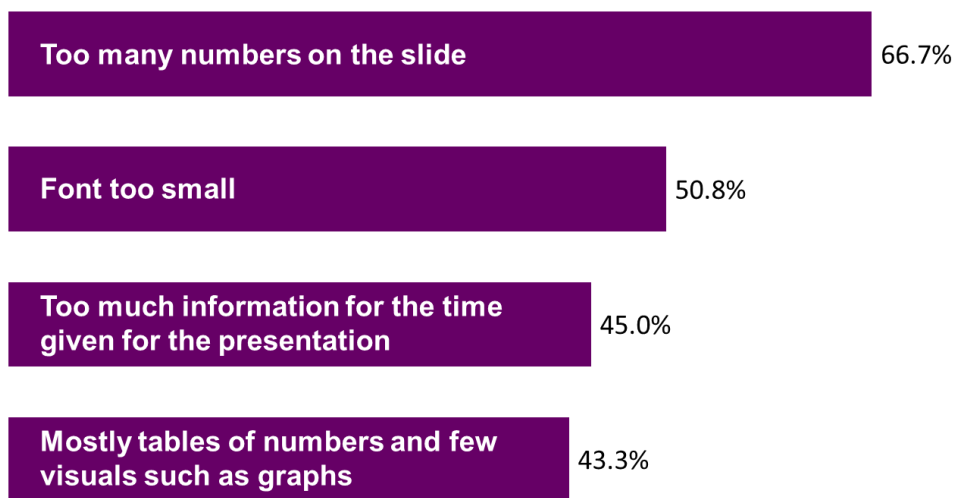


## The State of Financial Presentations 2014 Survey Results

How good or bad are financial presentations? I wanted to hear the audience's perspective. So I conducted a survey in May and June asking those who see financial presentations what they thought. I had 120 people fill in the survey, with most of the responses coming from professionals or management/executives in corporate or government organizations (I asked people to self-identify their organization category and role category). Here's what they told me.

### Financial presenters overwhelm the audience with numbers

I started by asking what annoys you about financial presentations. I gave the respondents a list of ten items and asked them to pick their top three. Most people stuck to three, but many could not contain themselves and the average number of selections was 3.6. Here are the top four responses, along with what percentage of respondents selected that choice in their list.



I must admit that the results on this question did not really surprise me. I see so many slides that have hundreds of cells from an Excel spreadsheet copied on to them. This is overwhelming for the audience. There are too many numbers to figure out. That's if they can even read the tiny font on the slide. It is almost all tables with very few visuals and it is way too much information. If you present financial information, as we will see in another area of the survey, audiences want you to cut the detail.

### Financial presenters confuse the audience with detail and financial language

After the respondents chose from the list I provided, I gave them a free form area to add additional comments of what annoyed them about financial presentations. Most were eager to share. After reviewing all of the comments, three themes emerged.

First, audiences said that the presenter focuses on the details of the numbers instead of what the numbers mean or why the numbers are important to the audience. Financial presenters



## **Financial presenters should focus on their message and support it with clear visuals**

So what should financial presenters do? I asked the people who responded to the survey. Again, they were generous with their advice. It fell into three main themes.

First, audiences want presenters to understand that the numbers are not the story. The numbers only support a message that needs to be communicated. Focus on planning the message and only after you clearly understand what you need to say, then figure out which few numbers you want to use to support those points.

Second, audiences only want the summary or highlight of the analysis and they want it presented in a way that clearly focuses on what those results mean to the members of this audience (which will change for each audience). The audience does not need, or want, all the details. They trust you to have done the work properly. If they do want to see the details, they want them in advance so they have time to digest and reflect on them. The details are for backup handouts, not for the presentation.

Finally, audiences want presenters to use more visual methods of presenting what the numbers mean. Instead of huge Excel tables copied onto a slide, they want graphs, diagrams, or other visual representations of the numbers. They are OK with a table of numbers, as long as it is a truly focused table of only the few key numbers that support the message, not the whole spreadsheet.

## **Financial presenters need to create presentations that have a clear message, focused content, and effective visuals**

What do financial presenters need to do? I suggest three areas to focus on.

First, stop focusing on the numbers. Instead, focus on what message you want to make sure the audience walks away with. Plan your message first, before you look for what numbers support the points you want to include. I use a GPS analogy in my workshops and [this article shows you how use this approach](#) to plan your message.

Second, focus on the insights from your analysis, not the details of the analysis. In my workshops I talk about moving from data to information to insight. Most presenters stop short and don't give the audience the insight they really need. [This video shows how I explain this in a workshop](#).

Third, use visuals instead of large tables of numbers. You don't need to be a graphic artist or designer to do this. You have the tools in Excel or PowerPoint already. For ideas of what visuals could work, [watch this SlideShare deck](#). To get more detailed information on how to present Excel data effectively to executives, [download this free e-book](#).

Financial presentations don't have to be confusing and boring. They can clearly communicate important information that the audience understands and uses.