



Tips for Writing and Presenting a Great Client Presentation

To create great slides:

- Use a simple visual theme throughout. Keep fonts, colors, and backgrounds consistent, clean, and limited in variety so that your presentation looks professional and is easy to read and remember.
- Use simple graphics for information or pictures, when possible, rather than lots of text or, even worse, a spreadsheet copied-and-pasted into your presentation.
- If your presentation will be projected onto a screen:
 - Keep the font size large and the amount of bullet points and word count low.
 - Generally, no more than 5-7 bullet points and 5-10 words each bullet point is a good rule of thumb.
 - Anyone who is trying to read the screen from the far side of the room will need larger fonts than you think. 24-point font or bigger is generally necessary. If in doubt, test your slides by projecting them and asking someone else to read them from the back of the room, or stand 6 feet away from your laptop screen and see if you can easily read the text on the slide from there.
 - More empty space on the slide always increases readability.
 - Unless you are selling something or making a Hollywood movie, avoid flashy animations, slide transitions, sound effects, and other distracting elements. Even when you are selling something, you are trying to sell *you* - your knowledge, expertise, insight, and perspective - not the *slides*. If the client spent the entire time looking at and conversing with you, and never looks at your slides at all, that's ok; indeed, that's a win.
- If your presentation will be printed and handed out for reading at the conference table, you can use a little more content per slide and convey more complex visualizations and organized information, but font size is still an issue for readability and so is wordiness, so simplify and limit the number of words where possible.
- Each slide should convey one main point, which should be stated in active voice in the headline of the slide. While headlines are not always at the top of the slide, make sure that they are clear, concise, obviously the key point, and easily readable wherever they are located.
- The sequence of headlines should be readable as a story without the slide content. A great way to check your presentation for clarity and completeness of message is to write out the sequence of headlines as a list of bullet points, then read them out loud to someone else sequentially. If the other person fully understood your story without information or logic gaps, then your presentation is well-structured and will be understandable by your audience.
- Proofread and proofread again. Any errors in spelling, grammar, and tense agreement or other textual consistency problems will distract your audience from you and your message.

When presenting to the client:

- Know your audience and the style of meeting and presentation they prefer. Does their work culture mean they expect a free discussion throughout? Or perhaps a stand-up presentation followed by Q&A is more their style? Know that beforehand so you can prepare and engage the client in the way that works best for them.
- Also know their concerns, fears, needs, wants, priorities, and agenda going in, so you are pre-prepared to navigate those and discuss strategically during or after your presentation.
- If you are giving a formal stand-up presentation:
 - REHEARSE. Don't wing it. Don't try to become familiar with the flow and timing of your presentation in real-time. REHEARSE.
 - Time your presentation when you rehearse, so you can stay on a good, comfortable, moving pace and not run over time.
 - Speak clearly and, for most people, slower than you think you should. Nervousness makes people speak faster than they usually do. Take pauses that feel uncomfortably long to you, that way they feel right to your audience.
 - Less is more, in every way. Fewer slides are better. Fewer words are better. A picture instead of text is better. So prepared, organized, rehearsed, and engaging as a presenter that you need no slides at all? Now you've leveled up!
 - Have a Plan B. Equipment fails. The client's conference room projector will choose your meeting time to decide not to connect to your laptop. Your laptop will choose the moment your presentation starts to decide to install updates and power down. These things do happen, so prepare and have a backup plan. A colleague's laptop with the latest presentation already downloaded or printouts of your slides are great options.
 - Know your presentation backwards and forwards, so you are not reading from your slides as you present. Your slides are to illustrate and support the points you are making, but you are making your points. You want your audience to listen to you, not to read your slides while you verbally repeat what the slides say.
 - Face your audience, not your projection screen. You are speaking to people, not to slides.
 - Stand still and poised, but relaxed and comfortable. Physically move your arm, hands, or upper body to "lean into" key points, conclusions, observations, or questions to emphasize these to your audience.
 - If you find yourself saying things out loud to your audience like "this may be a bit hard to read, but..." or "if you study this closely, you will see that..." or "it might be hard to tell, but the main point here is...", you need to rethink your slides.
- If you are having a discussion-based sit down or working meeting using printed slides:
 - All of the above tips still apply! Except you are inviting and driving discussion throughout, so the responsibility is on you to watch the clock and keep the pace going, or to schedule a short huddle and change the plan, so you can finish the meeting on time.
 - Prompt the discussion when needed. Ask questions. Seek clarification, confirmation, and building-on. Facilitate the conversation by whiteboarding notes that everyone can read.
- Start with introducing yourself, your team, and your topic, and give a short overview.
- Finish by reviewing key points at the end, highlighting important decisions, implications, needs, or next steps as appropriate.