Boardroom Presenting

Winning when the stakes are highest

Overview

Boardroom presenting has unique challenges that require specific skills. The setting combines elements of monologue, dialogue, presentation, and improvisation. With an ever-changing landscape, boardroom presenting can also now include aspects of in-person, virtual, or hybrid audiences. In an effort to address these challenges, Invesco Global Consulting partnered with Maslansky + Partners, a renowned word specialist and political consulting firm, to utilize their instant dial-response technology for boardroom language. This program also draws upon Invesco Global Consulting's expertise in coaching financial professionals and financial professional teams to enhance their presentation skills. The outcome is "Boardroom Presenting," a platform that aims to set the stage for impactful and influential presentations.

Program Toolbox

From principles to practice:

- Keynote presentation[1]
- Toolkit, with research results and editable scripts language[2]

Skills to be developed from the presentation

Program attendees will be shown new skills, including:

1. How to get off to a strong start using the research-based, client-centered opener for high-net-worth investors and institutions
2. Team presenting skills with highly effective best practices on roles, respect, and remote presenting
3. Seating and sightline strategies
4. Using small talk to set the foundation for a better, more cohesive meeting
5. How to close with a lasting impression, using the research-driven potential benefits-based close.

[1]VKC-BP-PPT-1I
[2]IGC-BP-BRO-1-E

Invesco Total CX

Invesco Total CX — the Total Client Experience™ — is a powerful platform and partnership with the tools, coaching, and content designed to help you achieve greater possibilities — all in one place and tailored to your specific needs.

Connect with your clients

- **Choose the right words** with resources designed to deepen trust and client scripts backed by studies on effective language.
- **Build client confidence** with resources designed to help clients adopt sound investing principles and stick with their plans.
- **Share market insights** on the latest trends and policies impacting global markets.

Enhance your business

- **Benchmark your practice** with our first-of-its-kind[1] diagnostic - the Practice Innovation Index - powered by Invesco and Cerulli Associates.
- **Create a reliable new business pipeline** with research-based processes designed to help you drive referrals and cultivate new business.
- **Drive efficiency in your practice** with leading resources designed to create capacity, motivate your team, and develop a succession strategy.

Optimize your portfolios

- **Strengthen your investment process** with tools and expertise designed to help you craft portfolios that sync your clients wealth plan and purpose.
- **Manage with conviction** using our proprietary frameworks, asset class views, and portfolio management tools.
- **Draw from a range of potential solutions**, including 1000+ investment strategies across asset classes and vehicles.

Contact us

National Wirehouse
1 800 998 4246

Independent and Broker Dealer
1 800 421 0807

Registered Investment Advisor (RIA)
1 800 421 4023

Retirement
1 800 370 1519

Insurance/Third Party
1 800 410 4246

Bank and Trust
1 800 421 4023

[1]Source: Cerulli Associates. Used with permission. Invesco Distributors, Inc. is affiliated with neither Cerulli Associates nor Cerulli, Inc.
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