

# Speak Up! Be Heard!

*Communications Consultants Can Sharpen Your Presentations*

**W**hile most portfolio managers are great at managing money, they may be unprepared to tell and sell their portfolio management story. Often these managers make more than 20 presentations a year, yet the team of presenters can be inexperienced and ill equipped to develop and succinctly deliver its message.

It is imperative to communicate why a plan's investment committee should entrust you with a piece of its portfolio. If your presentation is not as refined and polished as you would like, you might consider using a professional communications consultant to overcome this hurdle.

Communications consultant Melissa Monson of Monson Communications in San Francisco, says, "You can't afford an off-Broadway opening; you don't get second chances in this competitive arena. A consultant can prepare a team to give sharp, clearly focused presentations from start to finish."

Bill Jurika of Jurika & Voyles, a money management firm in Oakland, Calif., says that working with Monson Communications "helped reduce the excess verbiage that can confuse the prospect. Melissa got us to focus on the key points we wanted in our presentation. She really helped us make an impact, and we've used her to work with other people in our company as well."

David Petersen, marketing vice president at San Francisco-based DeSantis Capital Management, an affiliate of the Hambrecht & Quist Group, credits working with a consultant as instrumental in making presentations more interactive. "Our presentations used to be very structured monologues," he says. "Now they're stripped of formality and are more conversational. That allows us to become more engaged with, and responsive to, our prospects."

To locate a communications consultant in your area, check with your professional network—venture capitalists, attorneys, investment bankers or accountants—to see if you can obtain a

## Honing Your Presentation Skills

Here's how consultants can work with you to overcome communication problems and enhance delivery skills.

- Identify and bring out your best qualities, without asking you to change your individual style.
- Coach you to be comfortable with yourself and your story.
- Help you to synthesize the most important points of your story for a convincing delivery.
- Teach you to transfer the ease that most people feel in one-on-one meetings to standup presentations.
- Work with your accent so that you may be understood.
- Teach you the importance of "invisible punctuation"—the pauses and changes in pitch and tone that serve to indicate the importance of what speakers have said.
- Provide video feedback—a time-effective training tool.

recommendation. Also, contract marketing and public relations firms often have someone on staff who can make a recommendation. It helps if the consultant has work references in your industry. However, a good consultant is like a good litigator—he or she is able to work with you regardless of your industry. Make sure that the consultant has the necessary depth of knowledge in delivery skills and graphic presentations. And it is important that he or she can give you the time you need to "get it right."

Monson stresses that communications consultants provide more than just training in public speaking. "My role is to help a firm communicate its message effectively, both verbally and in print," she says. Creating the text and visuals for a presentation usually begins with a drafting session. Defining and refining the presentation will probably take two to three more sessions. Your consultant should function as the eyes and ears of the audience and be an exceptional delivery coach. In addition to delivery coaching, the consultant should also prepare the team for the all-important question-and-answer segment of the presentation. By running through potential queries, the consultant will teach you how to listen carefully, understand the questions and answer concisely.

Michael Jackson, founder of the San Francisco-based Emerging Growth Management Co., says that working with a consultant "really eliminates the tendency to overwhelm prospects with too much information. By simplifying our presentations, we've been able to clearly state and reinforce four or five messages that prospects can remember.

A regional marketing representative with a global investment advisor also noted that "less is more" in telling and selling your portfolio management story. "When your presentations are well-organized and concise, it has a positive effect on your confidence level," she says. "Our team has become much more comfortable and has really internalized the points we want to make. This results in a more relaxed and sincere presentation and encourages prospects to respond very positively."

The second crucial element is the visual presentation. You need to support your speech with simple, easy-to-understand, professionally produced graphics—whether they are tabletop flip charts, slides or handouts. Again, the communications consultant's rule is to help refine the concepts, making sure that your graphics are well-designed and reader-friendly. With each visual, the consultant can help define the "take-away" message for the audience.

Finally, the consultant can help select the best vendors. It's worth it to use an outside design firm, one that is capable of quick turnaround and last-minute changes. Don't try to produce the graphics in-house, unless you have a very talented graphics department.

With proper planning and preparation, your team will deliver relaxed, informative, crisp and persuasive presentations that plan consultants and investment committees will remember.