

5 quick tips for planning your Annual Meeting

by Tahra Millan & Cathy C. Bonczek

It's annual meeting season and CCB Communications is working with our clients to help them prepare for this important day.

Here are five quick tips if you are planning an Annual Meeting.



1. Determine the key message for this year's meeting.

What do you want your audience and stakeholders to think, feel and do? What is the main message that will serve as a thread throughout every presentation? Consider the universal benefits: making money, saving money, saving time and being considered best in class.

Don't just offer facts, i.e., you have multiple professionals around the globe, tell your audience what that really means: they will get quicker access to local intel, faster decision-making which will speed up deal processing and the benefit of all your colleagues collective experience to get the best terms and expected outcomes possible.

2. Craft the agenda like a story.

Plan the agenda for the day, as if you are crafting a story. Consider the story arc (beginning, middle, end). Think about the story that you are telling through the series of presentations. Put your best foot forward and save the best news for last. Plan presentations (context, speaker, and length) that will keep your audience engaged. Always end on a high note. This will set the tone for an inspired cocktail hour that will encourage investors to ask more questions and get to know your team better.

3. Select the speakers strategically.

Think about the story arc and assign speaker roles by using your strongest speakers and subject matter experts. Also, consider members of the team whom you want to introduce to investors. Balance experienced speakers with new ones. Just like casting a play, you want to assign speaker roles with strategy and intention.

4. Start crafting speaking points from the bottom up.

Start by writing your conclusion first. Many presenters start with the subject(s) and then fill the body of each section with a significant amount of detail for each slide. By the time we are finished, we rush through to the conclusion. By writing the conclusion first, you have a sense of where you're going and can organize the information to flow more naturally and succinctly. Most presentations have too much information. Less is better.

5. Rehearsal is KEY.

Use the 40/60 rule when crafting talking points. Spend 40% on content development and 60% on rehearsal and delivery. It is important to rehearse individually and as a group. Review your talking points, and then put away the script and begin to rehearse in front of a mirror, with a colleague or a coach. Putting your mouth around the words and simulating being on stage are critical components for a strong and compelling presentation.

At CCB Communications feedback is our superpower. With over 20 years of experience, we have the experience and expertise to take ordinary presentation and turn them into extraordinary conversations.