

Your Finance Presentation Worksheet

Finance data is crucial to the success of the business. But it can be challenging to keep a non-finance audience engaged when the charts and graphs come out.

The right presentation can showcase your department's expertise and broaden your role in steering the organization. This worksheet can help turn your presentation into an interactive, compelling storytelling session.

Got your pencil sharpened? **Let's begin.**



“ We're not being paid to regurgitate the data that's come out of our systems. The real value of our contribution to the organization is interpreting that information, giving some insights, giving some actions and some takeaways, so people take that information and do something with it.”

Blair Cook, CFO at Horizon Maritime

STEP 01

Define Your Audience

The more you tailor your presentation to a specific group of people, the more likely it will be to hold their attention. That's why defining the audience is the first step; it influences every aspect of your planning.

1. Is your audience internal to the department or external? _____
2. At what level of seniority/decision-making power are they? _____
3. How much do they know about finance already? _____

List 3 characteristics of your audience that will change how you present (for example, if your audience knows a lot about finance already, you can skip the intro-level material):

1. _____
2. _____
3. _____

STEP
02

Define Parameters

The best presentation not only fits the audience, it fits the occasion. This section will help you dial in these technical elements to make sure your presentations run more smoothly.

- What is the occasion for the presentation? _____
- How much time do you have? _____
- What technology will you be using? _____
- Will people have access to your slides before presenting? _____



I always have appendices to my presentations. That's where I put all the detailed numbers people can refer to as questions come up... I have a distilled version in the speaking points, then a detailed version in the appendix."

Blair Cook, CFO at Horizon Maritime

STEP
03

Define Purpose

- What is the story you're telling with this presentation? Write down your main point in one short sentence. _____
- What data will you need to support this story?
 1. _____
 2. _____
 3. _____
 4. _____

Comparing
Values:

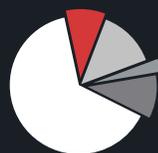


Bar graph

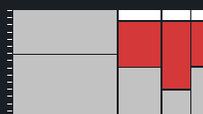


Pie Chart

Showing parts
of a whole:

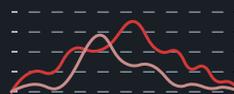


Pie Chart



Mekko

Showing change
over time:

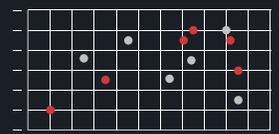


Line graph



Area graph

Showing distribution
of data



Scatter plot



Bubble chart

STEP 04

Find Your “Now What?”



“The really valuable finance professional of the future can tell a story about where you go from here. They can talk about the ‘Now what?’”

**Jennifer Warawa, Executive VP, Partners,
Accountants & Alliances at Sage**

It's important to build a purpose into your presentation. What is the next step for your audience after they've heard what you have to say? How should they feel? What do you want them to do?

Complete the sentences:

After the presentation, my audience should feel _____ because _____ . They should want to _____ .

Example: After the presentation, my audience should feel **energized** because **our investment in human resources boosted our third-quarter performance**. They should want to **consider another HR project given that success**.

STEP 05

Build Slides

Sadly, it's a lot easier to create an ugly slideshow than a beautiful one. And most finance pros don't have a lot of graphic design experience. But don't despair! Keep it simple, follow these basic design tips, and you'll look great.

Slide design best practices:

- Use a maximum of two fonts. **Any** more **looks unprofessional** and hard to read.
 - My fonts are _____ for headers and _____ for body text.
- Use just 2-3 subtle colors. Avoid the brightest reds, greens and blues.
- My colors are _____ and _____
- Use dark-colored text on a light background, not the other way around.
- Keep text minimal. Don't put everything you plan to say on the slide - people should listen rather than read.
- Use a consistent template. Only the images/text should change, not the background or layout.
- Use live data for visualizations. The Prophix plugin for PowerPoint provides live data without having to switch applications.



STEP
06

Practice, Practice, Practice

Make sure your data-gathering and slide-creating efforts pay off: Practice the presentation until you can present quickly and smoothly. While you practice, keep these tips in mind:

- **Don't read verbatim.** Resist the urge to type your entire presentation into the notes. Practice speaking spontaneously based on the text in your slides. The goal is to be present for your audience, not looking down and reading.
- **Anticipate audience questions.** Be prepared with data and slides to address the most likely questions your audience may ask.

Write down 3 likely questions to plan for:

1. _____
2. _____
3. _____

- **Be prepared to be dynamic.** Practice switching views, datasets, timeframes, etc. in your data visualization software. That way, if an unforeseen question pops up, you'll know how to find the answer.

Finance data is fascinating. It can help chart the future of the business, minimize risks, and highlight opportunities for growth. With a little preparation, your presentations can showcase the data, demonstrate your own expertise, and inspire your audience to action.

Prophix boosts finance presentations with real-time data served hot and fresh to your PowerPoint deck.

Contact Prophix today to learn more.

