

Six Crucial Tips For Presenting With Confidence

Although giving a presentation can be a nerve-wracking experience for financial advisors, thinking through it coherently is just as important. You need to communicate to your audience who you are and convincingly sell your ideas to them.

Here are six keys to giving confident and clear presentations:

The 'Why'

What's the expected outcome of your presentation? What point do you want to deliver to your audience? Why is it happening at a certain point in time? These are a few questions that you need to address before you present stock analysis or any recent development in the market to your clients.

Remember, your aim is to educate, motivate, inspire, convince, and sell to your audience. Analyze the desired outcome for every presentation based on its particular audience and their needs, and then structure it accordingly.

The 'Who'

What do you know about the audience and how much do they know about your presentation topic? This approach is the "Know Your Audience" approach to delivering a solid presentation, which will help you determine important areas of information and how you should present them to your audience.

Depending on the audience's level of understanding, a financial advisor should modify material to meet their needs. Equally important is the communication approach. Will you choose the conventional paper-based approach or present using an iPad or PowerPoint?

Create Flow

In order to make the context understandable to your clients, create a logical flow for your presentation. Don't inundate them with piles of information. Make an outline. Divide the information into several categories by answering the following 'W' questions:

1. What's the general subject?
2. What categories of information can be made?
3. What are the three-most important pieces of information within each segment?

Provide Context

Keep asking yourself “why” when working on the presentation material. Why is the financial presentation significant to my audience? Why do they need it? Your audience does not always know what your information means. Make it simple for them. Develop a clear link between the financial information and its importance for the listener. It is better to exclude any information that you can't give context to.

Behavior Mapping

Practice modifying your approach in response to the audience's reaction is an excellent way to connect with them. This technique is referred to as “mapping” or “mirroring”. For instance, slow down if you're a fast talker and your client is a slow, thinking type. However, you don't want to make this too obvious, otherwise, you will only annoy your audience members.

Closure

At the end of a presentation, review important bits of information. Moreover, leave your audience with important takeaways. Let them know if you want something from them. If you want them to make a pivotal sales decision, indicate it clearly.

No matter what the motive of your presentation is, these six tips can be modified to meet your specific needs. To learn more about presenting with confidence, please [click here](#).