



The Association of  
Accountants and  
Financial Professionals  
in Business

# Presentation Skills

## Participant Workbook

*Presented by IMA Leadership Academy*

## TODAY'S AGENDA

1. Introduction
2. The Effective Presenter
3. Preparing the Presentation
4. Delivering the Presentation
5. Close

## LEARNING OBJECTIVES

After this session, you'll 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 did they do that made them such a good presenter?
  
2. How would you rate your overall effectiveness when delivering a presentation? Why?

Poor      Below average      Average      Above average      Excellent

## IMA MANAGEMENT ACCOUNTING COMPETENCY FRAMEWORK



**Reporting & Control**  
▪ Integrated reporting



**Technology & Analytics**  
▪ Data visualization



**Leadership**  
▪ Communication skills  
▪ Negotiation

## QUALITIES OF AN EFFECTIVE PRESENTER

- Passionate
- Knowledgeable
- Authentic
- Confident
- Highly organized
- Calm
- Courageous
- Charismatic/Charming
- Commanding/Authoritative
- Astute
- Willing to be uncomfortable
- Cheerful and make others smile
- Memorable



Source: See Bibliography [2,4,10,15,20,26]



## SELF-ASSESSMENT

Rate yourself on each of the following qualities of an effective presenter.

### Passionate

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

### Knowledgeable

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

### Authentic

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

### Confident

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

### Highly organized

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

### Calm

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

### Courageous

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

### Charismatic/Charming

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

### Commanding/Authoritative

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

### Astute

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

### Willing to be uncomfortable

Poor	Below average	Average	Above average	Excellent
------	---------------	---------	---------------	-----------

*Continued on next page*



### Cheerful and make others smile

Poor      Below average      Average      Above average      Excellent

---

### Memorable

Poor      Below average      Average      Above average      Excellent

---

What are your top three qualities?

What are the three qualities that you need to strengthen?

1.

1.

2.

2.

3.

3.

## 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



Source: See Bibliography [2,4,10,15,20,24,26]

## TYPES OF PRESENTATIONS

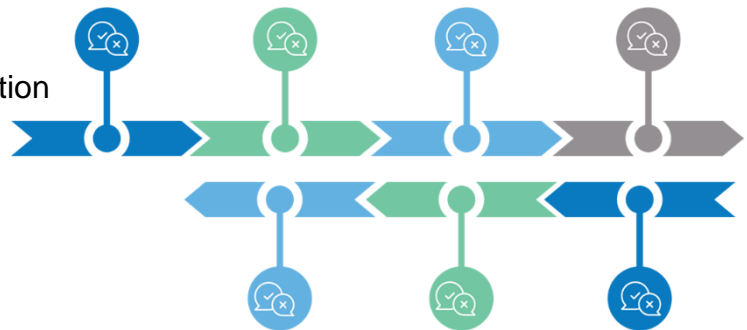
- Informative
- Instructional
- Arousing
- Persuasive
- Decision-making
- Solicit information



Source: See Bibliography [42]

## FACTORS TO CONSIDER

- Facilities available
- The occasion
- The intended duration of your presentation
- Your audience
  - What motivates them?
  - What concerns them?
- Your own experience with the topic
- The time of day when you're presenting
- Your personal preferences



Source: See Bibliography [17]

## STRUCTURING YOUR PRESENTATION



Source: See Bibliography [12,45]

## EDITING YOUR CONTENT

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



Source: See Bibliography [45]

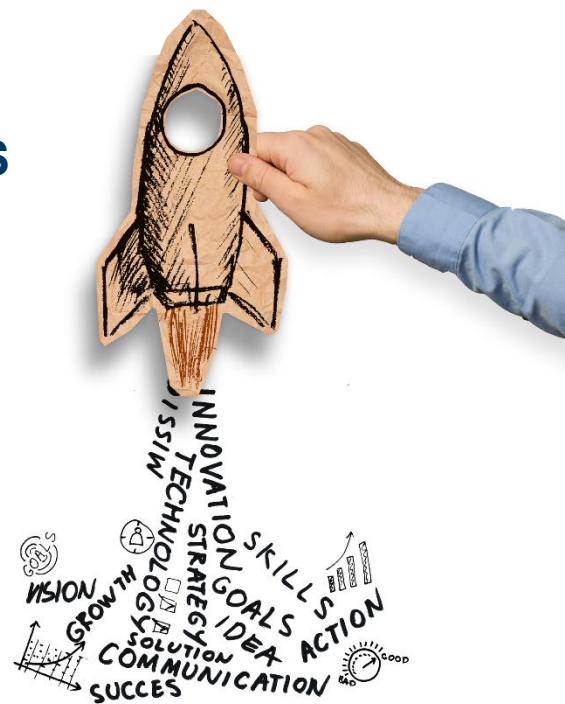
## HOW VIRTUAL PRESENTATIONS DIFFER

1. Less focus on performance
2. More potential distractions
3. Voice is more important than body language
4. More engagement is needed

Source: See Bibliography [8]

### STRONG BEGINNINGS

- Begin with a life experience
- Ask a question
- Deliver a compelling sound bite
- Use the word “imagine”
- Don’t begin with thank-yous or apologies



### STRONG ENDINGS

- Review key learning points
- Respond to questions
- Close with benefits



## POWER FORMULA

- P** **Punchy** opening
- O** **One** theme, **one** message
- W** **Window** into your ideas with stories
- E** **Easy** on the ears—no jargon
- R** **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 that they can answer by taking a seat
- Ask meaningful questions

Source: See Bibliography [17,29]

## 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

Source: See Bibliography [6]



## PLAN YOUR DELIVERY

Two choices:



Source: See Bibliography [4]

## 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
<ul style="list-style-type: none"> <li>• Prepare</li> <li>• Rehearse</li> <li>• Keep healthy</li> </ul>	<ul style="list-style-type: none"> <li>• Practice deep breathing</li> <li>• Drink water</li> <li>• Chew gum</li> <li>• Visualize success</li> <li>• Do a relaxation exercise</li> </ul>	<ul style="list-style-type: none"> <li>• Pause</li> <li>• Smile</li> <li>• Slow down</li> <li>• Move around</li> <li>• Stop thinking about yourself</li> </ul>

Source: See Bibliography [10,11]

## 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



Source: See Bibliography [2,4,29]

## 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



Source: See Bibliography [7,38]

## 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

Source: See Bibliography [22,25,28]



## 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



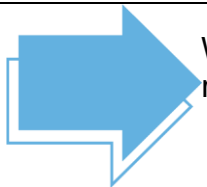
## ACTION PLAN



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?

## BIBLIOGRAPHY

- [1] Mary Abbajay, "Best Practices for Virtual Presentations: 15 Expert Tips That Work for Everyone," *Forbes*, April 20, 2020, [www.forbes.com/sites/maryabbajay/2020/04/20/best-practices-for-virtual-presentations-15-expert-tips-that-work-for-everyone/](http://www.forbes.com/sites/maryabbajay/2020/04/20/best-practices-for-virtual-presentations-15-expert-tips-that-work-for-everyone/).
- [2] Emidio Amadebai, "What Makes a Great Presenter: 9 Key Qualities to Look For," Ace the Presentation, [www.acethepresentation.com/what-makes-a-great-presenter-9-key-qualities-to-look-for/](http://www.acethepresentation.com/what-makes-a-great-presenter-9-key-qualities-to-look-for/).
- [3] Emidio Amadebai, "What Makes a Bad Public Speaker? Top 10 Worst Traits to Avoid," Ace the Presentation, [www.acethepresentation.com/traits-of-a-bad-public-speaker/](http://www.acethepresentation.com/traits-of-a-bad-public-speaker/).
- [4] Chris Anderson, "How to Give a Killer Presentation," *Harvard Business Review*, June 2013, [hbr.org/2013/06/how-to-give-a-killer-presentation](http://hbr.org/2013/06/how-to-give-a-killer-presentation).
- [5] Gail Anderson, "8 Characteristics of a Captivating Presenter," Applause Inc., May 3, 2016, [www.applauseinc.net/blog-content/2016/5/3/8-characteristics-of-a-captivating-presenter](http://www.applauseinc.net/blog-content/2016/5/3/8-characteristics-of-a-captivating-presenter).
- [6] Chariti Canny, "Cut Through the Noise: How to Design Slides for Virtual Presentations," Duarte, [www.duarte.com/presentation-skills-resources/design-slides-for-virtual-presentations/](http://www.duarte.com/presentation-skills-resources/design-slides-for-virtual-presentations/).
- [7] Nikki Carter, "14 Virtual Presentation Tips to Help You Prepare and Deliver," The Muse, [www.themuse.com/advice/virtual-presentation-tips](http://www.themuse.com/advice/virtual-presentation-tips).
- [8] Jeremy Cassell, "4 key distinctions between in-person and virtual presenting," Jeremy Cassell Coaching, May 20, 2020, [jeremycassellcoaching.com/online-presentations/distinctions-presentations/](http://jeremycassellcoaching.com/online-presentations/distinctions-presentations/).
- [9] Cynthia Clay, *Great Webinars: How to Create Interactive Learning That Is Captivating, Informative, and Fun*, Pfeiffer, San Francisco, Calif., 2012.
- [10] Erika Cober, "10 secrets of great presenters," Willowtree, June 13, 2017, [willowtreeapps.com/ideas/10-secrets-of-great-presenters](http://willowtreeapps.com/ideas/10-secrets-of-great-presenters).
- [11] "Coping with Presentation Nerves," SkillsYouNeed, [www.skillsyouneed.com/present/presentation-nerves.html](http://www.skillsyouneed.com/present/presentation-nerves.html).
- [12] Taylor Croonquist, "How to Build Presentations Like a Consultant," SkillsYouNeed, [www.skillsyouneed.com/rhubarb/expert-presentation-skills.html](http://www.skillsyouneed.com/rhubarb/expert-presentation-skills.html).



- [13] Ian Davies, “Presenting Is So Much More Than PowerPoint—Skills for the 21st Century,” Ian Davies Blog, June 18, 2019, [ianseyes.com/presenting-is-so-much-more-than-powerpoint-skills-for-the-21st-century/](https://ianseyes.com/presenting-is-so-much-more-than-powerpoint-skills-for-the-21st-century/).
- [14] “Dealing with Presentation Questions,” SkillsYouNeed, [www.skillsyouneed.com/present/presentation-questions.html](https://www.skillsyouneed.com/present/presentation-questions.html).
- [15] Maurice DeCastro, “10 Traits of Highly Successful Speakers and Presenters,” Mindful Presenter, October 24, 2015, [mindfulpresenter.com/10-traits-of-highly-successful-speakers/](https://mindfulpresenter.com/10-traits-of-highly-successful-speakers/).
- [16] Maurice DeCastro, “20 Bad Public Speaking Habits a Mindful Presenter Avoids,” Business 2 Community, March 18, 2020, [www.business2community.com/communications/20-bad-public-speaking-habits-a-mindful-presenter-avoids-02293663](https://www.business2community.com/communications/20-bad-public-speaking-habits-a-mindful-presenter-avoids-02293663).
- [17] “Deciding the Presentation Method,” SkillsYouNeed, [www.skillsyouneed.com/present/presentation-method.html](https://www.skillsyouneed.com/present/presentation-method.html).
- [18] Nancy Duarte, “How Experts Can Help a General Audience Understand Their Ideas,” *Harvard Business Review*, September 12, 2016, [hbr.org/2016/09/how-experts-can-help-a-general-audience-understand-their-ideas](https://hbr.org/2016/09/how-experts-can-help-a-general-audience-understand-their-ideas).
- [19] Forbes Expert Council, “11 Tips To Modify In-Person Presentations For Virtual Audiences,” *Forbes*, March 29, 2021, [www.forbes.com/sites/forbescoachescouncil/2021/03/29/11-tips-to-modify-in-person-presentations-for-virtual-audiences/](https://www.forbes.com/sites/forbescoachescouncil/2021/03/29/11-tips-to-modify-in-person-presentations-for-virtual-audiences/).
- [20] Gigi, “7 Qualities of Good Speakers That Can Help You Be More Successful,” SkillsYouNeed, [www.skillsyouneed.com/rhubarb/good-speaker-qualities.html](https://www.skillsyouneed.com/rhubarb/good-speaker-qualities.html).
- [21] “Giving a Speech,” SkillsYouNeed, [www.skillsyouneed.com/present/giving-a-speech.html](https://www.skillsyouneed.com/present/giving-a-speech.html).
- [22] “How Do I Give Presentations to Audiences from Different Cultures?” CommisCEO General, [www.commisceo-global.com/blog/cross-cultural-presentations](https://www.commisceo-global.com/blog/cross-cultural-presentations).
- [23] Robert Jerus, “Emotional Intelligence in Presentations,” LinkedIn, August 4, 2020, [www.linkedin.com/pulse/emotional-intelligence-presentations-robert-1c/](https://www.linkedin.com/pulse/emotional-intelligence-presentations-robert-1c/).
- [24] Vadim Kotelnikov, “Public Speaker: BEs and DON’T BEs,” 1000 Ventures, [www.1000ventures.com/business\\_guide///crosscuttings/speaker\\_qualities\\_do\\_donts.html](https://www.1000ventures.com/business_guide///crosscuttings/speaker_qualities_do_donts.html).
- [25] Ling Ling, “Presenting to a Diverse Audience? Some Tips and Considerations,” Culture Spark Global, July 24, 2020, [www.culturesparkglobal.com/presenting-to-a-diverse-audience-some-tips-and-considerations/](https://www.culturesparkglobal.com/presenting-to-a-diverse-audience-some-tips-and-considerations/).



- [26] Rich Maggiani, “28 Qualities of a Skillful Presenter,” Toward Humanity, August 14, 2012, [www.solari.net/toward-humanity/2012/08/14/28-qualities-of-a-skillful-presenter/](http://www.solari.net/toward-humanity/2012/08/14/28-qualities-of-a-skillful-presenter/).
- [27] “Managing a Presentation Event,” SkillsYouNeed, [www.skillsyouneed.com/present/manage-the-event.html](http://www.skillsyouneed.com/present/manage-the-event.html).
- [28] “Managing Your Presentation Notes,” SkillsYouNeed, [www.skillsyouneed.com/present/presentation-notes.html](http://www.skillsyouneed.com/present/presentation-notes.html).
- [29] Linda B. Marshall, “How to Engage Your Audience,” Prezi, September 10, 2013, [prezi.com/s1I72kck5aem/interaction-with-the-audience/](http://prezi.com/s1I72kck5aem/interaction-with-the-audience/).
- [30] Mark McGuinness, “Lesson 24: How to Give a Memorable Presentation,” LateralAction.com, [lateralaction.com/presentation-skills/](http://lateralaction.com/presentation-skills/).
- [31] Darren Menabney, “How to Give Presentations to an Audience from Another Culture,” *Forbes*, March 21, 2021, [www.forbes.com/sites/darrenmenabney/2021/03/21/how-to-give-presentations-to-an-audience-from-another-culture/](http://www.forbes.com/sites/darrenmenabney/2021/03/21/how-to-give-presentations-to-an-audience-from-another-culture/).
- [32] Vito Michienzi, “6 Secrets of Bad Presentations (and How to Avoid Them),” Lifehack, [www.lifehack.org/articles/communication/6-secrets-of-bad-presentations-and-how-to-avoid-them.html](http://www.lifehack.org/articles/communication/6-secrets-of-bad-presentations-and-how-to-avoid-them.html).
- [33] “Organise the Presentation Material,” SkillsYouNeed, [www.skillsyouneed.com/present/organise-material.html](http://www.skillsyouneed.com/present/organise-material.html).
- [34] Art Petty, “Surviving and Thriving When Presenting to Executives,” Art Petty, July 29, 2018, [artpetty.com/2018/07/29/presenting-to-executives/](http://artpetty.com/2018/07/29/presenting-to-executives/).
- [35] Brad Phillips, “Five Times To Take Questions From Your Audience,” Throughline, October 3, 2013, [www.throughlinegroup.com/2013/10/03/five-times-to-take-questions-from-your-audience/](http://www.throughlinegroup.com/2013/10/03/five-times-to-take-questions-from-your-audience/).
- [36] “Presenting Data,” SkillsYouNeed, [www.skillsyouneed.com/present/presenting-data.html](http://www.skillsyouneed.com/present/presenting-data.html).
- [37] “Presenting to Large Groups and Conferences,” SkillsYouNeed, [www.skillsyouneed.com/present/presenting-to-large-groups.html](http://www.skillsyouneed.com/present/presenting-to-large-groups.html).
- [38] “Quick Guide to Online Presentations,” 356 Labs, [356labs.com/product/quick-guide-to-online-presentations/](http://356labs.com/product/quick-guide-to-online-presentations/).
- [39] “Self-Presentation in Presentations,” SkillsYouNeed, [www.skillsyouneed.com/present/self-presentation.html](http://www.skillsyouneed.com/present/self-presentation.html).



- [40] “So, You Have to Give a Presentation Flow Chart,” XPLANE, 2019, [xplane.com/worksheets/give-a-presentation-flow-chart/](http://xplane.com/worksheets/give-a-presentation-flow-chart/).
- [41] “Top Tips for Effective Presentations,” SkillsYouNeed, [www.skillsyouneed.com/present/presentation-tips.html](http://www.skillsyouneed.com/present/presentation-tips.html).
- [42] Randall P. Whatley, “Types of Presentations,” Aristotle, Inc., September 12, 2014, [www.aristotle.com/blog/2014/09/types-of-presentations/](http://www.aristotle.com/blog/2014/09/types-of-presentations/).
- [43] Charmiane Wilson, “Characteristics of an Ineffective Public Speaker,” Pen & the Pad, April 17, 2017, [penandthepad.com/info-8561420-characteristics-ineffective-public-speaker.html](http://penandthepad.com/info-8561420-characteristics-ineffective-public-speaker.html).
- [44] “Working with Visual Aids,” SkillsYouNeed, [www.skillsyouneed.com/present/visual-aids.html](http://www.skillsyouneed.com/present/visual-aids.html).
- [45] “Writing Your Presentation,” SkillsYouNeed, [www.skillsyouneed.com/present/writing-your-presentation.html](http://www.skillsyouneed.com/present/writing-your-presentation.html).
- [46] “End of year message from President Christine Lagarde” European Central Bank, <https://youtu.be/YBvE1qGEP20>.
- [47] “STOP WASTING TIME - Best Motivational Speech Video (Featuring Arnold Schwarzenegger,” Motiversity, <https://youtu.be/kzSBrJmXqdg>
- [48] “Boris Johnson Business Speech,” Independent, <https://www.independent.co.uk/voices/boris-johnson-peppa-pig-speech-b1965266.html>.



The Association of  
Accountants and  
Financial Professionals  
in Business

## ACKNOWLEDGMENTS

Presentation produced by: Ignite It Group ([www.igniteitgroup.com](http://www.igniteitgroup.com))



## CONTACT US

For more information about this or other programs, please contact IMA.

[www.imanet.org](http://www.imanet.org)

10 Paragon Drive, Suite 1, Montvale, New Jersey 07645-1760

US (800) 638-4427 or International +1 (201) 573-9000

*Copyright © 2021 IMA® (Institute of Management Accountants). All rights reserved.*