

Preparing & Making Presentations to Board Members – the Dos & Don'ts

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Contents



- 1. Importance of Boards – Why Focus?**
- 2. Why Board Presentations?**
- 3. Board Presentations - Types**
- 4. Ways of Making Presentations to Board Members**
- 5. Essentials of a Board Presentation**
- 6. The Dos and Don'ts in Preparing and Making a Presentation to Board Members**



1. Importance of Boards

- ❑ Organizations are legally required to have Boards (Companies & Non-Profits most common)**
- ❑ Have overall powers, duties and responsibilities of governing the organization**
- ❑ Holders of fiduciary responsibility of the organization. The buck stops with them!**

1. Importance of Boards Cont...



- ❑ Ensure delivery of the mission and vision of the organization**
- ❑ Provide oversight over the Executive or management**
- ❑ Represent owners (shareholders) interests in the organization**
- ❑ Vision acts as a constraint (limits and gives a boundary)**

2. Why Board Presentations?



- 1. Allows the Board to have a picture of the organization**
- 2. Knowledge - enables Board make decisions**
- 3. Adds value through interaction**
- 4. Increases face time – foster openness and transparency**

2. Why Board Presentations? Cont....



- 5. Brings clarity of purpose and status of the strategy**
- 6. Positions Board members as ambassadors of the organization**
- 7. Builds cohesiveness within the Board**
- 8. Board Members never have enough time**

3.Board Presentations - Types



a) Technical (Program) Status Report

b) Committee Reports (e.g. Audit)

c) Financial Status / Health Reports

d) Budget Summary Forecast

3.Board Presentations – Types Cont ...



- e) Status of Resource Mobilization / Project or Profits**
- f) Institutional Risk Management and mitigation Reports**
- g) Strategic Plan – actual / progress**

4. Ways of making Presentations to Board Members



- ☐ **PowerPoint**
- ☐ **Departmental notes**
- ☐ **Newsletters to the Board**
- ☐ **Online video**
- ☐ **Teleconferencing**
- ☐ **Podcasts - online audio/video information
file available for downloading upon subscription**

5. Essentials of a Board Presentation



1) Planning:-

- ✓ **Purpose - Focused or informative**
- ✓ **Audience – who and where?**

2) Structure: -

- ✓ **Opening**
- ✓ **Body**
- ✓ **Summary / closing**

5. Essentials of a Board Presentation Cont...



3) Content: -

- ✓ **Focus on Strategic and Policy Issues**
- ✓ **Highlight key concern / success**
- ✓ **Be Brief**
- ✓ **Content and context are key**

4) Relevance:-

- ✓ **Value Addition – Board Members do not have all the time in the world**

6. The Dos and Don'ts in Preparing and Making a Presentation to Board Members



- I. Focus the presentation on the theme / topic**
 - II. Present clear and concise visuals – Font sizes be not less than 16 – better 20 or more**
 - III. Use different but strong colours to maintain interest and reduce monotony.**
- Some people don't like / see certain colours. Reduce monotony.**

6. The Dos and Don'ts in Preparing and Making a Presentation to Board Members



IV. Use the Power of the Written Word – PowerPoint Slides / Notes / Handouts

V. Do your research. Thou Shalt not Kill !!

VI. Practice your presentation

VII. Use the recommended format in your presentation (if given)

6. The Dos and Don'ts in Preparing and Making a Presentation to Board Members



- VIII. Use outside subject matter experts.
Don't pretend to be an expert – May look foolish**
- IX. Use plain language**
- X. Use short paragraphs / well spaced**
- XI. Remember you are the subject expert**
- XII. Be serious and appropriately dressed for the environment / occasion.**

6. The Dos and Don'ts in Preparing and Making a Presentation to Board Members



DON'T:-

- I. Use any acronyms except those which are familiar to the audience**
- I. Use complete sentences in your slides**
- II. Use small fonts and weak colours**
- III. Use too many transition elements**
e.g and because of that they...! Avoid dragging sentences
- IV. Overcrowd sentences**

6. SNAPSHOTS - Preparing and Making a Presentation to Board Members



Know your audience and subject well

- **They may know it too**
- **Genuinely want to learn**

Engage the audience

- **Maintain eye contact**
- **Speak slowly**
- **invite comments**

Use clear, concise and compelling information

- **Be Brief**
- **Time your presentation**

6. SNAPSHOTS in Preparing and Making a Presentation to Board Members



Be Professional	<ul style="list-style-type: none">• Be punctual and polite• Be prepared• Don't pretend to know it all
Avoid Death by PowerPoint!	<ul style="list-style-type: none">• Too many slides• Small fonts• Long sentences• Bombastic words
Organize your data and information	Print the slides for audience if need be for reference or notes filing

6. SNAPSHOTS in Preparing and Making a Presentation to Board Members



Don't lose your audience

- **Reading the presentation**
- **Lecturing**

Don't omit or downplay problem areas

- **Give time for questions and respect every questioner**
- **Promise to research where need be and do so. Don't pretend!**

Questions



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