

Guide

Presenting to your board

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Introduction

Being asked to present your marketing strategy to the Board – or perhaps your Executive management team – can seem daunting. Yearly sales projections, audience development plans, re-branding strategies or marketing planning headlines can all be information that is expected – sometimes in ‘one agenda item’ - in a board meeting situation. Or conversely, the other extreme is you may be asked to prepare a paper or presentation covering all of your plans for every single one all of these areas - to a board who you know may not be engaged with half of the topics.

Whatever the request, however daunting it may feel, you should firstly recognise that it’s a great opportunity. An opportunity to showcase the work you and your team do, and really open up a dialogue about the overall strategy and direction of the business. It’s your chance to ensure your planning is running in sync with what the company are trying to achieve, and for you to raise the profile of your team’s contribution to the overall aims of the organisation –ensuring your work (and budgets) get support.

However, with all of that positivity aside... it can still feel like a mammoth and scary task – and especially daunting if you are doing it for the first time. Here are a few pointers that can help steel your nerves, get you better prepared and generally ensure a more successful session

1. Know why you are there.

One of the key things to establish from the outset is who invited you. It maybe that your CEO or Artistic Director requested a one-off marketing overview, or perhaps a particular board member wanted to get a ‘in -person’ update on a particular area of the marketing strategy. Or maybe it’s a ‘regular slot’ every quarter that you are taking over for the first time. Whichever scenario, you need to understand the nuances of what you are expected to talk about and what your contribution should look like.

If it’s one-off ask on a specific topic, its important to read through the notes of the previous meeting and find out what context the ask was made – and by whom. This background information may show you that there was a very clear agenda or context needed from your presentation (for example it might form the basis of a future board decision – or reflect an important milestone of the company). Knowing that context will be crucial, so you sift and filter the information you deliver.

If you are picking up a regular slot from someone else – although more straightforward on paper – this can be more tricky in practise. Invest time in finding out how things have been presented before – but don’t let that deter you from introducing something new in terms of information dissemination or delivery. Just ensure that before you change things fundamentally –that you get the support of your CEO beforehand so that a ‘new way’ is not a surprise to all.

2. Research the board

Like any meeting, it's important to know the people around the table. One has heard horror stories of people unwittingly lecturing retail gurus on the new range in the venues shop, or telling global corporate marketing directors why social media is important. Like everything else in your professional career – it's just about knowing your audience. A quick Google search, exploration of LinkedIn or – if appropriate – the lowdown from Executive or friendly board member will tell you what you need to know about the people around the table in terms of their expertise, history with the company and potentially what their knowledge of marketing is. As well as useful for content, this quick and easy exercise will also ensure you feel more confident when you are in the room – as you have a bit of 'background information' up your sleeve, and can place names with faces and careers.

3. Get the background story

As well as the people in the room, you should also know the key issues or concerns that the board might have been discussing over the last year. Some of this will be confidential – and not appropriate to seek out – but where there have been common worries about marketing and a history of repeated 'themes' (for example poor brand, worries about sales, concerns over the demographics of the audience) – you need to make it your business to find out what there were – and understand the background of those topics. It is likely that the boards' concerns are things that you are well aware of and views you share – but seeing them from the standpoint of a board member is really important.

4. Keep your message clear

When you have done your digging on why / who / what – you can focus on your messaging. Clarity is the most important thing, especially in a board setting. You will inevitably have time pressures, different levels of understanding of the issues and varying levels of engagement. Therefore your deliver, report or PowerPoint presentation needs to be clear.

Pick out the main messages you are trying getting across – how many are there? Are they backed up with clear examples or fact? Is there any points in your presentation which are 'nice-to-have' but slightly stray from the issues you have been tasked with discussing?

Be ruthless in what you present - simplicity and brevity, as long as it has a sound grounding in fact will always work well in those high-level settings. If you know your stuff well, you can always talk around a really well designed slide and go into detail if and when asked... but going through 10 pages of information will lose your point and could get you tied up in knots.

5. Avoid jargon

An obvious point, but worth repeating. It's tempting to put marketing terminology in presentations of reports to show that you really are a specialist – but it's pretty well acknowledged that instead of making people feel at ease with your ability, it can make people feel detached from the content. Best to be clear and to the point.

6. Know your numbers

If presenting figures – or research – know your numbers. Numbers of tickets, financial capacity, % of visitors – all of the figures presented need to be understood. If there is something you are not sure on (there is always a bit of the sales report or a research % that is sent to test us and our understanding!) then just take time to find out and ensure you can explain it to yourself and others in layman's terms. If you don't, you can guarantee it's the one question you'll get during the meeting.

7. Be confident

You will have been asked to present as this is your area of expertise. There may be other marketing professionals around the table – but you are the arts marketing professional, who works at that organisation – so you are the expert. Confidence in your ability will ensure you make the point clearly and with conviction.

8. Never pretend to know something you don't

There is no shame in having to check something out. The latest sales figures or repeat visitor numbers or the answer to a very specific question on digital can allude to everyone - even on the best day. The worst thing you can do is bluff it. If found out it will diminish your personal standing with the whole board. Better to say you will find out and it will be circulated your response with the minutes.

9. Always offer opportunity for questions.

It's rarely done in board meeting situations where the presenter solicits questions or feedback - or even rarer still offers the members the opportunity to connect later should they have any other questions. But placing your report open for questions – and being able to handle those questions, is a great way to elevate your confidence, and those who are listening to you. As well as create direct links and build allies within the board members.

10. A bit of preparation goes a long way...

It's really easy – and completely human nature – to put off the thing you are dreading most, and focus on the immediate issues of the day – ad sign off, sales figures, front of house problems. But carving out some time to commit to the background research, preparation will not only improve your content, but it will give you the healthy dose of confidence you need to make a presentation such as this a positive and professionally rewarding experience.

About the author

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