

Polish your presentation skills



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RETIREMENT SOLUTIONS®

A formal presentation is often your first contact with a prospective client. As your first chance to make an impression, your content, appearance, and delivery can go a long way in persuading the audience to see you as credible and worthy of their business. Whether you're at a small lunch gathering or a standing-room-only event, here are a few tips to help you make an impression that's the start of a long, profitable relationship.

Crush it with content

While your appearance and delivery go a long way in making an impact, your audience came to hear what you have to say. Carefully consider what your core message is. Is it clear? Is it tied to a specific call to action?

Target your message to your audience. This means considering details such as where they're coming from and going to. Will they have just been in another meeting? Do they need to get back to work as soon as you're done? Are they paying a babysitter in order to listen to you? Factor in who they are and what else may be going on in their lives to determine if you need to use statistics and hard-hitting data or if you can use humor and tell a personal story.

As a financial professional, you're likely dealing with complex ideas and information. However, make sure you've simplified the message and made it easy for attendees to remember.

When using complex data slides such as charts or graphs, explain exactly what is being represented. While the main points of the graph may seem obvious, smaller details on the axes of a table may not be readable to everyone. Graphs often have several details, and you can help the audience focus by pointing out exactly what data you want them to notice.

Polish the presentation

Remember, in nearly all presentations, you will be more effective if you have a conversation than if you give a lecture.

If you notice your audience's attention starts to drift, try to regain it by asking a question, moving around, or mentioning someone in the audience by name. These can be ideas you think about proactively as well. For instance, consider how you want to check for understanding as you go along or how you might personalize one of your examples by asking for information.

Approaching presentations with this mindset may give you more confidence and help ensure the audience's needs are better met.

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