PRESENTATION

Start with why. Most people spend all their time talking about what they want you to know and never mention why you should care. Get clear from the start and your audience will be more engaged. Are you presenting to inform, influence, persuade, or for some other reason? What you say and how you say it may differ, depending on your goal.

CREATE AN OUTLINE

Creating an outline is a simple step, but stopping there is not enough. Refer to your outline as you complete each item, or you could find yourself investing lots of time and effort developing your presentation only to realize you got off on a tangent or completely missed covering a point that was important. Keep your outline simple and cover three to five main points, no more. You can have subtopics for long presentations, but keep people focused on a small number of things. Ask yourself along the way, "Will my audience understand the key point being made here?" and "How can I make this simpler?"

Use the outline feature in PowerPoint to create section headings that serve as the outline of your main topics.

Use Stories

Your outline should use a story structure. There are many approaches to storytelling, but you are better off using key principles to build your story, rather than using checklists or templates.

KNOW YOUR AUDIENCE

Understanding your audience is all about questions. Asking the right questions will tell you everything you need to know about your audience. There are many questions you can ask but keep it short and to the point. Whether you ask your audience directly, or you answer the questions through research, here are three key questions to consider:

1. **Experience:** What levels of authority will be in this session? Are they entry-level, mid-level, executive-level, or a mix?
2. **Topic Knowledge:** Are they familiar with the topic? Do they understand the issues or is this new to them?
3. **Communication Style:** How do they process information? Are they big picture, conceptual thinkers or are they a highly analytical group that loves diving into the details?

Creating the Content

A common challenge presenters are faced with is an audience they know little about. You know you are presenting to AFP members, so you have some idea of what's important to them, but within this group of attendees there are a variety of interests expecting to be served. AFP offers the CTP and FP&A certifications, so a basic understanding of what topics and issues are at the forefront of these fields is a good place to start in understanding a typical AFP event audience.

CLOSE STRONG

End your presentation on a high note. Develop a strong close and practice it just like you practice the rest of your presentation. A few tactics to consider for your closing include:

1. **Story** – A short story that encapsulates your session or is the ending to a story you started earlier in your presentation.
2. **Summary** – A simple, brief recap of the session takeaways, but only high-level takeaways.
3. **Call-to-action** – This is the best way to end if you want your audience to do something specific. For example: Provide an instruction like, “Now that you understand the power of story, take out a sheet of paper and write down the three bullet points you want to convey in your next presentation.”

Focus On Critical Take-Aways

Contemplate how your unique knowledge and experience adds value to your presentation and show, don't tell, your audience how they are getting the value of all you bring to the table. Show them with the stories you incorporate in your presentation that come from your real-world experience. These resonate with people and drive your points home more powerfully.

What are the learning objectives for your presentation? What will the audience get from attending? What do you want them to do? Whatever the answers to these questions are, tell people what they can expect and what you want them to do. Most importantly, remind your audience why what you are presenting is valuable to them. Keep in mind what level of learning you want your audience to take away. Are you simply transferring knowledge you want your audience to remember or do you want your audience to be able to evaluate the information you are presenting or maybe even teach it to someone else?

PROVIDE TACTICS THAT CAN BE IMPLEMENTED IMMEDIATELY

Giving your audience something they can implement immediately will anchor in their minds that they got value from your presentation. Include activities focused around hands on implementation of concepts you share and have them work together in small groups. Another effective tactic is asking specific questions about what they learned and how they can implement it. Consider highlighting this information as next steps for the audience.

EMPHASIZE THE LONG-TERM BENEFITS

Not everything you present will be actionable immediately. Long-term benefits are good incentives for people to review what you presented and continue gaining value. Keep this in mind as you develop your presentation.

Creating the Content

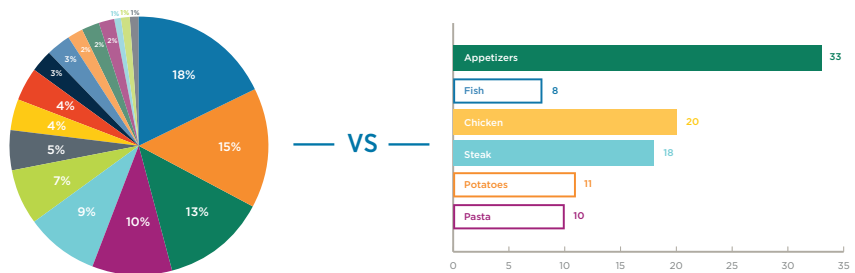
Use Visuals Carefully

Use Images to Anchor Concepts

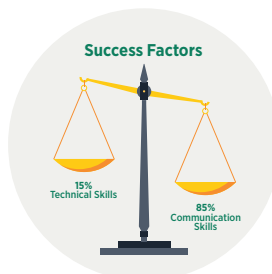
If you really want your presentation to take hold and be retained, use effective visuals. Keep these principles in mind:

1. **Be intentional** - Visuals should help anchor information in the mind of your audience.
2. **Brevity** - Keep your visuals concise, just like your text.
3. **Rule of Three** - Communicate no more than three pieces of information in any single visual.

Notice how the pie chart is so crowded, it's hard to know what to focus on while the bar graph highlights the three items the speaker wants the audience to focus on with very little extra data for context.



Here is an example of a visual that solidifies the idea of imbalance, that is simple, easy to understand and remember.



Here is another example of how you can use visuals in your session agenda/course overview. Use PowerPoint's design feature to automatically find icons for your bulleted list based on the bullet text. Again, notice the rule of three in action.



Creating the Content

Data Visualizations

People can process visuals 60,000 times faster than text, so using visualizations is an especially valuable tool when you're presenting lots of information. While visuals can be processed quickly, keep the focus on only key data. Think about it like you are an attorney going to court. Be prepared for every possible question and have your answers ready. Have the details ready but start with the most important information and let the audience's interests guide how deep you dive.

When it comes to presenting data visually, charts and graphs are just the tip of the iceberg. There are a wide variety of data visualization tools available beyond what Excel can offer. For simple bar, line graphs or pie charts, Excel is usually fine, but more complicated relationships might better be illustrated with specialized data visualization software.

SUMMARY OF KEY TAKE-AWAYS

1. **Use a structured approach** to clearly define the purpose of your presentation and follow the key principles: create an outline, know your audience and finish with a strong closing.
2. **Focus on critical take-aways** that your audience can use immediately.
3. **Remind them of the long-term benefits they will get** from implementing what you teach them.
4. **Use visuals wisely by being very intentional** and make sure they help anchor concepts. Keep them concise and simple.
5. **Data visualizations are a great addition when used wisely.** Again, think brevity and simplicity as core principles when developing data visualizations.



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Preparing Yourself and Your Presentation Team

“Practice isn’t the thing you do when you’re good. It’s the thing you do that makes you good.”

– **MALCOLM GLADWELL**

Outliers: The Story of Success

Preparing Yourself and Your Presentation Team

Organize Practice Run-Throughs

Test in the Presentation Environment

It's important to practice delivering your presentation in an environment as similar as possible to the environment where you will present. It will make you aware of some of the issues that might come up that you would not otherwise think of. This is especially important if you plan to use speaker notes because screen size does matter, as does where your screen is and how far away from it you are.

Ensure Your Technology Is Ready

Get to your venue early and bring all your equipment or back-up files with you. You probably won't need that much time, but there are lots of things that could go wrong that are simple to deal with if you have enough time. If there is a Speaker Ready Room at the event, it is highly advisable to check in with the AFP event staff 24 hours ahead of your scheduled session or at least 3 hours prior to allow sufficient time to review and make final edits to your presentation. Even if you have been in the room before,

plan to be in your session room 20-30 minutes ahead of your start time as things can change if other people have used the room and equipment before you. Test all the equipment and troubleshoot any issues with onsite AFP/Event Staff. If company protocol permits delivery of your presentation from a company computer/laptop only, be sure to give AFP Staff advance notice prior to the event or as soon as possible in the Speaker Ready Room so that any specific technical requirements can be addressed.

No matter how well prepared you are, stuff happens. Be prepared for as many contingencies as possible. You may end up with a smaller screen than expected, a technical issue or logistical problems, but don't let that get you flustered. As the presenter, you are the leader in the room. Ideally, be prepared to speak with no technology at all in a worst-case scenario. This will make you as bulletproof as possible and will boost your confidence.

Practice, Practice, Practice and Get Feedback

Practice Doesn't Make Perfect, it Makes Progress

Do NOT skip this step.

Practice is one of the most important steps, whether you're a solo speaker or on a panel. Many speakers put all their time into researching their topic and creating slides and overlook writing complete speaker notes. This is a big mistake. Even if you prefer to not read speaker notes or memorize what you will say, practice is still a must. Think about your preparation as analogous to a business plan. In the rapidly changing business environment you work in, most business plans are outdated quickly, but the value is

in the planning process. It's the same with practice. You will know your material so well, very little could get you off track.

When you know exactly what you're going to say, you can focus on other important things, like connecting with your audience. Keep in mind that you will usually be able to see your speaker notes on a desktop sized screen from the PC/laptop that is running your PowerPoint. This shouldn't be a crutch, but rather a safety net in case you get pulled off topic by a question or for any other reason need to get yourself back on track. If you're speaking on a panel, practice is even more imperative to delivering a successful presentation. Practicing in advance allows you to fine-tune the flow and timing between presenters.

Preparing Yourself and Your Presentation Team

Get Objective Feedback

One of the biggest challenges about practice is not knowing if you are performing well during practice. Feedback will help with this. Enlist the help of someone who can give you honest, constructive feedback and adjust accordingly. Consider practicing with an audience that is not an expert in your topic and get their feedback. In many cases, this means you need to make things easier to understand; think “Keep It Short and Simple”.

Record Your Run-throughs

Record your practice and watch and listen independently with a critical eye. Audio-only is helpful, but video is preferable so you can see your body language. You can also record yourself using apps that are specifically designed to give useful feedback. Orai and Speeko are apps that record your audio and provide specific feedback. For example, they count your filler words (e.g. uh, um, like) and keep track of your pace (your rate of speech expressed in words per minute), volume and other aspects of speech. Each app has its own features and free or paid versions are available.

Understand the Technology for Virtual Presentations (Webex)

1. **Know how your specific setup works**
2. **Have a backup plan**
3. **Understand what it can't do well**

Webex and other virtual meeting or web conferencing platforms come in a variety of setups and features. Make sure you're familiar with the version you will be using if you do not have someone helping to facilitate the logistics on the day of your presentation.

- Schedule a dry run using the platform a few days before your presentation to test connectivity or to allow time to download the application if it's your first time logging into the platform.
- Familiarize yourself with the features you plan to use. Features could entail setting up and activating in-event polling, managing chat/Q&A features, or recording the presentation.

If you're using polling in your presentation make sure they are all in a separate Word file and send to the event facilitator so they can be set up in advance of the presentation.

If you plan to include video in your presentation proceed with caution. Video is very engaging but depending on the platform you're using (Webex vs. face-to-face) there could be potential technical issues. If you must incorporate video, have a backup plan in case something goes wrong by preparing material to fill that time. Remember, your audience expects value for the time they're investing in you.

SUMMARY OF KEY TAKE-AWAYS

1. **Organize practice run throughs** in an environment as similar as possible to the room you will present in. Ensure all your equipment is running properly 20-30 minutes before your start time.
2. **Practice, practice, practice and get feedback** from a trusted colleague or friend for constructive feedback or use one of the many helpful apps like Orai or Speeko.
3. **Understand the technology for virtual presentations.**



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Delivering Your Presentation

Now that you have created a great presentation, it's time to make sure you deliver it effectively. Great content can put people to sleep if it is not delivered properly, so let's focus on some strategies to make your presentation spring to life.

Delivering Your Presentation

Presentation Key Principles

Engage Your Audience with a Full GAS Tank

1. **Get them involved quickly**
2. **Ask provocative questions**
3. **State a surprising fact and/or tell a story**
4. **WIIFM** – Let people know the answer to the question they are asking themselves, which is, “What’s In It For Me?”

Get your presentation off to a great start by grabbing your audience’s attention with a startling fact and/or a story that is relevant to them. Follow this fact up with a question to get your audience engaged. Here is an example for the start of a presentation on the topic of storytelling:

Cognitive psychologist Jerome Bruner’s research suggests that we are 22 times more likely to remember a fact when it has been wrapped in a story. If you’re not sure you buy into that, let’s try something together. Can you finish this sentence? May the force _____. Every time I have done this, the majority of the audience answers in unison, “Be with you,” and Star Wars debuted over 40 years ago. This has been the case even when the audience has been filled with people who were born decades after Star Wars first hit theaters. Strong stories are memorable.

For every topic, there is some fact that might surprise people and there is a story you can craft to get them engaged. Now that you have their attention, let your audience know where your story will take them and why they should pay close attention.

WIIFM — What’s In It For Me

Let people know early what’s in it for them. Tell them how what they will learn will be useful to them personally or how it will make their jobs easier. For example, use these presentation tips to make your presentations more effective, your messages more memorable, and your audience will be more likely to actually implement what they learn.

BUILD RAPPORT

A key way to build rapport is to learn people’s names and use them whenever possible. Arrive early to greet people as they enter the room. Introduce yourself, ask questions and point out what you may have in common so they are more connected and are more open to what you have to say. In most cases you will be formally introduced at the beginning of your presentation. If you are, don’t waste time telling the audience more about you. If you are not introduced, share a quick (30-60 seconds) snippet about your background and experience that illustrates why you are uniquely qualified to deliver the presentation you are there to deliver.

AWARENESS

There are two types of awareness you need to master, self-awareness and awareness of others and how they perceive you. Pay attention to your behavior, what you are saying and how you are saying it. Then, tune in to how your audience is responding to you and your message and adjust accordingly.

ASK QUESTIONS

Asking questions is one of your best tools. Use them throughout your presentation to maintain rapport, understand your audience and engage them in the session. Ask involvement questions. These require the person to picture themselves using the thing you are asking them about to answer the question. In a business setting that might sound like, “Now that you know how to effectively use macros in Excel, how would you use them to make your daily work more efficient?”

Delivering Your Presentation

Activities, Exercises, Discussions

Getting your audience physically and mentally involved will increase their attention during your presentation and their retention afterwards. Let what you want people to be able to do after an activity drive the choice of activity. If you want your audience to remember facts you share, have them read, listen to, or watch something. If you want

them to acquire a new skill, consider using role playing and demonstrations of the skill. If you are trying to get people to change their priorities or values use role play, discussions, or structured games. This last category is a much bigger challenge, but it is not an uncommon goal for people in leadership roles.

Do's and Don'ts

Do

1. **Smile** – This goes much further than most people realize towards building rapport.
2. **Make eye contact** – Stay focused on your audience, not your PowerPoint slides.
3. **Be enthusiastic** – Show your own type of enthusiasm. Don't try to act like a cheerleader if you're a naturally reserved person because people will pick up on it and it will feel insincere. Be genuinely interested in your topic and show it.

Don't

WORD CHOICE

At its core, all communication is a series of decisions about which words to string together. Choose your words carefully. Think about how the words you choose affect your clarity, tone, and attitude. Avoid vague or ambiguous words to ensure clarity. Words like some, lots, few, many and others may create questions in your audience's mind about what you mean, so avoid them when possible. Also consider how your words affect the tone of voice you convey. If you constantly sound like you're exaggerating, for example, constantly saying things are awesome will lead your audience to question the credibility of your presentation.

Be careful to not overuse the same words. This becomes more challenging when you are speaking on a topic that requires specific language. Use a thesaurus and vary your words so your audience doesn't feel you're being repetitive. Lastly, watch out for some of the "commonly confused words" and phrases. There, their, and there is one example. Another example is except and accept. Google commonly confused words and you will find all sorts of lists. The best way to guard against this is to have someone else who is good with grammar proof your presentation before you finalize it.

FILLER WORDS

One of the most common errors presenters make is overusing filler words. Examples are um, uh, you know, er, like, clearly, or so. There are many more, but you get the idea. One or two of these slipping into your presentation isn't going to ruin your presentation, but don't make them a habit. Avoid words that make your message less impactful. For example: to be honest with you, honestly, actually, and really, kind of, sort of, and like are all fillers you should eradicate from your vocabulary. All these give the impression you are less prepared and professional.

CONTROVERSIAL TOPICS

Unless you are specifically asked to speak on a controversial topic, and it is within your expertise, avoid controversy in your presentations. However, if controversy is unavoidable, acknowledge the "elephant in the room" to establish trust. Be neutral and open to hearing different points of view.

STEREOTYPING

If you are presenting statistics about groups of people, be clear that they can be useful generalizations to begin understanding a group of people, but you must get to know each individual before you can judge them, otherwise you are stereotyping.

SUMMARY OF KEY TAKE-AWAYS

1. **Presentation key principles** – Build rapport, awareness and ask questions.
2. **Activities, exercises and discussions** – Use audio/video to help your audience remember facts.
3. **Presentation delivery do's and don'ts** – Be engaging and pay attention to word choices, filler words, controversial topics.



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Conclusion

Creating presentations with a story structure in mind, while focusing on key takeaways and using carefully chosen visuals will propel your content to the next level. Follow that with well-planned practice and being responsive to feedback and you're well on your way to a great presentation.

Get to your venue early to troubleshoot any potential glitches and you're ready to present. When you step up to address your audience, focus on a few core principles: Get them involved quickly, ask questions, and remember everyone is tuned to WIIFM (What's In It For Me) radio. Steer clear of controversial topics, be intentional with your word choice and your audience will have an experience far better than average.

George Bernard Shaw once said, "The single biggest problem in communication is the illusion that it has taken place." When you use the tools in this guide, you will ensure your communication is not just clear, but impactful and memorable.



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About AFP®

As the certifying body in treasury and finance, the Association for Financial Professionals (AFP) established and administers the Certified Treasury Professional (CTP) and Certified Corporate Financial Planning and Analysis Professional (FPAC) credentials, setting the standard of excellence in the profession globally. AFP's mission is to drive the future of finance and treasury and develop the leaders of tomorrow through certification, training, and the premier event for treasury and finance.

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