



## Communication series: Presenting to executives

**Chitra Pamadi, Rajesh Abbi**

In this article we provide some guidelines for compiling an effective executive presentation. We go over the key steps and also point out some common mistakes presenters make. We also highlight essential elements of a good executive presentation that will help get the message across.

## You have 15 mins to present 4 months of work

Senior executives make decisions based on research and data analysis. How do you effectively present the outcome of your analysis to senior executives? Okay - so you've done research and analysis for months... That's awesome! You want to say so much in your presentations, but let's say you have only 15 minutes to present all the facts and data to your senior executive team... What do you do? Here are a few tips to handling this challenging task.

## Before the presentation

### Understand your audience

Before you even begin your presentation, there are a few essential steps to undertake. To begin with, you must get a good understanding of the target audience for your presentation. What are they looking for from this presentation? What are their hot-button issues? How much time would they have? Put yourself in their shoes and anticipate their needs by looking from all different angles. How can you help them reach the best possible decision? Refer to [1] for a little bit more discussion on the stakeholders and their interests.

### Develop a hypothesis

Develop a hypothesis (or a gut-feel) for the results of your analysis. What do you think the analysis is telling you? What makes sense? This will help give direction to your presentation. Here are a few ways you can get going to the hypothesis –

- Develop a questionnaire – let the customer interviews drive hypothesis
- Tap into your relevant experience
- Brainstorm with a SME in your team
- At a minimum do a logical analysis

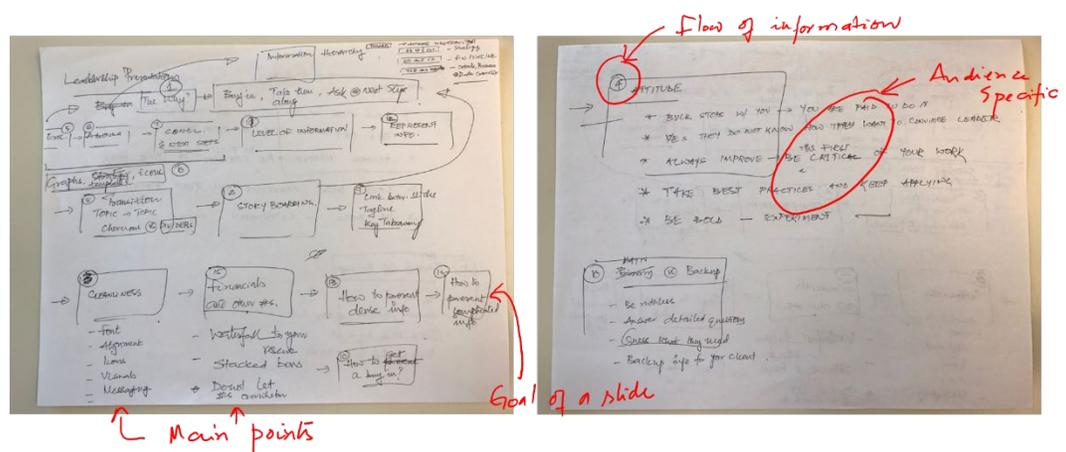
### Build a framework and validate it during the project

Build a framework that logically ties the various elements of your analysis. This will help you organize your thoughts and avoid confusion for your audience. This will be elaborated in a different blog.

## During the presentation creation

### Develop a compelling storyline

Every presentation is a story you are telling. Make sure your story has a clear message and a compelling storyline. Nothing like a good story to make people remember the message. First try testing it end to end on a paper, as shown in the figure, before start building it.



### What is the problem?

Making presentations to senior executives is challenging. They have little time and it is essential to get their buy-in to move forward. How do you approach such a challenge?

### Key Takeaways

Here are some guidelines to follow when compiling an executive presentation:

- Before the presentation
  - Know your audience
  - Develop a hypothesis
  - Build a framework
- During the creation
  - Have a good storyline
  - Keep it relevant
  - Make it appealing
  - Have executive summary
  - Include a call to action
  - Pay attention to details



## How ideas are sold to sr. leadership?



1

Set a baseline that the leadership nod their head - **Get a buy in on the starting point**



2

Take them along in a logical way  
**Keep them engaged** with right information, analysis, graphics, conclusions

ask

3

Ask for help or approval or propose next steps

## Keep it simple & relevant

Make sure you set the presentation to gain the nod from the leaders, keep them engaged and finally ask for help or approval, as shown in the figure.

A good storyline should be simple and easy to follow and remember. Research has shown

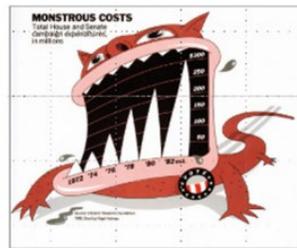
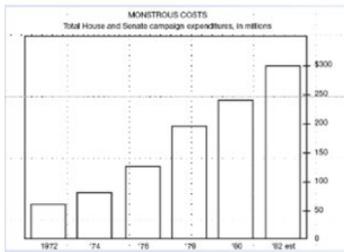
that people have difficulty tracking and remembering more than three things at a time. Therefore, stick to the rule of organizing your presentation in groups of not more than three things at a time.

## Check your facts

Think back on how many senior executives you know who remember a cost point or data point that you presented a few months or a few years ago? You might have forgotten but they haven't. It's amazing that they remember it till today! **Be careful when you put facts and figures on a graph- check that all your numbers are spot on.**

## Make it visually appealing

Have you ever sat through a boring presentation that made you want to fall asleep? Has there ever been so much text on a presentation that it made your head spin. A visually appealing presentation is not only more interesting, but easier to remember.



There are many factors that can affect the visual appeal of a presentation. We cannot cover them all here, but let's touch on a few common mistakes presenters make when presenting data in charts. Refer to [2] for a bit more on this topic.

**Boring and dull charts:** Let's take a look at the two illustrations on the left (example from the [24 Hour Company](#) website). Both charts show the same data, but which one

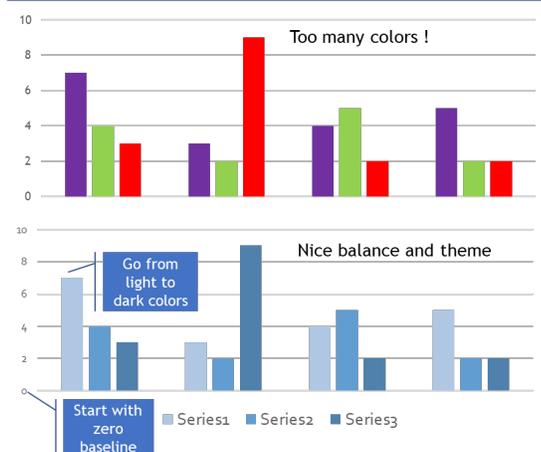
do you think your audience will remember?

**Distracting over-use of color:** Next, look at the two charts on the right. While the chart on top is bright and colorful, it can distract the audience from the message. Keep in mind that the simplest visualization while conveying the data is best done with one or two colors; doing this keeps distractions at bay. By sticking to the same hues of color, you can convey your message and help your audience retain information in an easier fashion.

## Always begin with an Executive Summary

As stated earlier, senior executives have little time and not much patience. To get their attention, you need to get to the meat of the presentation right away. This can be counterintuitive for many presenters. A good executive summary slide captures the essential message of the presentation.

## Keep the color scheme balanced and have right width for bars



**3 X 3 RULE**

**Problem**

- Moving from director level detailed information to executive level communication
- Key messaging, understanding what is important to the leader, presenting right stats, enabling discussion
- Improving your presentation skills and creating right frame works

*No more than one line*

**Opportunity**

- Our job is not to dump data!!! Our job is to present conclusions, takeaways – DO NOT HESITATE TO HYPOTHESIZE
- We are getting paid to do the analysis – not to summarize what we heard or provide trivialities
- Every presentation and modeling exercise is an opportunity for you to improve – get on it !!

**Next Steps**

- Self assess – If you can do better? Is this the right level of communication? Is this the right graphics?
- Take help – Know that you have to do your part before asking for help or before others jump in and assist
- Tardy presentation is not an excuse anymore – You are trained and given opportunity to communicate with the leaders

Make your executive summary easy to read. Give stakeholders the total story here. Notice that the leaders do not remember more than three points per group and no more than a line per point, as shown above.

### Always end with a call for action

Your presentation is not complete without a clear conclusion. What are the conclusions of your presentation and what are the next steps? What decisions are you looking to reach? Are you asking or making a recommendation or providing status? In all these cases there is a call for action.

### Finally, pay attention to details

Making an executive presentation is your big moment. Make sure it is not marred by unnecessary distractions such as spelling mistakes, slide formatting and alignment errors, distracting fonts and colors etc. that can detract the audience from key message.

I hope you enjoyed my blog. If you have any comments, please feel free to leave your thoughts. I look forward to hearing what you have to say!

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## References

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- [1] Sudheer Dharanikota, "A series on - Communicating like a consultant," DTS Magazine, Summer 2019
- [2] Sudheer Dharanikota, "Communication series: Presenting data," DTS Magazine, Summer 2019

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## About the Author

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Chitra Pamadi has more than 15 years of experience in the financial and telecommunications industries as a business analyst, engineer, tester and database administrator. Chitra has an undergraduate degree in Computer Science from Old Dominion University.

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