I AM SOUFYAN HAMID

Extensive training and practice in presentations, including TEDx talks and Toastmasters

On-site or online live trainings

One to One coaching sessions

Self paced training program (soon)

16 **Seasoned FP&A professional with 16 years experience in** Audit, Consulting and Finance Business Partnering

Freelance on temporary FP&A assignments

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WHY do you, as Finance Professional, need to give presentations?

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WHERE DOES THAT FIT INTO YOUR FINANCE WORK?

Data Analytics Marathon

Value

Last Mile

100%

80%

70%

30%

15%

5%

Data Collection

Data preparation

Data Visualization

Data Analysis

Insight Communicaiton

Take Action
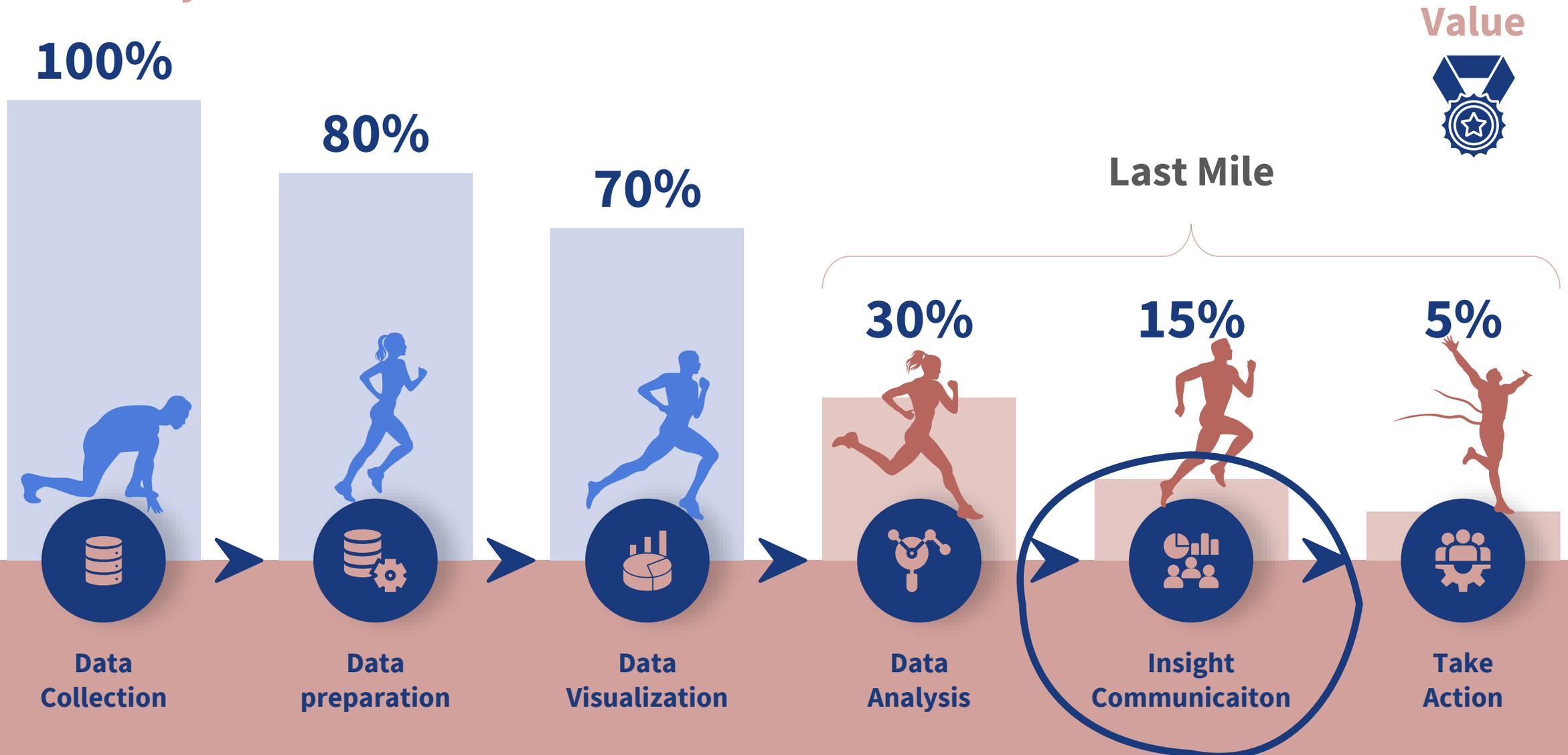
WHAT'S IN IT FOR YOUR COMPANY?

You **influence** the decision process

You bring **Data driven** mindset and **Finance rational**

You participate to the **strategy** of the company

And Finance can finally become a **Profit Center**

Instead of a **Cost Center**

External resources
- Storytelling with Data
- Winning the Room
- Effective Data Storytelling
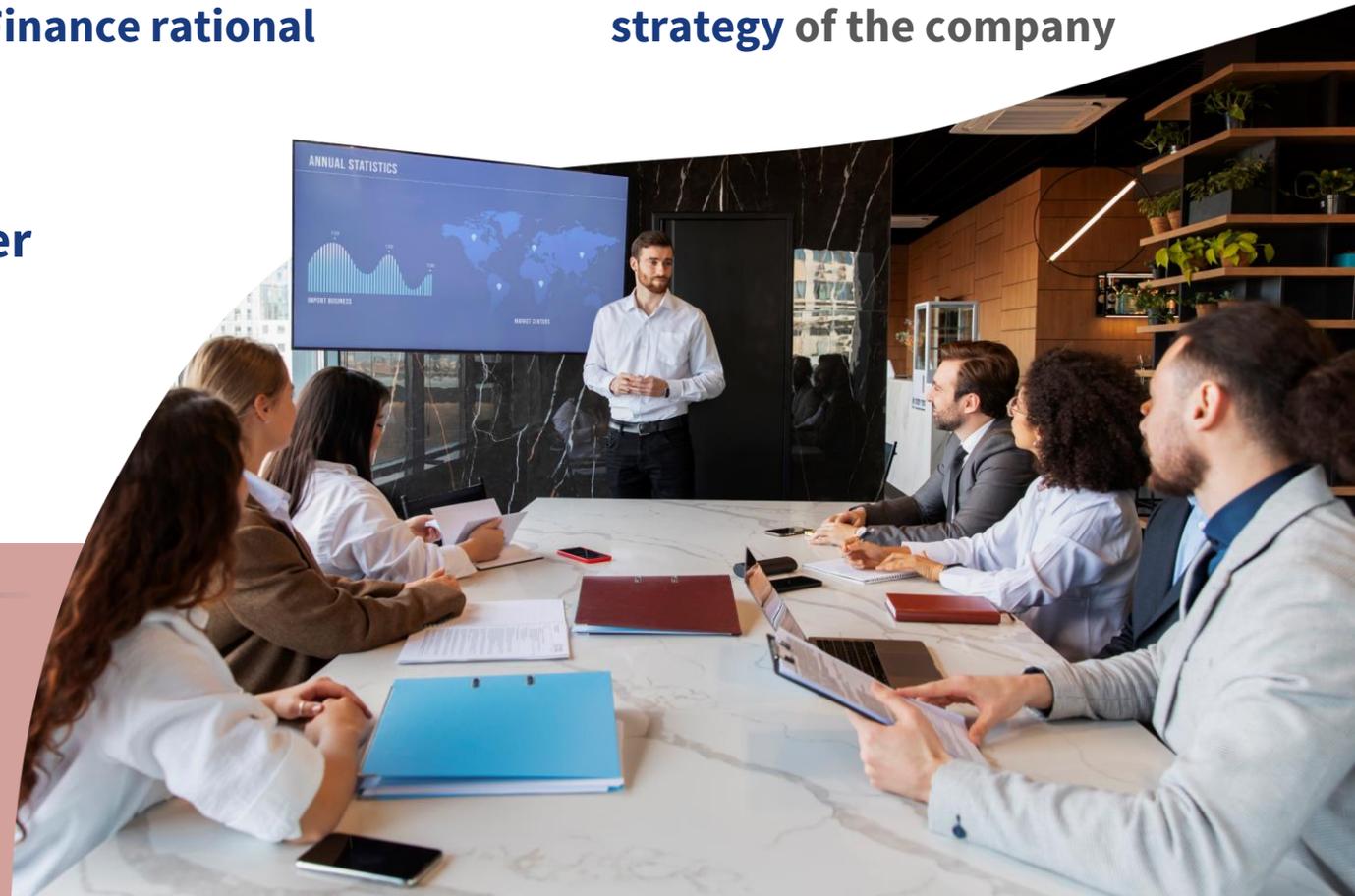
WHAT'S IN IT FOR YOU?

Finance Professionals run the risk to be categorized as experts

Experts hit the glass ceiling when

✖ They're not able to **communicate** efficiently

✖ They do not put themselves in **others' shoes**

✖ They can't explain what they do in **simple words**

You can break this ceiling and get to the highest positions of the company…

… and even out of if by developing your own **Personal Branding**

"The world rewards the people who are the best at communicating ideas, not the people with the best ideas "

David Perell

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TYPES OF PRESENTATIONS

	Monthly Results	Quarterly Results	Budgets	Forecast	Others
Frequency	1x month	4x/year	1x/year	2-3x/year	Ad-hoc
Goal	Assess performance and bring corrective actions if necessary	Deliver results to investors	Cascade strategy and targets to the company	Re-assess the outlook by considering course of action	Mainly to obtain the approval for a project
Main comparatives	vs Budget/Fcst	vs Prior Year	vs Current Year	vs Budget or Actuals	GO vs NO GO
Finance Focus	P&L justified by operationals and outlook	P&L and Cashflow	P&L justified by operationals and outlook	P&L justified by operationals and outlook	Finance Opinion on the business case
Business Focus	Operational drivers, Top-line and OPEX	Provide answers to analysts questions	Operational drivers, Top-line and OPEX	Operational drivers, Top-line and OPEX	Obtain the means to perform project

What are your biggest PAINS when preparing a presentation?

Tell me in the chat

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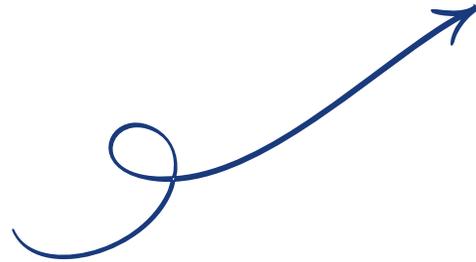
PREPARATION – WHAT WILL YOU SAY?

Gather Your Data

- **Use your Financials**
- **Link them to Operationals**

- Get your data structured according to the **analysis**

- Either from your ERP or **FP&A tool**

- Importance of existing agreed upon **groupings/mappings**

Analyse Your Data

- **Simple Graph**
- **Start from a hypothesis**
- **Confirm or Infirm**

- Start with a simple **line or bar chart**

- Compare similar metrics in different **scenarios** (vs LY, vs Budget/Fcst,…)

- Use **generally accepted** hypothesis in mind

- Apply the **80/20 rule**: you don't have to explain everything to reconcile

Craft Your Message

- **What's the main concern?**
- **What is unknown?**
- **What is actionable?**

- Your **Business Acumen** plays an important here

- Get to **know your audience**: what keeps them up at night?

- Your communicated message must be **actionable**

Challenge it

- **Check with your business partners**
- **Discuss it with peers (Finance)**

- Before preparing your presentation, discuss it with your business partners to check **reasonableness of your conclusions**

- If you have the opportunity, discuss it with your **Finance** colleagues

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PREPARATION - VISUALS FOR ANALYSIS

PREPARATION – HOW WILL YOU SAY IT?

Know your audience

- **Who is it?**
- **What type of presentation?**

- Tailor your approach according to the **audience**

- Ask yourself
  - *What do they care about?*
  - *How do they follow up?*
  - *What's their view about Finance?*
  - *What's the setup?*

Turn your message into a story

- **What?**
- **So What?**
- **Now What?**

- What: Explain what the **issue/insight** is

- So What: tell why it is **important** for your audience

- Now What: what **action** can we take about it?

Prepare your slides

- **Structure**
- **Content rules**
- **Visuals**

- Structure should follow the **Z-pattern**

- Limit **the number of slides** and be **logical** in the order

- Create your visuals according to the **message** of each slide

Rehearse

- **Check your slides**
- **Test it with colleagues**
- **Record yourself**

- Try to find a similar **setup**

- Speak out loud

- Ask **colleagues** (Finance and/or Non-Finance) to attend and give you feedback

- Record yourself and watch your **video**

Structure your message with the RUNNING MASTER

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What?

Describe what you observed in your analysis

What is the topic and the analysis?
This part is technical so it should be clear and concise

So What?

Identify the implications

Why should your audience care?
This is the emotional part
Tension must be high

Now What?

Define a course of Action

What are the next steps?
Give recommendations but always keep options open

Example

We observed that, after some disappointing months, Product A has improved performance in volumes to reach forecast level

➤

This performance started with the promo we implemented in Region S Volumes are according to plan but discount affect our expected margin

➤

We see the following options
- **Expand the promo but target a 10% increase in volumes to compensate margin**
- **Target promo on price seekers**

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RUNNING MASTER – YOUR FINAL STRUCTURE

3

So What
This is the climax: the audience knows the issue and why it matters to them

2

What
You start building your narrative towards the main finding

4

Now What
Audience starts to feel relieved by the existence of options and discuss their potentiality

1

Intro/Context
This part must include a strong hook to awake the interest of the audience

5

Conclusion and Recap
You ensure the message is passed and that there will be a follow up

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Now that you have your message, **BE READY** to cut it

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RUNNING MASTER – 3 VERSIONS OF YOUR MESSAGE

<u>**Situation**</u>   <u>**Solution**</u>

Concise

Level of synthesis

Detailed

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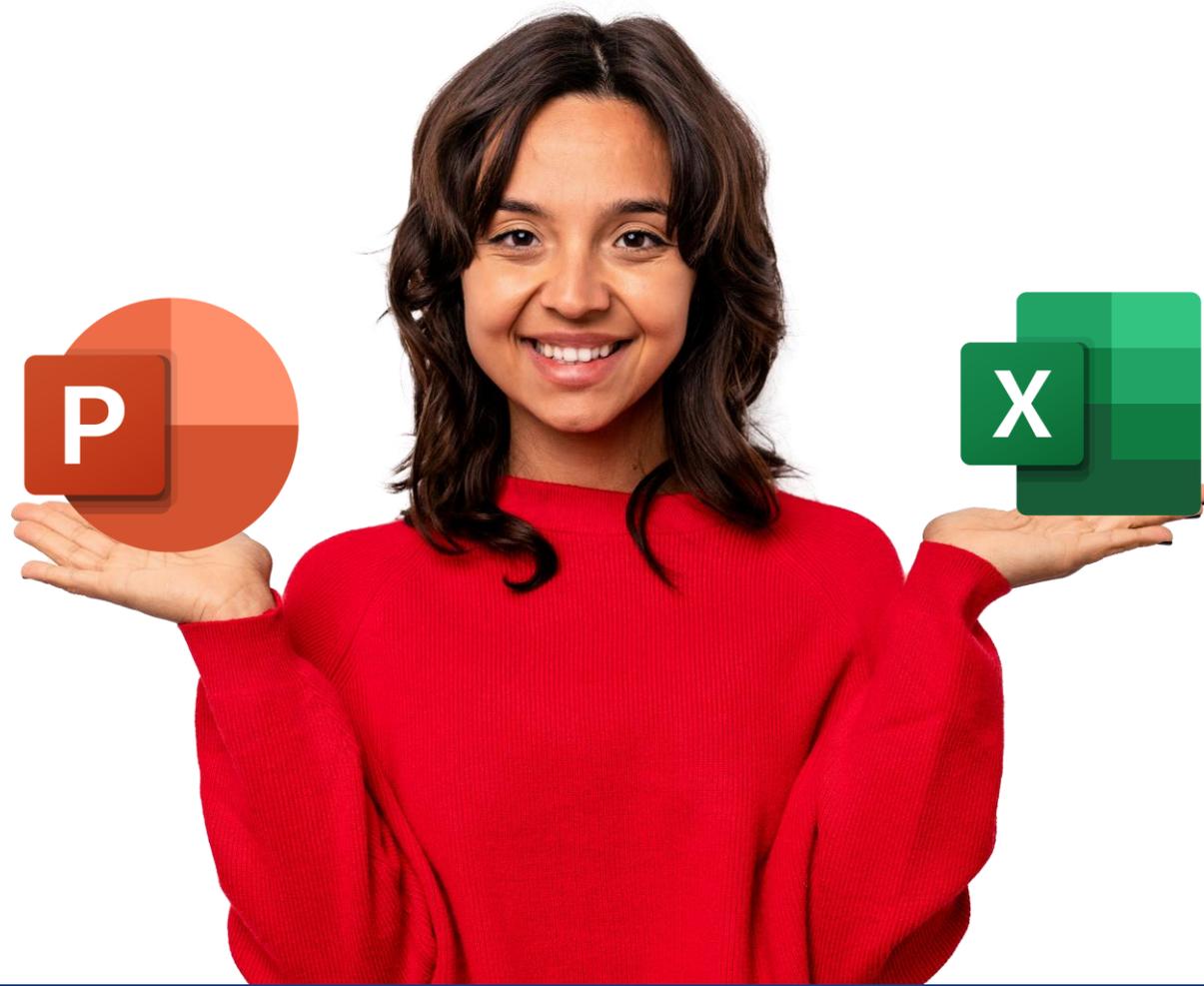
And to put it in visuals, **TOOLS YOU KNOW** are more than enough
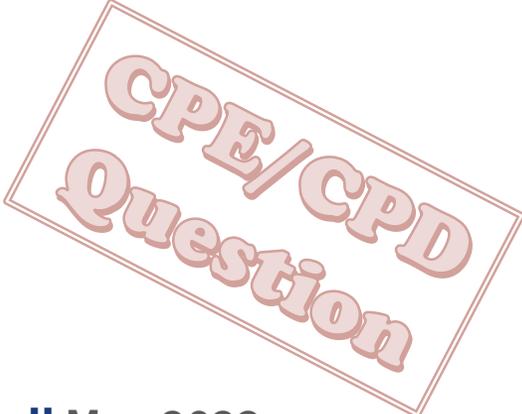
# How would you assess your own level with POWERPOINT ?

Answer to the Poll

Results Linkedin Poll May 2022

| Basic | Intermediate | Advanced | Expert |
| 25% | 49% | 24% | 3% |

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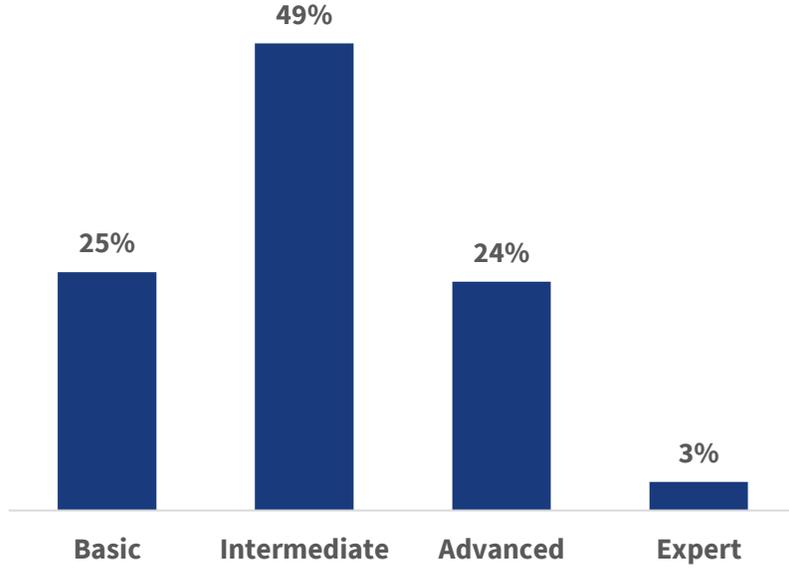
HOW CAN YOU IMPROVE YOUR POWERPOINT LEVEL?
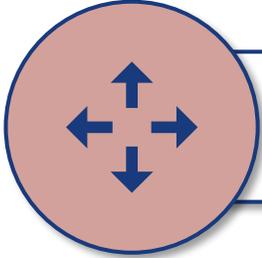
Use **SHIFT** key together with your mouse to move your elements **vertically** and **horizontally** only
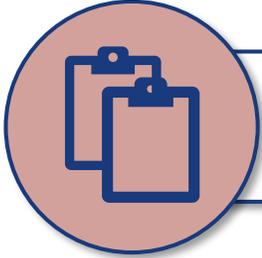
Use **CTRL** key together with your mouse to **copy** your elements (combine it with **SHIFT** to copy vertically and horizontally)
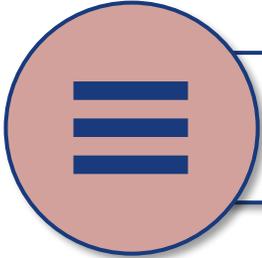
Make use of **Icons** to visually list your points
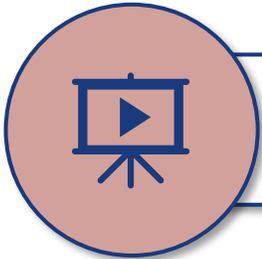
Learn on demand via **Youtube**

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SLIDE STRUCTURE

Title and/or and headings
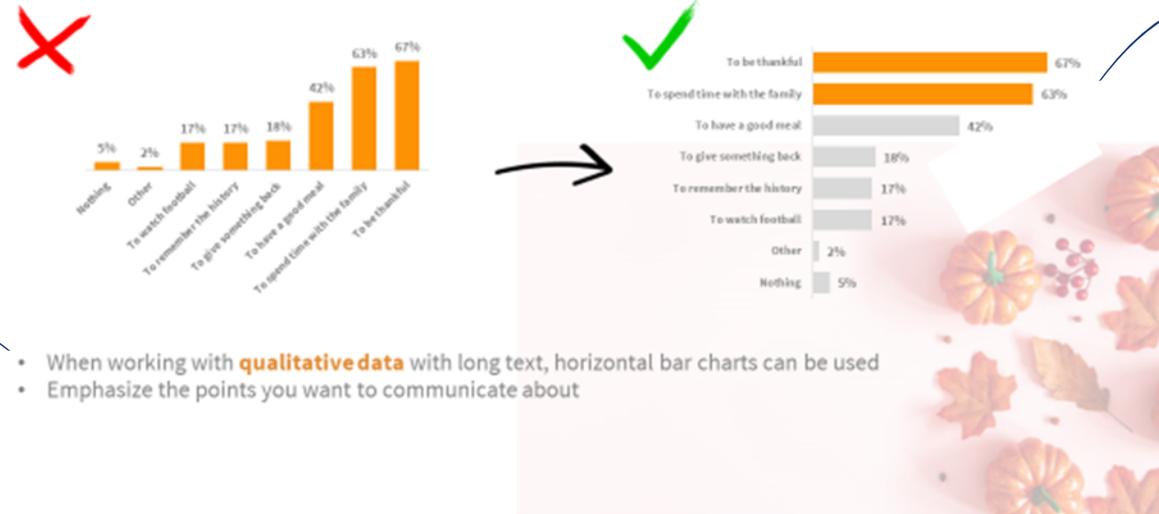
Data Visualization

Small text of explanations or bullet points

SLIDE STRUCTURE

Z-Pattern

SLIDE RULES

There is only one rule: Be concise and clear

10/20/30 Rule

10 slides
20 minutes
30 font size

5/5/5 rule

5 slides
5 lines per slide
5 words per line

2-4-8 Rule

2 minutes per slide
4 bullet points per slide
8 words per point

And many others

7x7 rule | 6x7 rule | 1-6-6 rule

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DATA VISUALIZATIONS

	Line Chart	Column Chart	Indicator	Stacked Chart	Waterfall
What?					
Goal	Show changes	Compare and contrast categories	Highlight a single measure	Show subcategories	Compares multiple measure between two scenarios
Type of data	Continuous metrics	Proportions	KPI's or Important metric	Part of a whole	Ordered Categories
Type Chart	Comparison	Comparison	Information	Composition	Composition
Time stamp	Over time	Over time	Static	Over time	Static

THE MOST USED GRAPH IN FINANCE

Easy to understand movements (beware of colour blind people)

650   100   -150   -200   350   50   800

Delta EBITDA +150 M€ vs LY

Starting point of your journey

The ending point

2022   Revenues   COGS   Payroll   OPEX   Others   2023
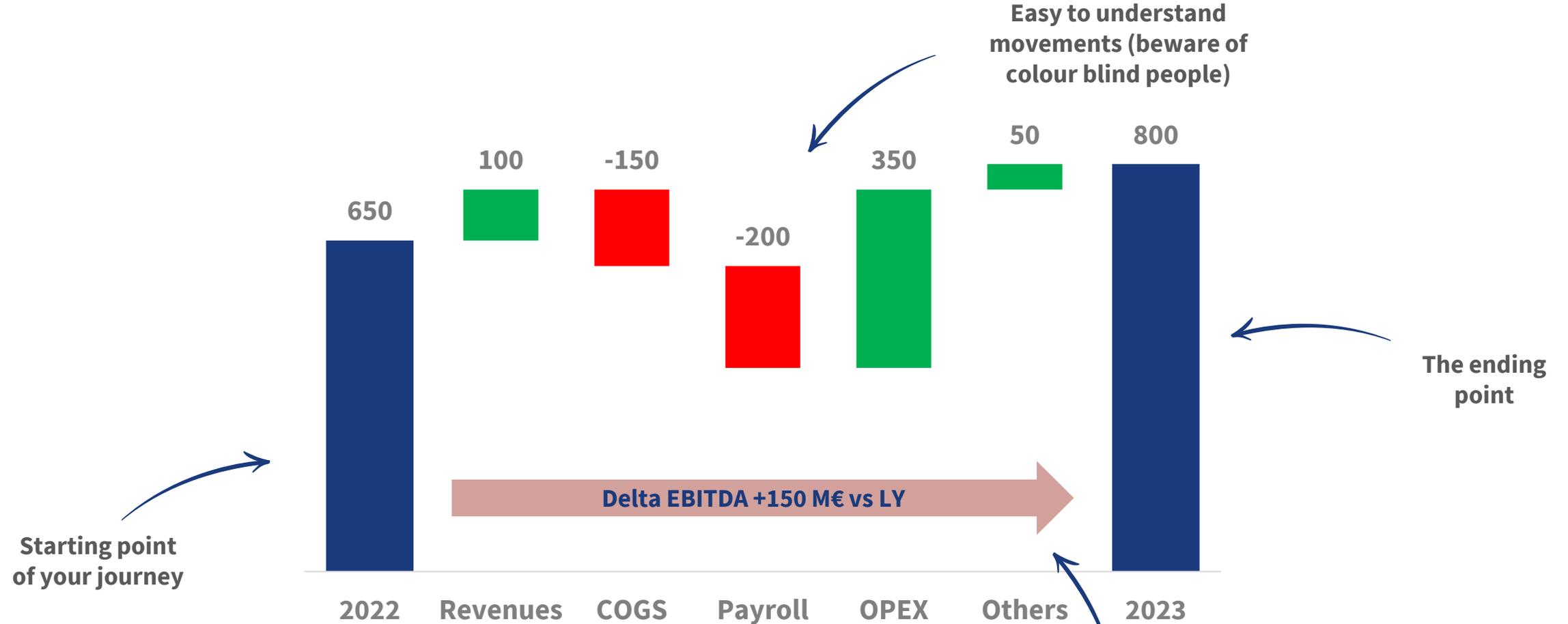
The journey representing your story

The summary

REHEARSE

With colleagues
(both Finance and Non-finance)
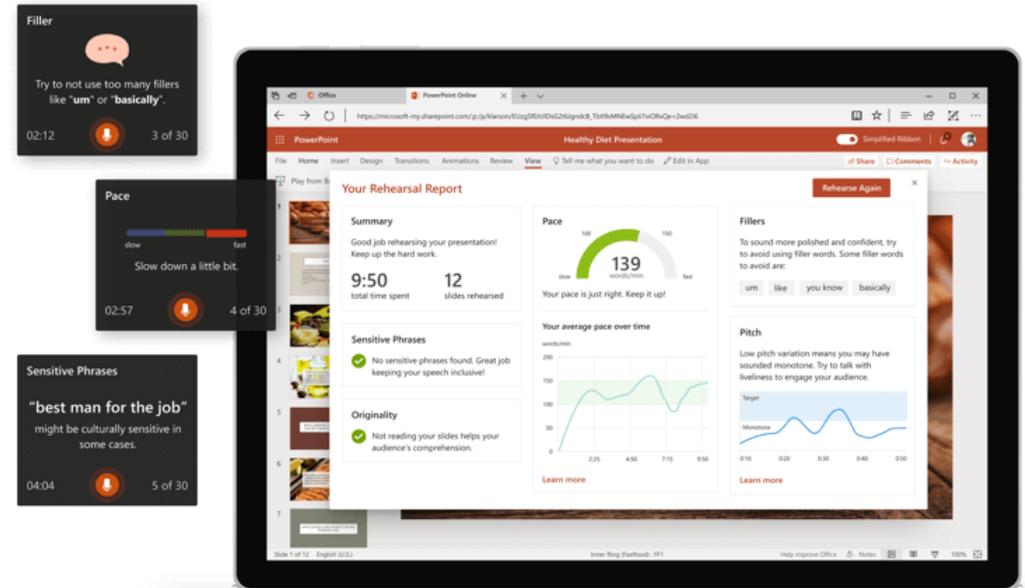
With PowerPoint
Rehearsal Coach

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PUBLIC SPEAKING – LOWER YOUR NERVES

Know your subject

Know your audience

Only you know the content of your presentation

Imagine Yourself succeeding

Focus on your message, not on you

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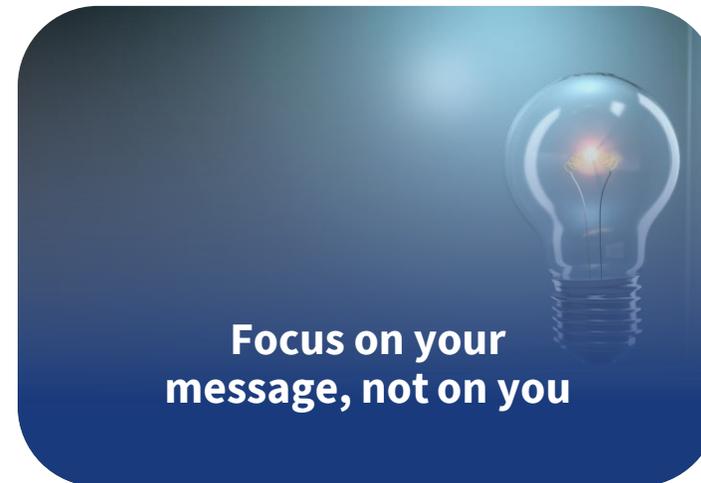
PUBLIC SPEAKING – VERBAL WIT

Avoid filler words (ah, mmhh,…)

Embrace pauses and silences (2 seconds max)

Speak with common language, avoid jargon

Record yourself speaking to detect areas for improvement

Use variations in your voice tone

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BODY LANGUAGE

Looking at the **audience**, not at the slides

Smiling

Open and **moving** hands
Don't point at the slides all the time

Put your **hands on your hips** when you have a strong statement

Legs are **ready to move** and actually move in all directions

Move in **all directions** and don't stand all the time in front of your audience

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DIGITAL PRESENTATIONS SPECS

Look at the Camera
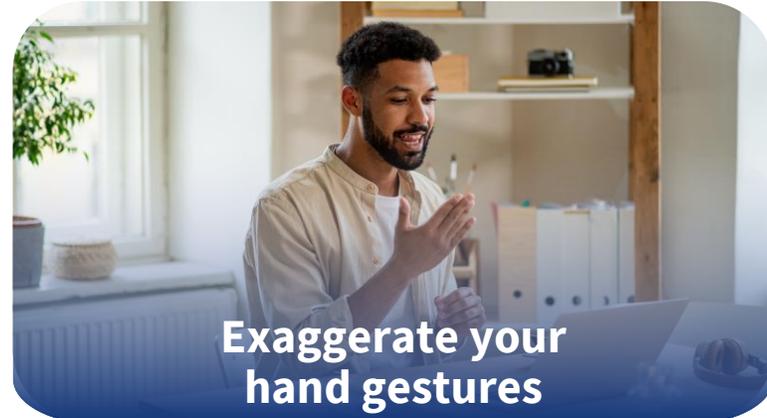
Exaggerate your hand gestures

Switch off your slides

Engage the audience

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WHAT HAVE WE LEARNED TODAY?

Adapt the angle of your presentation to the **audience**

Bring **value** and something they don't know (insights)

Prepare your message with the **issue**, the **consequence** and the **next steps**

Challenge your **conclusions**

Have your slides **structured**, **concise**, **clear** and **visual**

Be **ready** for anything: time slot reduced, technology issues, questions,…

Practice: body, voice, speech,…multiple times

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