

HOW TO PREPARE AN EXECUTIVE PRESENTATION

PRESENTATION PERFECTION

Follow the step by step guide to prepare for an executive presentation

IDEAS THAT WOW

Checklist and resources to help you find new solutions to old problems.

CREATING VALUE

Inspire your audience with the perfect value proposition





INTRODUCTION



Warwick Brown

In a survey of senior executive buyers, Forrester Research asked if sales people are frequently prepared for their meetings.

What do you think the answer was?

If you said “NO” then you were right.

In fact, between 70 to 80 percent feel vendors are *not* prepared for their meetings with senior level executives.

So, it's important that any time you present you make everyone – yourself included – immediately feel this is time well spent.

All you have to do is show your audience how to get results in a way that matters to them and you'll have them eating out of the palm of your hand.

And to do that, you need to prepare.

Let's discover how.



PREPARATION IS EVERYTHING

The good news is senior executives want to meet with you.

You're the expert and you know better than they do how to get the most from your solution.

There's nothing to worry about.

So now we have that out of the way, before we even begin preparing, you want to be crystal clear on the purpose of your presentation.

Ask yourself why you want to get in front of the senior level executive and above all, *why should they care?*

Not every presentation is to sell something. There's lots of reasons why facetime at a senior level is helpful:

- ✓ relationship building;
- ✓ confirmation of strategy or tactics;
- ✓ seeking clarity to help deal with uncertainty;
- ✓ advice on decisions;
- ✓ get a decision changed;
- ✓ inform;
- ✓ educate;
- ✓ get action.

What's your why?

Research is the foundation of any executive presentation. This is what you need to know by the time you get in front of any senior exec.

- ✓ Your company and your products.
- ✓ Their industry and yours.
- ✓ Your client's specific business.
- ✓ The executives' roles and responsibilities in their organisation.
- ✓ Your client's problems and some ideas on how to solve them.
- ✓ Your client's successes and how you can improve them.
- ✓ Examples that reassure them you can deliver on what you say you can do.



1

CHOOSE A KEY PERFORMANCE INDICATOR



Research the metrics that matter to the executive and pick a relevant KPI to build your presentation around.

Visit these resources and find the Key Performance Indicators that will get them excited and which you can link your solution to:

- ☐ [KPI Library](#). Crowdsourced library of 6,500+ KPIs searchable by industry or work-related process.
- ☐ [Klipfolio](#). KPIs by business function with calculations, chart ideas and templates. Sign up for a free 5-day KPI lesson email.
- ☐ [Bernard Marr](#). KPIs curated and organised by function. In addition, they're cross referenced with related KPIs which is useful when looking to appeal to multiple stakeholders.

B2B Elements of Value Pyramid.

For an alternative approach, consider the B2B Elements of Value pyramid.

Bain has organised 40 distinct kinds of value that B2B solutions provide customers into a pyramid with five levels.

The most objective kinds of value are found at the base, and the higher a level is, the more subjective and personal the types of value it contains.

This is a great place to discover how you can go beyond price to offer value.

- ☐ Read more about the [B2B Elements of Value Pyramid](#).
- ☐ Write down three elements of value your audience cares about and where your solution is the perfect fit.



2

UNDERSTAND THE CHALLENGE



Why aren't they achieving their KPIs or what's in their way of getting even better results?

Sell the cure not the prevention. Focus your presentation on an existing problem instead of a future one.

Answer these questions:

- ☐ **Productivity.** What's prohibiting them from being more efficient and effective?
- ☐ **Finance.** Do they need to reduce spending? Are there products and services they no longer need or can be found more cheaply?
- ☐ **Process.** Are there issues with their internal systems and processes?

Describe the senior executive's challenge around your chosen KPIs or elements of value.

- ☐ Who has the problems?
- ☐ What are the reasons for them?
- ☐ How does this impact them?
- ☐ How have they dealt with this problem until now?

Describe what they're doing well and how you could help them do it better.

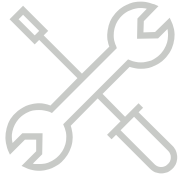
- ☐ Why are they doing well?
- ☐ Could they do better with your help?
- ☐ Are there opportunities they've overlooked?
- ☐ How can you help your client help their customers?

 **Always position your presentation around opportunities.**



3

FIND A SOLUTION



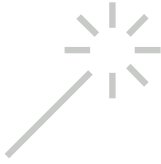
To solve a problem, you need to ask the right questions. Review each of these and write down your answers and any ideas that leap out at you as potential solutions.

- ☐ Is there anything they don't need to know?
- ☐ What do they need to know?
- ☐ How can we help them get there faster?
- ☐ How can you make them more efficient?
- ☐ Are people using workarounds?
- ☐ How is your solution better than what they do today?
- ☐ What happens if they do nothing?
- ☐ Are there any deadlines?
- ☐ What are their competitors doing?
- ☐ What problems or issues do you help them solve or avoid?
- ☐ Is anyone in their organisation trying to fix this as we speak?
- ☐ Will it take too long?
- ☐ Will it cost too much?
- ☐ What do you need from them?
- ☐ Is it disruptive?
- ☐ Does it require too much effort?
- ☐ Why should your client trust you?
- ☐ What makes you the expert in this situation?
- ☐ Why do you charge more than the competition?
- ☐ Why shouldn't they choose the competition instead?
- ☐ Do you have the right contacts and influence to make your ideas work?
- ☐ What alternatives are there?
- ☐ How will you decide which is the best one?
- ☐ What's in it for you? What rewards or value will you gain?
- ☐ Whose support do you need?
- ☐ Why haven't they done this before?



3

FIND A SOLUTION



What's the big idea?

After that, you want to decide which of the ideas you came up with are best on which to base your presentation.

Here's what Jeff Bezos, Amazon CEO & Founder looks for in ideas – look back at your solutions and see if they pass this test

- ☐ Is it original? "We have to have a differentiated idea. It can't be a 'me too' offering."
- ☐ Will it scale? "We can't afford to put our energies into something that if it works, it's still going to be small."
- ☐ Is there ROI? "It has to have good returns on capital."

Innovation can't happen without experimentation... and failure.

Bezos also encourages ideas based on "incremental improvements that can be reversed if they prove unwise."

Look back at your ideas and ask yourself:

- ☐ Is there anything on your list that's cheap, low risk and worth pursuing?
- ☐ Write down how you might explain this idea in a way that says there's nothing to lose and everything to gain.



▷ Watch Jeff Bezos' speak on thinking for the long term.



4

CHOOSE A MEASUREMENT



Executives love data. That's how they make decisions.

When you're presenting at an executive level - all your assumptions must be backed by numbers.

Quantify where your client is today, where you can get them and how you'll measure progress.

Look at your numbers and ask yourself if you agree with these statements:

- ☐ I know the source of the data.
- ☐ I understand how the assumptions were calculated.
- ☐ I understand the return on investment
- ☐ I have supporting data I can show during the presentation if asked.

5

REVEAL THE VALUE PROPOSITION



In other words, the hook.

You want to convince your audience that life will be so much better than before if they'll only act on your advice.

Here's how. Use Cooper & Vlaskovits' C-P-S Hypotheses.

- ✓ **Customer.** What's the current situation your client is in? Include some intrigue that hints at the enormity of the problem.
- ✓ **Problem.** Why is this challenge happening and why should it matter to them? For instance: time, money, market share, risk, customer satisfaction?
- ✓ **Solution.** What specific benefits can your client expect from your solution?



5

REVEAL THE VALUE PROPOSITION



Exercise:

- ☐ Based on what you've prepared, write your own value proposition that follows the C-P-S Hypothesis.
- ☐ Practice it in front of colleagues. Keep refining it until you're happy with it. It's going to become your closing pitch for your presentation.

Example:

Current solution: Users today have to choose between free Google Analytics or very expensive products like Omniture. Both require IT intervention and both rely on displaying “vanity metrics” such as the numbers of hits to a website or the number of unique visitors. More complicated (yet more relevant) metrics require complex website coding.

Our Solution: Our SaaS service replicates all activity on the customer's site so that it requires zero IT intervention. Our out-of-box graphs and metric tracking provides actionable, conversion-based metrics. For more complex sales funnels, our wizards walk non-technical users through funnel configuration.

Our benefits: Zero configuration saves time and money; relieves ITs headache. Our actionable metrics increase marketing ROI.

Presenting to senior executives is exciting. You're in front of the people who make the decisions and can fast-track any of the opportunities you're passionate about.

Follow these steps, invest the time in preparation and you will knock your presentation out of the park.



The KAM Club is a private learning community for key account managers who are short on time, big on vision and ready to make an impact on their clients and their careers.

Find out more at www.thekamclub.com

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