



## Big Words, Little Value

Stamp it official, the Digital Experience™ is here to stay. A new foundation for all businesses that desire to thrive in the future that is now. The way financial professionals have adapted to the new understructure has been vastly diverse and exciting to see implemented in firms. Especially those that once refused to participate in webinars, let alone host.

A category of the Digital Experience™ that will remain consistent: the onslaught of organized meetings. It is now as common as morning coffee to attend or host an organized meeting on any one of the many virtual web-based offerings. In fact, it has become so commonplace somehow it is suitable to include barking dogs and casual clothing.

But something bigger is brewing. The meetings are becoming bizarrely similar and adding less value to our daily richness. The meetings are becoming stale. Not to go as far as “publish or perish”, but it is seemingly becoming “forced” to host meetings. How then, do we broadcast with efficiency, but more importantly add value to every presentation we create? The meeting must become strictly simplistic and formulated. Nothing shows more prowess than coordination. The famous philosopher William of Occam developed the principle known as Occam’s razor. This principle states that in explaining a thing no more assumptions should be used or made than necessary. We should all use Occam’s razor in our presentation methodologies, and to create and extend the best outputs for our audience. Simple, standardized.

We will call this Occam’s presentation.

### **Introductions.**

How many times have we been on calls where the intro is orderless and lasts much longer than it should? 15-minutes for an introduction is too long unless in academia where credentials are overly important. Keep the intro to less than 10-minutes. Do this by using “a word” to describe your company based on the audience and intent of the call.

Jump immediately into the intended purpose of the call. Open dialogue by asking if this aspiration(s) aligns with the guests on the call if the audience is less than five attendees. This inquisition is not feasible with multiple parties attending your meeting.



### **The body.**

Minimize challenges by lessening complexities – Li Ka-shing. Our value to the beholder would skyrocket if presenters would all adhere to this consistently.

Do not use big words, acronyms, or the latest word you think is cool because of a TikTok your daughter showed you. Big words do not make you more valuable, and acronyms can be disconcerting. LOL.

Instead of trying to impress, get real. When trying to simplify, get on the same level as our audience, and get to the essence of the topic as professionally as possible.

### **Give homework.**

What is the biggest distractor of all meetings? Other technology. The vibrating phone in the hand of your audience is your worst enemy. How to combat this? Intra-call assignments. How dare you give your attendees something to concentrate on that will aid the call! Here is an example of effective intra-call collaboration and a major aid for takeaway: [audience] write down three words during this call that will make you either question this event, or remember this event for the benefit of the next few months after this call. After this event we are going to reach out to you and go through these three words with you to carry-forward and “personalize” this event for you even further.

### **Questions?**

The dreaded “I want to leave time for questions.” Easy rule of thumb: if less than five attendees, pause for questions in real time and not at the end. More than five attendees ask the group to direct message the host questions for later conversation. After all, in each meeting we are attempting future returns from all participants. By asking for directed questions it gives the opportunity to follow-up and be followed-up with.

### **Back it up!**

We call it the 1-2 rule. You get two chances for your technology to be on the ready and work cleanly. After two, you are embarrassing everyone on the call, you look inept, and open the door for



attendees to leave or get back on that dreaded phone again to start texting! Remember these three rules for your back-up plan:

1. *Run through* with colleagues before the call – have someone “attend” from outside company technology to ensure accuracy.
2. Be ready to *move to phone-only* – have a dial-in backup in your invitation.
3. Be ready to *email with full presentation* to all attendees if you cannot share screens.

### **“Not blahhh, but not AHHHH.”**

You ever stare at a dying fish watching it flop around? Not for very long. Nothing states “not interested” more than lack of energy. At the same time, every presentation should not be your rendition of one of Jordan Belfort’s speeches in “The Wolf of Wall Street.” The trick remains; “know your audience”, but sometimes it is not possible to know them during the first meeting or when you have a union of different personalities on the call. Therefore, we like to adopt the rule of Clever-Calm. Be clever on the call. Offer some excitement, flux in voice, a smile here and there, a quip, and other modifications to keep things fresh. And be calm. Nothing sells knowledge and confidence more than peace. A calm presenter knows his craft and can deliver to an audience of many.

### **Gifts for all!**

Let us include one idea for fun and in closing that allows you to be memorable. Send gifts before and after the event. Easier for smaller numbers, but still doable for mid-size groups. The gifts do not have to be PlayStations for summer sanity with kids at home. We are thinking a box of Snickers and Granola bars with a note: “do not open until call time.” After the call, a magnet with a word you may have used on the call or another word that may remind them of your event. For those overachievers, snapback hats with your company logo.

Remember, Occam’s presentation. Effortless presentations that bring the audience directly to you. Minimize the complexities to attract your desired outcome.

Be the group people continue to talk about.

*Spring 2020. Contact [info@surgebc.com](mailto:info@surgebc.com) for additional information. Sources: Surge Business Consulting. This is not tax or legal advice and is the opinion of its authors, Surge Business Consulting, only.*