

Presentation Skills for Finance Professionals

two-day fast
paced course
for Banking,
Finance and
Insurance



- ▶ **Acquire a toolkit of methods for getting the audiences attention**
- ▶ **Learn how to be self confident and charismatic when presenting**
- ▶ **Design high impact presentations (including strategies for building effective visual aids)**

Learning to make financial presentations with passion and power.



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Presentation skills for finance professionals



Overview

In the world of banking, finance and insurance the ability to ‘pitch’ an idea and present a proposal elegantly is a required competency for promotion to senior positions and this workshop aims to give participants the ability to be delivering powerful messages with a real sense of authority. It is also about having a real sense of confidence in yourself as a presenter and in the content of your message. The course is structured to meet the particular needs of people in the finance sector who have to present to colleagues; or speak at conferences, or pitch ideas to investors.

Learning objectives

By attending this highly interactive two-day course you will:

- ▷ **Gain an insight into the ‘golden rules’ and guiding principles of dynamic presentations**
- ▷ **Master powerful techniques for developing your self-confidence when standing in front of an audience**
- ▷ **Discover a simple, yet elegant, nine-step planning process that will enable you to have a systematic approach for creating excellent presentations**
- ▷ **Learn how to open and close a talk so that you make a good impression**
- ▷ **Develop a strong, flexible speaking voice that exudes confidence and energy**

Who should attend?

This is a training programme for relationship managers, account executives, corporate bankers, asset managers, senior insurance industry executives and other banking and insurance sector employees who have to make presentations to key decision makers (both internal and external) as part of their job.



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Pre course preparation

The emphasis of the course is on delivering material in front of an audience. In order to maximise the time available to do this, participants need to prepare a draft presentation with visual aids in advance of the course. The presentation, lasting around five minutes, will be delivered on day one. To help guide them in their preparation, participants will be sent a BMC planning guide in advance of the course to help structure their talk. Participants should also allow time on the evening of day one of the course to write a second talk, of around ten minutes duration. This presentation will be used on day two.

The inner game of presenting

The phrase the 'inner game' is a term borrowed from sports psychology. It is a reference to the fact that what is going on inside a person's head (their state of mind) is crucial to good performance. Here we consider the role perception and beliefs of expert presenters. We review the mindset that is associated with elegant and charismatic presentations.

- ▷ Examining your current beliefs
- ▷ Reviewing expert beliefs
- ▷ Making changes that you feel are appropriate for you

▶ **Pairs exercise: brainstorming the golden rules of**

effective financial presentations



Masterful planning method

Outstanding presenters plan and rehearse their talks thoroughly but quickly.

The BMC masterful planning process™ is a mnemonic in which each letter in the word 'masterful' covers one of the nine aspects of effective preparation. Learning the method allows the design of the presentation to be fast and effective.



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Delivering with impact

There will be a review of the BMC Financial Presentations Assessment checklist, which highlights the key points that the speakers need to implement when giving their talks.

- ▷ Introduction and ending
- ▷ Pausing, pace and pitch
- ▷ Logical flow – the importance of the signpost slide
- ▷ The power of metaphors
- ▷ Sensory based language
- ▷ Body language and gestures
- ▷ Positional anchors
- ▷ Visual aids and lines of sight

▶ **Group exercise: discussion of key points**



Revising the 5 minute presentation

Participants update and rehearse their five-minute presentations.

Delivering the 5 minute presentations

Speakers take turns to deliver their five-minute presentations in front of the group and are given feedback by reviewing the videotape of their presentation and as a result of getting feedback against the BMC assessment checklist.



Voice development exercises

Excellent presenters speak naturally and with pride. Here we consider the postural, breathing, and voice projection aspects of speaking well to groups. The exercises are of the types that are taught to actors and singers.

- ▷ Correct posture & relaxation
- ▷ Diaphragmatic breathing
- ▷ Projection
- ▷ Resonance

▶ **Pairs exercise: breathing exercises**



Building presenter confidence

Confidence in presenting has four sources. Firstly it stems from having expert beliefs, secondly from knowing your material, thirdly positive experience (i.e. having done it successfully in the past) and fourthly from conditioning yourself to feel good about presenting. Using a technique known as 'resource anchoring' we can develop this conditioning aspect of building confidence.

- ▷ The conditioning process
- ▷ Building positive emotions
- ▷ Using 'triggers'

▶ **Pairs exercise: resource anchoring to build confidence**



Handling hostile questions

Methods for dealing with hostile, difficult or awkward questions.

- ▷ The 3 step technique
- ▷ Car parking
- ▷ Responding with a question
- ▷ Inviting audience participation

▶ **Open forum: question and answer session**



Making graphs count



Understanding how to get the most out of graphs as a key means of presenting financial data to clients and senior executives.

Delivering a second presentation (10 minutes long)



Speakers take turns to deliver their ten-minute presentations in front of the group and are given feedback by reviewing the videotape of their presentation and as a result of getting feedback against the BMC assessment checklist. Particular emphasis will be put on self-confidence and voice projection.





The BMC programme philosophy

Customisation

All our programmes are run on an in-house basis and we conduct interviews and facilitate focus groups to gather information with which to write bespoke exercises and case studies that precisely reflect the culture and work environment of the participants.

Feedback

Numbers limited to twelve per course to maximise participation in the programme. Presentations are videoed so that attendees can see for themselves how they come across to the audience and see how they grow in confidence and competence as the course progresses. In addition each presenter is given a detailed assessment of their talk, which is prepared by their peers. Completing the BMC assessment checklists is not only valuable to the presenter it also helps those completing them to gain an in-depth understanding of the building blocks that make up an excellent presentation.

Course structure

There is an option of following the workshop with a three month long Action Learning project to link the lessons from the training back into the workplace. If this option is selected there is a closure workshop at the end of the project phase where delegates present how they have applied the techniques learned on the course into their daily work routines.

Contact

Further information is available by contacting **Boulden Management Consultants** at:

- ▷ email: bmc@Boulden.net
- ▷ telephone: UK 0844 394 8877 - International +44 1788 475 877
- ▷ website: www.Boulden.net



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