



ASSOCIATION FOR  
FINANCIAL  
PROFESSIONALS

# AFP Speaker Guide



# Creating the Content

---



# Creating Content

- 1. Use a structured approach**
- 2. Focus on critical takeaways**
- 3. Use Visuals Wisely**



# Presentation Facts

- 35 million PowerPoint presentations per day
- 79% say “most presentations are boring”
- 10 minutes = Time before most people tune





**“You can have brilliant ideas, but if you can't get them across,  
your ideas won't get you anywhere.”**

***- Lee Iacocca, former CEO of Chrysler Corporation***





“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 at Duke University



# Story Structure



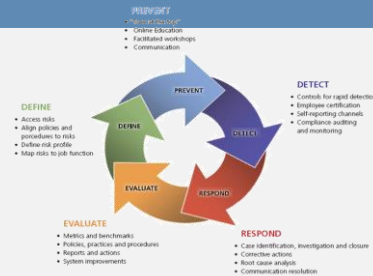
Hero



Project  
Sponsor



Conflict



Obstacles in the  
way of Your Goal



Resolution



Results of Your  
Work



# 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.





# Create an outline

1. Create it
2. Refer to it often
3. KISS – Keep it short and simple.  
Cover 3 to 5 main points
4. Ask yourself, “Will my audience understand the key point?” and “How can I make this simpler?”.
5. Create section headings

Table of Contents	
Introduction .....	2
<b>1. Creating the Content .....</b>	<b>2</b>
a) Use a Structured approach – Principles, not templates .....	2
i) Clearly define the purpose of your presentation .....	3
ii) Create an outline .....	3
iii) Know your audience – relevancy, context .....	3
iv) Close Strong .....	4
b) Focus on critical takeaways .....	4
i) Things they can implement immediately .....	5
ii) Longer-term benefits they will get .....	5
c) Use Visuals Carefully .....	5
1. Use images to anchor concepts .....	5
2. Data visualizations .....	6
Part 1: Summary of Key Takeaways .....	6
<b>2. Preparing Yourself and Your Presentation Team .....</b>	<b>7</b>
a) Organizing practice run throughs .....	7
b) Practice, practice, practice and get feedback .....	7
c) Understanding the technology for virtual presentations (WebEx) .....	8
Part 2: Summary of Key Takeaways .....	9
<b>3. Delivering Your Presentation .....</b>	<b>9</b>
a) Presentation key principles .....	9
b) Activities, Exercises, Discussions .....	10
c) Do's and Don'ts when you present .....	11
Part 3: Summary of Key Takeaways .....	12
Conclusion .....	12

# Know your audience



1. Experience
2. Topic Knowledge
3. Communication Style



# Close Strong

1. Story
2. Summary
3. Call-to-action





# Focus on Critical Takeaways

- What are the learning objectives?
- What will the audience get from attending?
- What do you want them to do (call-to-action)?



# Focus on Critical Takeaways

- What's the value of what you're sharing?
- What level of learning are you aiming for?
  - Knowledge transfer
  - Evaluate what they learn
  - Will they teach others?



# Focus on Critical Takeaways



1. Things they can implement immediately
2. Longer-term benefits





# Use Visuals Carefully



**Be intentional**



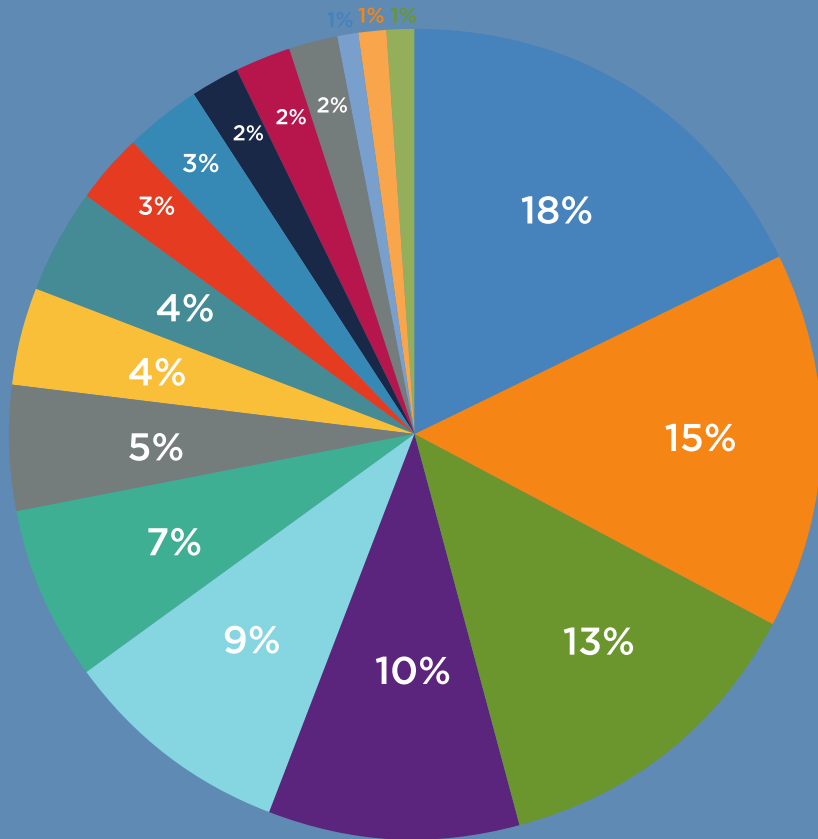
**Be Brief**

**3**

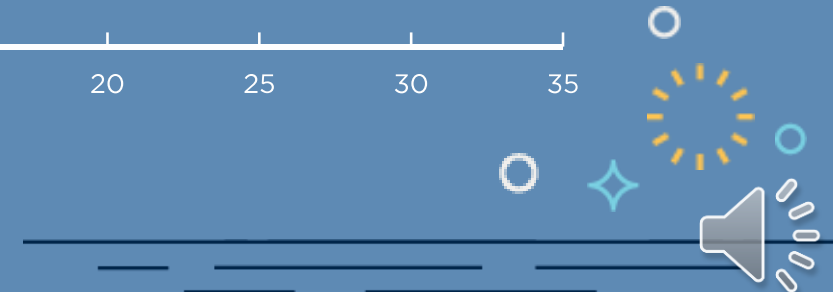
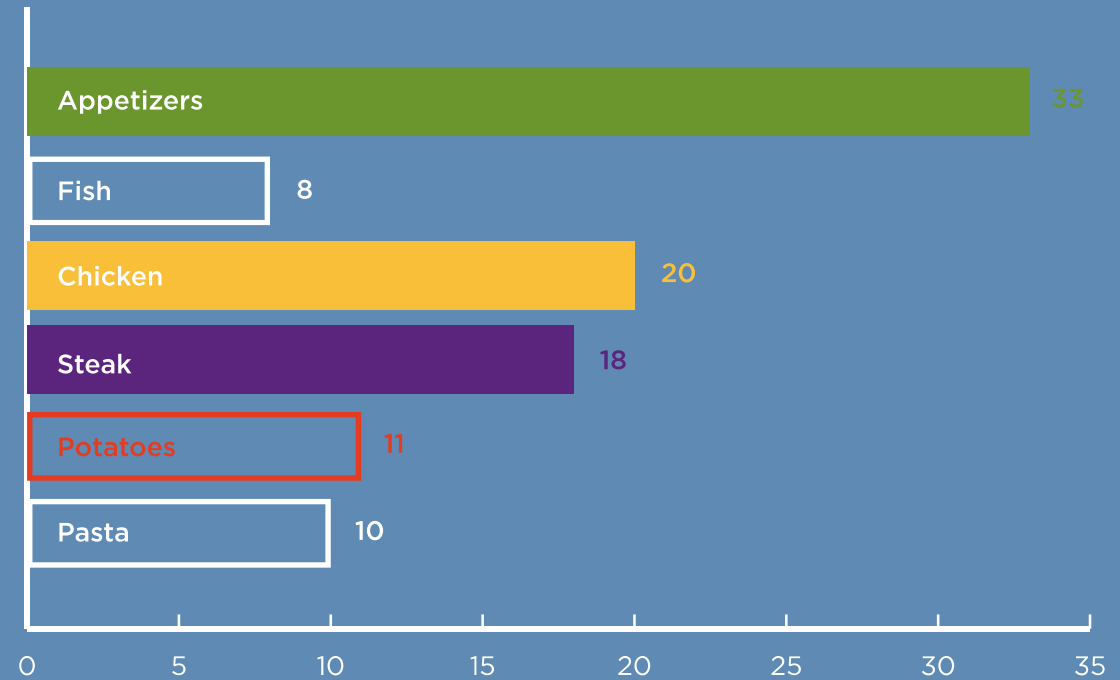
**Rule of Three**



# Use Visuals Carefully

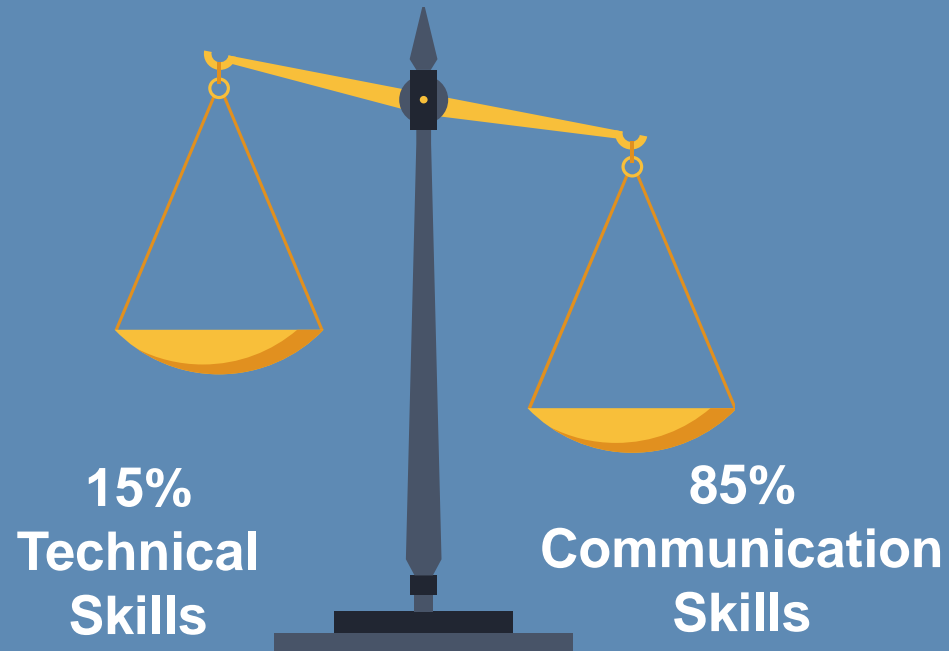


VS.



# Use Visuals Carefully

## Success Factors



Creating the Content



Preparing Yourself  
and Your Team



Delivering Your  
Presentation



# Data Visualizations



- People can process visuals 60,000 times faster than text
- Focus on key data
- Be prepared to dive deeper, but don't do a data dump



# Creating Content Recap

## 1. Three main story elements:

- The Hero
- Conflict
- Resolution

## 2. Be clear on the purpose of your presentation

## 3. Proper use of an outline

## 4. Things you want to find out about your audience



**5. Strong close.**

**6. Critical takeaways**

**7. Simple rules for using visuals wisely:**

- Be intentional
- Be brief, and
- The Rule of Three





# Knowledge is Only Potential Power

**“The success of your presentation will be judged not by the knowledge you send but by what the listener receives.”**

*~ Lilly Walters, Author*

