CHECKLIST 6

Delivering a Presentation to Leadership

PURPOSE: *Prepare, structure and deliver a presentation to executives or senior stakeholders, and ask clearly for what you need.*

Presentation: *Topic*	**Audience:** *Who is in the room*	**Date:** *MM/DD/YYYY*	**Time allotted:** *Minutes*

WHEN TO USE

Use this when presenting to executives, senior leadership, or stakeholders. Start with the Mindset section; confidence comes from preparation.

BEFORE YOU BUILD A SINGLE SLIDE

What does this audience care about?

What decision or action do I want from them?

My bottom line in one sentence:

PREPARATION

- ☐ Understand your audience: What do they care about?
- ☐ Know your goal: What decision or action do you want?
- ☐ Start with “why”: lead with purpose and impact
- ☐ Prepare for tough questions
- ☐ Time your presentation (stay under your allotted time)
- ☐ Have backup slides for deep dives
- ☐ Practice out loud at least twice
- ☐ Test all technology in advance

STRUCTURE

- ☐ Executive summary first (key message up front)
- ☐ The “why”: purpose and context
- ☐ The “what”: your proposal or update
- ☐ The “so what”: impact and benefits
- ☐ The “now what”: what you need from them

- ☐ Appendix: supporting details if needed

SLIDES

- ☐ One key message per slide
- ☐ Headlines tell the story
- ☐ Minimal text (not paragraphs)
- ☐ Data visualized clearly
- ☐ Professional appearance
- ☐ Your company's template/brand
- ☐ Slide numbers included

DELIVERING

- ☐ Start with the bottom line
- ☐ Make eye contact with everyone
- ☐ Speak clearly and confidently
- ☐ Be authentic: don't try to sound like someone else
- ☐ Use pauses for emphasis
- ☐ Stay on time (prioritize ruthlessly)
- ☐ Read the room and adjust
- ☐ Answer questions directly
- ☐ Say "I don't know" when you don't know

HANDLING QUESTIONS

- ☐ Listen to the full question
- ☐ Pause before answering
- ☐ Repeat or rephrase if needed
- ☐ Answer concisely and directly
- ☐ Admit gaps in knowledge honestly
- ☐ Offer to follow up if needed
- ☐ Stay calm under pressure
- ☐ Don't get defensive

TOUGH QUESTIONS I EXPECT

Likely question	My answer

ASKING FOR WHAT YOU NEED

- ☐ Be specific: “I need X by Y to achieve Z”
- ☐ Explain why it matters
- ☐ Present options if appropriate
- ☐ State your recommendation clearly
- ☐ Be prepared to discuss trade-offs
- ☐ Accept feedback gracefully

THE ASK

> “I need *[X]* by *[Y]* to achieve *[Z]*.”
> “My recommendation is *[option]*, because *[reasoning]*. The trade-off is *[trade-off]*.”

AFTER

- ☐ Send follow-up summary within 24 hours
- ☐ Include: decisions made, next steps, owners
- ☐ Deliver on any commitments you made
- ☐ Thank key supporters
- ☐ Incorporate feedback for next time

MINDSET

- ☐ You belong in the room (avoid imposter syndrome)
- ☐ You know your material better than they do
- ☐ They want you to succeed
- ☐ Confidence comes from preparation
- ☐ Your authentic self is your strength

Pro Tip: You belong in the room. You know your material better than they do, and they want you to succeed. Lead with the bottom line and let the preparation carry you.