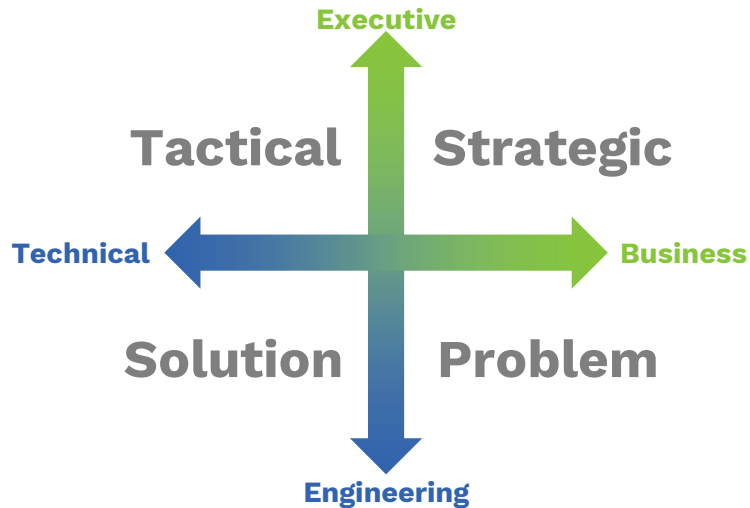


Executive Presentations



This presentation details a three-step method for developing executive presentations. It lays out a step-by-step process highlighting commonly held myths and the actual truths and cautions you should use when forming your executive presentations.

4 Flavors of Customer Presentation



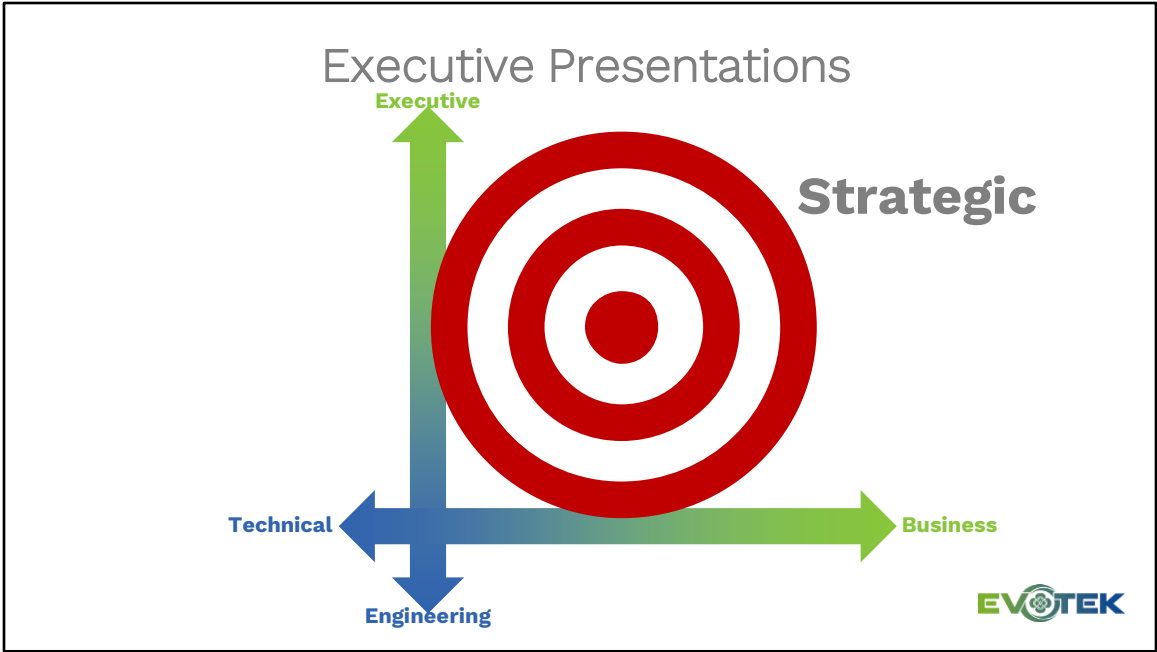
Scope (what we're talking about): Technical to Business

Audience (who we're talking to): Engineering to Executive

- Executive = Business Leadership (Decision Makers, Budget Holders, Business Owners)

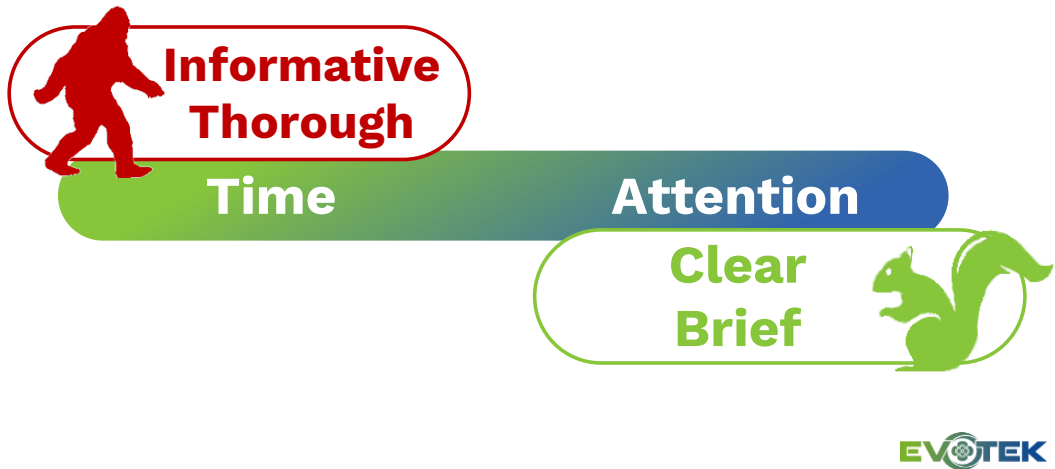
4 Presentation Focus Points:

- Technical + Engineering = Solution Analysis Focus
- Technical + Executive = Tactical Objective Focus
- Business + Engineering = Problem Analysis Focus
- Business + Executive = Strategic Objective Focus = Your Target



EXECUTIVE PRESENTATIONS are Strategic Discussions with Business Leadership

Myth #1: Executive Presentations need to be...



Many people believe that in an executive presentation their overarching objective is to provide all the information they have on the discussion topic. However, the responsibilities of an executive's position dictate they switch rapidly between topics and tasks to provide oversight, decisions, guidance, sanctioning, and mentorship across, not only, their organization's goals, but with all other groups in the company they interact with. Executives have limited time to give their limited attention to any topic. Above all else, executive presentations must be Clear and Brief.

Short & Sweet beats Dull & Complete

"Our job isn't to buy technology; It's to buy value first. - We don't have time to sit through a sales pitch. Buyers are overwhelmed" – CIO of \$1B company

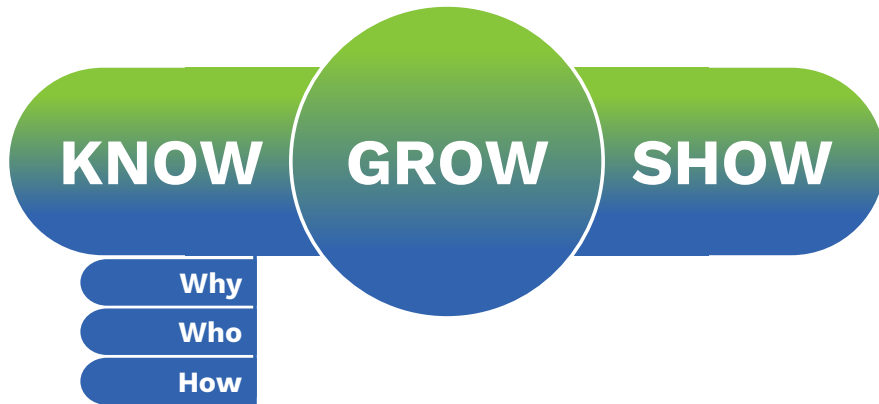
Your Framework



OK, but how do you make an executive presentation that is Short & Sweet but still gets your point across. This 3-stage process will help you create highly effective executive presentations quickly, professionally, and repeatably.

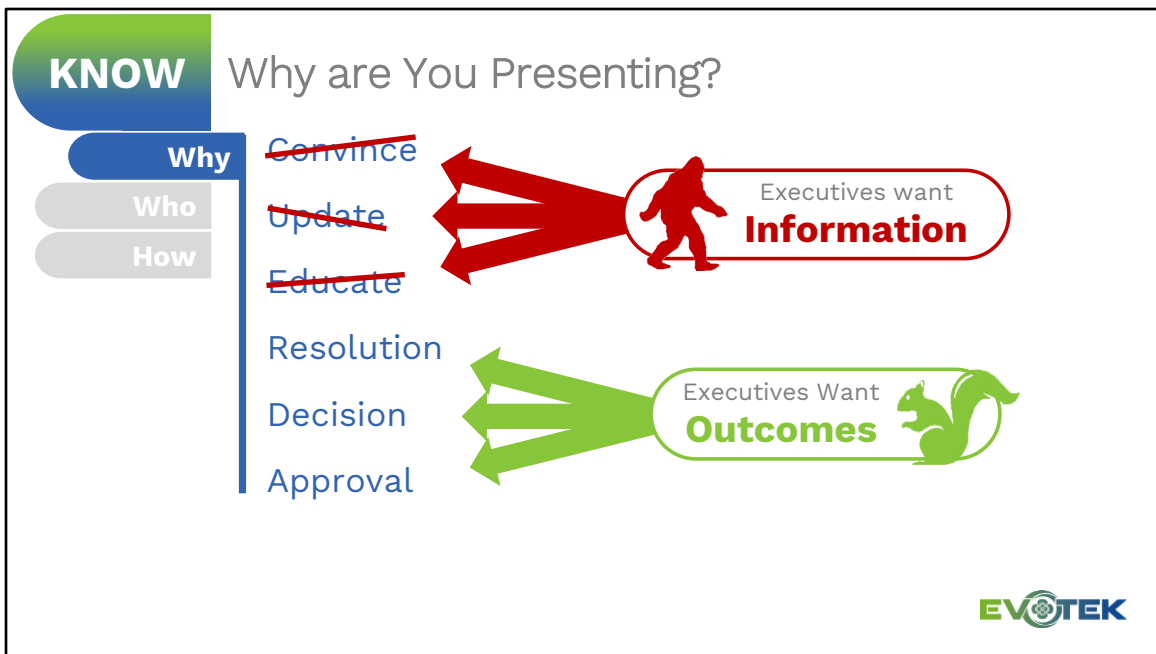
Know – Grow – Show

Your Framework



Let's look at the Know stage. These steps may seem obvious, but far too many executive presentations misfire because of poor understanding of the basic facts about the presentation.

- **Why** are we presenting?
- **Who** are we presenting to?
- **How** are we going to present?



Why are You Presenting?

Executive Presentation must serve a purpose otherwise you will not get on the executive's calendar, or you will waste their time if you do. You must have a Desired Outcome. Common outcomes include:

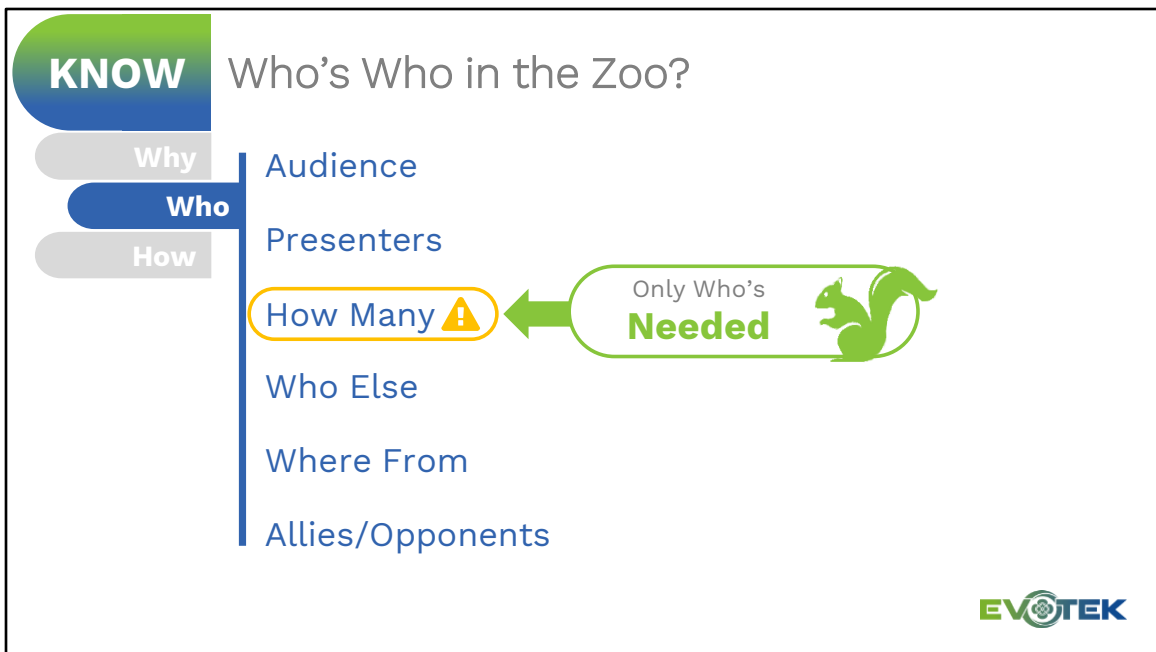
- **Resolution** – Resolve or gain clarity on a dispute E.g., contract dispute, billing issue, solution defect, behavioral issue, resource constraint
- **Decision** – Help an executive reach a decision, record it, and plan next steps. E.g., The project is cancelled, EVOTEK gets the work, add three weeks to the schedule, decrease budgets by 10%.

- **Approval** – Have an executive approve a particular action. E.g., Sign a change order, accept a deliverable, select an design option, accept a known risk.

MYTH: Executive want information

TRUTH: Executives do not want information alone – they want whatever leads to execution (its even in their job title). So, link Information sharing presentations to an outcome above:

- **Convince** – Helping an executive understand a particular approach out of other possible options and decide to follow it. This is often coupled with a follow up meeting to refocus work. E.g., Convincing a customer, they need expert analysis before “adding AI” to an existing application because of undue compliance, ethical, and security risks.
- **Status** – You should not just deliver status on an imperative issue or project. You should chain to an outcome activity like approval. E.g., The site rollout is 4% ahead of schedule, the contract is reviewed and awaiting signature.
- **Educate** – You should not set up an executive presentation to deliver information alone. Education by itself does not have an outcome (except ego-building). You must team education to another desired outcome.

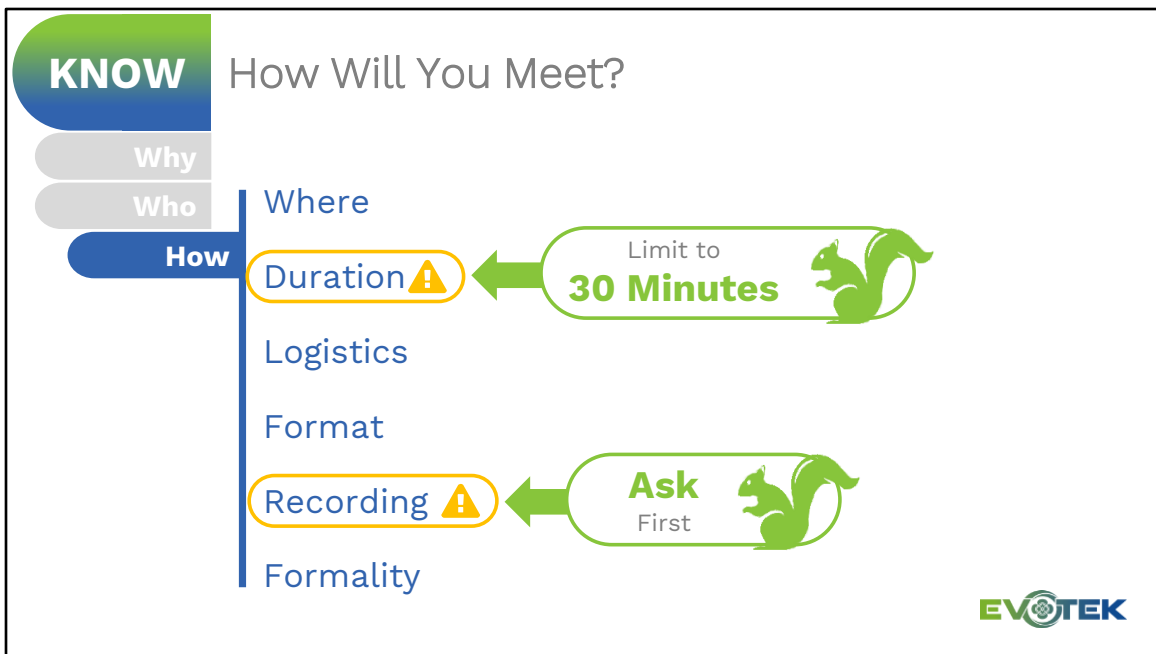


Who are you presenting to?

- **Audience** - Who is the audience you are trying to reach. Specifically, who is the executive you are targeting to help you achieve your desired outcome?
- **Presenters** – Who is presenting and what topics are they presenting?
 - CAUTION: Switching presenters adds risk - See Show stage.
- **How Many** – How many people will be in the meeting? One-on-ones are very different from a Town Hall.
 - MYTH: You should bring anyone who might be of

help since you never know what an executive could ask.

- **TRUTH:** Only bring who is needed. If you need someone not in the meeting, set up a follow-on meeting with them and keep the presentation going.
- **Who Else** – Are there outside people the customer is inviting? Are there outside resource you should bring? What risk do they introduce?
- **Where From** – From what teams, organizations, companies, partners are the attendees coming?
- **Allies/Opponents** – Are there attendees who can help you get your desired outcome? Are there opponents who might hinder you?

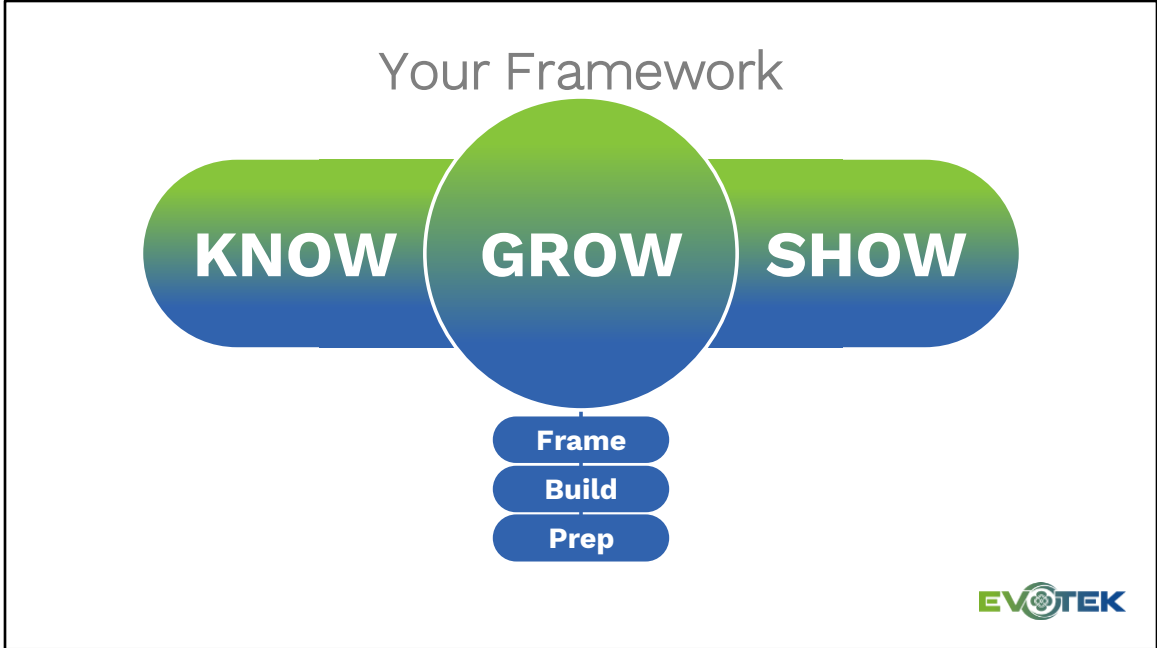


How will you meet?

- **Where** – In-Person, Remote, or Hybrid
- **Duration** – How long do we have? Is it flexible?
 - TRUTH: Unless the customer requests it, limit executive presentations to 30 minutes. Aim for 20 with dialogue after the presentation. (Think “Clear & Brief”)
- **Logistics** – Who is booking the room, setting up the bridge, sending the invitation, coordinating catering, getting security access
- **Format** – Will this be on-stage, in a conference room, video teleconference, will there be a

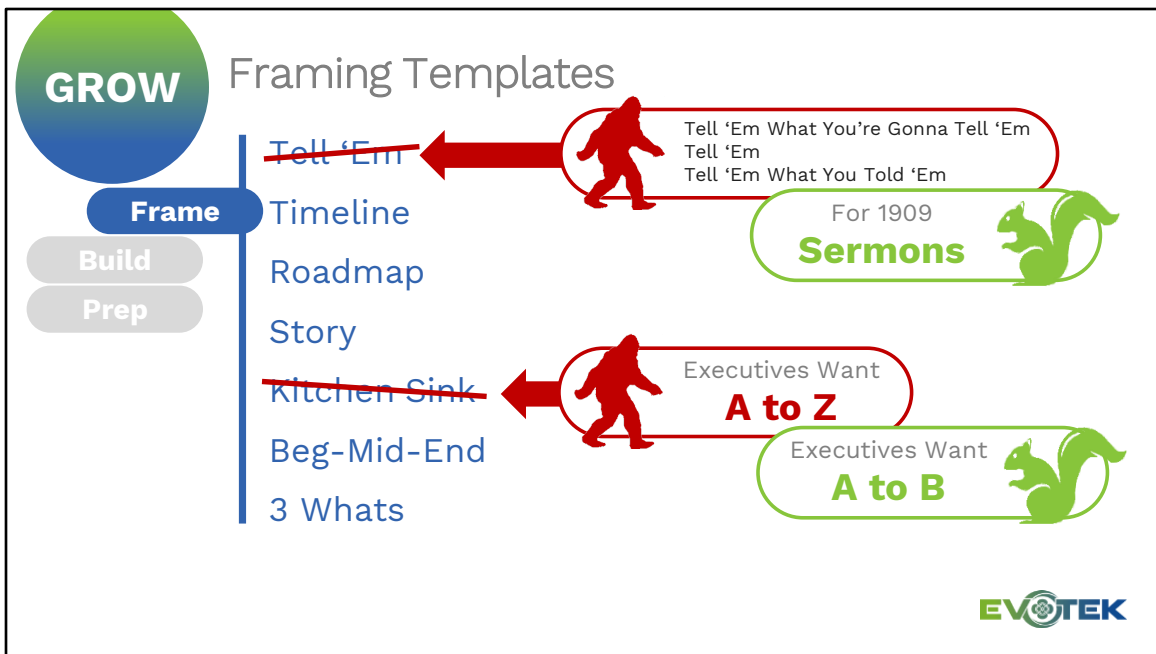
presentation/projector, Q&A session

- **Recorded** – Will the session be recorded?
 - TRUTH: You must ask permission to record a session for legal and etiquette reasons.



Grow stage. These are the heavy lifting steps needed to create the presentation material. Many people just brain dump what they know into PowerPoint and wing the presentation. This is not effective, persuasive, or professional – it will likely tell the customer “we are not prepared to handle this”. Instead, you should make a world class presentation easily using three steps:

- **Frame** what we presenting.
- **Build** the content to present.
- **Polish** the presentation for the professional touch?



Using a framing template will save you time, give a proven structure to build on, and will keep your presentation Brief & Clear. There are several proven templates listed here but there are others:

- **Timeline** – Takes the audience from the past, to the present, and looks forward to the future
- **Roadmap** – (variant of the Timeline) Takes the audience from where we are, to where we are going and explains how we are going to get there.
- **Story**: Introduces the audience to a character (them), with a problem, who meets a guide (us), who gives them a plan, that calls them to action, and results in success
- **Beg-Med-End** – (combination of Timeline & Story) Takes the Audience from the beginning, through the middle, and arrives at the end
- **3 Whats** – What happened, What it means, What we are going to do.

Avoid these framing templates:

- **Tell 'Em** – This was devised in 1909 for sermons on contrition. Don't use this with executives as the repetition is tedious and you will lose their attention.
- **Kitchen Sink** – Executive do not want the whole story. They want the quickest presentation to link two ideas and reach an outcome (generally now and the

future).

GROW

Framing Templates

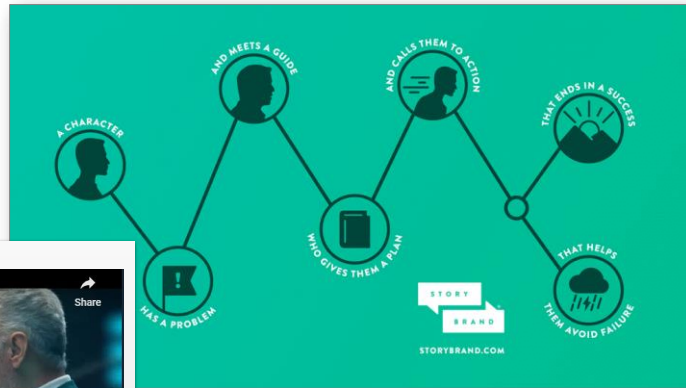
Story

EXAMPLE

Frame

Build

Prep



EVOTEK

EVOTEK Labs Overview (available on the Resource Hub) takes the viewer through the story framework to tell how executives don't have enough time to look at emerging tech and they need a guide to take them through the startup landscape and help them find the solutions their current tech stack can't solve.

Resource: StoryBrand, Labs Overview Video

GROW

Framing Templates

Timeline

EXAMPLE

Frame

Build

Prep



Today

Tomorrow

Onward



The Nextracker team leveraged a timeline framework to show the customer what problems they faced Today, why they needed Security Advisory Services to reach their Tomorrow and prepare for the future beyond that.

GROW

Framing Templates

Roadmap

EXAMPLE

Frame

Build

Prep



nextacker.

Today

Tomorrow

Onward



EVOTEK

The Irvine Company team leveraged a roadmap framework to explain the customer's cloud migration challenge, the approach we'd take to meet this challenge, our execution plan, and what the expected result would be.

GROW

Framing Templates **Timeline/Roadmap**

EXAMPLE

Frame

Build

Prep



nexttracker.

Today

Tomorrow

Onward

IRVINE COMPANY

1

2

3

4

The Approach

The Plan

The Result

Where We Were

Where We Are

A

B

C

Where We're Going

How We Get There

Builders
FirstSource

EVOTEK

At Builder's FirstSource the team laid out a roadmap detailing "Where We Were" in the past, "Where We Are" right now, "Where We're Going", and three ways "How We Can Get There" – one of which is the approach we are recommending.

GROW

Framing Templates

Beg-Mid-End

EXAMPLE

Frame

Build

Prep



nextacker.

Today

Tomorrow

Onward

IRVINE COMPANY

1

The Challenge

2

The Approach

3

The Plan

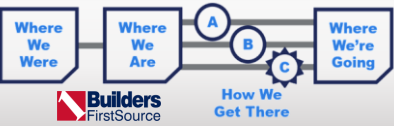
4

The Result

KNOW

GROW

SHOW



EVOTEK

Look familiar – yes, we're eating our own dog food.

This presentation uses a framework with a Beginning (Know), Middle (Grow), and End (Show).

GROW

Framing Templates

EXAMPLE

Frame

Build

Prep

We Have a Marketing Department

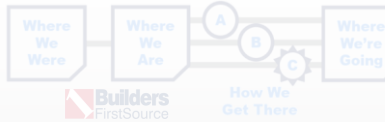


4

KNOW

GROW

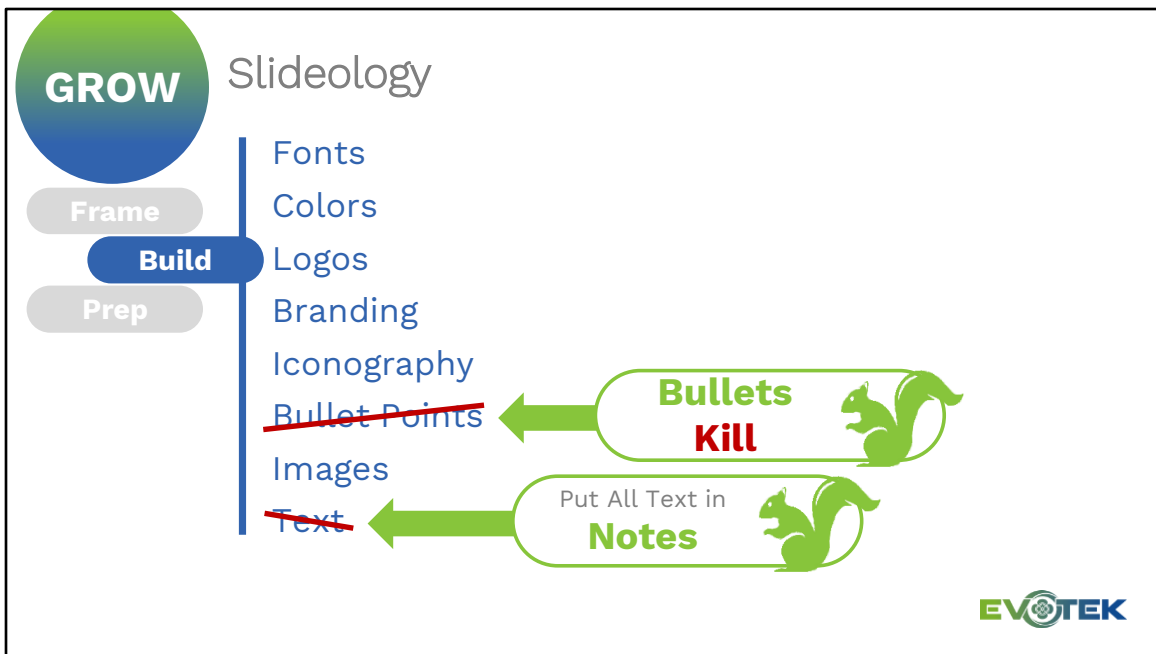
SHOW



EVOTEK

But wait there's more... Our Marketing Department has templates on the Resource Hub you can use for each of these frameworks.

Resource: Resource Hub



Slideology (term from the Moxie Institute)

- **Fonts** – Customer website & presentations
- **Color** – Any official presentation from the customer’s marketing department – just ask.
- **Logos** – Use only the logo on their website landing page. Others may be obsolete even if your customer uses them. Their marketing department will ensure their website is current.
- **Branding** – Fonts, Colors, Logos – Use the customers branding artifacts if possible. You can get them from:
- **Iconography** – What Icons will be used (to replace bullets for example)
- **Bullets** – Don’t use. There are more creative methods of listing category items.
- **Images** – These are terrific to keep attention and replace words. But stay consistent – color vs. black & white, drawing vs. photo, full bleed vs. thumbnail. Use highest resolution possible - Never scale pictures up (it blurs them) – Never stretch them (makes them look amateurish).
- **Text** – Don’t use text. Sentences are for Prisoners. Making an executive read will either insult them, waste their time, or force them to ignore it. Put all supporting text in the Notes section so it is in the “leave behind” – it forms the “words behind

the words”

Current State

Physical Installation Problems

- Equipment is not installed in racks
- Improper length patch cables
- Equipment is installed with no regard for environmental factors
- Wireless access points and cellular backups are installed improperly and are not oriented for optimal performance.

Physical Infrastructure Issues

- Equipment racks are not standardized
- Equipment is connected directly into power outlets or strips rather than a managed battery backup
- Equipment and/or racks are not properly grounded

Non-standard equipment and installations

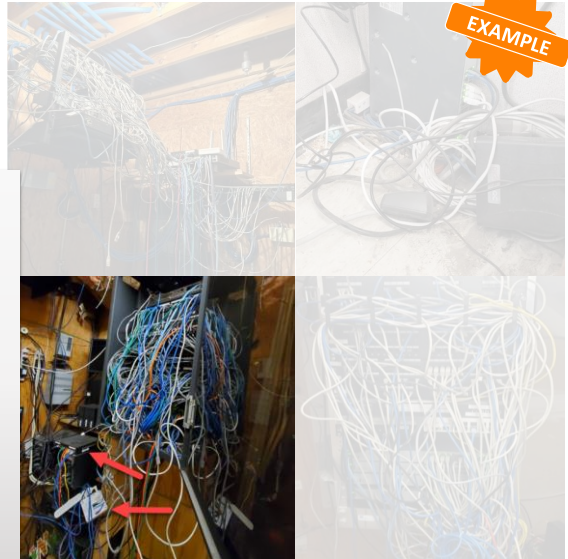
- Non-standard, unmanaged devices are installed without IT involvement
- Network switch hardware is not consolidated properly. For example, you may have 4x24 Port switches stacked on top of one another rather than consolidating into 2x48 Port switches. This costs more and adds complexity and risk to the environment.



Current State

Physical Installation Problems

HOLY SCHNICKEYS!
What the heck is this!
What are those red arrows?
Is that a Blu-Ray Player?
I loaned my Blue-Ray player to Kyle?
Wonder what Kyle is doing these days?
What was his sister's name?
Something weird like Lervina or something
She was straight up nuttier than a road lizard



Look at the Slideology:

- **Bullets** – Overused
- **Images** – Not sure what these depict. Are these real? Downloaded from the internet? What are the red arrows calling our attention to?
- **Text** – Numbing amount of text. Cut and paste this into the notes for a leave behind.

Think what your reaction was when first seeing this slide.

Example Only: Some terms were removed to protect customer confidentiality.

Our Sites Have 3 Big Problems

EXAMPLE

1

Design

Devices	Not IT Approved
Site HW.	Non-standard
Env. Design	Ignored



2

Infrastructure

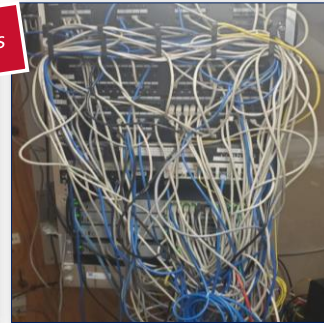
Racks	Non-Standard
Power	Direct, No Backup
Safety	Grounding Issues



3

Installation

Equipment	Unracked
Cables	Mismatched
Wireless	Not On All Sites



>10% Sites DO NOT Meet Standards



Current State

Physical Installation Problems

- Equipment is not installed in racks
- Improper length patch cables
- Equipment is installed with no regard for environmental factors
- Wireless access points and cellular backups are installed improperly and are not oriented for optimal performance.

Physical Infrastructure Issues

- Equipment racks are not standardized
- Equipment is connected directly into power outlets or strips rather than a managed battery backup
- Equipment and/or racks are not properly grounded

Non-standard equipment and installations

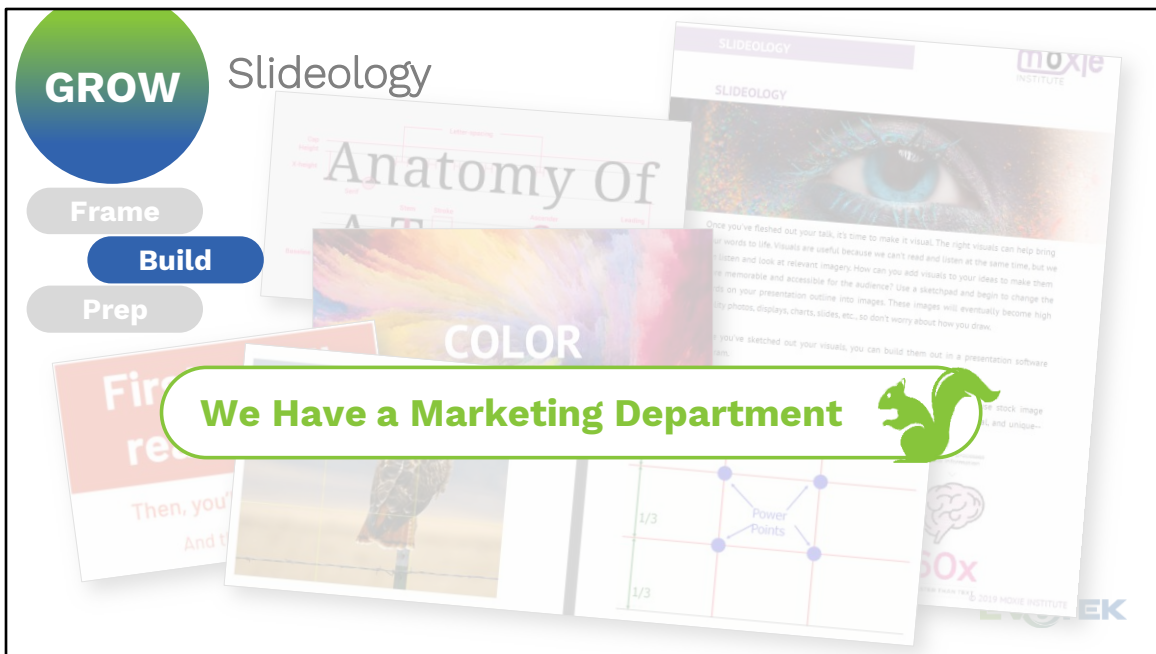
- Non-standard, unmanaged devices are installed without IT involvement
- Network switch hardware is not consolidated properly. For example, you may have 4x24 Port switches stacked on top of one another rather than consolidating into 2x48 Port switches. This costs more and adds complexity and risk to the environment.



Our Sites Have 3 Big Problems

1 Design		2 Infrastructure		3 Installation	
Devices	Not IT Approved	Racks	Non-Standard	Equipment	Unracked
Site HW.	Non-standard	Power	Direct, No Backup	Cables	Mismatched
Env. Design	Ignored	Safety	Grounding Issues	Wireless	Not On All Sites





There is a lot of material, studies and theory how to build an effective slide deck. We can go as deep as you would like on:

- Fonts, Typeface, Lettering
- Images, positioning, Style
- Color, Palettes, Punch colors
- Animation, Transitions, Embedded Content
- Layout, Chunking Theory, Cognitive Linkage

But our Marketing department can help you with all of this.

Resource: Moxie Institute Slide Design, Marketing Department

And there is Pitch.com and Presi.com if you are sick of Powerpoint

GROW

The Professional Touch

Frame

Build

Prep

Polish

The Leave Behind

Internal Prep

External Prep

From Text in the

Notes



Prep with

Sponsor

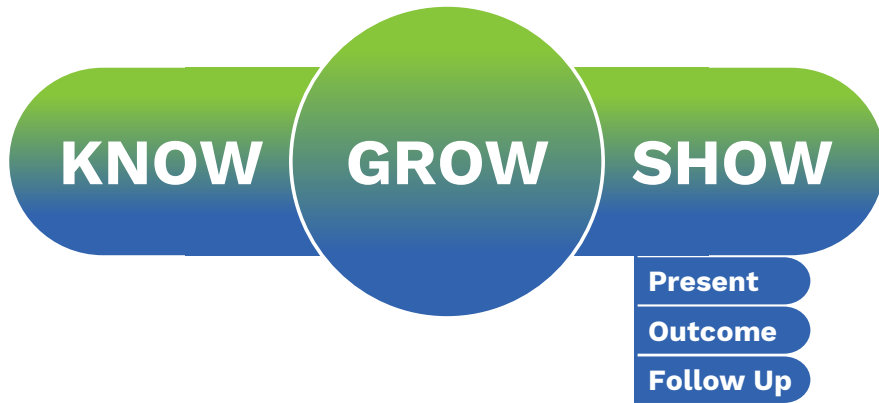


EVOTEK

Polish:

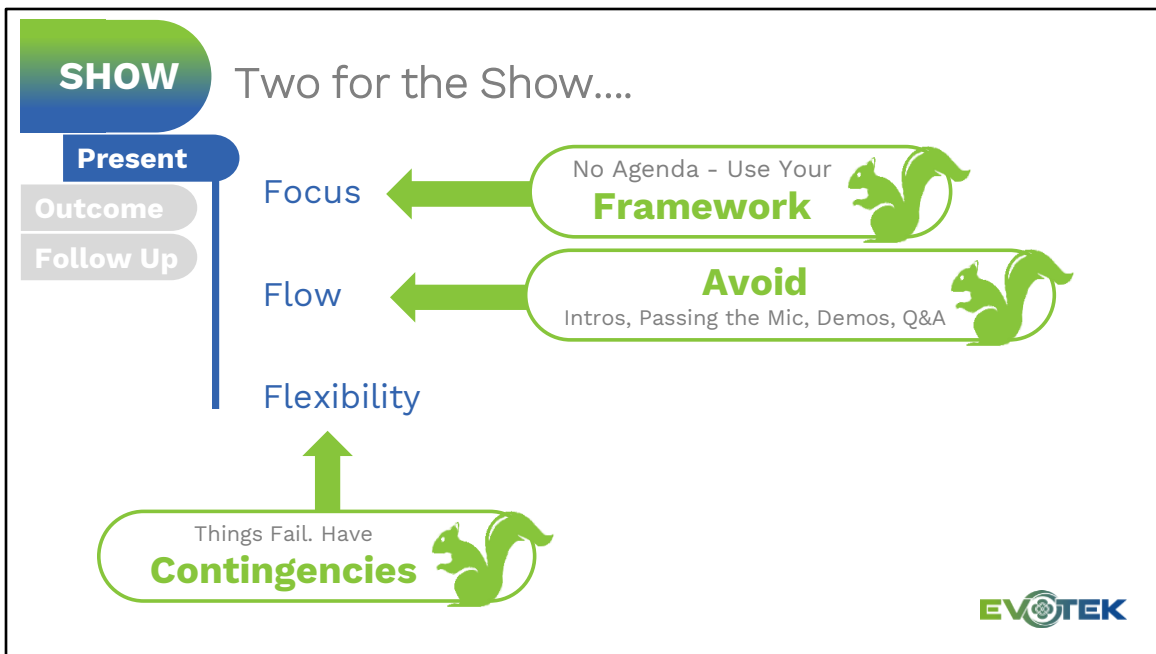
- Condense
- Correct
- Clarify
- Animations
- Transitions
- Attention to Detail

Your Framework



Show stage. After all this hard work, now its time to get present it to your executive audience. You should:

- **Prep** what we presenting.
- **Present** the content.
- Ensure you got the **Outcome**.



When you are presenting you must:

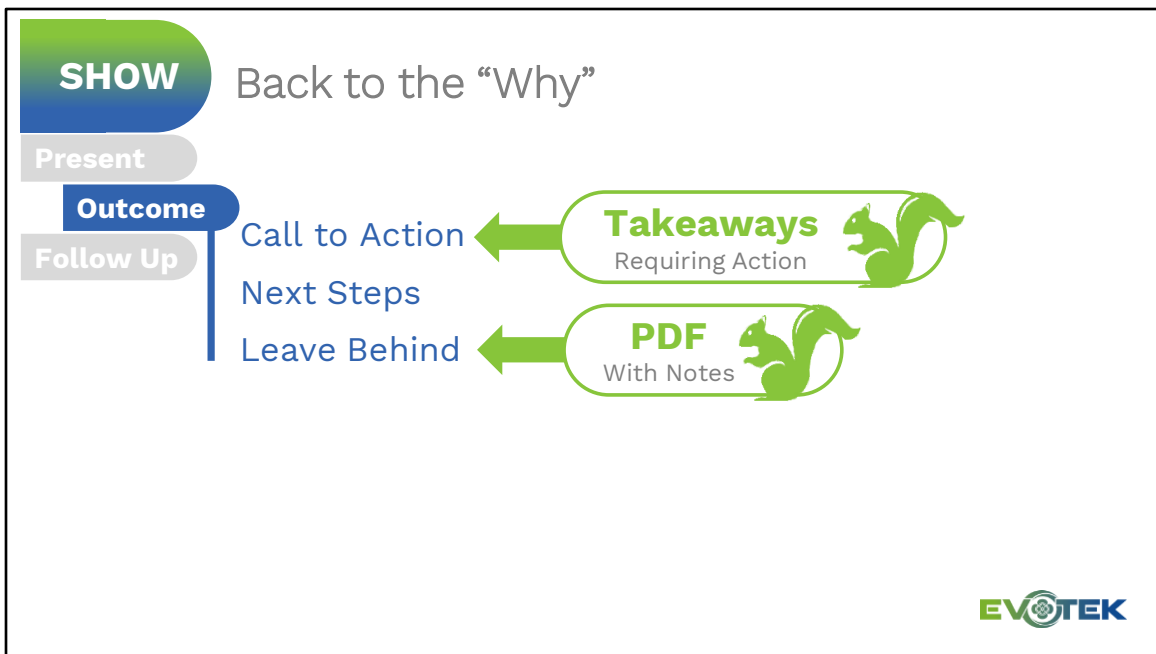
Focus – Minimize sidebars and chit-chat (especially by your team) – keep the meeting to one conversation. Small talk is fine but don't let it defocus the meeting.

Flow – You need to keep things flowing if you want to retain the executive's attention. Avoid these flow breakers:

- **Agenda** – It is often said that you need an agenda. While this might be true, you do not need to state it (Tell 'em what you're Gonna Tell 'Em). Agenda are simply not needed for Executive Presentations. Instead, use your framework.
- **Introductions** – Probably not adding any value unless the purpose of the meeting is to make introductions. Whatever you do NEVER introduce the executive to themselves.
- **Pass the Mic:** There is a common feeling that you should give everyone a chance in the spotlight. This is only true if this is the purpose of the meeting. In practice the executive doesn't care, and it causes disruption to the flow – “Sorry, couldn't find the mute button”
- **Demo:** Only do a demo if it helps accomplish the Outcome – if so, keep it very brief and high level (no weed diving). A demo most likely will not help drive the outcome unless that is the purpose of the meeting. Old adage: “Do a Demo; Lose a Sale”

- **Q&A:** A common practice is to “hold questions until the end”. This frustrates executive who might have a great question but will forget it by the time you get done going through your slides. You want to create an Open Forum

Flexibility: Things will inevitably go differently than you planned. Executive have a propensity of diving into unforeseen areas, not care about others, or head off into a tangent. Microphones, cameras, and teleconferencing apps fail. People can't make the meeting or don't show. Be ready to adapt the flow to these hiccups.



You need to verify that you achieved your Outcome – or start to plan on replanning

- **Call to Action** - Restate the outcome in a series of Takeaways that require actions. This is different than the “Tell ‘Em what you Told ‘Em” which just restates the agenda. These Takeaways are action-oriented.
- **Next Steps** – Define what comes after. What is the next engagement point
- **Leave Behind** – Print out the deck with Notes (remember all the text we pasted into the Notes section?).
 - UNLESS you are worried the content could be passed onto the competition and damage what your outcome.

SHOW

In a Revolving Door - Halfway Kills

Present

Outcome

Follow Up

When

Who

How

Why

Next

Outcome



You must determine how you will follow up on your outcome

- **When** will you follow up
- **Who** will you follow up with AND who will do the follow up
- **How** will you follow up
- **Why** will you follow up – what is your next outcome? We began with a Why, and we end with a Why.

SHOW

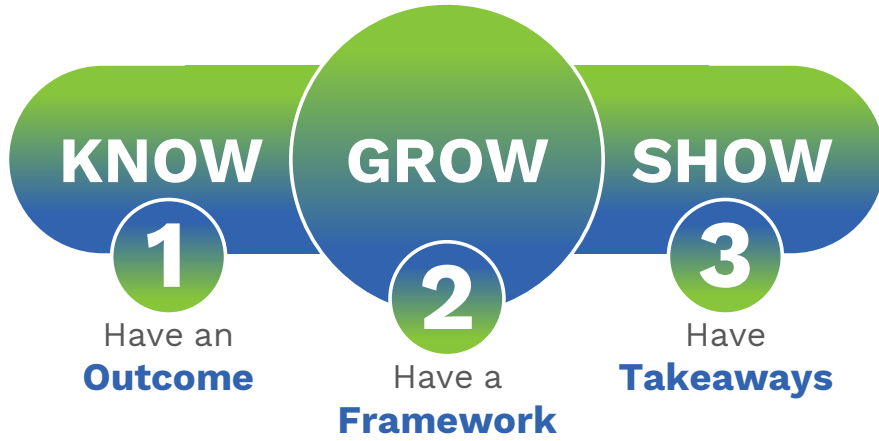


Louie Quackers & Flapfoot
Alleged members of the Duck Mafia



In the quaint town of Featherburg, a small, unassuming duckling named Louie McNibbles found himself drawn into a world he never anticipated – the avian underworld. Louie, soon nicknamed “Quackers”, with his innocent yellow feathers and wide-eyed charm, caught the attention of Bill “Flapfoot” Mallard, notorious boss of the Duck Mafia. Despite his initial reluctance, Quackers soon became unwitting accomplices in Flapfoot’s feathery felonies. Quackers natural leadership and quick thinking propelled him through the ranks of the web-footed syndicate. When Flapfoot got quacked on a trip across the pond, Quackers became the undisputed boss of bosses and ruled the roost with an iron wing, proving that even the most unassuming duckling could make waves in the quacktastic world of organized fowl crime.

Your Takeaways



Your Takeaways

1
Have an **Outcome**

2
Have a **Framework**

3
Have **Takeaways**

Download the **Leave Behind** 

TEK

.... And Yes! We have a Leave Behind

Thanks



KNOW

GROW

SHOW

Resources

StoryBrand - <https://storybrand.com/>

Moxie Institute - <https://www.moxieinstitute.com/presentation-slide-design/>

Labs Overview - <https://www.evotek.com/resources/299403280414/>

Resource Hub - <https://www.evotek.com/hub/>

Marketing Department - marketing@evotek.com

