

CLEAN THE
WHITEBOARD BEFORE
LEAVING THE ROOM



10 TIPS FOR KILLER BOARD PRESENTATIONS

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1 LESS IS MORE

- You may have mountains of data, but resist the temptation to share it all. Instead, pare down information into clear, concise summaries.
- Outline the key issues you wish to communicate, and make sure to highlight them in your oral presentation.
- Don't inundate the board with paper. Too many lengthy spreadsheets and documents can pull focus from the most critical information.

2 CONSISTENCY IS KEY

- Report data and other information in a consistent format by using standard metrics and data sets so board members can quickly digest the information and easily identify trends, irregularities or changes.
- While it's important to highlight new initiatives

“While it’s important to highlight new initiatives and timely information, it’s also important to deliver a consistent, key set of metrics in each report.”

and timely information, it's also important to deliver a consistent, key set of metrics in each report. Seeing these reports meeting after meeting will help the board spot trends, better understand the overall program and be more prepared to drill down into details.

3 BE PREPARED

- Questions are inevitable. Prior to the meeting, put yourself in the shoes of the board, and think about what you would ask (or check out our list of [35 Questions You Should Expect from the Board](#) to help you brainstorm!). Then, prepare responses to those questions.
- Drill down into any irregularities, trends and key incidents so

you understand and can communicate what's happening.

- Read the news (your board does!). Sure, you're busy, but you can bet on fielding a question or two about the compliance crisis du jour. Make sure you're up to speed on current events and how, if at all, they might apply to your organization and what you are doing to stay in front of the issue—and out of the headlines.

4 CLEAR THE BENCH...MARK.

- Provide a frame of reference for the board by leveraging benchmarking data, including industry averages, current best practices and your own company's

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historical performance.

- Make it clear that regulators and enforcement agencies will compare your company to others in the industry if you do come under investigation, so benchmarking should be a standard practice and fodder for discussion on program results, progress and resourcing.

oversight, the board should be aware of all significant risks, incidents and missteps.

- After sharing the bad news, provide a solution with a mitigation or corrective action plan.
- Encourage dialogue by inviting board input into how to move forward. Given their breadth and depth of experience, some directors may be able to provide valuable advice.

Be proactive and honest about how to improve your program initiatives, systems and management.

- Don't forget to close the loop. If you've implemented a mitigation or corrective action plan, or introduced a new initiative in response to board concerns, share the progress (and results) of these actions.

5 STAY OUT OF THE WEEDS

- Remember that board members are not as intimately familiar with the organization's day-to-day operations as you are. Know when to provide the 30,000-foot view and when nitty gritty details are critical.

7 SHOW AND TELL

- Don't be so modest! Your program likely has seen some successes. Talk about them.
- In some cases, you can position "shortcomings" as "opportunities."

8 RINSE, AND REPEAT

- Board members may not remember slide 20 of your compliance report from nine months ago. If an issue has a far-reaching business impact, bring it up again.

6 REPORT THE WARTS

- Don't omit or downplay problem areas. To exercise effective

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9 YOU DON'T KNOW EVERYTHING, AND THAT'S OKAY

- It's okay to say, "I don't know." Admitting that you're not sure of an answer to a question is much preferable to taking a wild guess—or making something up. Let them know you will find the answer and report back and then make sure you follow through.

10 ALLOW TIME FOR QUESTIONS AND DIALOGUE

- Your board will—and should—have questions, so leave them time to ask them. While the thought of being grilled by the board may be daunting, it is also an opportunity to demonstrate your acumen and effectiveness while engaging in a more interactive forum with your board members.

*It's okay to say,
"I don't know."*

- Take mental notes of the type of questions the board asks and what topics they seem most interested in—then proactively incorporate this newfound knowledge into your next board report.



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