

# Pitching & Presentation Best Practices

*July 13, 2023*







# Presenters

- Whitney Owen, Executive Director
  - Senior Leadership briefings
  - Highlighting benefits
  - Easy to understand financials
- Nikki Smith Acierto, Senior Consultant
  - Streamlined communications
  - Visually appealing PPTs
  - Action items/next steps



## Poll 1

What is your comfort level with presenting to senior leaders?

# Goals for Today

- 1** Learn how to identify the BLUF, business case, and benefits of a project/initiative
- 2** Share best practices for pitching to leadership
- 3** Discuss tips for creating effective presentations

## Poll 2

Have you ever used a “BLUF” technique when presenting?



# Identifying the BLUF



# BLUF – Bottom Line Up Front

## What Is It?

- Most important information at the start (different from academic writing)
- Usually one slide – similar to an elevator pitch or headline for your presentation
- Less critical information comes later
- Originated in the military

## Why Use It?

- Captures your audience's attention right away
- Especially with leaders, may not have long with them
- Communicates what you did and what you need all at once
- Gets your message across even if you lose their attention

## How to Do It?

- One slide, few bullets, include visual aides
- Summary or background information, including your ask



## OUR CHALLENGE

Plan and execute 10-12 months of activities to commemorate Mason's 50<sup>th</sup> anniversary, involve the community, and support Mason's future success by building our reputation and increasing Vision Day fundraising.

## OUR SOLUTION

Pull together representatives from across Mason – as well as alumni and community stakeholders – into a 50<sup>th</sup> Planning Committee. The Committee members will collaborate to promote the 50<sup>th</sup>, plan new events, and involve students, staff, faculty, alumni, and the community.



# BLUF – Military, Veterans, and Family Initiative

- MVFI brings many benefits to Mason and its military-connected students. Better coordination of services and dedicated leadership is needed to solidify this effort as a true priority for the university.

**Kickoff** MVFI launched on Veteran's Day 2020 to leverage and expand Mason's strengths to support service members, veterans, and their families.

**Progress** The initiative made progress in coordinating services during COVID, but it lacks dedicated resources and an identified sponsor to champion this work.

**Relaunch** Feb. 13, 2023  
MVFI leaders gathered to redefine their vision and mission for the future to escalate this work as a priority for the university.

## Poll 3

Have you ever developed a business case for an aspect of your work?







# Outlining the Business Case



# What is a Business Case?

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-  Presents the reasons behind your “ask” to leadership or outside investors for funding or an increase in resources
-  Ideally shows a return on investment (ROI) or return on value (ROV) calculation for what they fund
  - *Highlight the benefits!*
-  Includes both narrative and project financials
-  Depending on project maturity, should have some idea of implementation timeline and project management approach for risks, barriers, stakeholder engagement, and communicating change



# Telling Your Story – Who Benefits?

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- Up front (BLUF/Exec Sum) of business case, you need to convey *not what YOU* will get out of the investment, but *what the FUNDER* will get
- What other stakeholders might benefit from the project moving forward? Be sure to highlight the benefits to THEM.
- The benefits to you should be mentioned last (if at all)
- Example benefits:
  - More student services
  - Increased enrollment
  - Less ticket-processing time
  - Smaller class sizes
  - Less manual entries leading to fewer errors and increased efficiency



# Example Benefit Statements

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## Okay

By investing in our project, we will be able to hire 5 new employees who will reduce the workload on our current staff and allow us to service more students each year.

## Way Better

By providing the minimal investment we're requesting, we will be able to service twice the number of students each semester and reduce their wait time by an average of 30 minutes per interaction with our office.



# Presenting Financials

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- Only present the numbers you absolutely need to!
  - Once a number is out there, people tend to latch onto it
- Keep your charts simple and font sizes readable
- Not everyone is a financial expert – make the data accessible for non-CPAs
- Use text boxes or other callouts on slides to point out the main takeaways from complicated financial charts
- Highlight data sources, years, caveats, and any assumptions

EXAMPLE

# 5-Year Projected Operating P&L (FY24-28)

	FY24(Budget)	FY25(Estimate)	FY26(Estimate)	FY27(Estimate)	FY28(Estimate)
Total Revenue	\$2,347,514	\$2,464,140	\$2,586,597	\$2,715,177	\$2,850,185
Total Personnel Expense	\$2,474,521	\$2,524,011	\$2,574,492	\$2,625,981	\$2,678,501
Total Direct Operating Expense	\$ 1,215,000	\$1,239,300	\$1,264,086	\$1,289,368	\$1,315,155
Net Income	\$ (1,342,007)	\$(1,299,172)	\$(1,251,981)	\$(1,200,173)	\$(1,143,471)

Assumptions


- 5% revenue growth rate YOY
- 2% expense increase YOY

# Tips for Pitching to Leadership



# Key Items to Cover

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- Most important information up front (BLUF/ExecSum)
- Frame the story for your audience  Decision
  - How much do they know already? What do they care about? What info do they need to know to make a decision?
  - Outline: Why we're doing this/Where we were/What we've done/Where we're going
- Include critical information they care about:
  - Budget & Timeline
  - Risks/Barriers + your mitigation strategies
  - Similar efforts at Mason and/or other universities (benchmarking)
  - Impacted stakeholders
- Don't try to cover too much ground or get lost in technical jargon

Senior Leadership Team meeting example –  
Priority KPIs vs. 32 outcome-based KPIs



# Creating Effective Presentations



# Disclaimer:

These presentation tips are appropriate when presenting to leadership – they sometimes differ from general presentation best practices (e.g. a good TED talk is very different than a pitch to Mason leadership).

## Tip 1:

Identify your purpose and message first – slides come last.



# Define the Purpose

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- Consider these questions:
  - Do these stakeholders **require certain information** to make a decision?
  - Do you need to **gather feedback** on aspects of your project?
  - What **other reasons** are there for taking time to meet?
- Develop a presentation that moves information in **two directions** (to and from the audience)

# Outline Your Message

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- Include in your outline:
  - BLUF
  - Business case (with benefits)
  - Any background/context needed
  - The exact points and information you need to share
  - What information (e.g. decision, action, feedback) is needed from audience (and by when)

# Develop the PPT

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- Key elements:
  - Agenda/Table of Contents
  - BLUF/Executive Summary
  - Transition slides
  - Use 1 slide per message
  - Key Takeaways and/or Next Steps
  - Questions and contact info
  - Appendix



## Tip 2:

Use visual elements carefully to ensure simplicity and a consistent look & feel.

# Keep It Simple

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Typeface, Size,  
& Spacing

Colors

Background

Pictures

Smart Art

Text

Alignment

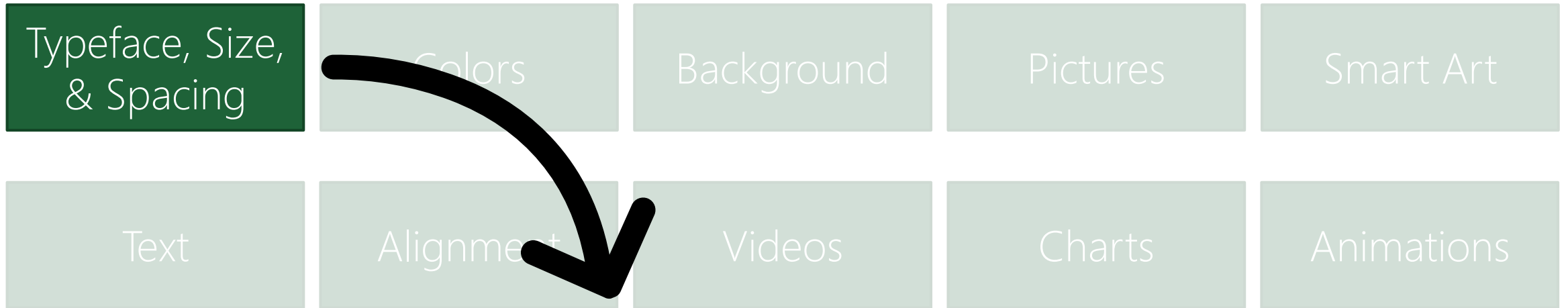
Videos

Charts

Animations

# Keep It Simple

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Don't go below size 18

Stick to 1-2 typefaces for entire presentation

Use Mason preferred typefaces

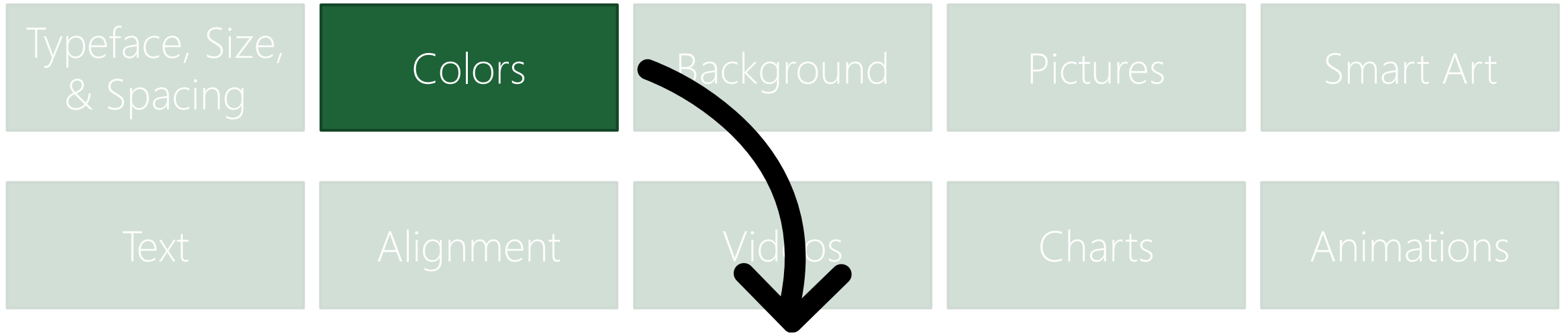
Avoid serif – hard to read

Increase spacing between lines



# Keep It Simple

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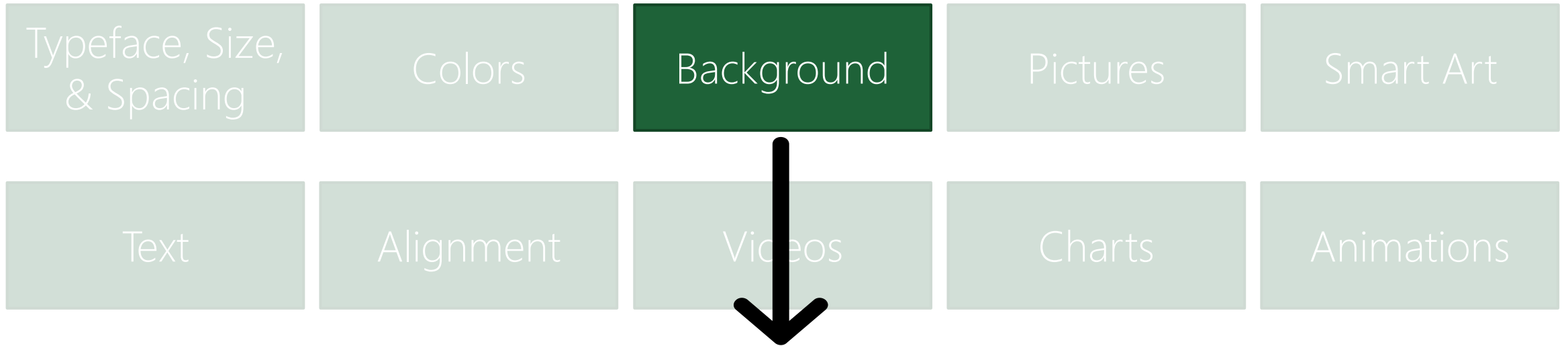
Stick with Mason colors

Use same colors throughout for the same application

Ensure large color contrast

# Keep It Simple

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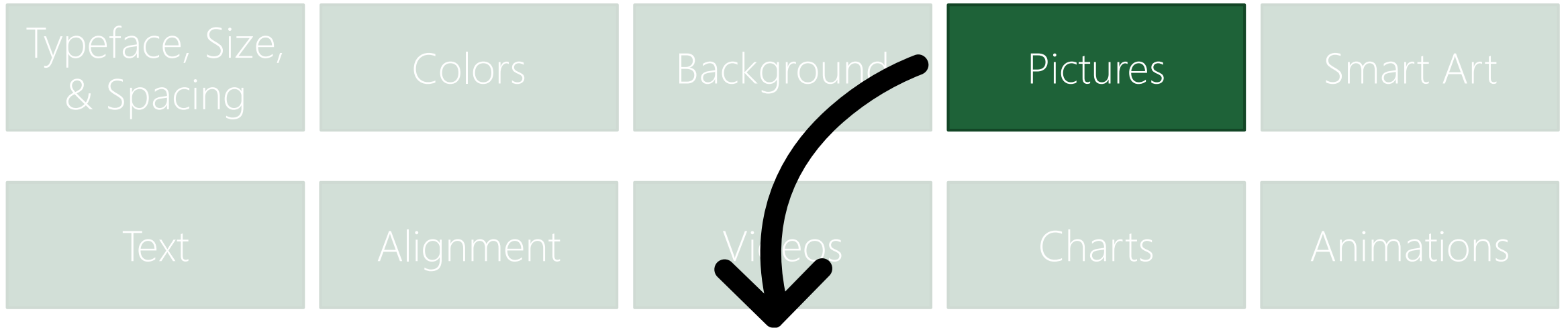
Aim for lots of white space

Don't use distracting background templates or images

Use Mason templates

# Keep It Simple

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Use high quality photos

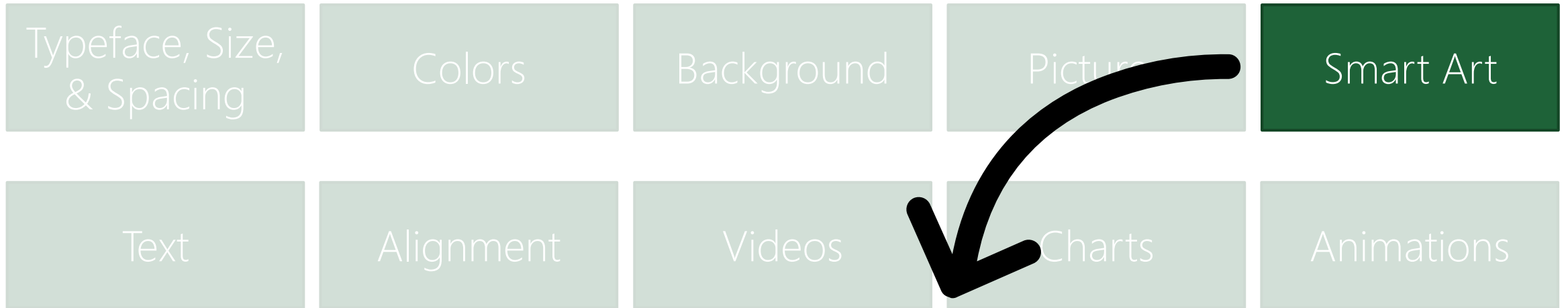
Use pictures to enhance/clarify message

Avoid borders, shadows, shading, etc.

Utilize [Mason Photo Gallery](#)

# Keep It Simple

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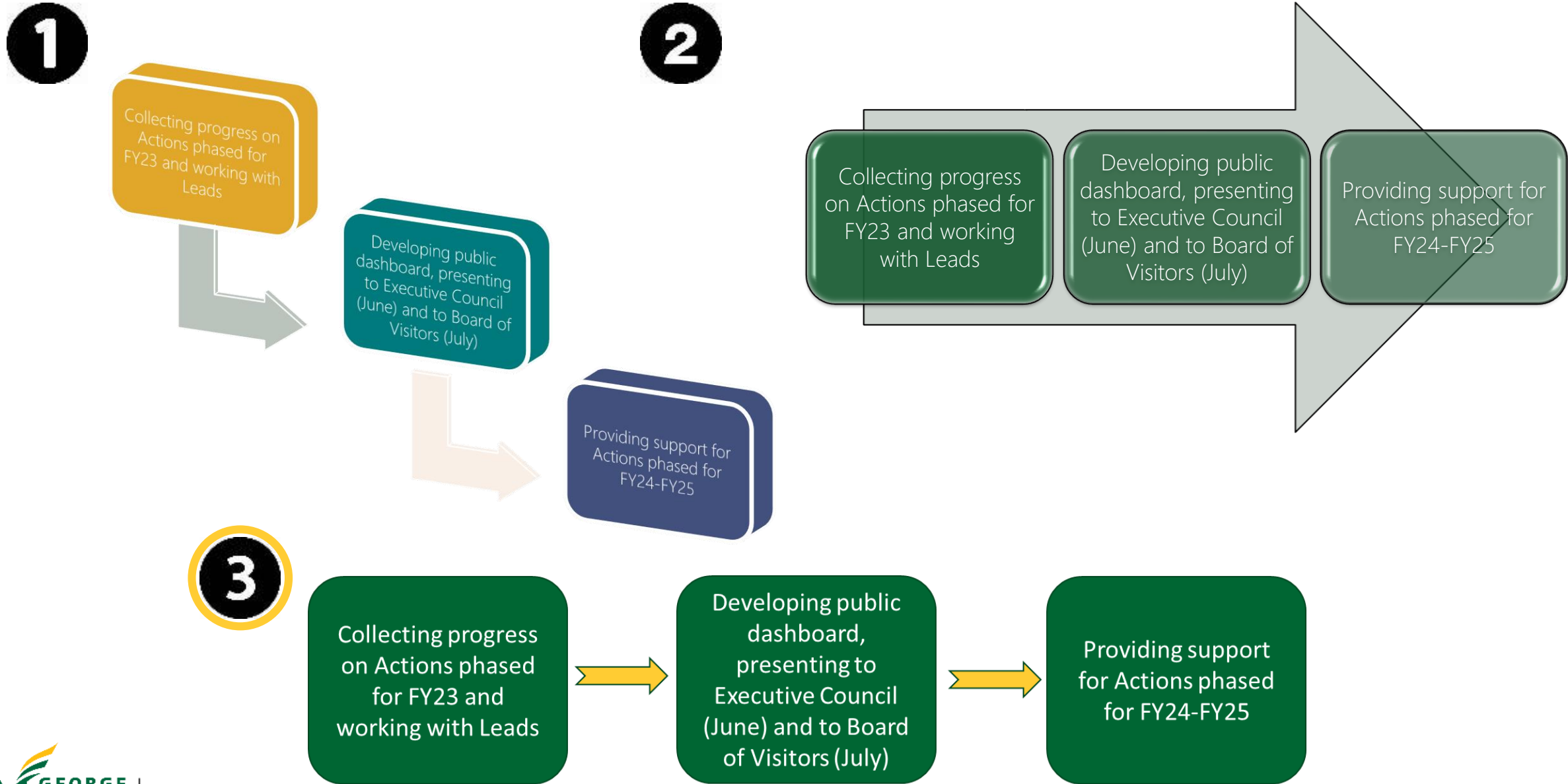


Use Smart Art when it will enhance understanding  
and/or replace text

Aim for least format-heavy option (reduce gradient,  
shading, borders, # of colors)

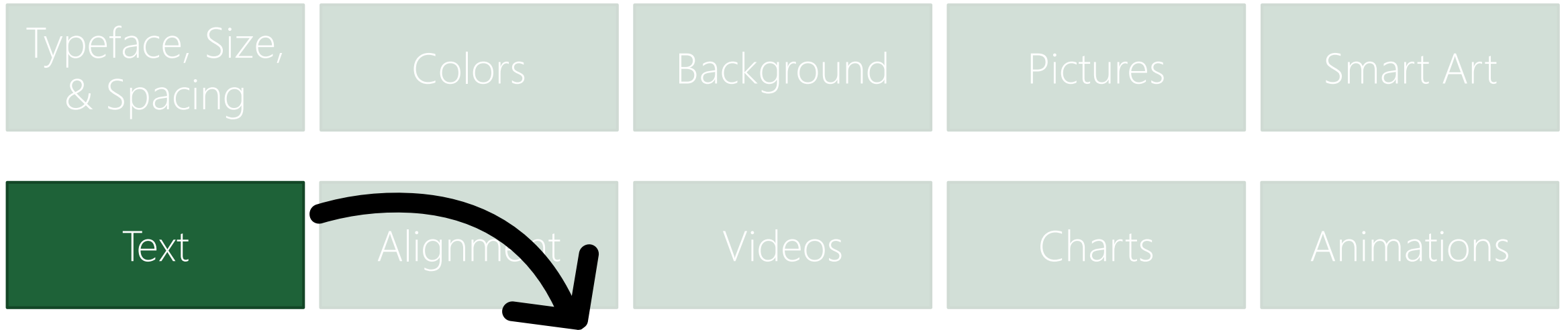


# EXAMPLE



# Keep It Simple

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Use spell check!

Use parallel structure for bullets

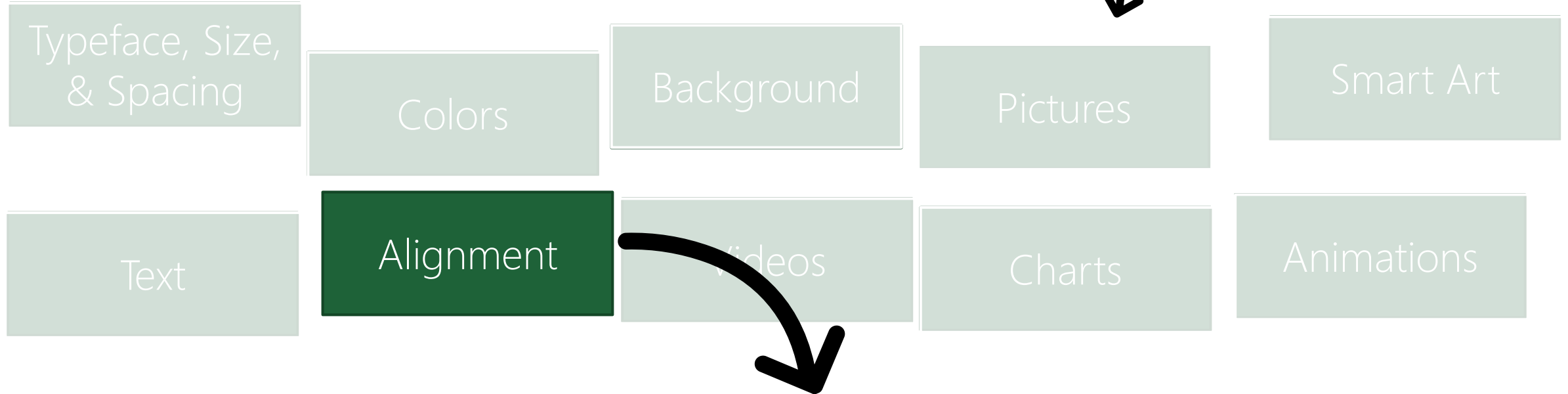
Full sentences are often unnecessary

Review text for succinctness and clarity

Use bolding to draw attention to **key words**

# Keep It Simple

This looks bad!



Be familiar with Drawing Tools (Align and Distribute)

Maintain same alignment in tables throughout slides

To quickly align and distribute shapes: select shapes (CTRL, select), go to Drawing Tools/Format, Align, choose how to align (Left, Center, Middle, etc.) and how to distribute (horizontally or vertically)

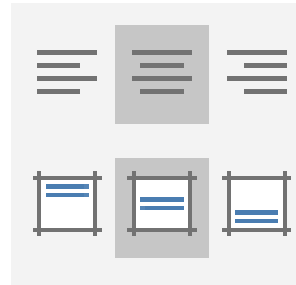
# EXAMPLE

To align and distribute tables: highlight the rows/columns, go to Table Tools/Layout, Align, choose how to align (see options below) and how to distribute (see options below)

Row & Column Distribution:



Text Alignment Options:



	Food and Beverage Policy	Event Alcohol Policy	Farmers' Market Policy	Approved Vendor List	Food Truck Policy	Late Night Event Policy	Policy/Request Forms Centrally Located
Virginia Tech	X	X		X	X	X	x
James Madison University	X			X			X
Virginia Commonwealth University	X	X		X			

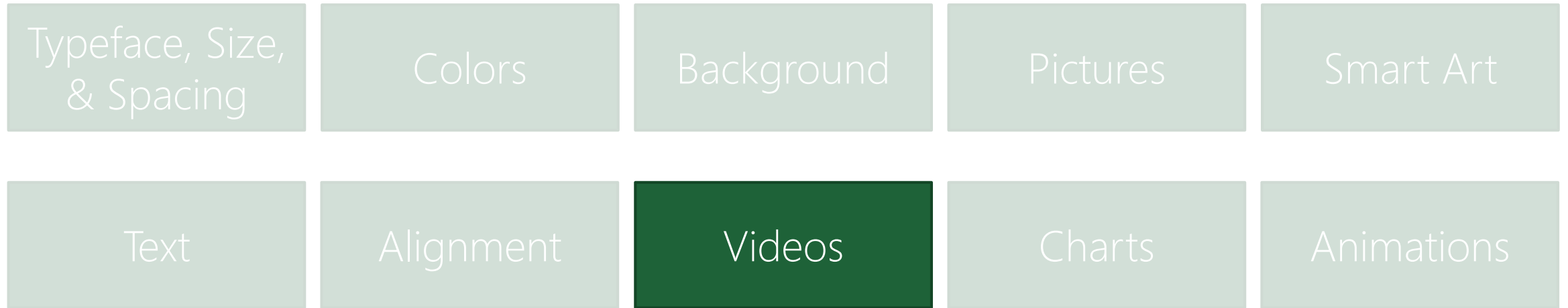


This looks bad!



# Keep It Simple

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Avoid unless necessary to illustrate a point  
Check technology ahead of presenting

# Keep It Simple

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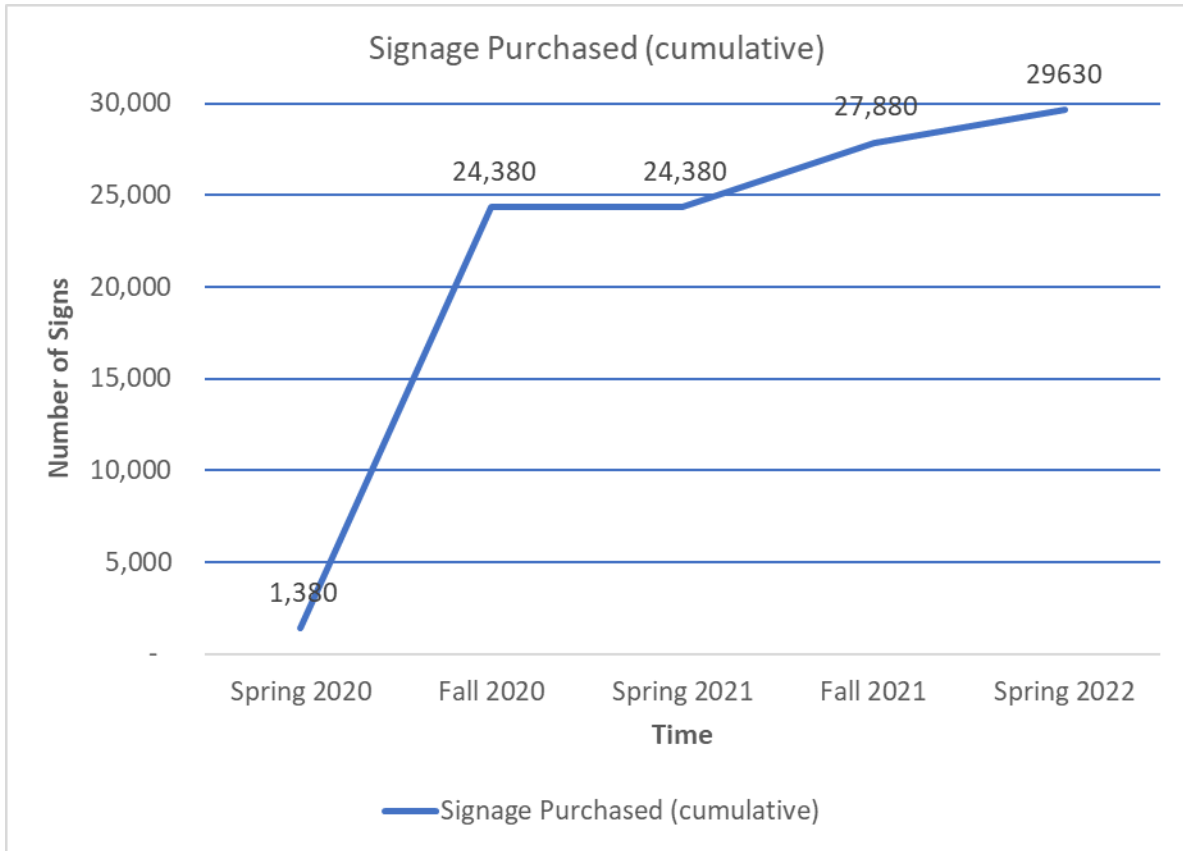
Simplify charts – delete unnecessary labels

Use same color key throughout slides for all charts

Have the raw data handy for when Q's arise

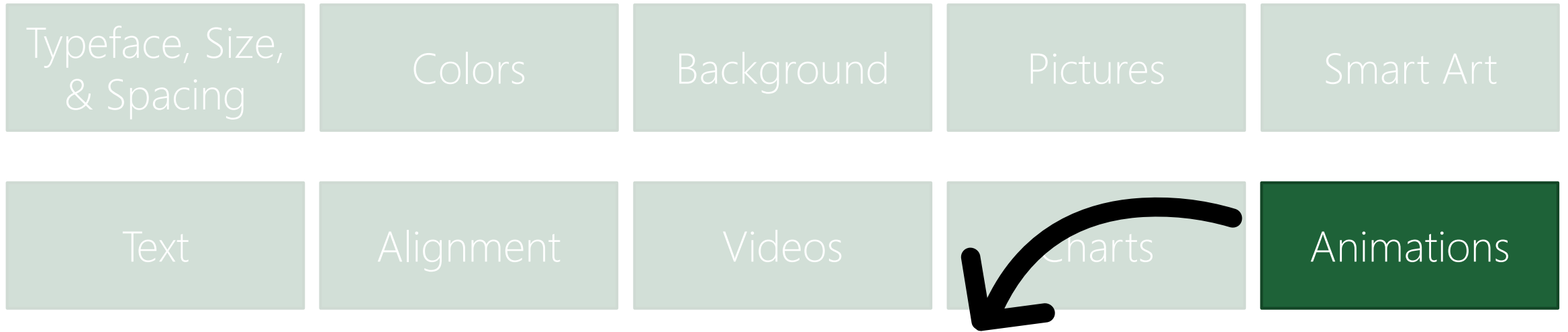
Use a textbox to summarize key takeaway(s)

# EXAMPLE



# Keep It Simple

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Avoid unless necessary to prove a point  
Use simplest options to avoid distraction



## Tip 3:

Aim to strike a balance between simplicity and allowing key slides to stand alone.

# EXAMPLE

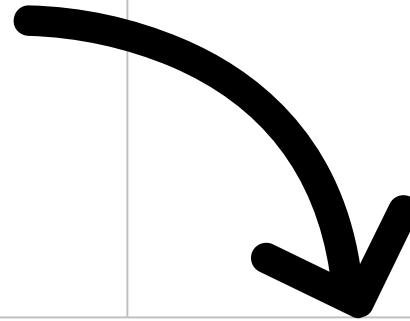
## Breakdown of Progress Reports

Status of Action

Evidence of Success

Barriers/Challenges

Progress Metrics Data



## Breakdown of Progress Reports

Status of Action

Evidence of Success

Barriers/Challenges

Progress Metrics Data

Status dropdown options:  
Not Started, In Progress, Completed

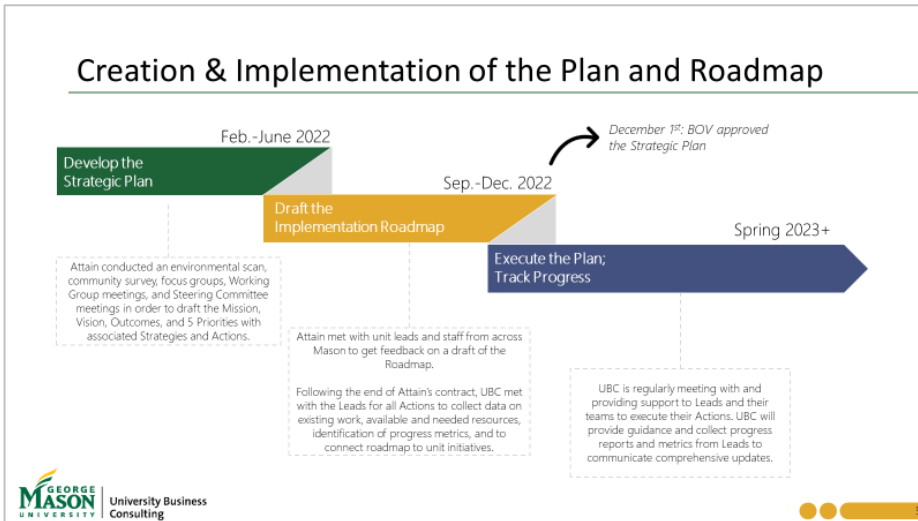
Please provide **updates** related to the Action. This can include a written **summary of work completed** (e.g., committee formed, project plan developed) and/or news articles or press releases that highlight progress (e.g., event, new initiative, etc.).

If progress is delayed, provide a summary of the **contributing challenges** (e.g., lost a key team member, had a grant deadline, did not have access to funding for X, etc.)

Provide the data for the 1-2 metrics you identified in your Roadmap

## Tip 4:

Avoid creating slides that only have text.



### UBC's Role in Strategic Plan Implementation

- We will provide status reports to senior leadership on a regular basis
- We are managing and updating the [Strategic Planning website](#)
- In partnership with OIEP, we are developing a dashboard on the website to reflect university KPIs
- We are assisting the Office of University Branding with communications around the plan

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### Project Summary

**Part 1: Data Collection (UBC)**

- ✓ Web-based benchmarking of seven peer institutions
- ✓ Inventory of current Mason policies and guidance
- ✓ Review of relevant county, state, and federal regulations
- ✓ Collection of more detailed policy and process information from 12 units

**Part 2: Analysis & Synthesis (UBC)**

- ✓ Identification of themes and areas of improvement
- ✓ Synthesis of themes and findings
- ✓ Creation of final report with recommendations and decision tree

**Part 3: Share (Auxiliary Services)**

- ❑ Incorporate/act on recommendations
- ❑ Publish updated guidance on OBS website
- ❑ Incorporate decision tree into internal standard processes
- ❑ Update stakeholders about policies and new resources

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Tip 5:  
Make sure content is accessible.

# Keep It Accessible

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- Consider audience members with visual disabilities
  - High contrast
  - Large text size
  - Avoid using only colors or images to convey meaning
  - More guidance is [HERE](#)
- Data literacy or subject matter expertise
  - Spell out acronyms on first use
  - Limit technical jargon
  - Provide narrative with key takeaways on charts and complex data

Tip 6:  
Plan the delivery ahead of time.

# Plan the Delivery

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Prepare your speaking points



Use a facilitator's agenda



Be brief



Keep an eye on time



Suggest a Parking Lot



Take notes on decisions and next steps

# [MEETING TITLE]

## Internal Facilitator Guide

**Date:** MM DD, YYYY

**Time:** MM:HH a.m./p.m.

**Location:**

**Meeting Goal:**  
[GOAL]

**Agenda:**

TIME	TOPIC

**Facilitator Notes:**

- [insert as needed]

**Links:**

- [insert as needed]

**Participants:**

- Facilitators/internal team
- Invitees, units

Role	Name	Action
Timekeeper & Zoom Wizard		Set up breakout groups and send timing reminders Have second computer available to stay in main Zoom room during breakouts
Breakout room facilitators		Assist breakout rooms during activities – make sure that attendees have Mural access, answer questions, and keep group on time.
TBD		

## Agenda

Time	Duration	Topic	Description	Speaker	Other Notes
N/A		Pre-meeting materials (reading, agendas, etc.			

Download this template from our website:

[https://consulting.gmu.edu/wp-content/uploads/2023/06/Meeting-Facilitator-Guide\\_Template.docx](https://consulting.gmu.edu/wp-content/uploads/2023/06/Meeting-Facilitator-Guide_Template.docx)

# Plan the Delivery – Virtual Meetings

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Do a test run beforehand



Check lighting & webcam location



Log on early



Designate a person to support the speaker

- Deal with technical issues
- Share links in real time via Chat
- Field questions
- Take notes



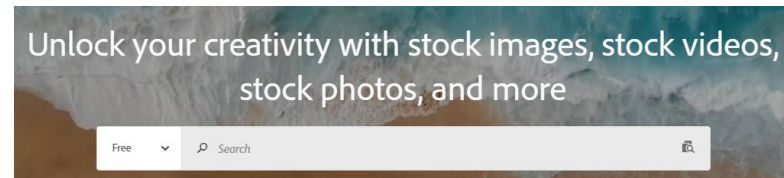
Tip 7:  
Use your resources!

# Use Your Resources

## OUB's Mason Brand Toolkit



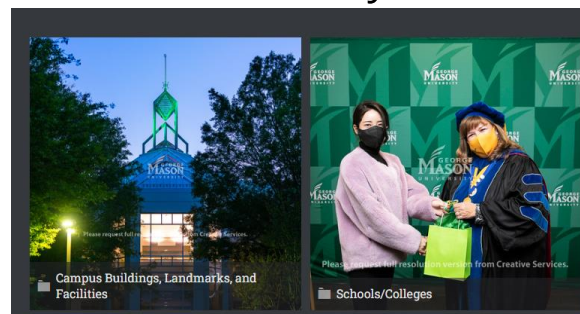
## Adobe Stock Photos



## 10 Tips for Better Slide Decks Ted Talk



## Mason Photo Gallery



## Successful Facilitation Tips & Tricks





# Questions?

Feedback Survey

Email: [UBC@GMU.edu](mailto:UBC@GMU.edu)

Website: [consulting.GMU.edu](http://consulting.GMU.edu)



# UBC Summer Series: Final Session

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## Change Management Primer

August 10, 2023 @ 12 pm

Registration info at [consulting.gmu.edu/resources](https://consulting.gmu.edu/resources)