

Boardroom Presenting

Little-known skills and strategies designed for winning high-stakes presentations in the unique and challenging boardroom setting

Overview

Winning when the stakes are highest

Presenting in a boardroom is unlike any other setting; it's part monologue, part dialog, part presentation and part improvisation. The dynamics are unique, and the stakes are high, so Invesco Consulting teamed up with word specialists and political consulting firm, Maslansky + Partners, to apply their unique instant dial-response technology to the language of the boardroom. Maslansky + Partners, well known for shifting public opinion with phrases like "Contract with America," "death tax" and "energy exploration," tested boardroom language and strategies with over 100 focus group participants and a 300-person survey conducted between 2007 and 2011. In this highly interactive workshop, attendees are shown preparation tactics, seating strategies, presentation skills and group presentation skills designed to help presenters win boardroom meetings.

Speakers



Scott West
Head of Consulting



Gary DeMoss
Director of Consulting



Lisa Kueng
Director of Creative Campaigns



Maura Scherer
Director of Creative Campaigns

Program toolbox: from principles to practice

- "Boardroom Presenting" half-day workshop *A highly interactive workshop that begins with the boardroom principles on setting, strategy and speaking, followed by a workshop on speaking skills and performance training. 4 hours, optimal audience: 12 to 21*
- "Boardroom Presenting" full-day workshop *A highly interactive workshop that begins with videotaped baseline presentations and in-depth evaluations of each presenter, followed by boardroom principles focusing on setting, strategy and speaking. The day continues with a workshop on speaking skills and performance training, and it ends with attendees viewing before-and-after videotaped presentation. 8 hours, optimal audience: 12 to 21*

Contributors

- Gary DeMoss, Director of Consulting, who has trained thousands of investment professionals on consultative selling and presentation skills over the last several years
- Jim Morel, president of JAM Consulting, a firm that specializes in sales and presentation skills
- Maslansky + Partners

Skills to be developed from the presentation

Attendees are shown:

- How to structure presentations for clear, concise and compelling messaging
- How to open meetings
- Team presenting skills
- How to close meetings



Helping select financial professionals with skeptical clients get, keep and grow business with never-before-seen ideas

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Founded in 1998, I•C is a team of 14 specialists with over 25 programs and 15 books that is seen by over 40,000 advisors each year.*

*as of 12/17

Proprietary, relevant and actionable research

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Note: Not all products, materials or services available at all firms. Advisors should contact their home offices.

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