



Engaging Non-Financial People



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- It is often said: “that money isn’t everything” but then again it sure keeps you in touch.....
- Group exercise: Turning Numbers into Information so grab a pen and some paper.

The logo graphic consists of a vertical black line on the left, a horizontal black line at the bottom, and three overlapping squares: a yellow one at the top left, a red one at the middle left, and a blue one at the bottom left. The text 'AMCTO' is positioned to the right of the vertical line.

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- Non-profit managers understand the importance of achieving the mission of the organization and are trained in delivering direct services to their respective stakeholders. Although highly skilled in a particular program area they do not have a lot of training and experience working with financial data. When prioritizing their work non-profit line managers will often choose to spend their time on direct services rather than examining numbers on a budget worksheet.

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- The challenge and opportunity for the non-profit Chief Financial Officer is to learn how to make numbers come alive for those on the frontline and help them embrace the numbers as a critical step on the path to achieving the organizations goals.

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Let's face it; financial data has a reputation for being boring and a financial presentation can fill even the most devoted manager with dread.

To change this you need to create a presentation you're excited about. Hold the interest of your audience instead of making feel they are being held captive. Here's some ideas.

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1) Communicate the story behind the data

People respond to stories rather than data and figures. When you plan your presentation, plan to tell the who, what, where, and why behind the numbers.

Data will appeal to people's analytical brains, but to maintain their interest you also have to use examples to explain who the numbers affect, where the figures come from and why they are important.

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- You don't need to be a born storyteller to do this, you just have to go a bit deeper. So rather than simply saying 'These are the projections for next year.' go further and talk about where that projection has come from, what has and can still influence it and why it's important for your audience to know.

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2) 10-20-30 Rule is simple:

Where possible a presentation should include 10 slides, be twenty minutes in duration and use a thirty point font.

By following this process you keep the presentation concise and it forces you to get to the point.

This creates ideal conditions for your audience to tune in to what you are saying.

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3) Hide your notes and bullet points

There's nothing wrong with a handout or take away, but if you put your whole presentation on the handout or on the screen behind you, your audience will read ahead and then tune you out. It's a fact of human nature and we've all done it at least once in our careers.

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Make sure your handouts and slides don't detract from what you're saying.

Remember that you and what you have to say are the main event. Keep your slides simple and then expand and explore with your own commentary.



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4) Make it picture perfect

Too much text will kill any presentation. People just don't respond to blocks of uninterrupted information.

To make a financial presentation interesting slides, ensure you have at least a few interesting and relevant graphics.



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A well-designed, simple presentation will catch your listeners' eyes and attention. Use attractive visuals that will back up what you have to say. If design isn't your thing, various apps can help or get young staff member to help. And, if it's appropriate, throw in a funny picture to illustrate a point. We're all human and making us crack a smile during a data-heavy presentation can be refreshing.

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5) Look to the pros

Once you've planned what to say and what materials you will use, you have to know how you're going to say it. This means learning to communicate with your audience try taking some **tips from the masters.**



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People like Warren Buffet, talks about finances all the time, and if you watch his talks online, he's a charming, relatable speaker, not boring at all. When Steve Jobs spoke, he took technical information and made it interesting.

How you talk affects how people listen so work on your public speaking abilities even if you only present in the meeting room.



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6) Arrange for discussion

People are more interested in conversation than a speech. To engage your audience in your presentation, allow time for discussion. They might have plenty to say or nothing at all, but it's always good to offer the floor for comments, questions and suggestions for improvement. Interaction reigns in the attention of the audience since they have to participate and prove they've been listening.



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7) Open and close

Try to begin with something like 'I have four things I want to talk about today.' By doing this, you are letting your audience know how long their talk is going to last so that the audience know how long they have to concentrate for.

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Letting your audience know what to expect in terms of how much material you have to cover gives your audience something to watch out for and helps them to follow along, knowing there's a fixed endpoint. On your final point, include a 'and just one more thing' to let them know you're coming to a close.



Make a financial presentation interesting

Financial presentations don't have to be boring and a meeting with finance no longer has to fill your colleagues with dread.

Giving meaning to your numbers, making your visual data interesting to look at and engaging with your audience will help ensure your finance presentations become the highlight of your colleagues calendars. You might not get it right the first time, but as long as you're always trying to improve, you'll get there - and your audience will thank you for it.



Thanks for having me
Any Questions

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