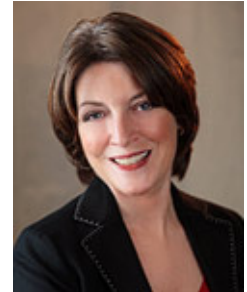


## How to Improve Your Presentation Skills

By Beverly Flaxington  
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*Beverly Flaxington is a practice management consultant. She answers questions from advisors facing human resource issues. To submit yours, email us [here](#).*

*Advisor Perspectives welcomes guest contributions. The views presented here do not necessarily represent those of Advisor Perspectives.*



*Dear Bev,*

*My financial advisors have the worst presentation skills. Any advice?*

*Mark C., Florida*

Dear Mark,

This is such an important topic for advisors. Even the smartest person – if they can't present well – won't be "heard" and embraced!

I have seven keys to confident presenting for advisors. Hopefully you can go through and pick out one or two that could help your advisors.

1. Do you have a story that's easy to tell? Do your advisors have a presentation plan such as a pitchbook or one-pagers to tell it? Make sure they are armed with a consistent story and a solid way of telling it.
2. Do your advisors know the objective for each presentation? It's not always to "sell". Sometimes it is to inform or to educate. Have them state an outcome or reason for presenting at the outset of every presentation, so the person or people listening to them also know what to expect by the end.
3. Do your advisors take the time to know their audience? Do they give a canned presentation or do they learn about the prospect, client or center-of-influence (COI) so they can gear their comments to what matters to the listener? Focusing on the recipient of the information is important and modifying the material so it fits their needs will help.



4. Do your advisors know how to “chunk” information? Do they know how to take complicated concepts and make them more accessible? Financial information can get overwhelming to the novice. Even successful people who aren’t from this industry struggle with jargon. Be sure they are being clear and concise.
5. Do your advisors know how to deliver the material with a “So what?” built in? Why should the listener care about what they are saying? How does it impact their life, solve a problem, or bring them some coveted gain? Adults learn by associating new material with something they already understand. Put it in context.
6. Do your advisors understand how to match style? Do they modify their communication approach for greater understanding? If the client is a thoughtful, pensive person, does your fast-talking, and fast-thinking advisor slow down so the listener can catch up? People who have different communication styles hear and understand things very differently.
7. Do your advisors know how to go for the close? Do they know how to ask for a next step and confirm it at the end? Too many times a great presentation is left hanging with no known follow-up for either party. Make sure they confirm what’s next – whatever that may be.

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*Dear Bev,*

*How should I approach my friend about becoming a client? I have known him for 20 years and even vacationed with him twice. Now that our children are in college, I do not see him. His family is extremely wealthy so I am a bit intimidated.*

*James L., Pennsylvania*

Dear James:

The context of your past relationship is important to rendering good advice in this situation. For example, was his family this wealthy over the duration of your knowing him and being friends, or has he more recently become wealthy? Did he become wealthy, or did he recently inherit some of that wealth? Were you “friends” only because your kids were friends and as soon as college came the reason for a relationship ended? Have you been a financial advisor for the whole 20 years, or is this career more recent for you? If more recent, does this person know now that you’re an advisor?



When you say “I am a bit intimidated,” it infers that you feel something has changed because now you would be asking him for something (i.e. his money to manage). And, while you traveled together, I get the sense that the relationship was casual or child-focused.

If he’s been wealthy for the whole time and you’ve also been an advisor the whole time, is there a reason you didn’t broach the subject of your work earlier? If either he’s recently wealthy or you’re recently an advisor you have a more natural reason for contacting him about your services. Either scenario is a transition where touching base to “congratulate” (i.e., his wealth came recently from selling a company or the inheritance) or you are calling to “share interesting news” (i.e. you’re no longer the pure accountant you were 10 years ago, you’re now a financial advisor) would allow you to get caught-up and take a “soft-sell” approach to learning about his life and wealth management needs.

In any event, in this age of Facebook and social media, people frequently connect with friends they haven’t touched in with for 10, 20 or even 30 years! Don’t launch into asking about his financial needs right away. Spend some time reconnecting in other ways. Most importantly, you will want to work to eliminate your feeling of intimidation – you probably do good and valuable work, and offer services that are potentially of value to him, and the worst thing that can happen is that he says “no” but at least you have made a connection again.

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*Beverly Flaxington co-founded [The Collaborative](#), a consulting firm devoted to business building for the financial services industry in 1995; in 2008 she co-founded Advisors Trusted Advisor to offer dedicated practice management resources to advisors, planners and wealth managers. She is currently an adjunct professor at Suffolk University teaching undergraduate students Leadership & Social Responsibility. Beverly is a Certified Professional Behavioral Analyst (CPBA) and Certified Professional Values Analyst (CPVA).*

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