

Mastering Effective Presentation to Senior Executive Meeting and the Boardroom

Dr. Chatchai Thnarudee

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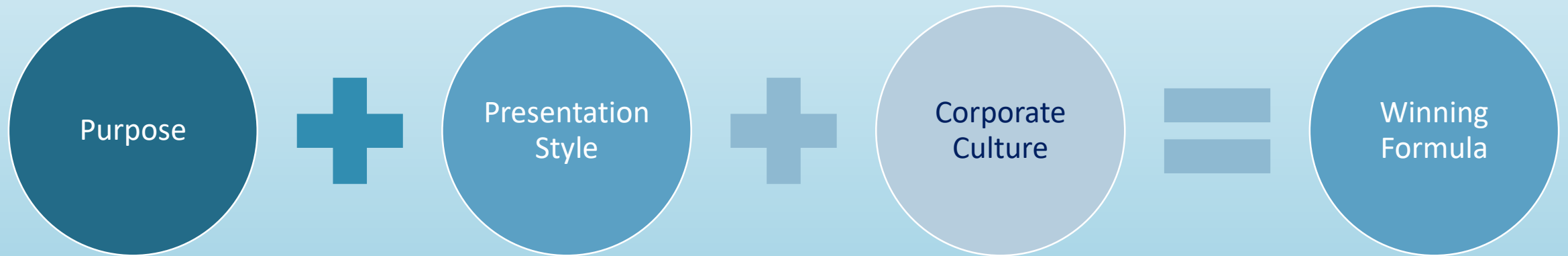
Brief Bio of Dr. Chatchai Thnarudee

(ประวัติโดยสังเขปของ ดร.ฉัตรชัย ธนาฤดี)

- ดร.ฉัตรชัย ธนาฤดี สำเร็จการศึกษาระดับปริญญาเอก ด้าน Strategic Management and Strategy จาก University of Canterbury ประเทศ New Zealand ปริญญาโท 2 ใบคือ ปริญญาโทบริหารธุรกิจจากมหาวิทยาลัยเกษตรศาสตร์ และปริญญาโทวิศวกรรมคอมพิวเตอร์จากมหาวิทยาลัยเทคโนโลยีพระจอมเกล้าธนบุรี รวมถึงปริญญาตรีด้านวิศวกรรมคอมพิวเตอร์จากมหาวิทยาลัยเทคโนโลยีพระจอมเกล้าธนบุรี นอกจากนี้ยังได้เข้าร่วมโครงการพัฒนาความเป็นผู้นำและหลักสูตรพัฒนาผู้บริหารระดับสูงจากสถาบันบริหารธุรกิจ INSEAD และสถาบัน Massachusetts Institute of Technology (MIT) Sloan School of Management และจากสถาบัน IDG's CIO Executive Council
- ดร.ฉัตรชัย ธนาฤดี เป็นผู้บริหารเชิงกลยุทธ์และนวัตกรรมที่ขับเคลื่อนการเปลี่ยนแปลงของธุรกิจมาหลากหลาย และมีประสบการณ์บริหารจัดการมาหลายประเทศ อาทิ สหรัฐอเมริกา นิวซีแลนด์ และเอเชียใต้ รวมถึงมีประสบการณ์บริหารงานในหลากหลายกลุ่มธุรกิจ เช่น การเงิน การธนาคาร ประกันภัย พลังงาน นวัตกรรมและเทคโนโลยีด้านดิจิทัล FinTech/InsurTech รวมทั้งที่ปรึกษาด้านการบริหารจัดการและกลยุทธ์ธุรกิจและด้านดิจิทัล รวมถึง ดร.ฉัตรชัย ธนาฤดี มีประสบการณ์บริหารงานระดับองค์กรข้ามชาติที่อยู่ใน Fortune 500 และแม่ฮ่องสอนครขนาดใหญ่และขนาดกลางในประเทศและองค์กรที่เป็นสตาร์ทอัพ
- ปัจจุบัน ดร.ฉัตรชัย ธนาฤดี ดำรงตำแหน่งเป็นประธานเจ้าหน้าที่บริหารและกรรมการผู้จัดการใหญ่ (Chief Executive Officer) บริษัท เจพี ประกันภัย จำกัด (มหาชน) และก่อนหน้านี้ มีประสบการณ์ระดับผู้บริหารมาหลากหลายองค์กร เช่น เคยดำรงตำแหน่ง กรรมการผู้จัดการ (Managing Director) บริษัท แอคเซนเจอร์ (Accenture), Senior Vice President and Chief Information Officer ของ บมจ. กรุงเทพประกันภัย และ Country Head of IT ของ บริษัท เซฟรอน ประเทศไทยสำรวจและผลิต และผู้บริหาร ด้าน Global Production Operation, Accounting & Data Analytics ของ บริษัท Chevron Energy Technology ประจำที่สหรัฐอเมริกา และ Regional Planning & Shared Services Manager ของ Chevron Asia South เป็นต้น
- รวมทั้งดร.ฉัตรชัย ยังรับหน้าที่อาจารย์พิเศษคณะบริหารธุรกิจ มหาวิทยาลัยเกษตรศาสตร์ และอาจารย์พิเศษคณะวิทยาศาสตร์และเทคโนโลยี มหาวิทยาลัยหอการค้าไทย รวมถึงคอลัมน์นิสต์เกี่ยวกับการบริหารจัดการเชิงกลยุทธ์วารสาร For Quality Magazine ของสำนักพิมพ์สมาคมส่งเสริมเทคโนโลยี (ไทย-ญี่ปุ่น) และยังรับหน้าที่ Honorary Board Member ของหอการค้านิวซีแลนด์-ไทย และเป็นประธานสมาคมนักเรียนเก่านิวซีแลนด์อีกด้วย



Reference: [LinkedIn](#)





Providing Information. This format encompasses anything from a team meeting that gives updates on a project or upcoming event to a demonstration that shows product functions.



Teaching a Skill. Your company just installed a new system or implemented a new process that requires people to learn how to use the new tool and apply the process.



Reporting Progress. As you integrate the new system into your daily routine, your boss wants to know how it's working. You might schedule a divisional meeting or group off-site to share the progress.



Selling a Product or Service. A briefing like this might include a recap of the product or service, next steps and action items, or a discussion of needs and improvements before the product is ready to sell.




Making a Decision. It's time for the annual holiday party and ideas are being tossed around the office. When giving your input on the location, make sure to share the must-haves and nice-to-haves for the event. When it's time for the final decision, you can see how your idea stacks up to the other options.



Solving a Problem. This could be in a panel setting or other meeting where the problem is identified, the facts of the problem are presented and a list of causes is generated. From here, you lay out the ideal outcome, present solutions and discuss your recommendation.

Purpose

1 VISUAL STYLE




- ✓ If you're a firm believer that slides are just there to complement
- ✓ It's all up to what you're going to say to get your audience engaged
- ✓ Great if you're about to deliver a presentation under time pressure

2 FREE FORM STYLE



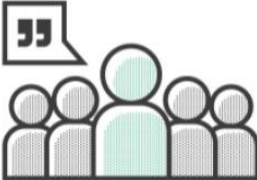
- ✓ Impromptu style
- ✓ No slides required
- ✓ Strong stories to share and illustrate points

3 INSTRUCTOR STYLE



- ✓ To deliver a complex message across
- ✓ Lots of figures of speech and metaphors
- ✓ LOTS of content

4 COACH STYLE



- ✓ Energetic and charismatic speakers
- ✓ Connecting and engaging with their audience
- ✓ Use of role-playing

5 STORYTELLING STYLE



- ✓ Provide examples or anecdotes to connect with your audience
- ✓ Take these stories and connect them to learning points from your presentation ideas
- ✓ TED's Commandments: Let your emotions out and tell your story in an honest way

6 CONNECTOR STYLE



- ✓ Connect by showing how they can be one of us or the audience
- ✓ Connectors enjoy a freeform Q&A environment
- ✓ They use lots of gestures and highly encourage audience reaction or feedback

Presentation Style

Empowered Culture

The epitome of an empowered culture is when every individual in your organization feel fully engaged and actively participates in the success of the business. People initiate new activities that will benefit your company, take ownership of their work, and are willingly responsible for the outcomes.

Customer-centric Culture

Unlike a sales culture I discussed above, a [customer-centric culture](#) is all about the consumers who buy your company's products or services. This type of culture permeates your entire organization, including those who have no interactions with customers at all.

Culture of Leadership Excellence

Although individuals in a company often do not get to choose their leaders, in a company with a culture of leadership excellence, every individual feels confident that leadership is consistently doing everything they can to achieve excellence and continually improve. This might include ongoing training, a [leadership development program](#), mentoring, and coaching.

Sales Culture

Creating an entire [corporate culture centered around sales](#) means that there is an underlying impetus to support the activities that generate revenue for your company. For companies with a large sales force, developing a unified culture within that group can make them better able to promote new products and services, approach new markets, develop a sales process that is in line with your company's values, and use the tools that will help them maximize sales.

Culture of Innovation

In some industries, innovation is highly valued and necessary for the ongoing success of the organization. A culture of innovation focuses not just on coming up with new ideas, but also on following a rigorous process to bring those ideas to fruition.

Culture of Safety

In industries that involve physical labor, heavy machinery, or hazardous materials, having a [culture of safety](#) means that you are committed to protecting the health and well-being of every individual. This includes having certain safety procedures in place, requiring specific behaviors, and ongoing training to ensure that everybody has all the necessary information to perform their job safely.

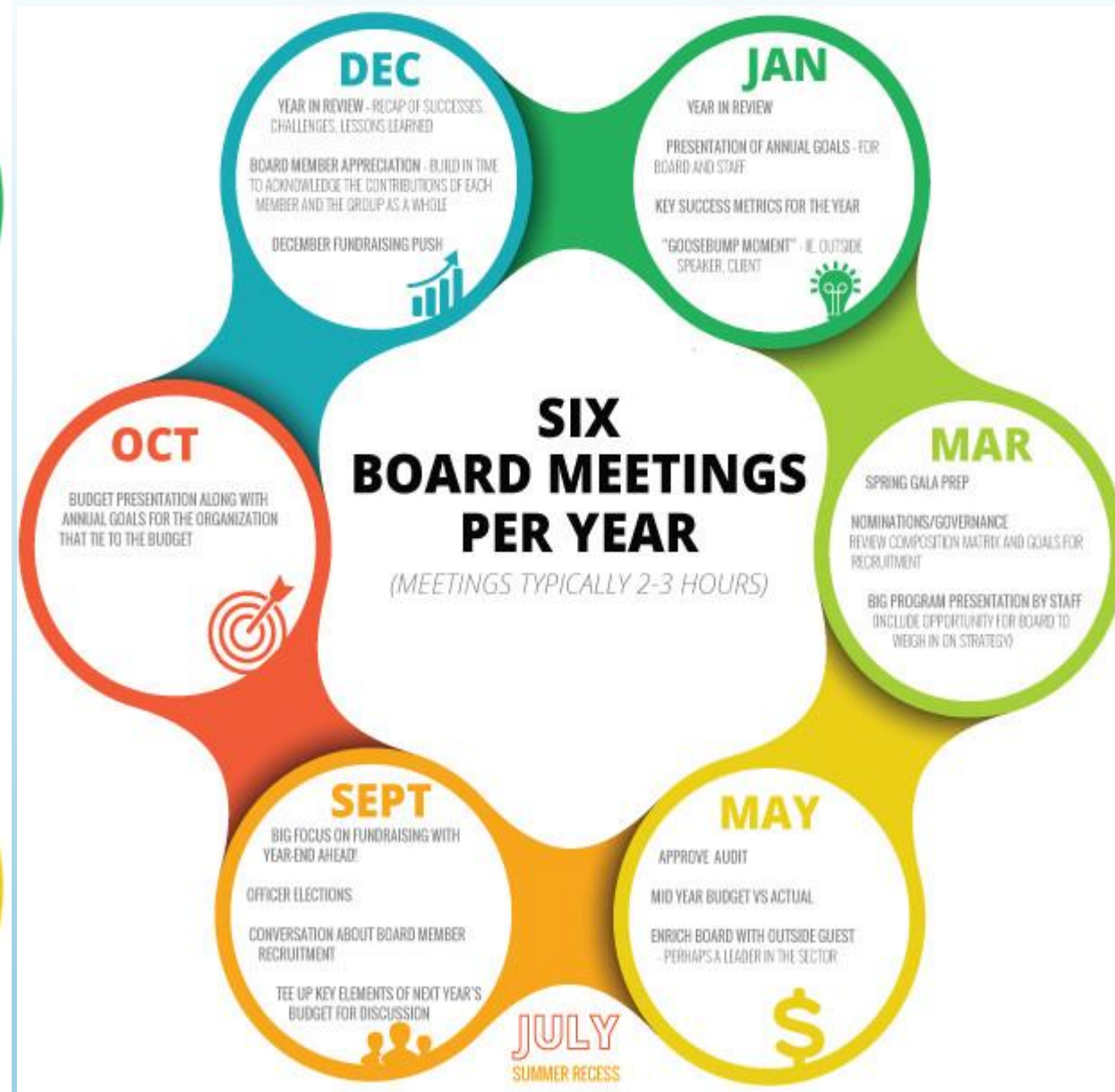
Corporate Culture

- **Know what you are walking into.** Board meetings are often jam packed with a long agenda. In the past couple of months I've been in meetings that have lasted up to 8 hours, covering up to 20 topics. Your topic is special to you, but you have a finite amount of time to get essential information across.
- **Do your homework.** Who is on the board? What is their background? It helps to be able to tailor the presentation when applicable, so you are not telling them things they already know, nor assuming knowledge they might not have.
- **Send documents in plenty of time.** I try to ensure board members get their papers at least a week in advance. If there's a deadline, meet it with several days to spare in case there is feedback before it goes to the board. Please don't "surprise" us, as in "I didn't provide the papers in advance because I wanted to keep you in suspense". This isn't an Agatha Christie novel, it's a board meeting. Give us the tools we need to make a decision.
- **Know in advance how much time you have.** Do not go over your allotment. If the chair feels more time is warranted, he or she will extend it. Make sure to leave plenty of time for questions.
- **Ask how the board would like the information presented.** For example, ask the chair, "shall I present the whole thing or hit the high points?". Another approach: suggest that you "take the papers as already read". That means you presume that everyone has reviewed the documents you sent in advance, and you will just address the most important points and avoid repeating every detail.
- **Be prepared. Be professional. Be concise.** Board members will judge the content of your presentation, but also the confidence with which you deliver it.
- **Stay calm and answer the question asked.** If you don't know the answer, don't get flustered, defensive or try to fake it. Instead, promise to come back with the answer as swiftly as possible. Then follow through quickly. Also, and this is really important, don't get thrown off if you get a lot of hard questions. If we didn't think your proposal had merit we wouldn't bother with questions, we'd simply say no. Board members ask questions differently — some meander, others get straight to it. No matter the style, stay even-tempered and answer clearly and concisely. Also, don't give attitude about questions you think are "dumb" or obvious — we are doing our job. Often the most interesting or important information comes from seemingly simplistic questions.
- **Be clear and concise about the outcome.** If there is a decision to be taken by the end of your presentation, make sure the options are very clear. It never hurts to state the options up front, explain them and then present the options again.
- **End with grace.** When it is time for you to go, say thanks and leave. Don't linger.

Board Presentations **Do's:**

- **You may be kept waiting — don't complain.** Meetings can run late depending on the agenda. If it is a closed door meeting you'll be kept waiting outside. If not, you'll be there watching other people presenting, or listening to debates on other agenda items. Don't under any circumstances grumble about it, as it will taint the room's view of your presentation before it even starts. A cheerful "no problem" goes a long way.
- **Don't bore us.** I recently sat through a report that essentially told everyone in the room something we all already knew. The presenter quickly lost our attention. Even worse, we had all mentally checked out by the time he'd gotten to the "ask".
- **Don't lobby.** Your presentation is not an opportunity to take the stand on other areas. If you are there to talk about upgrading the IT infrastructure, throwing in a "while I'm here I'd like to make a pitch for better parking facilities" is not helpful to you or us.
- **Don't use jargon.** We are not necessarily experts in your field. Use clear language that everyone around the table will understand. The first time out, explain what you mean by ESG, grok and API, otherwise it just sounds like a string of nonsensical letters and words. Try to avoid overblown statements — a "complete sea change" better be pretty big. Also trend-driven words that will make people roll their eyes. "Thinkfluencer" comes to mind.
- **We are not all the same — don't air your bias and political inclinations.** With any luck the group around the table is a diverse one, with diverse opinions. Off-colour jokes and political comments have no place in your presentation and could offend the very people you are trying to persuade.
- **Don't go over the top with bells and whistles.** There's no need to pass out flowers or an entertaining video unless it is directly related to the topic. Useful: "Here is a sample of what we are talking about." Strange: "Here is a flower for all you lovely people." And yes, I was in a meeting where someone once handed out flowers to "all the lovely lady board members".

Board Presentations **Don'ts:**



Examples of Board Meeting Agenda

Agenda

Approvals

Approval of
Minutes

Option Grants

Approval X

2016 Meeting
Schedule

Update & Performance

Highlights &
Challenges

KPIs

Status of Action Items

Financial Outlook

HR Updates

Discussion

Competitive Moves

Deep Dive on X

Actions

Actions and
Follow-ups

In-camera

In-camera and
debrief

Examples of Board Meeting Agenda

- **Title.** Your company name and one-line description.
- **Problem.** What pain point are you solving?
- **Solution.** How are you tackling the problem?
- **Secret Sauce.** What's the underlying magic of your solution?
- **Business Model.** How do you or will you make money?
- **Traction.** How much revenue? How many customers?
- **Market Opportunity.** What's the size of the market you're tackling?
- **Competition.** Who are the other players in the space?
- **Team.** Who's on the management team?
- **Roadmap.** What are your plans for the future?
- **Ask.** How much money are you trying to raise?
- **Summary.** Company name, and summary of key metrics.

Startup Pitch! – *Choose the right story to tell*



Case Study – Airbnb: A \$1.3 Billion-Dollar Startup's First-Ever Pitch Deck

Problem

2

Price is a important concern for customers booking travel online.

Hotels leave you disconnected from the city and its culture.

No easy way exists to book a room with a local or become a host.

Solution

3

A web platform where users can rent out their space to host travelers to:

**SAVE
MONEY**

when traveling

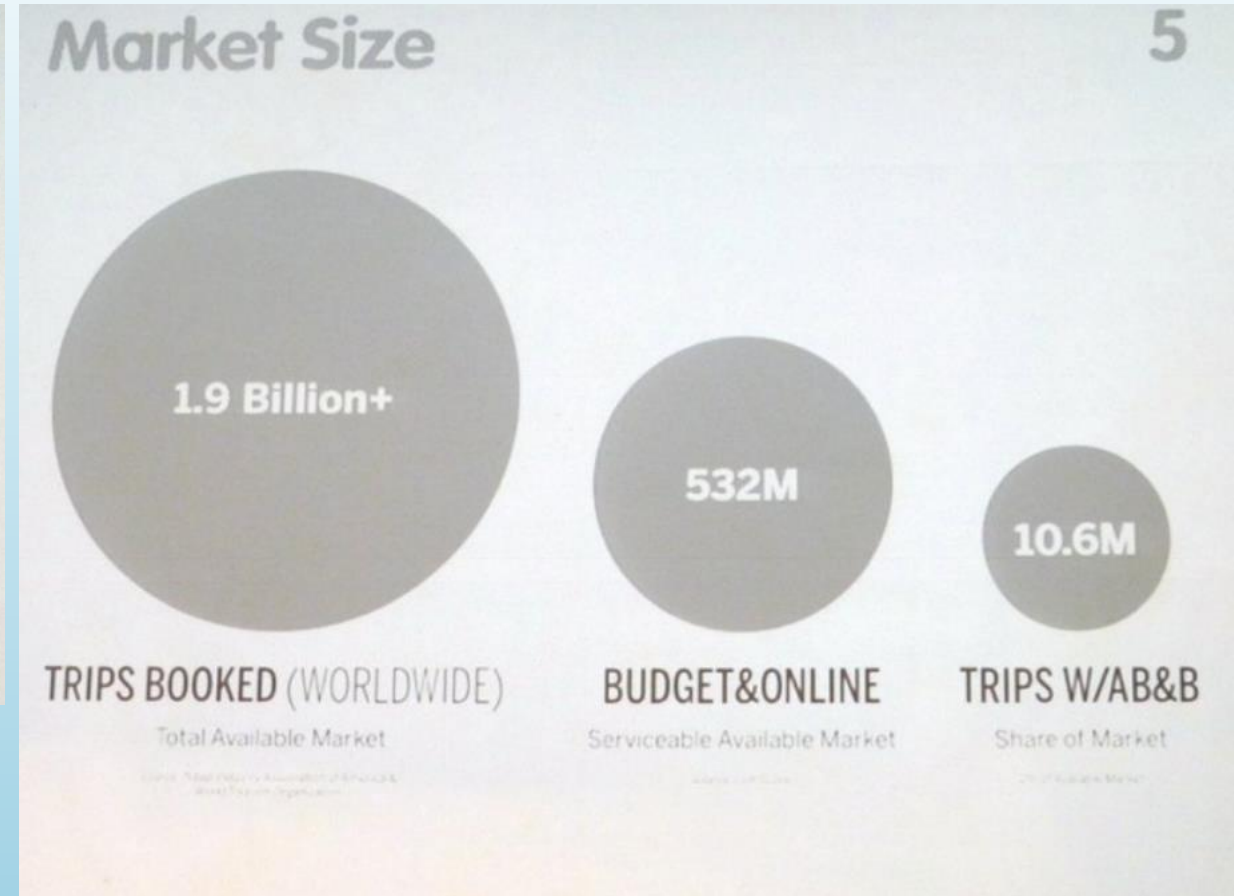
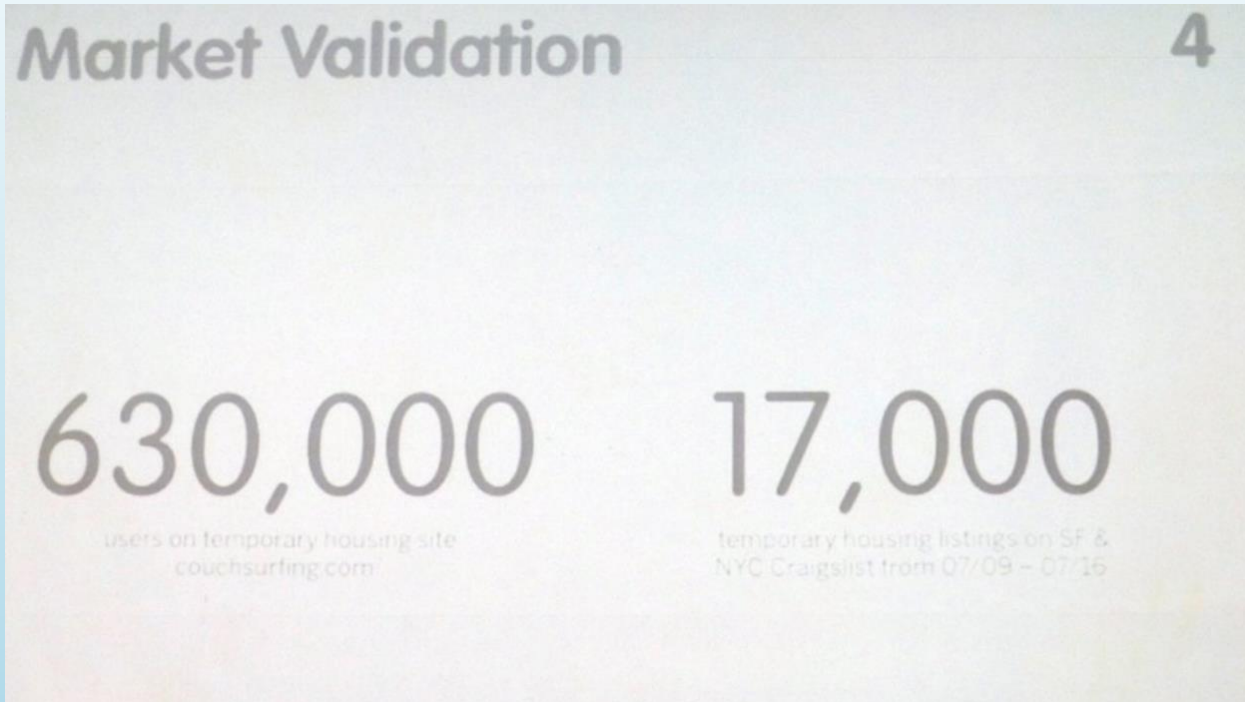
**MAKE
MONEY**

when hosting

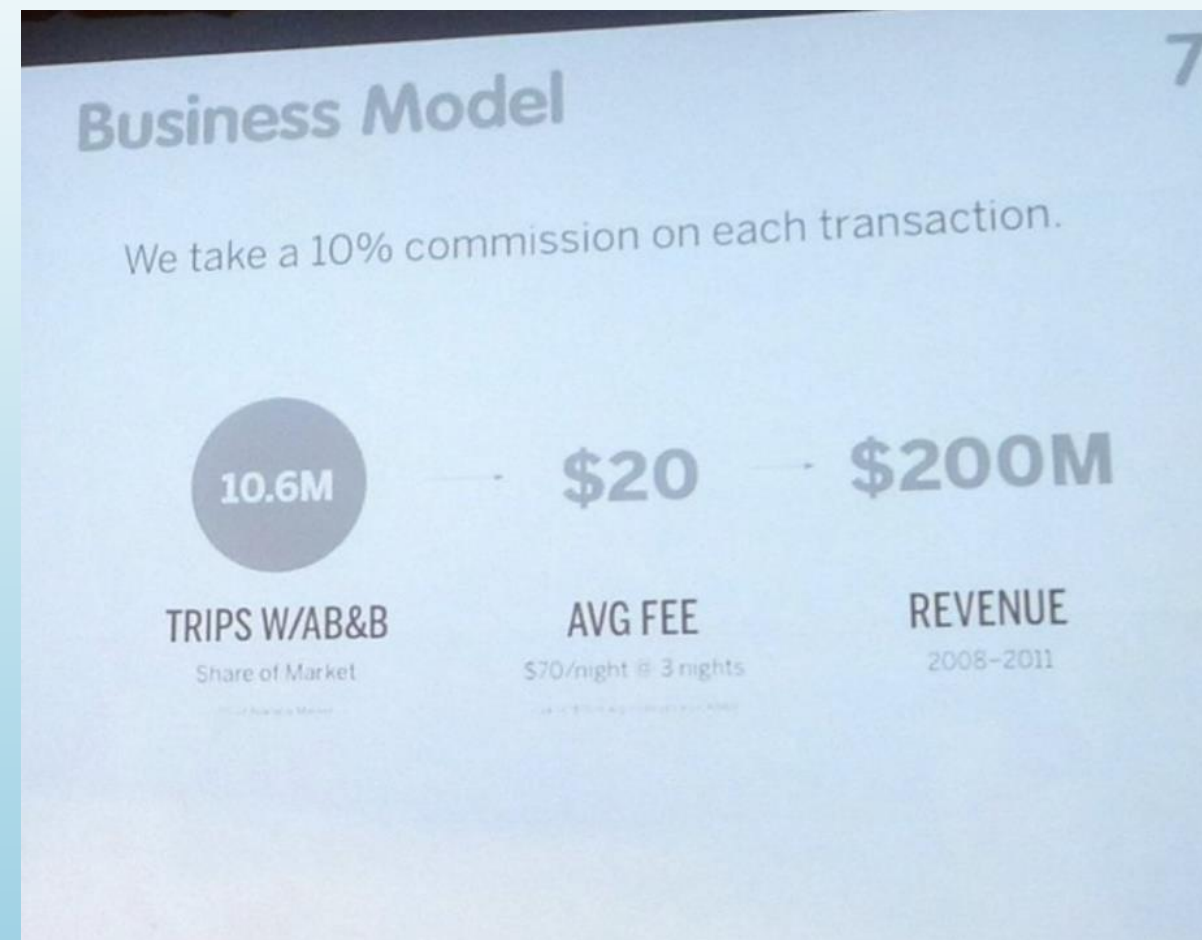
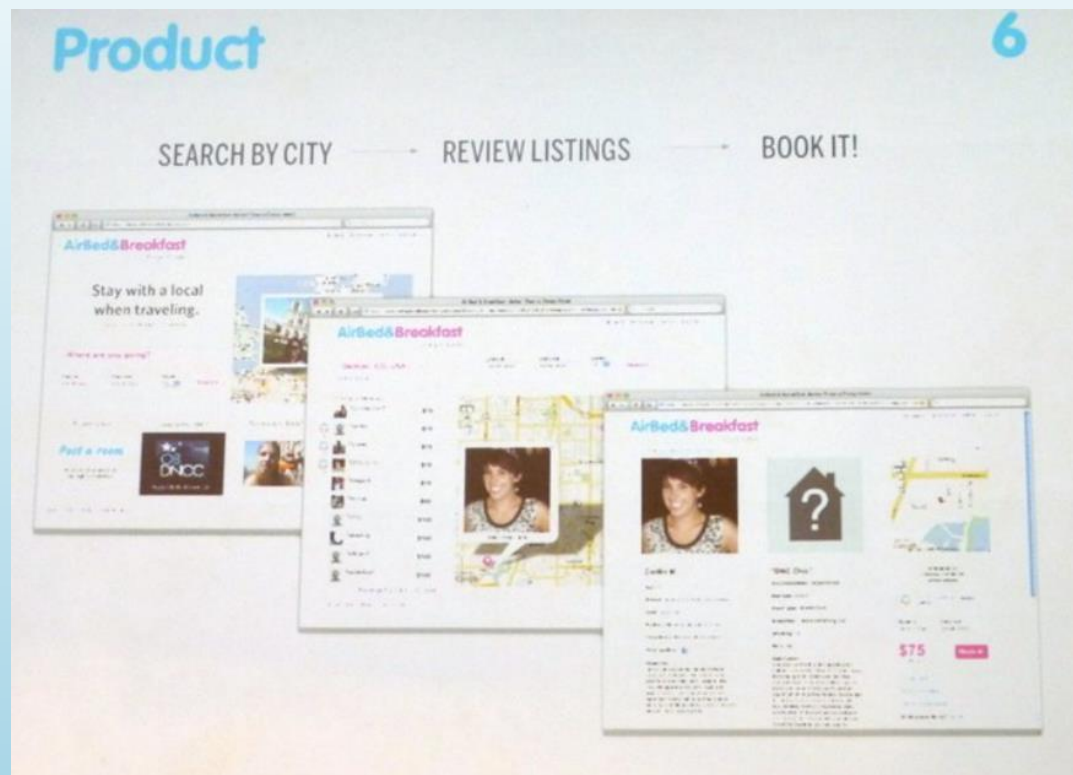
**SHARE
CULTURE**

local connection to the city

Case Study – Airbnb: A \$1.3 Billion-Dollar Startup's First-Ever Pitch Deck (Continued)



Case Study – Airbnb: A \$1.3 Billion-Dollar Startup's First-Ever Pitch Deck (Continued)



Case Study – Airbnb: A \$1.3 Billion-Dollar Startup's First-Ever Pitch Deck (Continued)

Market Adoption

8

EVENTS

target events monthly

- Octoberfest (6M)
- Cebit (700,000)
- Summerfest (1M)
- Eurocup (3M+)
- Mardi Gras (800,000)

with listing widget

AirBed&Breakfast	
	\$75
	\$75
	\$95
	\$100
	\$100
see all for "Octoberfest"	

PARTNERSHIPS

cheap / alternative travel



CRAIGSLIST

dual posting feature



Competition

9



Case Study – Airbnb: A \$1.3 Billion-Dollar Startup's First-Ever Pitch Deck (Continued)

Discussion