

**Presentations...To the Board  
(and others)**

**Some Recommendations**

# Who am I?

- Lucas Secor
- Executive Director of Finance for LLUMC-Murrieta
- CPA (Licensed in the State of California)
- MBA (from the University of Southern California)
- BBA (from Walla Walla University)
- Volunteer with AHI



# Why presentations matter?

- The mission and work is important
- We are stewards of His resources
- Time is valuable
- Focus/attention is valuable
- Good governance and management are dependent on making the best decisions possible....which requires relevant, timely, accurate financial information and analysis

# Why is it worth talking about?

*Good presentation is a combination of multiple disciplines:*

- Storytelling and public speaking
- Financial acumen
- Planning
- Prioritization
- Practice
- Anticipation of questions
- And more!

# 5 Important Thoughts / Ideas

1. Know the audience
2. Storytelling
3. Input from stakeholders & avoid surprises
4. Information not data
5. Visuals

# 1. Know the audience

- Craft message to the needs of the audience
- Boards are responsible for governance
- Provide the relevant information and presentation to inform appropriately
- Sharing enough without oversharing
- Prepare for questions

## 2. Storytelling

- As a presenter, you are the story teller
- Story tellers are:
  - Engaging/Interesting
  - Responsive
  - Have a path/journey to take the audience on
- Stories typically have:
  - When and where
  - Main characters
  - Narrative arc
- Storytellers hone their craft



### 3. Input from stakeholders & avoid surprises

- Healthcare is a team effort
- Likely more than just the finance person has a vested interest in the financial performance of the organization
- Craft and adjust content based on feedback
- If there is something that is surprising, get out in front of it early





# 4. Information not data

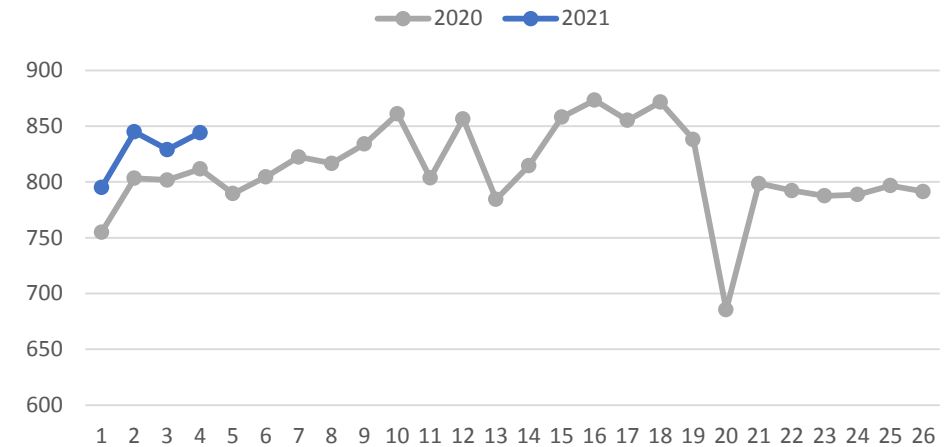
- Information is processed, organized, structured and made to be useful
- Imagine the difference between lines of data and a graph
- Information is useful for decision making



# 5. Visuals

- Simplicity over complexity
- More is **not** better
- Use color to make your point, not to distract
- Use bold and italics to emphasize or call-out points
- Good visuals are understood quickly and easily

Total Paid Staff by Pay Period



# Coda & Call to Action

*Suggestion.... After the presentation, spend 10 minutes answering the following questions:*

- Who are the best presenters you know? What do they do that you appreciate?
- What takeaways do you have from this presentation?
- What will you do differently the next time you present?
- What other ways can you bring financial information to life for the people that depend on you?
- Are my visuals concise, pithy and impactful? What can I do to improve them?

# Feedback / Comments / Questions

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