



Outline for Spotlight Executive Presentation

Rev 1, November 2018

From time to time, we take a deeper look at each members' business. This allows us to better put into context issues that arise within it and be more intelligent in our comments. It is also useful as an introduction to a new member's business.

David Friedman shared this outline for a spotlight executive presentation. You can certainly deviate from it, but the list is a good reminder of what is of interest and value to the group discussion.

The whole deck is should be about 15 slides. You can pull many of the slides from other decks you have from company meetings or board presentations. You can also outsource the creation of some slides to other teammates. (eg. financial slides can be prepared by your CFO, product slides by your product people, etc.)

- 1) Title slide with mission statement
- 2) The three biggest challenges before your business right now and for the next 1-3 years.
- 3) What you do, who the clients are, and your place in the market. (eg. "We make footballs for NFL and College football teams. Our footballs last longer than any other balls and therefore we are able to charge a premium price.") Keep this brief with more detail to follow.
- 4) Leadership team and org structure. Include your governance structure, advisory boards and coaches. (This could be 2 slides)
- 5) Financials (Don't move this to the end. Keep it near the front. The room will not understand your business without numbers.)
 - a) 5 year P&L
 - b) Historical (3-5 year) Revenue, Expenses, EBITDA - Graphs are best.
 - c) Balance sheet
 - d) Projections
- 6) Product
 - a) What does it do?
 - b) What does it look like?
 - c) Who uses it?
 - d) Where is it headed?
- 7) Sales & Marketing
 - a) How do you market and sell the product
 - b) What is your sales team structure
 - c) Sales team performance (graphs and trailing numbers help)
 - d) Sales Projections and how they are made
- 8) Where is the business headed?
 - a) Where do you want the business to be in 3 - 5 years?
 - b) Where do *you* want to be in 3 - 5 years?