



Presentation Skills

Presented by IMA Leadership Academy

December 7, 2021



The Association of
Accountants and
Financial Professionals
in Business

Webinar Features and CPE Credit

A purple square icon with the text "Q&A" in white.

Asking Questions



Help



CPE Credit

Certification

Criteria for Partial Credit Option 1

- ☐ Minutes to Watch: 50
- ☐ Number of Completed Polls required: 3

Criteria for Full Credit

- ☐ Minutes to Watch: 75
- ☐ Number of Completed Polls required: 5

Moderator

Virginia “Ginger” White, CMA, CSCA

Global IMA Chair 2018-2019

IMA Global Board of Directors

Member

**Volunteer Leadership Standing Board
Committee**



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Presenter

Gwen van Berne, CMA

Chair-Elect, 2021-2022

IMA Global Board of Directors

Chair

Nominating Standing Board Committee

Member

Strategic Planning Standing Board Committee



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Gwen van Berne's Biography

- Gwen van Berne is the Chair-Elect of IMA's Global Board of Directors for the 2021-2022 fiscal year. She is also serving as chair of the Nominating Standing Board Committee and as a member of the Governance Standing Board Committee and the Strategic Planning Standing Board Committee. In addition, van Berne serves as a trustee of the ICMA Board of Trustees, IMA Research Foundation Board of Trustees, IMA Memorial Education Fund, and the IMA Europe Board.
- Ms. van Berne is a supervisory board member of International Card Services (ICS), the largest credit card provider in the Netherlands. For the last four years, she was CFO of RIPE NCC, the Regional Internet Registry (RIR) that provides Internet resource allocations and registration services to Europe, the Middle East, and Central Asia. Before RIPE NCC, van Berne fulfilled a variety of roles within ABN AMRO Bank, including head of capital and risk reporting (ABN AMRO Bank NV), global manager of business development (ABN AMRO Clearing Bank NV), and manager of private banking (ABN AMRO Mees Pierson Wassenaar).
- In her spare time, Gwen is the treasurer of the Delft Chamber Music Festival. She is also curatorium member of the executive education program for the CMA program at Vrije Universiteit Amsterdam.

Course Goal and Agenda


The **goal of this course** is to help management accountants design and deliver organized, effective, and memorable presentations.




- ☒ Introduction
- ☐ The Effective Presenter
- ☐ Preparing the Presentation
- ☐ Delivering the Presentation
- ☐ Close


Learning Objectives

AFTER THIS SESSION, ATTENDEES WILL BE ABLE TO:

 **IDENTIFY** key characteristics of an effective presenter

 **DEFINE** what makes an effective presentation

 **DESCRIBE** how to design an organized and memorable presentation

 **LIST** best practices for delivering an engaging and memorable presentation



Reflection

1

Think of the **best presenter** you have ever seen. What made them such a good presenter?

2

How would you rate your **overall effectiveness** when delivering a presentation? (*Poor, Below average, Average, Above average, Excellent*) Why?



The Effective Presenter



IMA Management Accounting Competency Framework



Reporting & Control

- Integrated reporting



Technology & Analytics

- Data visualization



Leadership

- Communication skills
- Negotiation

Qualities of an Effective Presenter

PASSIONATE

Confident

CALM

Charismatic/Charming

ASTUTE

COURAGEOUS

Knowledgeable

HIGHLY ORGANIZED

Willing to be
uncomfortable

AUTHENTIC

Commanding/
Authoritative

MEMORABLE

**CHEERFUL AND
MAKE OTHERS SMILE**



Self-Assessment

In the Participant Workbook, rate yourself on each of the qualities of an effective presenter.



Identify three qualities that are
YOUR STRONGEST.



Identify three qualities that
YOU NEED TO STRENGTHEN.



Actions of Effective Presenters

- **Provide** actionable content
 - **Make** the complex simple
 - **Connect** with their audience
 - **Tell** great stories
 - **Deliver** unique messages and ideas
 - **Are** well-prepared
 - **Control** question-and-answer sessions
- **Are** aware of their body language
 - **Engage** in active listening
 - **Know** when to stop talking
 - **Avoid** “fillers”
 - **Think** about the big picture
 - **Focus** on the opportunity
 - **Fine-tune** their voice
 - **Practice** with people
 - **Have** a conversation
- **Think** like a designer
 - **Always looking** to improve
 - **Go beyond** objectives to intentions
 - **Share** instead of tell; give instead of take



Poll Question #1

If you had to choose, which of the following actions do you think is **most important for effective presentations**?

- a. Provide actionable content
- b. Make the complex simple
- c. Connect with the audience
- d. Tell great stories
- e. Be well-prepared
- f. Fine-tune your voice



Poll Question #1 Results



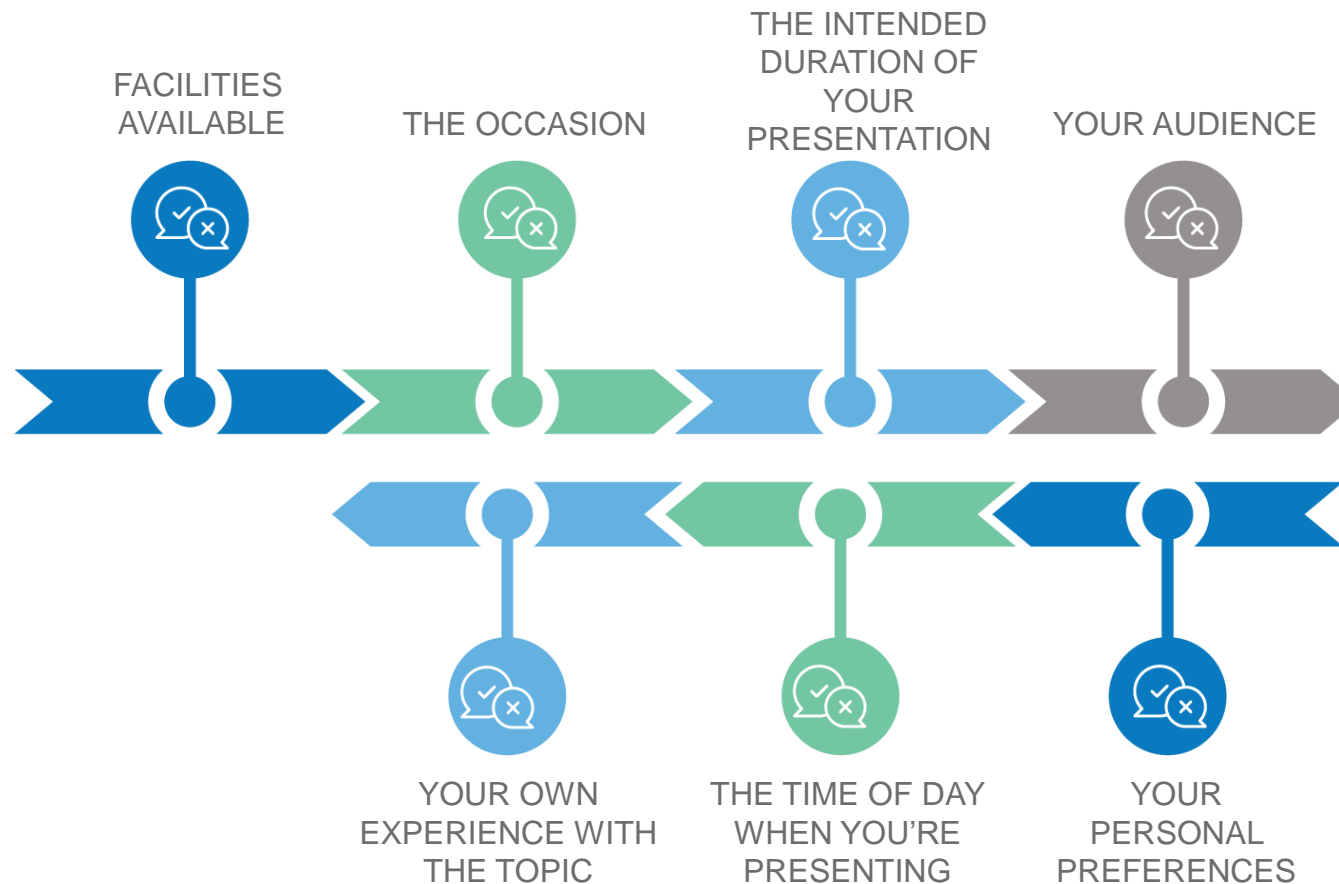
Preparing the Presentation



Types of Presentations



Factors to Consider



Structuring Your Presentation



PYRAMID PRINCIPLE

Start with your answer first

Group and **summarize** your supporting arguments

Logically order your supporting ideas



TAKE A JOURNEY

Structure the presentation around a single story

Illustrate each point with a story



WHAT, WHY, AND HOW?

What is your key message?

Why... should I do that?
... Think that?
... Is it like that?

How will the audience achieve/do what you suggest?

Editing Your Content



- ① Take a break before editing
- ② Ask a friend or colleague to review
- ③ Use plain language and no jargon or acronyms
- ④ Use short sentences
- ⑤ Check the flow
- ⑥ Insert “hooks” to get and hold the audience’s attention
- ⑦ Check and double-check spelling and grammar
- ⑧ Ruthlessly delete content

How Virtual Presentations Differ



1

Less focus on performance

2

More potential distractions

3

Voice is more important than body language

4

More engagement is needed

Poll Question #2

Of the ways that virtual presentations differ from in-person presentations, which is the **most difficult for you to deal with as a presenter?**

- a. Less focus on performance
- b. More potential distractions
- c. Voice is more important than body language
- d. More engagement is needed



Poll Question #2 Results



Strong Beginnings

①

BEGIN

with a life experience

②

ASK

a question

③

DELIVER

a compelling
sound bite

④

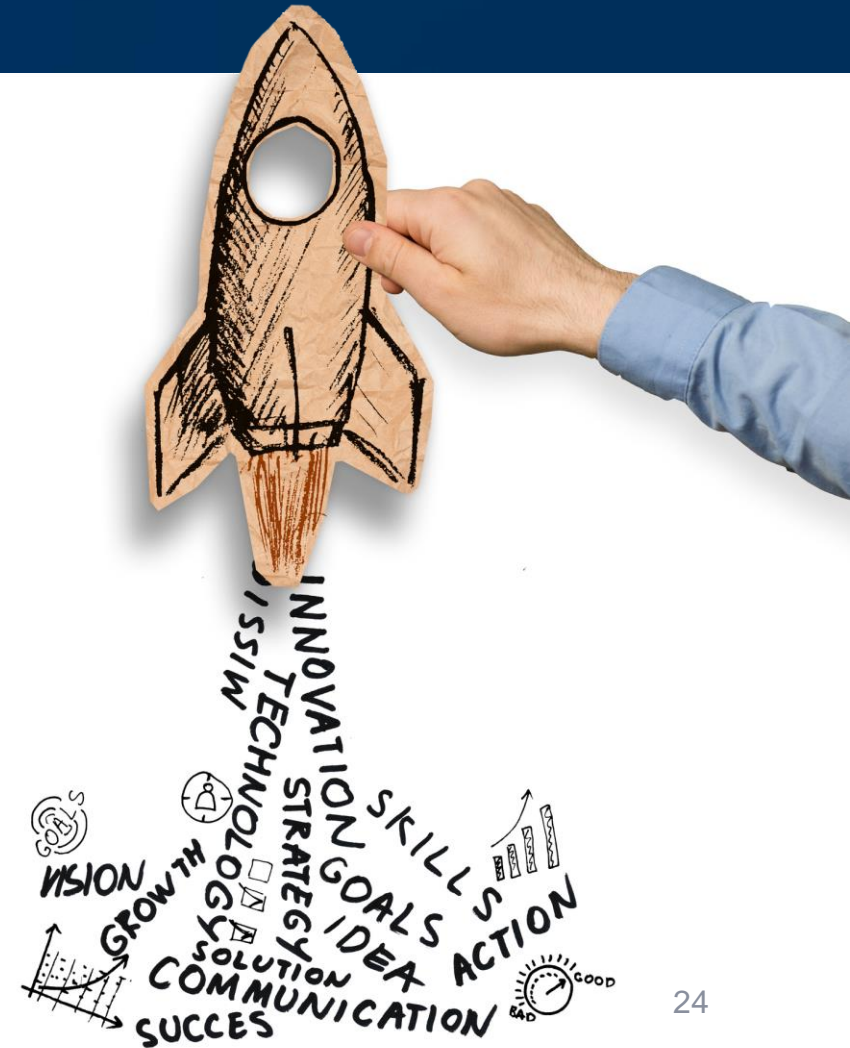
USE

the word “imagine”

⑤

DON'T BEGIN

with thank-yous or apologies



Strong Endings

①

REVIEW

key learning points

②

RESPOND

to questions

③

CLOSE

with benefits



POWER Formula



PUNCHY
opening



ONE theme,
ONE message



WINDOW
into your ideas
with stories



EASY on
the ears—
no jargon



RETURN to
your key points
at the end

Audience Interaction



- **Have** your audience talk to each other
- **Ask** for examples and explanations
- **Ask** the audience to group themselves in different parts of the room
- **Explain** how you want people to interact
- **Have** people stand and then **ask** questions they can answer by taking a seat
- **Ask** meaningful questions

Elements of Good Slide Design

Colors with good contrast

Bold, visual designs with appropriately sized graphics

Consistency in design

One clear idea per slide

Keep text brief

Vary slide layout

Reduce visual noise

Appropriately sized fonts

Plan for bandwidth issues



Poll Question #3

Of the **suggested audience interactions**, which is one that you would like to try?

- a. Have your audience talk to each other
- b. Ask for examples and explanations
- c. Ask the audience to group themselves in different parts of the room
- d. Explain how you want people to interact
- e. Have people stand and then ask questions they can answer by taking a seat



Poll Question #3 Results



Delivering the Presentation



Plan Your Delivery

TWO CHOICES:



1

Use bullet points or a mind map



2

Memorize your talk verbatim

Preparation—Practice, Practice, Practice

- **Use** a stopwatch to check your timing
 - **Have** a friend or colleague offer constructive criticism
 - **Present** to yourself in a mirror
 - **Video** or audio record yourself
 - **Be** authentic
- **Practice** gestures, posture, body movement, expressions, eye contact, language, and audio levels
 - **Be** conscious of using fillers
 - **Anticipate** common questions and practice your responses
 - **Rehearse** with technology components

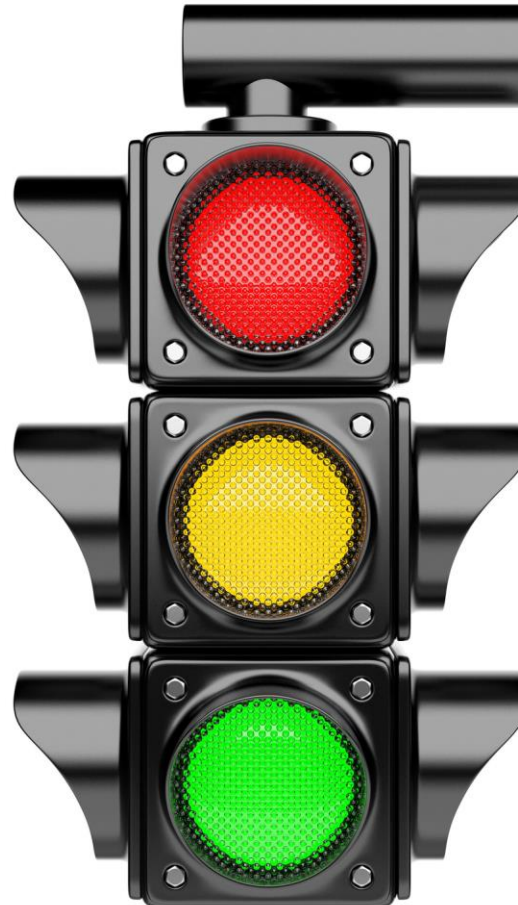


Physical Readiness

BEFORE THE PRESENTATION

IMMEDIATELY BEFORE THE PRESENTATION

DURING THE PRESENTATION



- Prepare
- Rehearse
- Keep healthy

- Practice deep breathing
- Drink water
- Chew gum

- Pause
- Smile
- Slow down

- Visualize success
- Do a relaxation exercise

- Move around
- Stop thinking about yourself

Poll Question #4

When do you get **most nervous** when presenting?

- a. The day before the presentation
- b. Immediately before the presentation
- c. When you first face the audience
- d. While doing the presentation
- e. Some other time



Poll Question #4 Results



Interacting with the Audience



- **Listen** carefully
- **Provide** positive feedback
- **Ask** people to think
- **Model** behaviors
- **Use** activities to engage
- **Pause** after asking a question
- **Make** eye contact and **smile**

Handling Questions

- **Listen** carefully
- If you don't know the answer, **say so**
- **Repeat** the question
- **Answer** the question directly
- **Respond** to the whole group
- **Focus** on the main idea
- **Know** when to move on



Virtual Considerations



- **Optimize** lighting and sound quality
 - **Remember** you may have to bring more energy than usual
 - **Consider** hiding self-view
 - **Know** when to mute yourself
 - **Encourage** participation
 - **Look** directly into the camera
- **Turn off** any software you don't need
 - **Turn off** any application using internet bandwidth
 - **Turn off** all notifications
 - **Use** a browser with no tabs or favorites displayed
 - **Make** sure your files are readily accessible
 - **Clean up** your desktop icons

Presenting to an Audience from Another Culture

Be open and curious

Do some research

Look for differences
and similarities

**Structure your presentation to
match the audience's style**

Color has different meanings
in different cultures



Other symbols can also have
different meanings

Be cautious with humor

Be even more careful about
keeping your language simple

Watch your body language

Audience reactions differ in
different cultures

Poll Question #5

How would you prepare for a presentation **to a culture that is less familiar to you?**

- a. I would check whether translations are needed.
- b. I would change the material.
- c. I would do a culture scan.
- d. From my experience, I am comfortable presenting to many different cultures.



Poll Question #5 Results



Close




Review—Top Tips for Presenters

1. Show your passion and connect with your audience
2. Focus on your audience's needs
3. Keep it simple
4. Structure the presentation around your purpose
5. Design slides using good visual design principles
6. Concentrate on your core message
7. Know your material well
8. Practice, practice, practice
9. Design for and encourage audience interaction
10. Smile and make eye contact
11. Begin and end strong
12. Tell stories
13. Use your voice effectively
14. Use your body as well
15. Relax, breathe, and enjoy




Learning Objectives, *revisited*

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Action Plan

What **SQUARED** or agreed with what you already knew?



What did you learn today that completed a **CIRCLE** of knowledge?



What **ACTION** will you take as a result of the workshop?



What did you see from a new **ANGLE**?



Questions & Answers



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Thank you to Our Presenter!

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Final Reminders

- ▶ **Complete the Evaluation poll** – 2 options
 - On your screen
 - Evaluation Survey icon at the bottom of your console
- ▶ **Access to your CPE Certificate** – 2 options
 - Click the “CPE” icon at the bottom of your console
or
 - Click the link in your post-event e-mail
- ▶ Please print a copy of the CPE certificate for your records.
- ▶ Your CPE credit will be automatically recorded in your transcript.

Thank you!



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