APAC Regional Webinar: Effective Online Presentations That Energize Audiences and Increase Your Influence

Andrew Stotz, PhD, CFA

CEO, A. Stotz Investment Research

7 October 2020, 8:30-9:30 PM HKT

Moderated by Chamara Gunetileke, CFA
Director, Specialized Solutions, Acuity Knowledge Partners

CFA Institute

SESSION CHAIR

Chamara Gunetileke, CFA

Director, Specialized Solutions, Acuity Knowledge Partners

HOUSEKEEPING

- Today's webinar is scheduled for 60 minutes
- All participants are muted, we welcome questions via the Q&A function on your screen
- Audience can use CHAT to share comments and to see what others are saying
- This webinar will be recorded and be available to view after the presentation concludes
- At the end of the webinar, please take a moment to complete the short survey. Your feedback is valuable to us.

WE ACKNOWLEDGE THE FOLLOWING AS PRINCIPAL SUPPORTING ORGANIZATIONS:

CFA Society Sri Lanka

CFA Society India

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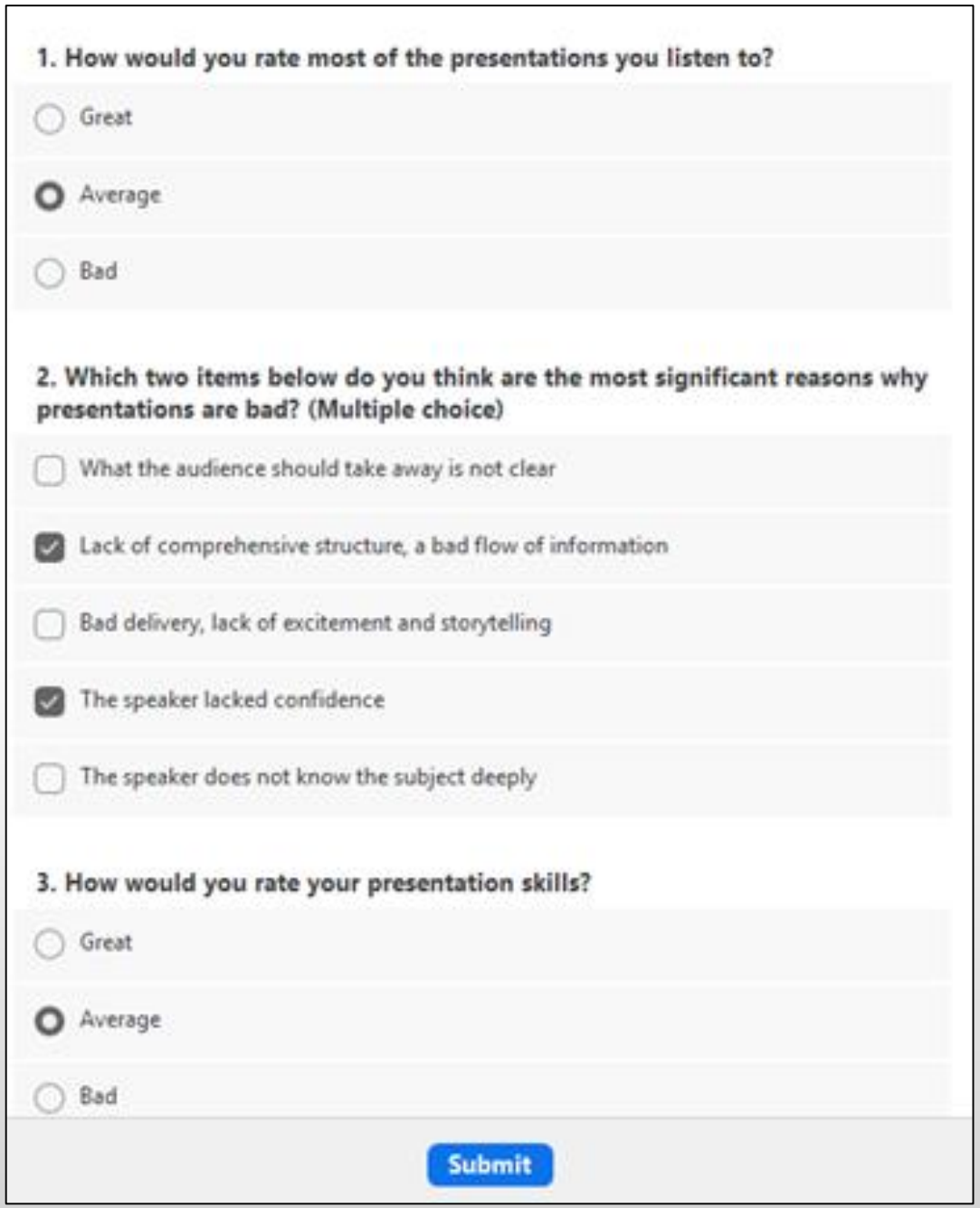
SPEAKER

Andrew Stotz, PhD, CFA

CEO, A. Stotz Investment Research

Poll time!

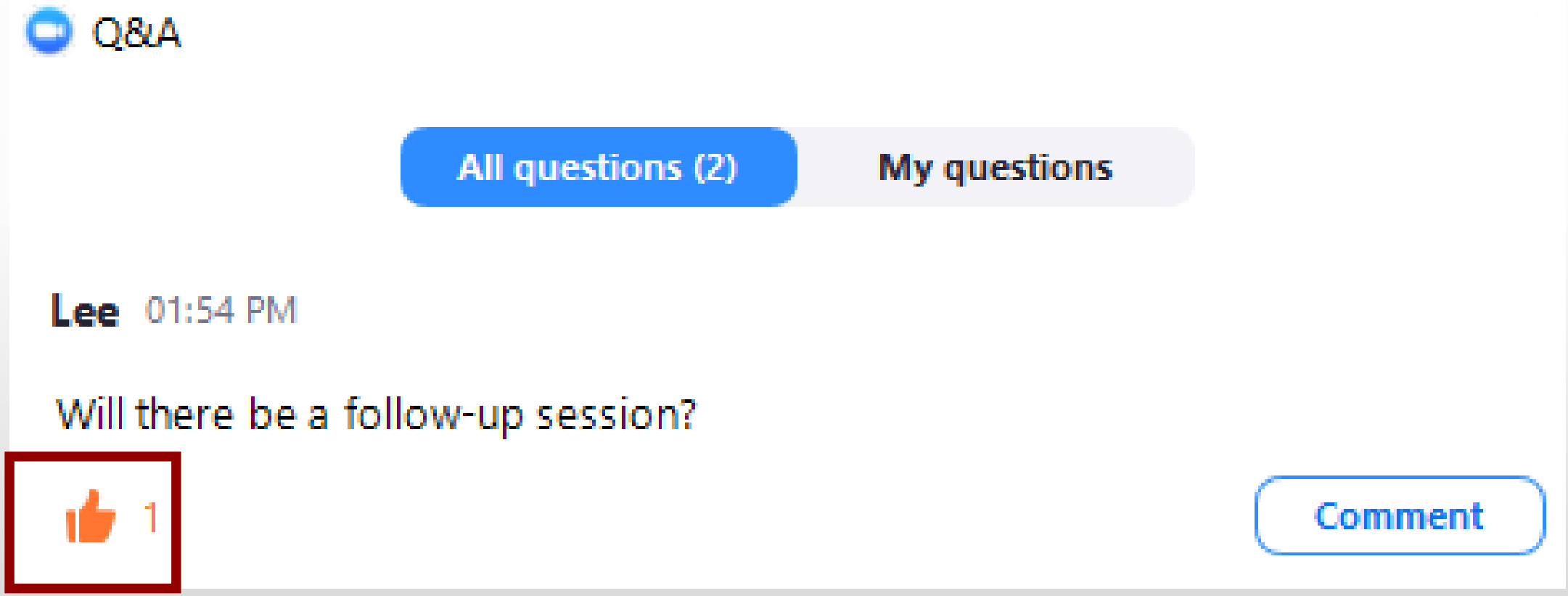

1. How would you rate most of the presentations you listen to?
Great
Average
Bad
2. Which two items below do you think are the most significant reasons why presentations are bad? (Multiple choice)
What the audience should take away is not clear
Lack of comprehensive structure, a bad flow of information
Bad delivery, lack of excitement and storytelling
The speaker lacked confidence
The speaker does not know the subject deeply
3. How would you rate your presentation skills?
Great
Average
Bad
Submit

Ask questions

Start now!

Type your question into the Q&A box

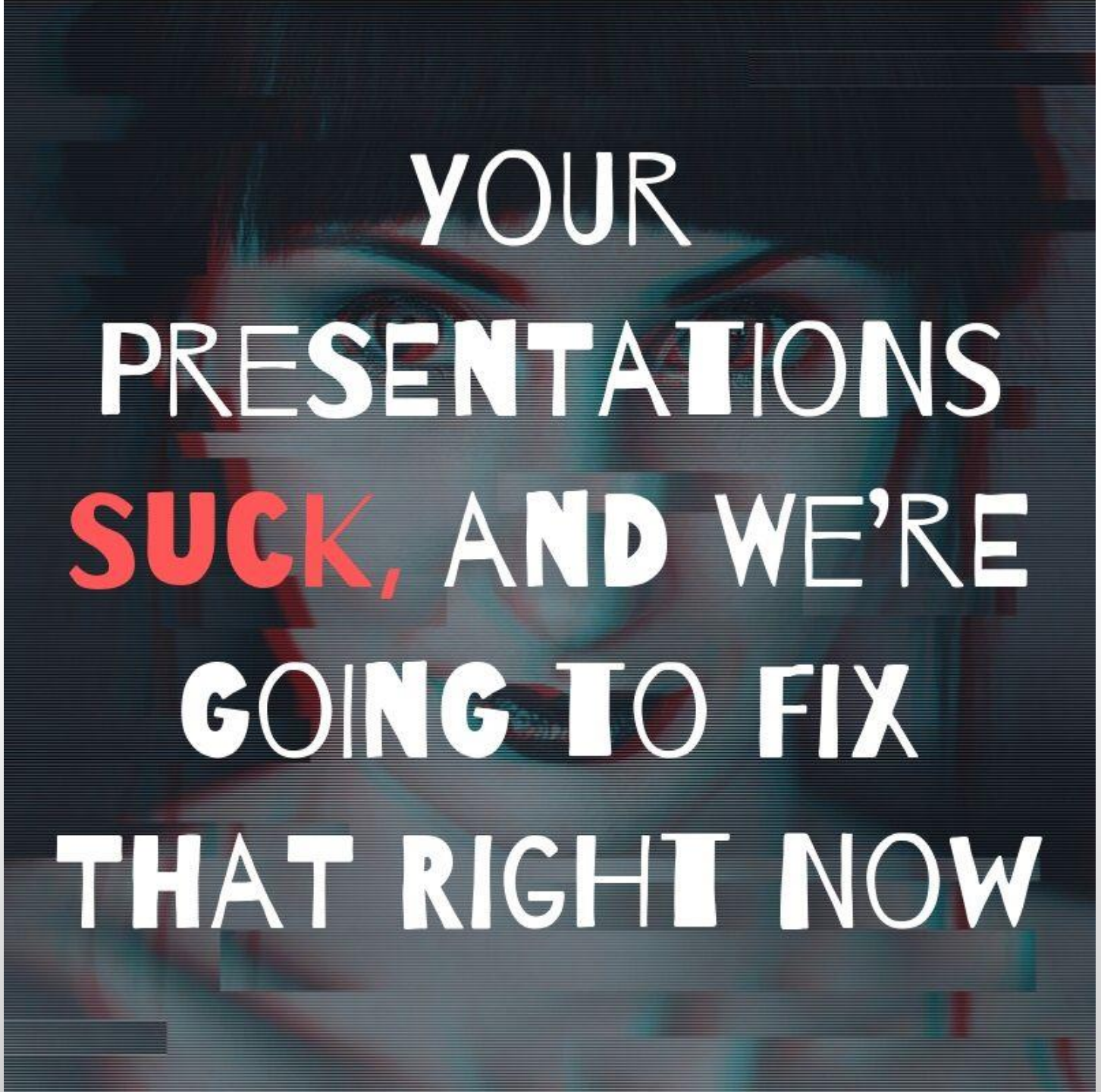
Up vote your favorite questions!



Effective Online Presentations That **Energize Audiences** and **Increase Your Influence**

Andrew Stotz

Ooops…
That’s not correct…
Today’s presentation is called…


YOUR
PRESENTATIONS
SUCK, AND WE'RE
GOING TO FIX
THAT RIGHT NOW

Call to action!

I want **YOUR** next presentation to be a **Great Presentation**

Before we get started…

- I have built my career analyzing companies and…

Andrew Stotz, PhD, CFA

A. Stotz INVESTMENT RESEARCH

Before we get started…

- …recently I have been conducting some exhaustive financial research on a mid-sized company listed in a stock market in Asia
  - **Let's call the company "ABC"**
- I finally got a chance to visit the management of the company and what I found confirmed my research findings that this stock is…
  - **Cheap, has growing earnings, and is unknown**
- Would you like to hear more?

Andrew Stotz, PhD, CFA

A. Stotz INVESTMENT RESEARCH

ABC is Cheap

- ★ Trading at 8x PE vs 11x for its industry
- ★ It has taken me three years of searching to find such a cheap stock
- ★ Some may say ABC has been cheap for years
  - **But isn't buying low the whole point of investing!**

Andrew Stotz, PhD, CFA

A. Stotz INVESTMENT RESEARCH

ABC is Growing

- My forecast is that earnings should double in the next three years
- My meeting with management confirmed that they've signed a major new deal that will drive that growth
- Some may say ABC has had delays in implementation in the past
  - **But the new management team delivered the most recent project on time**

Andrew Stotz, PhD, CFA

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ABC is Unknown

- Because ABC is a mid-cap company, only two analysts are covering it
  - **But no analyst has visited the company for at least six months and forecasts are nine months old**
- Some may say the market doesn't care about mid-caps and won't push up the price, but
  - **The price is already starting to move**

Andrew Stotz, PhD, CFA

A. Stotz INVESTMENT RESEARCH

So…

- …would you like to know the name of company ABC?
- But wait, we are not here to talk about stocks, we are here to talk about how to give a great presentation!
- So let's come back to this at the end of today's presentation!
- Now, on with the show!

Andrew Stotz, PhD, CFA

A. Stotz INVESTMENT RESEARCH

Your Presentations Suck and We're Gonna Fix that Right Now

Most presentations waste time and money

Most presentations are bad and don't achieve their objective

We're gonna make your next presentation a Great Presentation

The girl who made me cry in an elevator…

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Most people don’t inspire anyone

- Today, I challenge you to set the goal of inspiring people to action after EVERY presentation you make

Andrew Stotz, PhD, CFA

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What is my call to action for you?

Call to action!

I want **YOUR** next presentation to be a **Great Presentation**

Your Presentations Suck and We're Gonna Fix that Right Now

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Most presentations waste time and money

- Ian Parker in The New Yorker magazine referred to Microsoft estimates that there are more than 30 million PowerPoint presentations made each day
- Dave Paradi who blogs at ThinkOutsideTheSlide.com took this statistic and elaborated on it

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Most presentations waste time and money

- He assumed this about meetings:
  - **Four people per presentation**
  - **Half-hour presentation on average**
  - **Wasted time due to a poor presentation is 25% of the presentation time**
- Then he arrived at a waste of 15 million person hours per day due to bad presentations

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Most presentations waste time and money

- At an average salary of US$35,000 per year for those attending the meeting
- The cost of the wasted time due to bad presentations is a staggering US$252 million each day

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An employee came to me with a presentation

to give the next day

She told me that she had worked on it for 5 days

Non-stop

Her fatal mistake was that she didn't structure her presentation around any clear points

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Point:

Main point to support your conclusion

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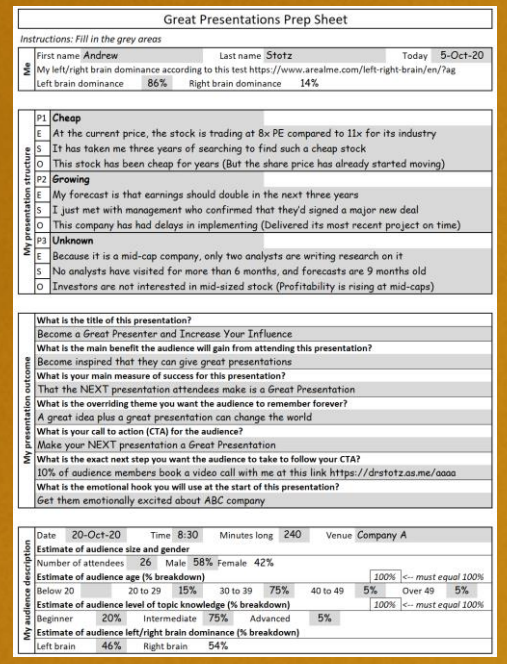
Follow a framework

- To not waste time, follow a framework
- I created a framework for my clients that helps their employees get the structure of their presentation right long before they start working on creating the actual presentation

Andrew Stotz, PhD, CFA



Great Presentations Prep Sheet

Instructions: Fill in the grey areas

Me

First name Andrew | Last name Stotz | Today 5-Oct-20

My left/right brain dominance according to this test https://www.arealme.com/left-right-brain/en/?ag

Left brain dominance 86% | Right brain dominance 14%

My presentation structure

P1	**Cheap**
E	At the current price, the stock is trading at 8x PE compared to 11x for its industry
S	It has taken me three years of searching to find such a cheap stock
O	This stock has been cheap for years (But the share price has already started moving)
P2	**Growing**
E	My forecast is that earnings should double in the next three years
S	I just met with management who confirmed that they'd signed a major new deal
O	This company has had delays in implementing (Delivered its most recent project on time)
P3	**Unknown**
E	Because it is a mid-cap company, only two analysts are writing research on it
S	No analysts have visited for more than 6 months, and forecasts are 9 months old
O	Investors are not interested in mid-sized stock (Profitability is rising at mid-caps)

My presentation outcome

What is the title of this presentation?
Become a Great Presenter and Increase Your Influence
What is the main benefit the audience will gain from attending this presentation?
Become inspired that they can give great presentations
What is your main measure of success for this presentation?
That the NEXT presentation attendees make is a Great Presentation
What is the overriding theme you want the audience to remember forever?
A great idea plus a great presentation can change the world
What is your call to action (CTA) for the audience?
Make your NEXT presentation a Great Presentation
What is the exact next step you want the audience to take to follow your CTA?
10% of audience members book a video call with me at this link https://drstotz.as.me/aaaa
What is the emotional hook you will use at the start of this presentation?
Get them emotionally excited about ABC company

My audience description

Date 20-Oct-20 | Time 8:30 | Minutes long 240 | Venue Company A

Estimate of audience size and gender

Number of attendees 26 | Male 58% | Female 42%

Estimate of audience age (% breakdown) 100% <-- must equal 100%

Below 20 | 20 to 29 15% | 30 to 39 75% | 40 to 49 5% | Over 49 5%

Estimate of audience level of topic knowledge (% breakdown) 100% <-- must equal 100%

Beginner 20% | Intermediate 75% | Advanced 5%

Estimate of audience left/right brain dominance (% breakdown)

Left brain 46% | Right brain 54%

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What side of your brain is most dominant?

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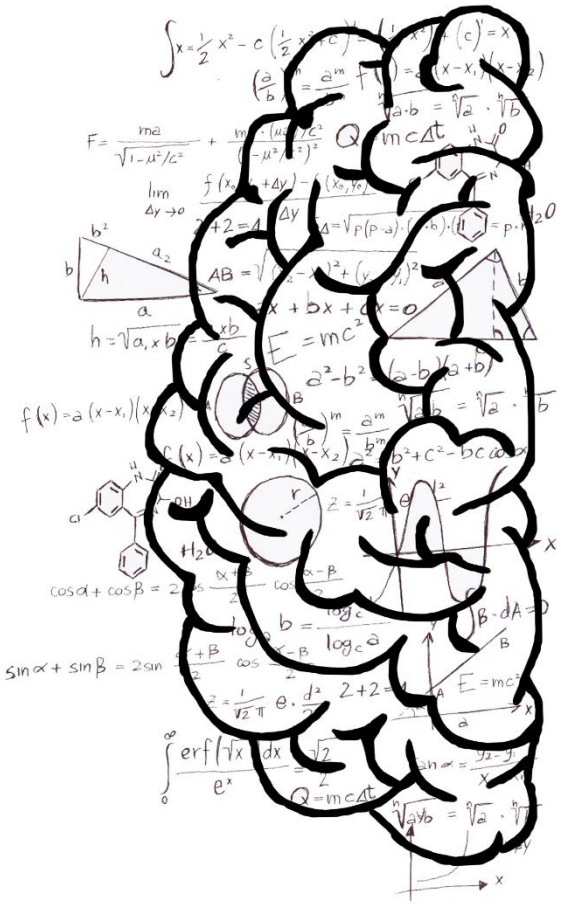
Left brain dominant



- ★ Thinks logically and linearly
- ★ Likes order, evidence and facts
- ★ Good with language, numbers, and analytical thinking

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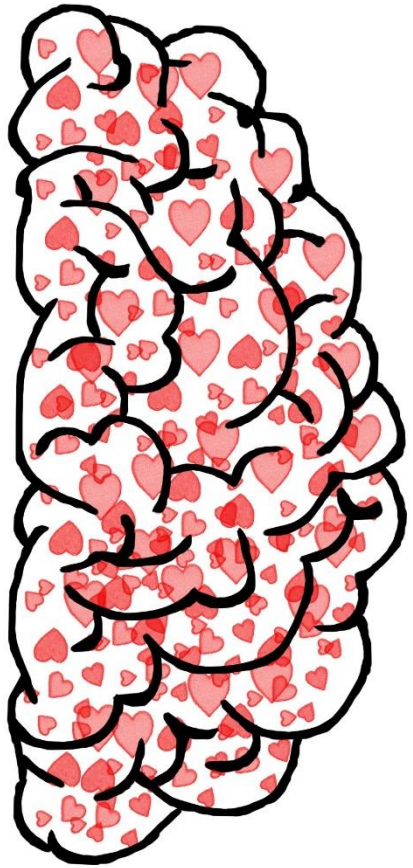
Right brain dominant



- Thinks in a free, creative style
- Likes art, music, emotions, pictures, and stories
- Good with expression, emotional intelligence, instincts, and imagination

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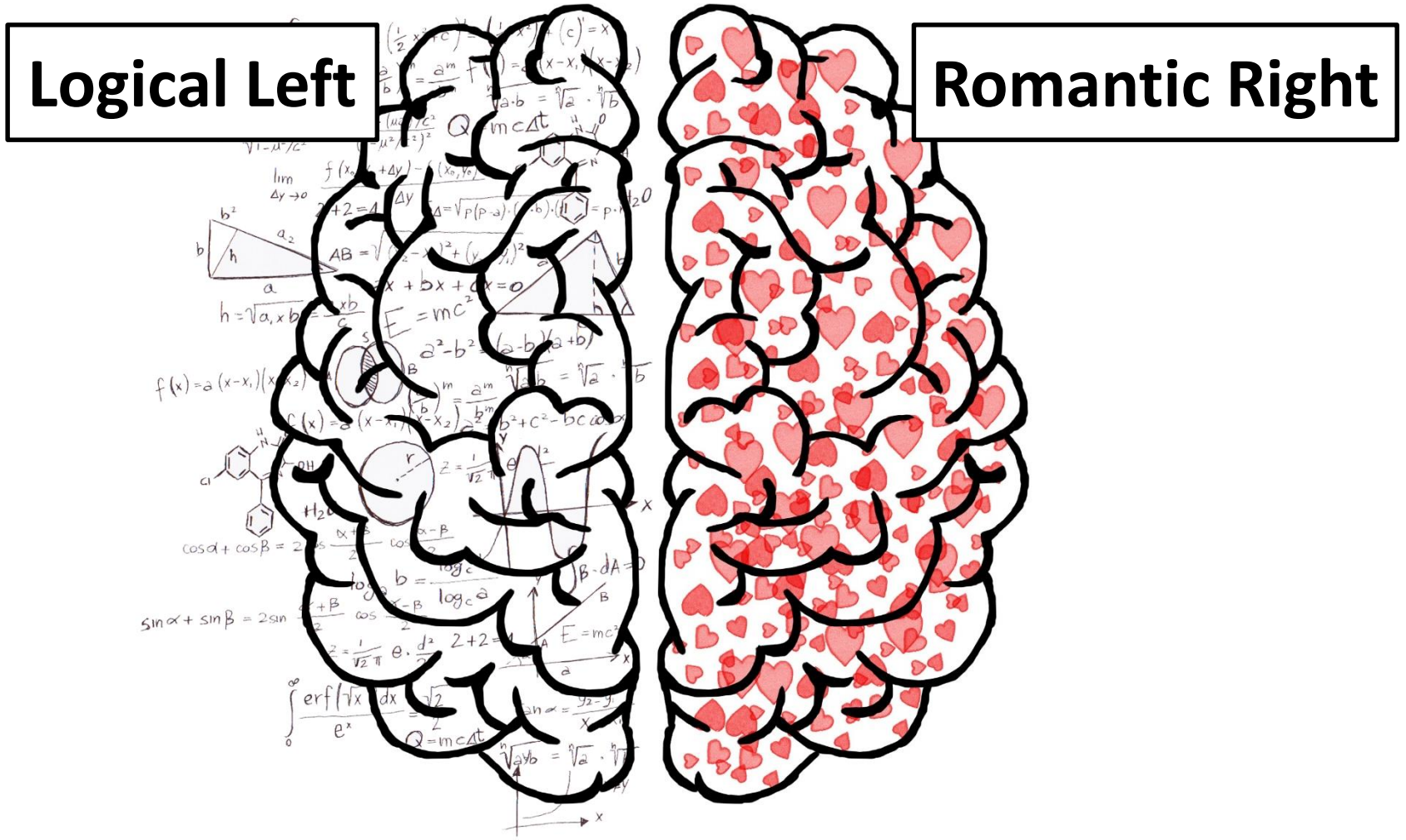
What side of YOUR brain is most dominant?



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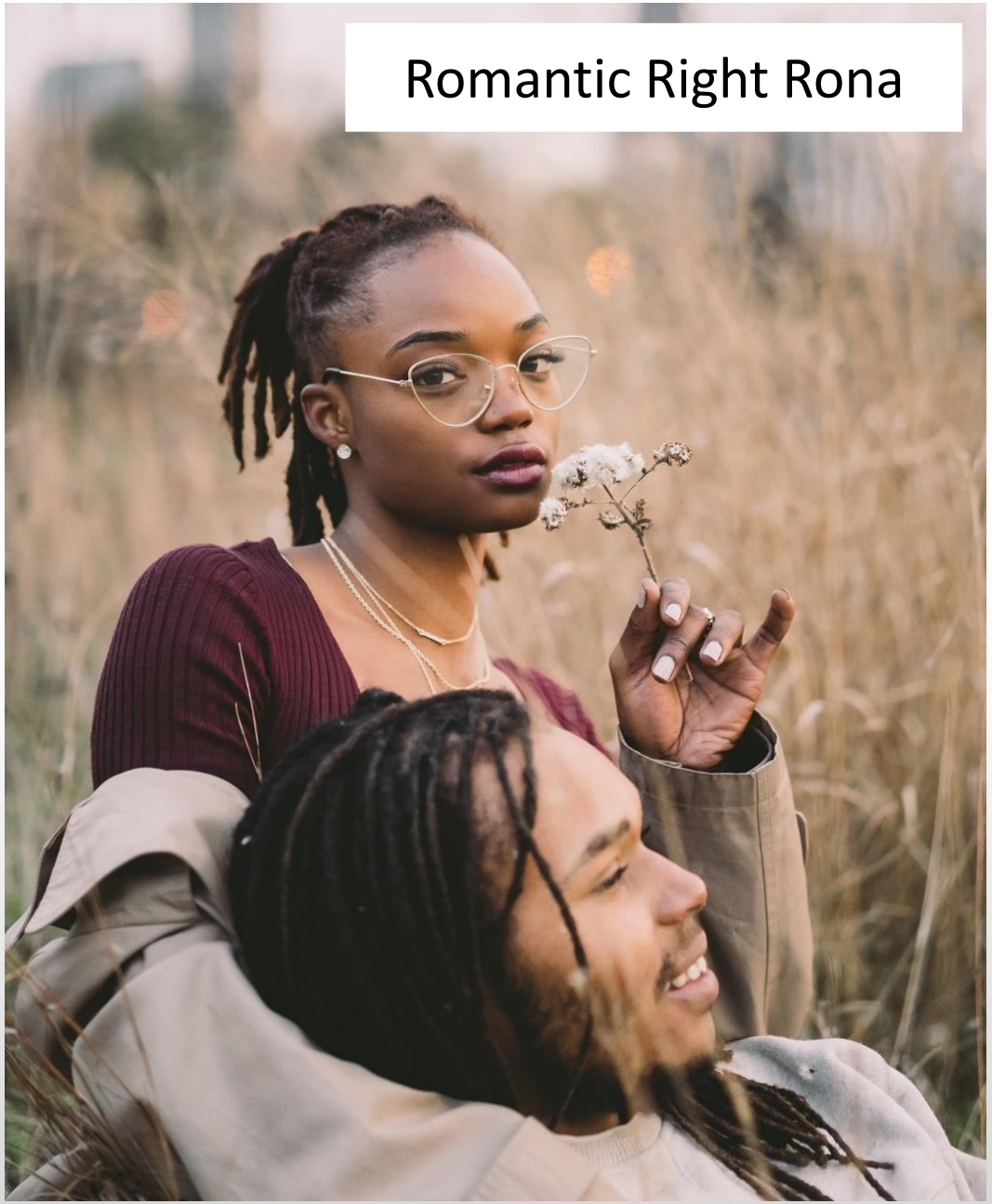
Logical Left Larry


Romantic Right Rona

Why is this important?

- Because people who are Logical Left tend to create their presentations around logic and evidence
- And people who are Romantic Right tend to create their presentations around stories and appeals to emotions

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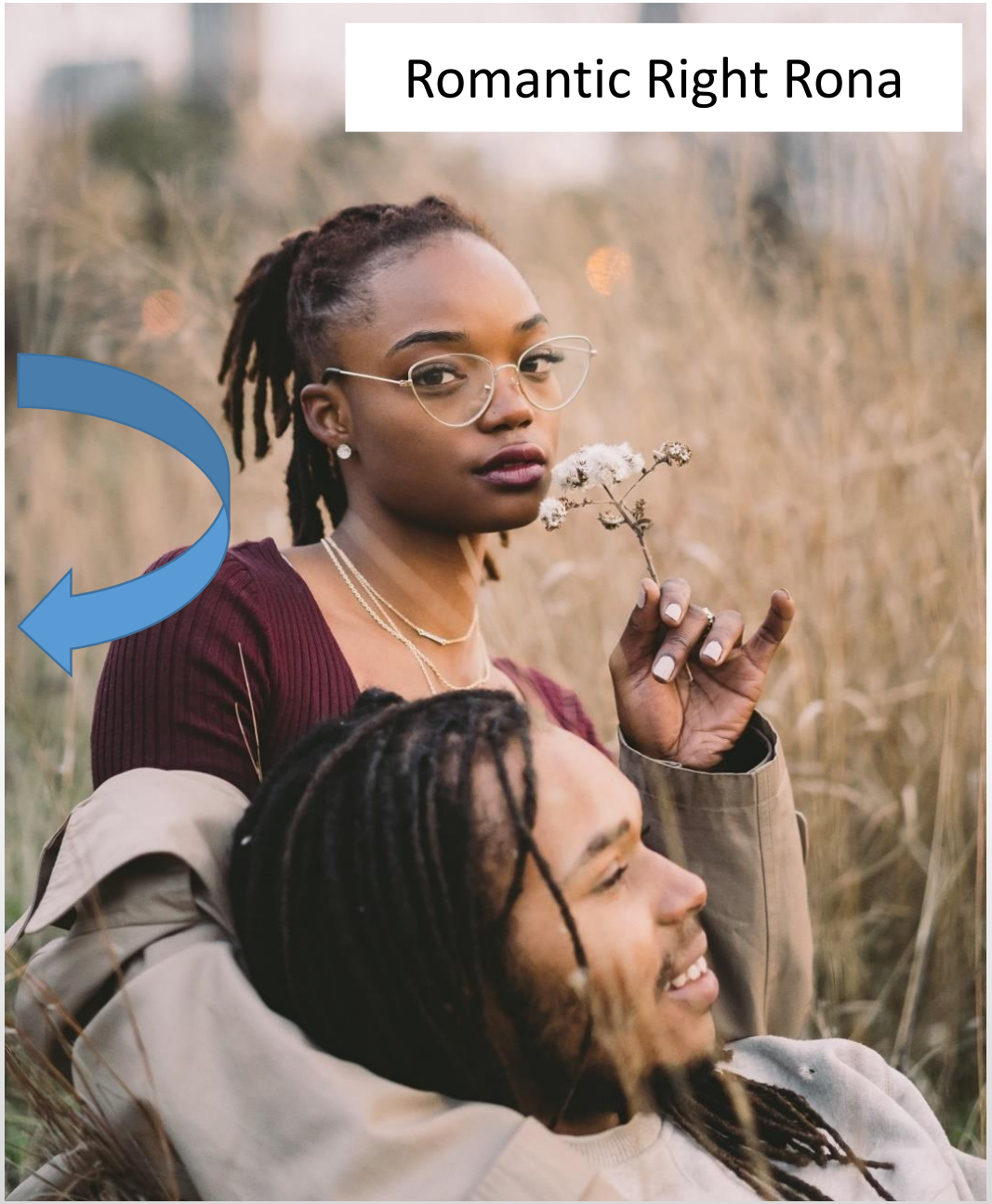
Logical Left Larry


Romantic Right Rona

How to win the “other half” of the audience

- When you construct an argument, which one of the two do you appeal to?
  - **You will probably create your presentation based on whether you are left or right brained**
- But if half your audience does not think like you, then you will lose them with your presentation

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How to win the whole audience

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- For those who are Romantic Right
  - **Don’t just make statements and tell stories**
  - **Show facts and evidence to convince Logical Left Larry**
- For those who are Logical Left
  - **Don’t just rattle off a list of facts**
  - **Instead, bring energy and emotion to excite Romantic Right Rona**

PEE

Point:

Main point to support your conclusion

Evidence:

Appeal to the “Logical Left”

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Andrew Stotz, PhD, CFA

- Your presentations should inspire action
- Billions of dollars and hours are wasted on bad presentations
- Know yourself: are you Logical Left or Romantic Right; create your presentation for the other
- Have all employees complete a structured framework, **before** they even start creating their masterpiece

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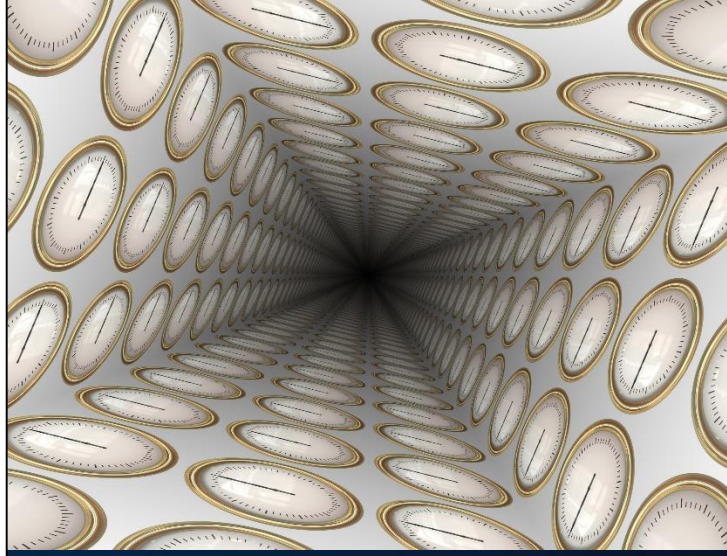
Your Presentations Suck and We're Gonna Fix that Right Now

Most presentations waste time and money

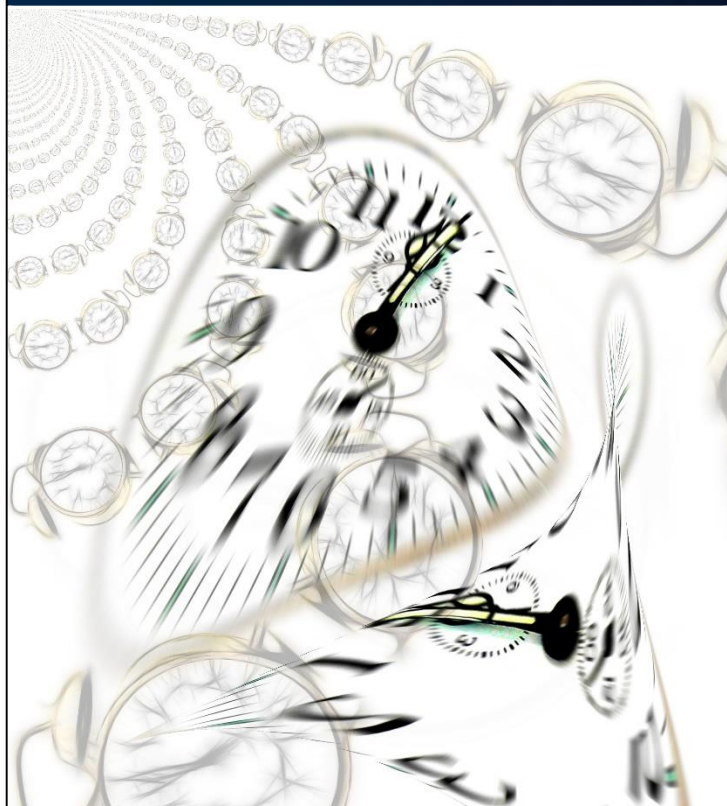
Most presentations are bad and don't achieve their objective

We're gonna make your next presentation a Great Presentation

Remember stock ABC?



Andrew Stotz, PhD, CFA



- ★ Can you remember the three characteristics of stock ABC that I told you about earlier?
  - **Cheap, has growing earnings, and is unknown**

Most presentations are bad and don't achieve their objective

- Andy Goodman and Cause Communication surveyed 2,500 Americans
  - **Asked 43 closed- and open-ended questions about how good and effective presentations were**
- They also evaluated several factors that can derail a presentation

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That survey said

- When asked to recall presentations they had seen over the past few months, respondents said they were
  - **54% likely to see a poor presentation**
  - **25% likely to see an excellent presentation**
- Meaning they were twice as likely to see a poor presentation as an excellent one

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A quote from the study

- “Even if I’m interested in the topic if the speaker is boring, I’m easily distracted by other goings-on in the room like someone’s cool shoes or outfit. And then I’m totally lost thinking, ‘I need to go shopping!’”

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What is my call to action for you?

Call to action!

I want **YOUR** next presentation to be a **Great Presentation**

We have all seen bad presentations!

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- But I have analyzed them
- Here is my analysis of what makes a bad presentation, well…
- …Bad

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A bad presentation is poorly…

- ★ Written
- ★ Designed
- ★ Prepared for
- ★ Started
- ★ Executed
- ★ Ended

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A bad presentation is poorly written

- ★ It has a bad structure
- ★ Shows no clear benefit
- ★ Conveys no clear message
- ★ Has too many messages, too complicated
- ★ Gives no call to action
- ★ Shares no emotion, no risk is taken
- ★ Lacks engagement

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- ★**Written**
- ★Designed
- ★Prepared for
- ★Started
- ★Executed
- ★Ended

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A bad presentation is poorly designed

- ★ It has bad slides
- ★ Has too many words
- ★ Uses text that is too small
- ★ Is full of bad graphs and visuals

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★Written
★**Designed**
★Prepared for
★Started
★Executed
★Ended

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A bad presentation is poorly prepared for

- ★ The speaker does not understand the audience
- ★ The presentation has not been reviewed by others
- ★ The presentation has not been rehearsed
- ★ The speaker does not arrive early
- ★ The speaker makes no equipment check

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★Written
★Designed
★**Prepared for**
★Started
★Executed
★Ended

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A bad presentation is poorly started

- ★ The speaker starts with an apology
- ★ Starts by disqualifying themselves
- ★ Makes no appeal to emotion
- ★ Shares no story
- ★ Sets no hook to grab audience attention

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★Written
★Designed
★Prepared for
★**Started**
★Executed
★Ended

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A bad presentation is poorly executed

- ★ The speaker looks mainly at slides, even reads from them
- ★ Makes no eye contact with audience
- ★ Goes too fast
- ★ Brings no energy
- ★ Makes excessive movement
- ★ Runs over time

Andrew Stotz, PhD, CFA

- ★Written
- ★Designed
- ★Prepared for
- ★Started
- ★**Executed**
- ★Ended

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- ★Written
- ★Designed
- ★Prepared for
- ★Started
- ★Executed
- ★**Ended**

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The presentation that compelled no one

Boring

No feeling

No call to action

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Because he told no story it was boring!

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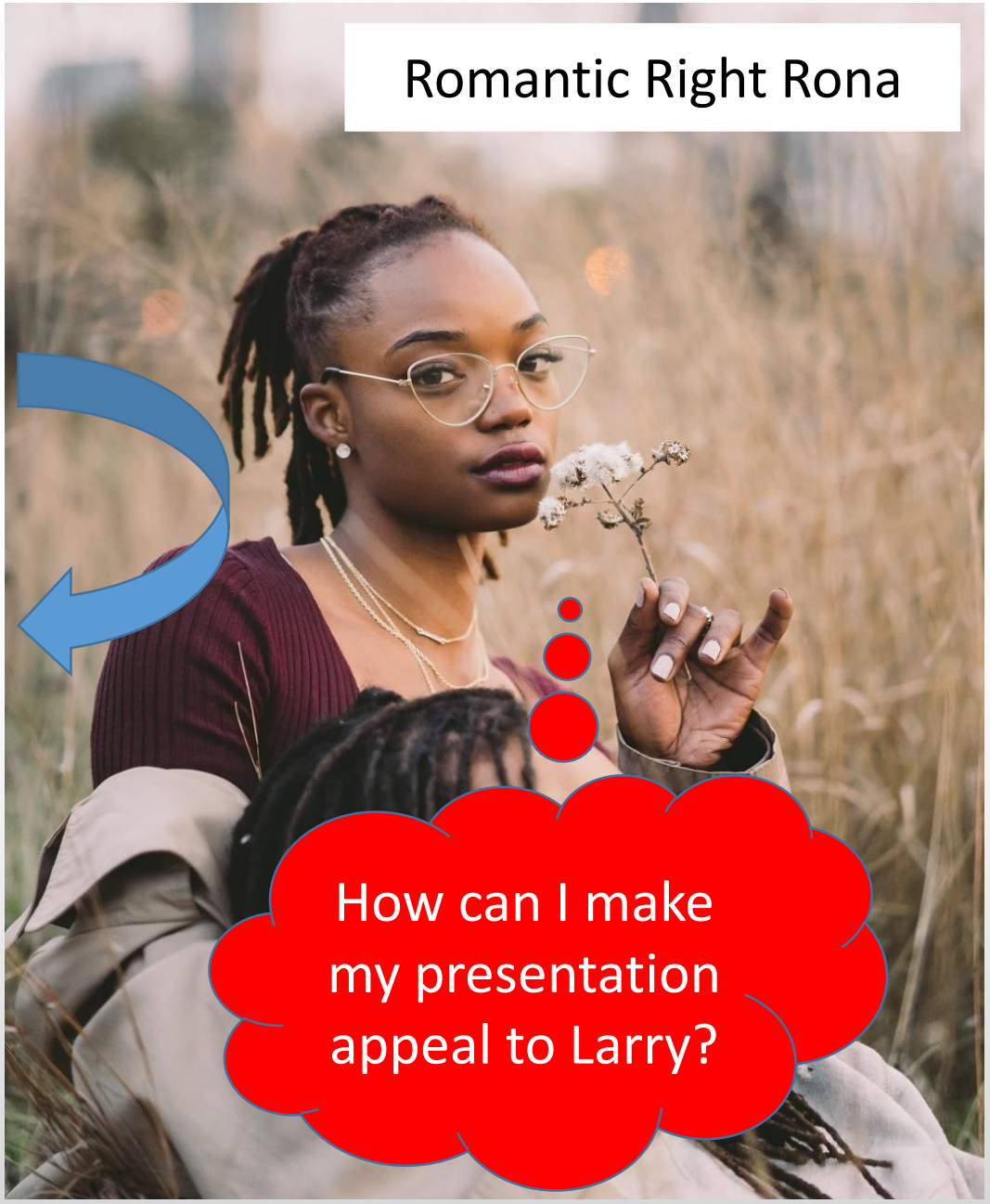
How can I make my presentation appeal to Rona?

Logical Left Larry

Romantic Right Rona



How can I make my presentation appeal to Larry?

PES

Point:

Main point to support your conclusion

Evidence:

Appeal to the “Logical Left”

Story:

Tell stories to appeal to the “Romantic Right”

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Why stories?

- ★ Since the beginning of time, human knowledge has spread through stories
  - **The Bible for instance is a collection of stories**
- ★ There is a reason they used stories
  - **Stories are easy to remember**
- ★ We all have stories to tell
  - **So start telling them**
- ★ Stories touch emotions
  - **Numbers and evidence rarely arouse emotion**

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To summarize, stories are…

- ★ A common tool
- ★ Easy to remember
- ★ Already in your head
- ★ The best way to touch emotions
- ★ A great way to inspire action

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What is my call to action for you?

Call to action!

I want **YOUR** next presentation to be a **Great Presentation**

Andrew Stotz, PhD, CFA

- Most presentations are bad and don't achieve their objective because they are poorly written, designed, prepared for, started, executed, and ended
- Use stories because they are easy to remember, you already have them, they touch emotions, and they inspire action

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Your Presentations Suck and We're Gonna Fix that Right Now

Most presentations waste time and money

Most presentations are bad and don't achieve their objective

We're gonna make your next presentation a Great Presentation

We’re gonna make your next presentation a Great Presentation

Andrew Stotz, PhD, CFA

- One simple framework can make your next presentation significantly better
- And now I’m going to show it

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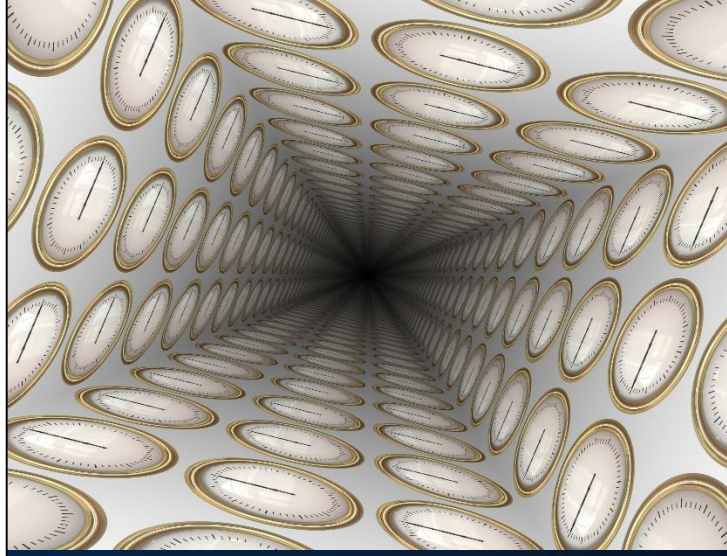
But first, remember stock ABC?

- **Cheap**, has **growing** earnings, and is **unknown**



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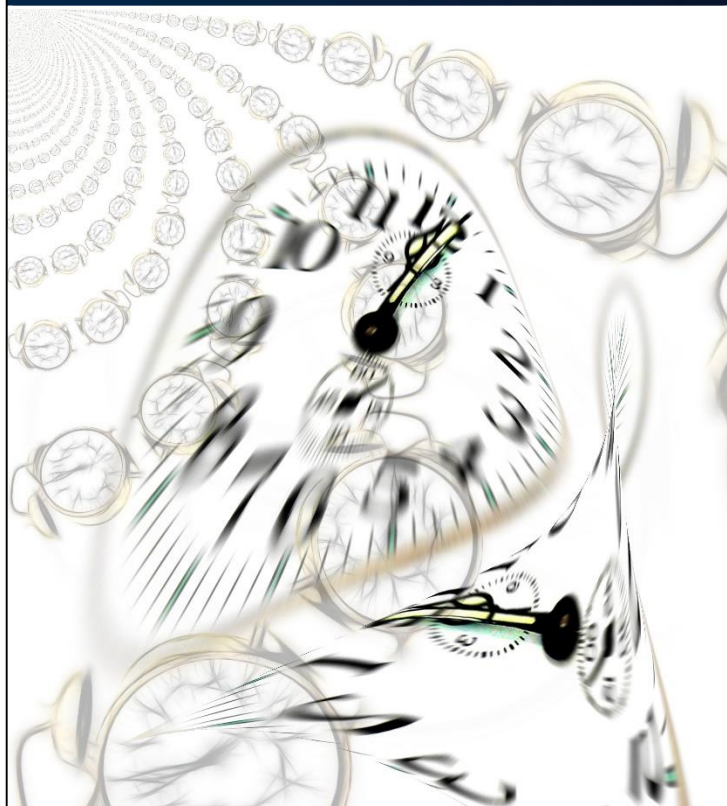
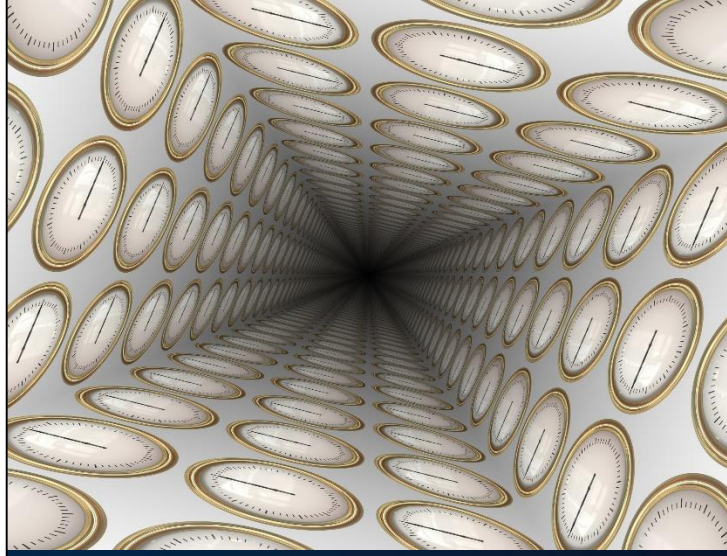


Do you still want to know what company it is?

- It's called…
- **I Appealed to Your Greed and Hooked You with Emotion Public Company Limited**
- Now, I'll show how I used the **PESO** format to create my whole presentation of it



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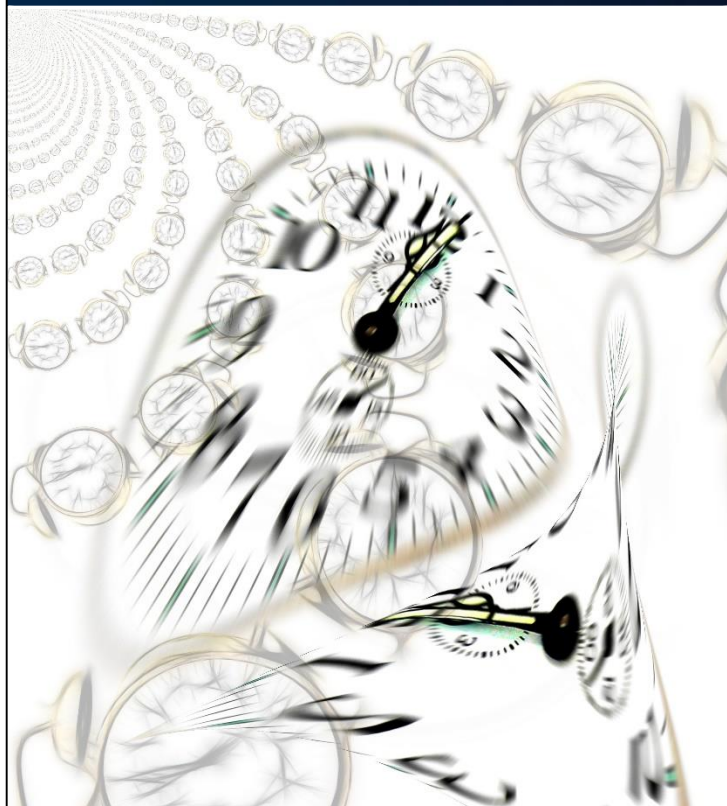

PEOPLE

Point:

Main point to support your conclusion

Evidence:

Appeal to the “Logical Left”

Story:

Tell stories to appeal to the “Romantic Right”

Objection:

Anticipate the #1 objection

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PITCH

Point 1:

Cheap

Evidence:

Trading at 8x PE vs 11x for its industry

Story:

It has taken me three years of searching to find such a cheap stock

Objection:

But this stock has been cheap for years

Andrew Stotz, PhD, CFA

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PITCH

Point 2:

Growing

Evidence:

My forecast is earnings should double in the next three years

Story:

Met with management who confirmed that they've signed a major new deal

Objection:

Has had delays in implementation in the past, this will happen again

Andrew Stotz, PhD, CFA

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PITCH

Point 3:

Unknown

Evidence:

Because it is a mid-cap company, only two analysts are covering it

Story:

The analysts haven't visited for six months, forecasts are nine months old

Objection:

The market doesn't care about mid-caps and will not push up the price

Andrew Stotz, PhD, CFA

A. Stotz INVESTMENT RESEARCH

So of the other things I teach teams…

- ★ Focus on three words
- ★ Practice the “repeat technique”
- ★ Use your Prep worksheet
- ★ And much more…

Andrew Stotz, PhD, CFA

A. Stotz INVESTMENT RESEARCH

“Andrew, I would like to express my gratitude.”

- I gave my presentation to one department the day after your Great Presentation training.
- I created a set of simple phrases for my presentation and used the repeat technique that you taught.
- Today, my manager still remembered those phrases out of my presentation last week. Now she is asking me to do this presentation to another department! Thank you for your simple and easy-to-follow training.”

Andrew Stotz, PhD, CFA

A. Stotz INVESTMENT RESEARCH

What is my call to action for you?

Call to action!

I want **YOUR** next presentation to be a **Great Presentation**

Andrew Stotz, PhD, CFA

- Use my PESO framework to help make your next presentation a Great Presentation!
  - *Point: Main point to support your conclusion*
  - *Evidence: Appeal to the "Logical Left"*
  - *Story: Tell stories to appeal to the "Romantic Right"*
  - *Objection: Anticipate the #1 objection*

A. Stotz INVESTMENT RESEARCH

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Questions
Answers