

# Deliver Presentations That Get Boardroom Results

Presenting to the board of directors, whether in a private-equity-backed company or publicly traded enterprise, often conjures uncertainty and risk among sales and marketing leaders. This can be driven by inexperience in the boardroom, misaligned expectations on what the board needs to hear, or uneasiness in presenting information about the real business situation in a vulnerable and transparent way.

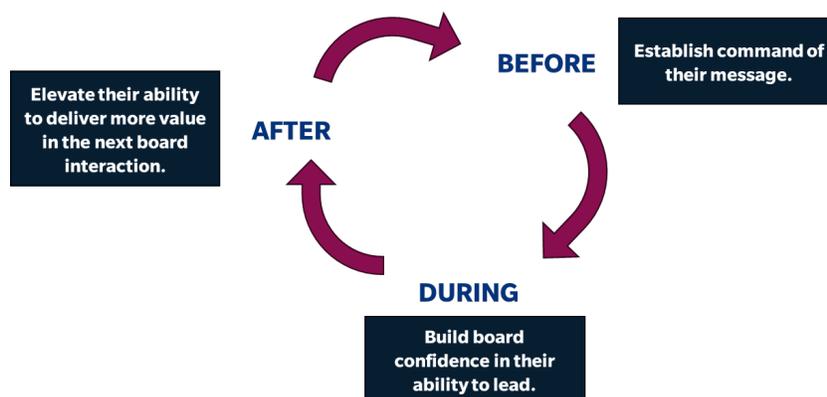
In our research, we’ve found that many go-to-market (GTM) leaders are thriving in their board interactions, using them as a launchpad for broader functional and personal success. So, how do the most effective sales and marketing leaders prepare, present, and continuously succeed in their board interactions?

To answer this question, SBI sought the advice of seasoned business leaders from both sides of the conversation. We gained practical advice from current CROs and CMOs, perspective from board directors of both private-equity-backed and publicly traded companies, and reflections from senior SBI partners and advisors, all with decades of experience presenting to boards and participating in others’ presentations.

GTM leaders who consistently lead in the boardroom:

- **Are rigorous in their preparation and practice.** They proactively build substantive relationships with board members and know how to frame their data and messaging to drive strategic discussion even when business conditions are challenging, or they’ve missed their number.
- **Think differently about their activities across the full lifecycle of board presentation development and delivery.** This extends to their preparation techniques, what they are focused on during the meeting, and how they reflect and improve after it’s finished (see Figure 1).

**Figure 1 | How Successful GTM Leaders Approach Their Board Interactions**



Source: SBI, Inc.

## Before The Board Meeting, Establish Command Of Your Message

Delivering a concise and insightful board presentation requires much more than preparing slides and other background information in the weeks prior. Unfortunately, many functional leaders underestimate the effort required in being well-prepared. They fail to allocate enough time for planning, sourcing, and interpreting data, as well as developing and refining a story that’s aligned with their peers and CEO. This lack of preparation puts them in an oftentimes tenuous situation when board members want to dig deeper into their story or data. Furthermore, some sales and marketing leaders let pride get in the way of leveraging board member expertise, which could improve their plans and presentation.

Establishing the command of your message involves creating an environment where you can comfortably and confidently convey your ideas with an unmistakable clarity. Our research and conversations found the following behaviors from leaders:

- Begin developing your presentation 30 days — at minimum — before the board meeting.** No one presents their first draft to the board. Allocate substantial time to messaging and story development, refining your talk track, and practicing delivery. Develop a standard routine every quarter to repeatably interpret data, develop your story, and practice board presentation (see Figure 2).

**Figure 2 | Board Presentation Development Work-Back Plan**

Task	5 weeks	4 weeks	3 weeks	2 weeks	1 week
Meet with CMO/CRO/Head of CS/Head of Product/CEO/CFO. Discuss key topics, gather perspectives, and review current data and metrics. Create first presentation draft.	█	█			
Share first presentation draft and get feedback from peers and CEO.		█			
Refine message and storyline, update data, tailor message and visuals to board member orientation and engagement.			█		
Reach out to board members for input.			█		
Share “pre-reads” with board members.				█	
Adjust any final data updates and analysis.				█	
Dry run practice with GTM peers and CEO.				█	█

Source: SBI, Inc.

- Align early with internal stakeholders on messaging and data interpretation.** Plan for back-and-forth collaboration and iteration on the story with your internal GTM leadership team and CEO.
- Focus the story on what’s happening and why, and what you are doing as a result.** Communicate how you’re contributing to revenue, cost reduction, or productivity, and how you’re helping the organization manage risk. Using a construct like the Minto Pyramid can instill your message with clarity and conciseness.

- **Use market data to demonstrate the scope of your visibility, i.e., exploring beyond the confines of your organization.** Source data from competitors, customers, prospects (e.g., win/loss and NPS), and employees. Combine data from different stakeholders to present an objective perspective versus just your opinions.
- **Cultivate relationships with board members and reach out for input.** Take the time to understand each board member’s orientation, their professional background, and their concerns. Use working groups and individual conversations to build substantive relationships outside the boardroom. Reach out to one or two board members before the meeting to get feedback on your story and to gather questions and topics they would like to discuss in the board meeting.
- **Prepare for tough questions from the board.** Focus intently on anything you don’t want board members to ask, and have an answer prepared. Be ready to respond with data to back your argument up. Use [SBI’s Board Q&A Quick Reference Guide](#) as part of your preparation. Some questions you might hear include:
  - If we gave you more money, what would you do?
  - How do we decrease operating expense by 25% while increasing our revenue plan by 20%?
  - What are we really getting for the money we are spending on marketing? Why can’t we just start in 24 months instead of now?
- **Be ready to present in less time than planned.** Memorize the relevant points of your story, so that if you have to condense it to half the amount of allotted time, or to just 5 minutes in, you’ll be prepared to do so in an eloquent manner. Also, consider adding hidden slides, or an appendix that you can jump to on-demand.
- **Send out one-page summaries prior to the board meeting.** Include a one-page summary of your function with key highlights from the quarter, near-term priorities, and current challenges to let the board quickly see what’s happening in your department. This should go beyond what’s typically included in the board pack of financial data.

Having command of your message requires preparation and planning. Take time to consider the steps and activities required and begin the process well in advance of your board meeting. This way, you’ll show up to the boardroom confident in your message, ready for discussion, and able to pivot when needed.

## During the Board Meeting, Build Confidence In Your Ability To Lead

Well-prepared leaders exude confidence and trust in the boardroom. They don’t hide behind excuses; they transparently report the facts and their interpretation of them. Unfortunately, building boardroom acumen can take time and even highly skilled GTM leaders struggle.

For example, the inexperienced leader might enter the boardroom thinking they have the single best answer, rather than properly bringing the board along on the decision-making journey. Or they fail to effectively communicate the significance of the information they present, focusing too much on the “what” and “how,” without clearly explaining the “why,” or the underlying rationale or strategic

implications. In other instances, functional leaders may fall short on connecting their data analysis to concrete actions and next steps.

Build board confidence in your ability to lead by taking a different approach during your presentation with the following behaviors:

- **Approach the board as a businessperson first, and as a functional leader second.** Provide a clear rationale for your decisions that maps to the business strategy and goals. Unless specifically asked, stay clear of functional details that go in-depth on how things are done.
- **Understand executive psychology and don't box them in.** The board rarely wants the "right answer." Rather, they want a choice and a discussion so as to understand the tradeoffs you made to arrive at your decision. Help the board see the clarity in your thinking and rationalize your priorities and recommendations to suit.
- **Explain data variations before you're asked.** Always provide context and interpret any data you share with the board. Board confidence is built through a data-driven story that's told in an articulate manner; supplement this conversation with recommendations for what to do next.
- **Don't sugarcoat the facts or try to fabricate answers you don't know.** Be transparent when regarding the current state of the business. If you don't know something, have the confidence to say you don't know and follow-up with an answer.
- **Focus on metrics that impact revenue, cost, and risk.** Provide less information and more insight. Align your metrics commentary with strategic measures that matter most to the board. Only include tactical metrics where they add value and bring context to help the board see your thinking more clearly.
- **Communicate in a language the board immediately understands.** Don't frustrate board members by using functional jargon or terms that could be said in a more direct way. For example, replace talking points that refer to your marketing qualified leads (MQLs) with discussion on the impact marketing programs are making on accounts and the opportunity pipeline.

The most successful GTM leaders use their time in the boardroom not only to position themselves for success during the actual presentation, but to also build board confidence in their leadership.

## After The Board Meeting, Elevate Your Ability To Deliver More Value In Your Next Board Interaction

Sales and marketing leaders with years of boardroom experience know the value of coaching and being coached. They proactively seek input and identify where they can improve. Unfortunately, not all GTM leaders follow this pattern and invest the time or effort to improve their skills. This causes them to repeat mistakes, or worse, consistently lose the trust and confidence of the board.

For example, they might believe that getting approval and/or not receiving hard pushback in the moment constitutes as success, and this would be a flaw as it disallows any chance of critical self-assessment. Either that or they fail to seek feedback from their peers or CEO, disallowing them from seeing their blind spots and areas for improvement. In other cases, sales and marketing leaders might see the end of the meeting as a cue to immediately transition back into their daily grind, causing them to miss the opportunity of capturing learnings while the experience is fresh.

As GTM leaders, you should elevate your ability to deliver more value in your next board presentation by adopting the following process that drives consistency and improvement in how you show up in the boardroom:

- **Be open-minded and candidly self-assess your boardroom performance.** Think critically about what went well and where you can improve. Use [SBI's Board Reporting Maturity Model](#) to spot areas for improvement.
- **Get feedback from your peers and CEO.** Ask for coaching to identify where others see opportunities for you to improve.
- **Get feedback from trusted board members.** Reach out to board members whose background and experience most closely align with your functional role. Listen to their feedback and incorporate their ideas into your next board presentation.
- **Update your presentation to the way you would have liked it to be.** The most forward-thinking sales and marketing leaders know the value and efficiency that come from applying insights and ideas when they are fresh. Meaning, they'll update their presentations just after they've been delivered to reflect the immediate feedback and improvements they see.
- **Refine your storytelling and boardroom presentation skills.** Adopt a business messaging framework such as the Minto Pyramid to add more efficient structure to your storytelling. Refine your ability to pivot and tell the story out of sequence while still maintaining context, clarity, and message impact.

## Next Steps

Elevate your ability to deliver more value in your next board meeting by adopting a growth mindset. Be honest with yourself, stay open to feedback, and pursue skill improvement. Presenting to the board of directors doesn't need to be a stressful experience. With the right mindset and approach any GTM leader can succeed in driving transparent, strategic interactions with the board that convey their leadership value.