

Presentation skills

The finalist pitch

Provides people involved in competitive pitches with the skills to succeed. Offered to investment and corporate bankers, institutional asset managers, group insurance associates, and others.

Content includes:

- A structured process for a strategic client and context analysis
- Practice in selecting and structuring content so that it makes an impact
- A template of best practices for design of appropriate support materials
- Practice and coaching in presenting your case, and managing Q&A as a team.

Delivering a keynote

For leaders, wholesalers, or others who need to make an impression on large audiences of shareholders, advisors, or thought leaders.

Content includes:

- Understanding why people dislike change, and how to overcome their resistance
- Balancing emotion (stories, metaphors) and rationality (facts, argument) appropriately
- Leveraging the stage, your speaking notes, and your slides to make an impact
- Using body language and voice to create the desired 'emotional temperature'.

Presenting bad news

For those tasked with delivering bad news - a portfolio loss, covenant change, staff cutbacks, or service breakdown. Offered to leaders,

These are sample programs.

We will custom-build a program for you - at a Master or Executive level - that is:

- **Work-based:** Participant pitches used to practice, thus increasing relevance.
- **Tailored:** Calibrated to each participant's needs and level.
- **Flexible:** Length runs from half a day to two days.
- **Impact-focused:** On-the-job support turns new skills into productive habits.

institutional asset managers, corporate bankers, wholesalers, and others.

Content includes:

- Understanding how listeners respond to negative news, loss, and the unfamiliar
- Reframing the bad news through a short, powerful, and strategic opening statement
- Asking questions that unearth grievances in a way that permits productive discussion
- Techniques for closing bad news meetings positively and productively.

Simplifying complex ideas

For technology and financial specialists who are asked to 'translate' complex ideas - financial, scientific, technical - into non-specialist language.

Content includes:

- Analysis of where misunderstandings may arise, and what to leverage to maximize buy-in

- Techniques for simplifying language without dumbing down the concept
- Use of structure and visual language to clarify concepts and induce action
- Coaching to refine the story, present with clarity, and manage discussion productively.

The elevator presentation

Distilling messages to their impactful essence is critical in many contexts - traders pitching a stock, analysts on a morning call, motivational huddles, or advisors prospecting telephonically.

This program teaches participants how to do this in a highly practical learning environment.

Content includes:

- The importance of a powerful opening 'hook'
- How to speak about your value without sounding too 'pushy'
- Conducting a focused conversation: listening, questioning, and threading in your ideas
- Closing strongly: a compelling call to action.

Perfecting conference calls

Designed to hone the skills of people who present frequently by telephone, like regional leaders, analysts, and wholesalers.

Content includes:

- Understanding how people listen and behave in non face-to-face contexts
- Using your voice effectively (and other techniques for increasing listener engagement)
- Techniques to reinforce conference calls so that your message's impact is sustained.