7 Deadly Sins of Presenting

Sins	Solutions
Inadequate Preparation	▪ Confirm meeting objectives, agenda and logistics ▪ Research prospect, consultant, competitors ▪ Customize to prospect needs in a compelling way ▪ Work as a team – assign roles, content and times ▪ Never “wing it”
Hard to Understand	▪ Highlight benefits versus features ▪ Limit number of key messages and use repetition ▪ Simplify language – avoid industry buzzwords ▪ Weave in anecdotes
Lack of Credibility	▪ Be honest and professional ▪ Show, don’t just tell – substantiate ▪ Demonstrate confidence and enthusiasm; use the active voice
Inappropriate Statements	▪ Focus on what you are versus what you are not ▪ Turn negatives into positives ▪ Do not criticize the competition
Poor Presenting Skills	▪ Body language = 60%; voice = 30%; words = 10% ▪ Smile, use “power” posture, personality, gestures, eye contact ▪ Speak slowly, vary tone – pause periodically ▪ Prepare – rehearse; be flexible and responsive
Hard of Hearing	▪ Hone good listening skills ▪ Rehearse responding to tough issues ▪ Treat every question as important ▪ Be candid, positive, specific, concise ▪ Support team presenters
Paper Blizzard	▪ Limit number of handouts ▪ Be creative with well-designed graphics, visuals and color ▪ Produce quality, error-free materials ▪ Distribute after presentation

Respond To Questions and Objections Well

- Keep track of all prospect, client and consultant questions, concerns and objections. As a group, develop and rehearse standard responses to these questions and issues.
- Decide prior to presentation or meeting who will respond to which questions.
- Clarify questions you do not understand – for example, "Are you interested in our portfolio turnover or professional turnover?"
- Consider every question important.
- Diffuse sensitive issues by responding directly, honestly and professionally. First empathize with prospect/client, then ask probing questions to learn the basis of the prospect's/client's concern. Ask for agreement on the proposed follow-up or solution.
- Be positive – never become defensive.
- Be concise – limit responses to two or three sentences.
- Be specific – use an actual example or numbers whenever possible.
- Be relevant – keep all information focused on prospect's/client's interests.
- Use responses to sell your firm's strengths and investment approach.

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