

The Boardroom Report

Getting value out of presentations to the board

Boards often have to sit through glossy presentations involving new projects or the purchase of new products and services. But how can they ensure they get the best out of these and don't have the wool pulled over their eyes?

Julie Garland McLellan, an experienced board director and author of *Presenting to Boards*, says the important thing is to know how every presentation fits into the context of the organisation. "That's a question of how it fits into the organisation's strategy; budget; whether it involves expected planned expenditure or new expenditure; and what liabilities will be incurred," she says. "Directors have to ask themselves: 'Do I understand this and the implications of the decisions I have to make.' It's also a question of knowing whether it's right."

Garland McLellan notes that some presenters have been advised to remove the difficult parts of their presentation or to structure it so the tricky questions don't arise, or make the presentation so long that there isn't time for the board to ask questions.

She advises boards to set limits on time and the amount of slides used, and to always ensure there is enough time for questions. "If you are running late, go straight to questions and miss the presentation. If the presenter can't cope with that then he or she isn't a good person to do business with," she says.

Traps could include the use of a lot of technical jargon or diagrams and spreadsheets that may look like gospel, but don't elaborate on the assumptions used.

Garland McLellan says: "If it's not clear in the presentation, ask the presenter for clarification. If it's not appropriate to ask the presenter, ask senior management when the presenter has left the room."

She adds that the timing of the presentation is also important. "Don't have presentations about big decisions too late in the day when everyone is tired or too early when directors haven't warmed up to the discussions."

Garland McLellan advises that the board minutes are produced within 48 hours of the presentation. "That way you still remember very clearly what you decided and why. Read the action items very carefully to ensure that is what you wanted. If someone who wasn't in the room reads this, would they understand exactly what you wanted the company to do?" she asks.

"You want the minutes circulated quickly because after a board meeting most good CEOs will sit down with their executive teams and debrief them on decisions made and what is expected to happen. You don't want the CEO to do that and then three weeks later, you get your minutes and say: 'Oh no. That's not what we meant' or 'That's not very clear', because the executives will have already started on the plan of action."

Here are some of the questions Garland McLellan believes directors should ask themselves during and after presentations:

- What are the processes and procedures required to make this work?
- How do we make sure this is properly implemented, reported and appropriately controlled?
- Do we have what it takes to implement this?
- What is the probability of success?
- What will we do if it doesn't go to plan?
- Who is going to do this? Have they been trained? Do they have enough experience?
- Is the ownership of the intellectual property clear?
- Who will be accountable for implementing this?
- Who needs to be told what?
- Is this in line with our organisation's risk appetite?

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