

THE SEVEN BIGGEST MISTAKES PRESENTING TO A RETAIL INVESTMENT AUDIENCE

TMI - Too Much Information Sure it would be nice if investors could remember every small detail about every big strategy that your company is undertaking. It would also be nice if investors could absorb every small detail about every big success that your company has completed. But no one has enough memory to retrieve that much information. Do not tell investors everything about everything. Rather, use the time to tell them what they cannot forget about your company.

TMT - Too Much Time Whether you are presenting at a breakfast, luncheon or after-market presentation, you must respect your audience. A presentation which continues past schedule is not doing the attendees any favors. There is no excuse for a presentation that exceeds its allotted time. Even if there are still some questions from the floor, there are many others in the audience who are anxious to get back to their desks. Here is a tried and true closing announcement, “Thank you all for attending. I know some of you need to get back to your office therefore we will now end the group Q&A. However, I will remain behind for those who would like to ask questions one-on-one.”

Sending Invitations Too Early, or Too Late It’s one thing to be invited to a wedding far in advance, but for a one-hour investor luncheon, invitees do not need two months’ notice. In fact, they may be unwilling to commit so early. Rather, best to wait for a two- to three-week timeframe. Early enough to book the date, and close enough to ensure you can make it.

Neglecting the Logistics Sometimes it can be so easy to get wrapped up in the details of the presentation that you forget to pay attention to the larger circumstances. How big of a room, where should the registration table go, what A/V is needed, how will the lighting work and is the background music shut off? Your audience cannot focus on the content if the logistics are not managed well.

Ignoring the Microphone I cannot count the number of presentations I have been to where the presenter decides that his voice is loud enough and he doesn’t need the microphone. This may be true when he is making some initial, booming remarks. But once he settles into the presentation, invariably the intensity drops. Then the onus reverts to the audience to be absolutely silent to ensure they can hear. This is especially pesky during a meal when simply trying to eat can involve silverware, plates and resulting noise. Use the microphone. Even if you have a loud and booming voice, amplification will ensure your audience can hear your presentation.

Going Too Green - No Hand-outs Although there are lots of good reasons for streamlining the amount of paper you give out, there is still the need for at least one piece of paper that summarizes the company story including the business model, the execution strategy and the milestones along the way.

One Hit Wonder It’s not enough to show up once and then never return. There has to be an ongoing communications program to make an impact. Retail investors are just like institutional investors in this regard. They want to know you will say what you’re going to do, and then you’ll come back to confirm you did what you said.

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