
The CFO Leadership Council
The Art and Science of Board Presentations for
CFOs
www.cfolc.com
@CFOLeader

The CFO Leadership Council

About Me

BS Accounting; CPA/MBA

Three years with KPMG, five five as a Controller



Founder of the CFO Leadership Council

CFO for 26 different companies with 300 board members

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About the CFO LEADERSHIP COUNCIL



Mission is to Empower CFOs and other financial leaders

Cutting-edge professional development programs designed by CFOs for CFOs

Peer networking events



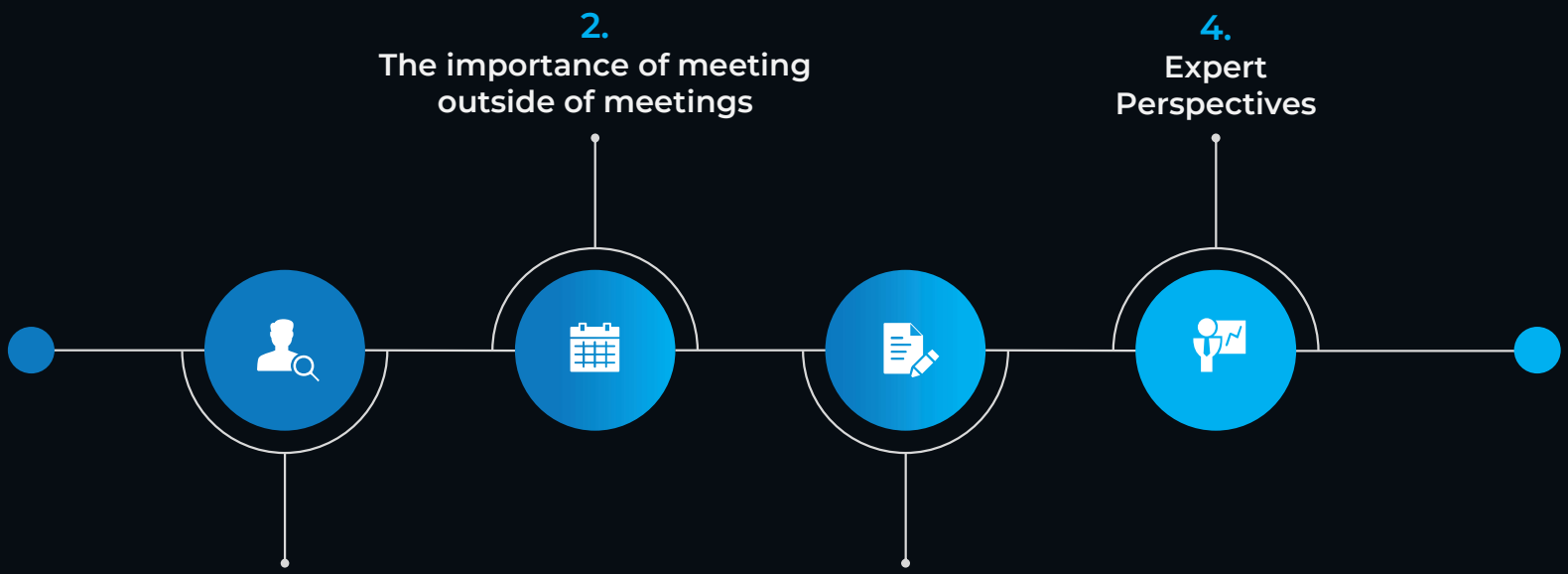
Focus is on the "People" side of being a CFO

Building Elite Teams, Working with Millennials, Board Relationships, Communications Workshops among most popular topics



Founded in Boston; 27 chapters across North America

High Level Points



1 KNOW YOUR AUDIENCE

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- Boards are typically small, and only meet four to six times per year.
- What is the purpose of this meeting and your role in it?
- What are the actual skills of your audience? What are their self-assessed skills?
- What do they want to know?
- What do you want them to know?



2 MEETINGS OUTSIDE OF MEETINGS



You should be meeting with every board member 1:1 at least four times per year, if you have a typical sized board

Technology has taken away barriers

These meetings will help you build trust and confidence

You will understand their needs better

It's also wise from a career management perspective

It is all about DATA



WHAT ABOUT CONTENT? 1/3



A picture paints a thousand words



GAAP – Minimize
- Focus of Audit Committee Discussions



KPIs are more meaningful to non-financial executives, and increasingly, to financial executives



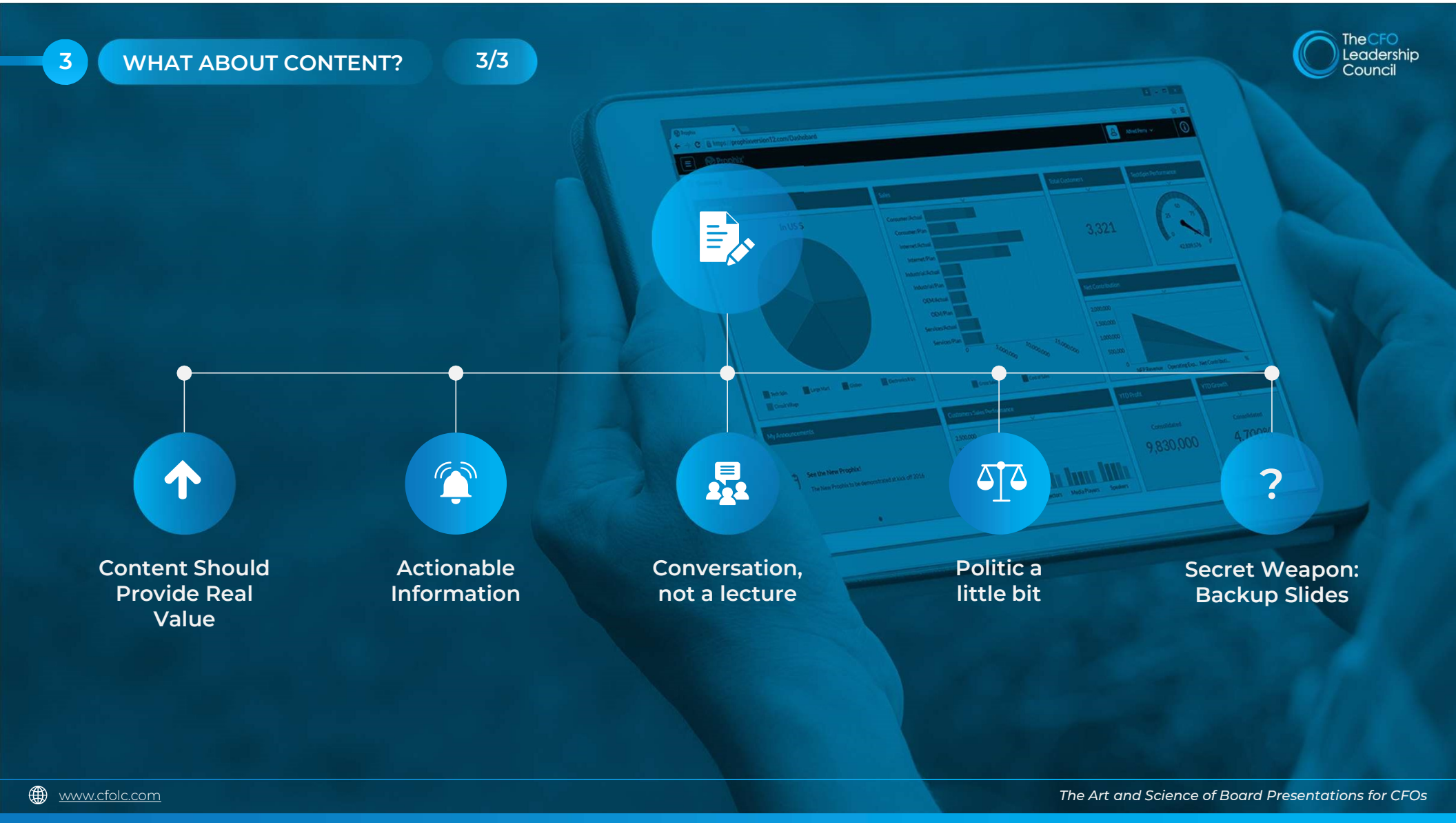
The truth, the whole truth, and nothing but the truth



- Surprises are for birthdays!
- Discussion should recap info everyone in the room knows
- State the history, but explain what it means for the future
- Efficient Use of Time
- The Five W's – What, Who, When, Where and Why

WHAT ABOUT CONTENT?

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- Content Should Provide Real Value
- Actionable Information
- Conversation, not a lecture
- Politic a little bit
- Secret Weapon: Backup Slides

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Audience Engagement

Guy Kawasaki and the 10-20-30 Rule

10 SLIDES

20 MINUTES

30 FONT SIZE



Audience Engagement

Watch and listen to Warren Buffet

Let’s Keep In Touch



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