



SOCIETY OF ACTUARIES

Article from:

The Actuary Magazine

August/September 2011 – Volume 8 Issue 4



DON'T LET THIS HAPPEN TO YOU!

BY SAM PHILLIPS

“How much longer!?” “Is this EVER going to end?” “I am so bored!” Don’t let these be the reactions you get to your presentation. The following article will give you the tips you need to MAKE YOUR TALK A WINNER!

WHETHER IT BE A PRESENTATION amongst peers or to the board of directors, you want to make sure you wow them with your message. *The Actuary* polled some of the SOA’s top presenters to get their trade secrets. Here’s what Dale Hall, FSA, CERA, MAAA; Stuart Klugman, FSA, CERA; Patricia Matson, FSA, MAAA; and David Wylde, FSA, MAAA, had to say.

Q: What makes for a good actuarial presentation—whether it be at an SOA meeting or before the board of one’s company?

People receive messages best in a variety of ways and good presentations tend to have a mix of several senses. Some audience members hear the spoken message and need nothing more, but others need to have visual cues or additional audio cues to receive it well.

Dale Hall

Interesting/timely topic, enough time to adequately cover the topic and good audio/visual accompaniment are important.

David Wylde

Knowing your audience and targeting the

discussion based on that. So if it is for an SOA meeting you have a technical audience, but they may not know the particular topic so you need to consider that. If it is the board, you need to be careful about how you describe technical actuarial concepts, but they probably have the basic background on the issue so you should focus on exactly what they need to know and what you expect of them.

Patricia Matson

If voluntary, like at an SOA meeting, the members of the audience leave believing that the time they invested in listening was worthwhile. If involuntary (like the board example) the audience has understood the messages you wanted delivered.

Stuart Klugman

Q: How do you prepare to give a presentation?

Many times, my presentation is from an article I wrote. I will first make an outline from the paper, and then use the outline as a basis for PowerPoint slides.


David Wylde

I typically research the topic a bit, just to make sure I can answer detailed questions. I also try to anticipate what the questions will be so I can cover them well.

Patricia Matson

I prepare the appropriate amount of notes needed. Technical presentations need more notes as I want to be sure all the facts and formulas are at hand. I review the notes, but rarely

Talk Tips

Ready to hone your presentation skills? Check out the **SOA’S VOLUNTEER RESOURCE CENTER**, where you’ll find tips on content development and using PowerPoints, as well as presenter and moderator tips. Just go to <http://bit.ly/joOSMK> or use the QR code provided here. 

practice the actual speech (the only exception is when there is a strict and rather short time limit and several points need to be made).

Stuart Klugman

Q: What have you done in the past that has “worked”?

An interesting/timely topic that is presented in an appropriate amount of time will overcome even the dullest of speakers.

If at all possible, I try to get away from the podium and interact with the audience directly. Physically going to the screen to highlight a specific slide point (rather than using a laser pointer) also works for me.

David Wylde

I talk to the audience, not to my notes or the screen.

Stuart Klugman

Q: What have you done in the past that has been “not as successful”?

Not enough practice and not having the faintest idea what’s on the next slide. Not a good recipe for success ...

Dale Hall

In general, people enjoy “war stories” much more than factual commentary. So if you can add real-life examples or interesting stories as you are explaining specific topics it tends to engage the audience more.

Patricia Matson

Trying to get across too many points in too little time rarely works.

Stuart Klugman

Q: What should or should not be included in slides in a presentation?

Use high level bullet points only; charts/graphs should not be too busy; don’t just read the slides; color contrast, etc. should be easy to read by the audience; and I don’t like to get too “cute” with graphics/icons/clip art.

David Wylde

They should not be too detailed—you want people to be listening to you, not trying to decipher words or complicated graphics to the point that it is distracting. But on the flip side, just plain bullets on a page, slide after slide, is too boring.

Patricia Matson

Put the minimal amount of information possible on the slide. Only include more if it is absolutely necessary to point to it during the presentation.

Stuart Klugman

Q: How do you ensure your message will be received? Through audience participation? Handouts? Break-out activities? Ice breakers?

I will sometimes start off with a joke or something from the news to get everyone’s attention.

Break-out activities are not usually appropriate for SOA presentations.

I use the rule I learned in high school speech class: “Tell ‘em what you’re going to tell ‘em, tell ‘em, and then tell ‘em what you told ‘em.”

David Wylde

I think real-life examples and war stories make the message much more real and memorable than plain factual summaries.

Patricia Matson

You can connect with an audience even without their participation. Handouts should not distract from your message (which will happen if there is so much information on them that they read ahead instead of paying attention). I am not big on ice-breakers, such as a joke at the beginning. Any humor I inject is related to the subject at hand. I leave story and joke telling to the professionals.

Stuart Klugman

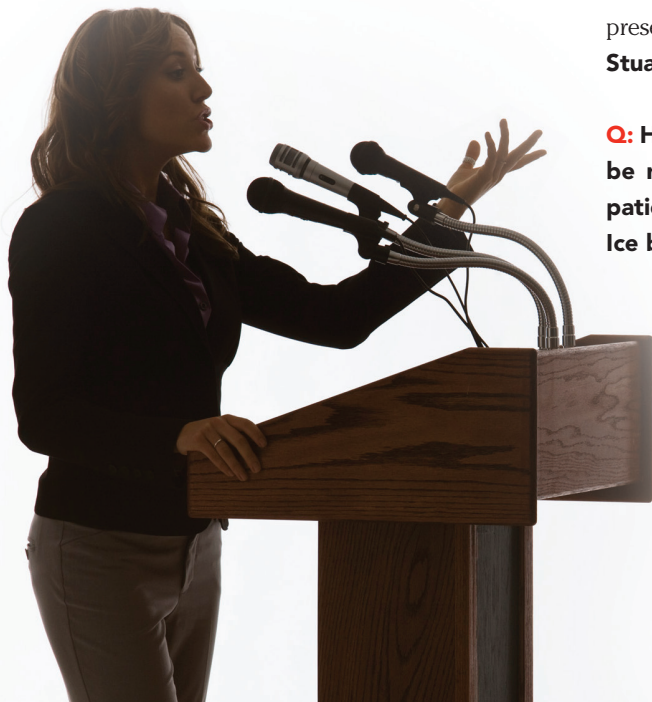
Q: How do you keep your audience engaged? Alert? Interested?

I try to use a theory that the audience needs to be smiling back at the speaker at least once every four to five minutes. If you fail on that, the audience can quickly lose interest. Even on the dullest of topics, speakers need to find ways to inject some level of humor, even if self-deprecating, or even just a reference to a current event or topic. You don’t necessarily have to have people rolling in the aisles, but they seem to stay more in tune if they know there’s a chance something entertaining or current is just around the corner. I always try to make sure I am checking current events or finding what is trending prior to giving a presentation.

Dale Hall

Sometimes you just can’t. Once again, an interesting/timely topic will help greatly in keeping the audience engaged.

David Wylde



Change is key. So making sure that there are changes in speakers every 30 minutes or so, switching topics, switching the types of graphics, adding animations, war stories, moving around the room, using flip charts, etc. Standing in the same place with slides that look alike and talking in a monotone voice is sure to put everyone to sleep!

Patricia Matson

I had better be excited about my subject or no one else will be.

Stuart Klugman

Q: When you are a member of the audience, what do you look for in a presenter? What makes you stay at the meeting? Seminar?

An interesting/timely topic with good slides will keep the audience engaged.

David Wylde

Continuous movement/change/interest and use of war stories. And, of course, a topic that is relevant and understandable and applicable to my day-to-day work.

Patricia Matson

I have to be getting information I can use. If further work is required on my part, I have to at least believe that I can get it done.

Stuart Klugman

Q: How do you rate the following: Rapport with the audience? Enthusiasm about the topic? Examples and stories?

(1) Enthusiasm about the topic: I have received a lot of good feedback regarding my “energy level” while presenting.

(2) Examples: Depending upon the topic, a simplified illustration can greatly improve the audience’s understanding.

(3) Rapport: Either you have it, or you don’t. I’m not sure this is something you can easily acquire or learn.

David Wylde

They are all critical. But enthusiasm makes it easier to accomplish the other two. At the Fellowship Admissions Course, the following Emerson quote is offered: “Nothing great was ever achieved without enthusiasm.”

Stuart Klugman

Q: How do you overcome stage fright?

Practice, practice, practice.

David Wylde

Despite presenting quite often, I still almost always get nervous. Planning a funny comment or something a bit more personal and nontechnical to start can be calming, and then things are more casual and less stressful from there. I don’t imagine people in their underwear!

Patricia Matson

I’ve given more than 4,000 presentations and I still get nervous. But once the first words come out everything starts to flow.

Stuart Klugman 

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