



# Boards want the story: Preparing for a successful board of directors' presentation

KPMG Board Leadership Center  
FEI Los Angeles Chapter

October 14, 2020



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## UPCOMING EVENTS SCHEDULE



### PD SESSION + NETWORKING

## 2021 Hiring and Compensation Trends

October 22 | 4:00 pm – 6:30 pm PT

*Presented by Jorge Marquez | Strategic Accounts VP | Robert Half*



### MULTI-CHAPTER VIRTUAL EVENT

## Q&A Session with Rick Steves, America's Most Respected Authority on European Travel

November 2 | 3:00 pm – 4:00 pm PT

*Rick Steves, CEO, Rick Steves, Inc.*



### KEYNOTE SESSION

## Controlling Uncertainty and Risk as a Financial Leader

November 18 | 12:00 pm – 1:00 pm PT

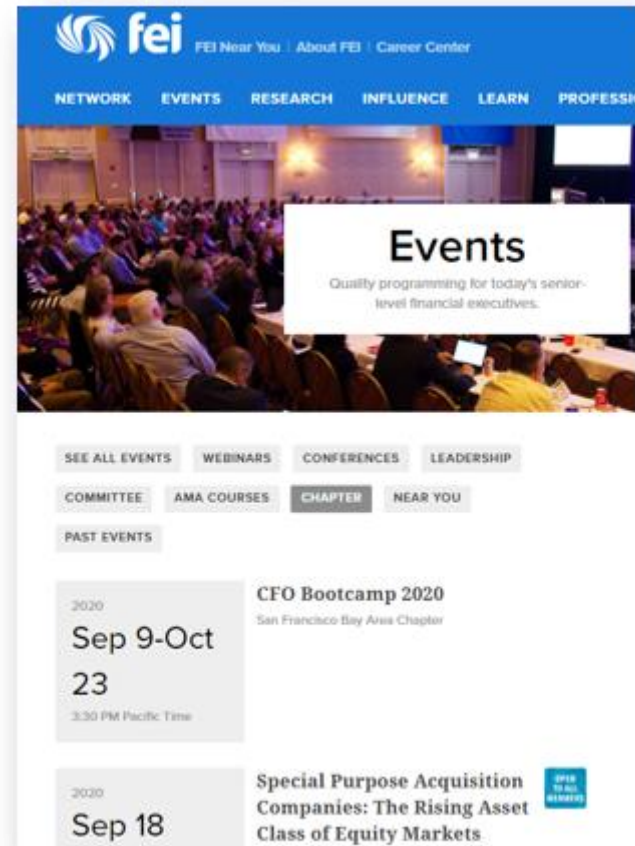
*Presented by Ryan Lahti, Founder and Managing Principal, OrgLeader*

## FEI Chapter Events

*Chapters outside of FEI LA are allowing you to attend as a guest to network with members across the country, as well as obtain CPE credits.*

*To learn more visit [financialexecutives.org/events](https://financialexecutives.org/events)*

*Click on the **CHAPTERS** tab to view Events **OPEN TO ALL MEMBERS**.*



## **MONTHLY EVENT SCHEDULE**

### **VIRTUAL NETWORKING LUNCHEONS**

2<sup>nd</sup> Thursday | 12:00 pm – 1:00 pm PT

### **KEYNOTE SESSION**

3<sup>rd</sup> Wednesday | 12:00 pm – 1:00 pm PT

### **PD SESSION + NETWORKING**

4<sup>th</sup> Thursday | 4:00 pm – 6:30 pm PT

## CPE CREDITS AVAILABLE FOR THIS EVENTS

This event is worth for [1 CPE credit](#).

### To be eligible for this credit you must:

- Answer [at least 3](#) of the 5 polling questions (during the event) and have a total viewing time of at least 50 minutes.
- In accordance with the standards for the National Registry of CPE Sponsors, 1 CPE credit will be granted [based on a 50-minute hour](#).
- Participants will have the opportunity to [download their CPE certificate](#) following the event if above requirements are met.
- We are unable to grant CPE credit in cases where technical difficulties disqualify eligibility. CPE Program Sponsorship guidelines prohibit us from issuing credit to those not verified by the technology to have satisfied the minimum requirements listed above.

# With you today



**Stephen L. Brown**

*Senior Advisor*

Board Leadership Center



# Agenda

- I. The importance of getting it right
- II. Top ten tips
- III. Q&A and conclusion



# POLLING QUESTION

# The importance of board presentations

➡ **“High-stakes” nature**

➡ **Assessment of talent,  
bench strength, and  
succession**



# Top ten tips on board presentations

- |               |   |   |
|---------------|---|---|
| <i>Before</i> | [ | 1. Understand and respect the role of the board |
|               |   | 2. The written deliverable                      |
|               |   | 3. Do your homework                             |
|               |   | 4. Rehearse                                     |
| <i>At</i>     | [ | 5. Boardroom dynamics                           |
|               |   | 6. Get in, get out!                             |
|               |   | 7. Anticipate questions                         |
|               |   | 8. Manage tricky situations                     |
| <i>After</i>  | [ | 9. Go beyond the data                           |
|               |   | 10. Postmortem after the presentation           |





# Before the board meeting

# POLLING QUESTION

# 1. Understand and respect the role of the board



- ➔ Understand the board's role in the enterprise
- ➔ They may not be experts
- ➔ Director accountability
- ➔ Caution on using internal lingo and acronyms

## 2. The written deliverable

- ➔ Clearly state what actions you need from the board
- ➔ Provide the appropriate amount of information
- ➔ Use executive summaries and appendices
- ➔ The wonders and perils of PowerPoint
- ➔ No typos



### 3. Do your homework



- ➔ Know your audience
- ➔ Seek advice from veteran management
- ➔ Have situational awareness



## 4. Rehearse

- ➡ Rehearse your presentation
- ➡ “Red teaming”



# POLLING QUESTION



# At the board meeting

## 5. Boardroom dynamics



- ➡ Understand protocols
- ➡ Assume everyone has read the materials
- ➡ No reading from the slides

## 6. Get in, get out!

- ➡ Your job is to inform, persuade, and impress
- ➡ Don't sell what is already sold
- ➡ No need to be a superhero

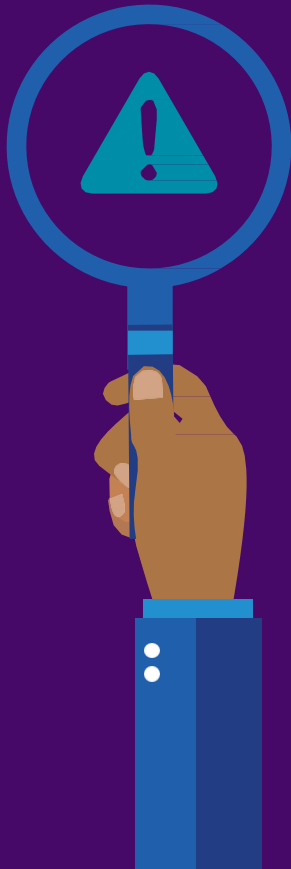


## 7. Anticipate questions



- ➔ Expect questions from the beginning
- ➔ Always answer honestly

## 8. Manage tricky situations



- ➡ The power of the pause
- ➡ Don't show up your boss



## 9. Go beyond the data



- ➡ Be prepared to provide insights and perspectives beyond the numbers
- ➡ Trends, changes in model inputs, and forecasts



# POLLING QUESTION



# After the board meeting

## 10. Postmortem after the presentation

➡ Obtain feedback from management



# POLLING QUESTION



# Questions



# Thank you

Questions regarding CPEs? Contact us:  
**[conf@financialexecutives.org](mailto:conf@financialexecutives.org)**



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