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Media Release

Financial Advisers Presentation Deficiencies Hinders Client Engagement & Connection

Monday April 7, 2013. Mr. Claudio O. Pannunzio President and Founder of US based i-Impact Group said financial advisers invest a lot of time and resources to develop their client presentation, spending many hours rehearsing the delivery to ensure its success. However, many advisers unknowingly have a number of common deficiencies in the articulation and client interaction process with failings similar to traps speakers fall into when delivering presentations or speeches.

Pannunzio's personal research into this area that includes Australian advisers, has identified five key areas for improvement, the first being failure to emotionally engage with the audience.

"During a presentation, just stating the facts could actually increase the risk of losing the audience," said Claudio Pannunzio. "Powerful and effective communication is a symbiotic interaction of emotional and intellectual powers that aims to engage your audience's hearts and minds."

"While the scope of emotional power is to stimulate an audience's imagination, intellectual power should be used to pique listeners' interest by using reasoned arguments and backing them up with data."

Even when dispensing data and statistics to their client or prospective customer, advisers should add some '*emotional colour*' with an appropriate anecdote or a short story to make the delivery more powerful and meaningful.

An emotional connection is established *only* when the adviser can satisfy the audience's unspoken million-dollar questions: "What's my takeaway here?"

Pannunzio suggests that the clear answer to that question provides the emotional hook needed to captivate the audience. For example, instead of stating, "Today, I will talk to you about the importance of establishing a spending rule while in retirement." Instead, say "Today, you are going to learn how to reduce the risk of outliving your retirement savings."

Not being genuine is the second deficiency identified by Pannunzio as the success of any presentation is also a direct function of the authenticity of the presenter.

Pannunzio continued, "Don't waste time and energy trying to be and act as the person you believe your audience wants you to be, but rather focus on who you are and the message you intend to deliver."

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“By trying to be someone else you will most certainly lose your most effective persuasion asset – your authenticity. It was Judy Garland who once said, “Always be a first-rate version of you, instead of a second-rate version of someone else.”

Abusing technology is the third adviser presentation deficiency.

When it comes to creating content and visuals for a presentation, nothing is friendlier than technology. PowerPoint can be a powerful tool, but only when practitioners know how to use it.

“I continue to see a significant number of advisers who misuse this medium, as they cram too much content into their slides and often overload them with images, videos and animations,” said Pannunzio.

The written content of a slide should be limited to very brief sentences or single words that act as placeholders for the thoughts and ideas to be articulated during the presentation.

Slides crowded with long sentences and dense paragraphs will lead the audience to think “this is a slow and tedious read-along.”

Pannunzio added, “The important fact that must be remembered is that a visual aid like PowerPoint is just an aid, and as such, can only help get the point across. That’s it!”

“The most important task must be performed by the adviser: connecting to his / her audience in an emotionally engaging manner.”

The omission of stories and anecdotes is a further missed opportunity by advisers to engage and connect.

A study conducted by well-known author and psychiatrist William Glasser determined that people retain 20% of what they hear, 30% of what they see, and just 50% of what they both hear and see.

These statistics should provide strong encouragement to intersperse a presentation with clever anecdotes and relevant stories. Narratives help audiences give life and meaning to the movie that is going on in their heads as they listen to the adviser.

To facilitate this, Pannunzio recommends the use of powerful human-interest stories, memorable characters, and engaging, dramatic and amusing anecdotes relevant to the adviser’s presentation.

“Fire up their imaginations and keep them interested. Ultimately, that’s what they will remember,” said Pannunzio.

Speaking in jargon is the fifth and final flaw that many advisers exhibit.

Sitting in on an adviser’s presentation, Pannunzio realized that although the adviser was very knowledgeable and communicated her financial industry expertise with confidence, the audience was having difficulty following and understanding the presentation.

Unfortunately, too much of the presentation was filled with industry jargon and

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acronyms. This is a mistake too many advisers continue to make when delivering a presentation or conducting a client event.

When preparing any presentation, Pannunzio recommends that advisers try to emulate the type of language used by newspapers to craft their personal finance columns as it is the clarity and simplicity of the language that enables everyone to understand it.

Pannunzio concluded, "Don't forget the basic rule: If your audience cannot follow what you're saying or understand what you're offering, they won't adopt, buy or apply it."

Profile: Claudio O. Pannunzio



Claudio Pannunzio is Founder and President of USA based i-Impact Group Inc and possesses two decades of financial services experience. He has held senior positions and led the currency trading activities of a number of premiere global financial institutions both in Europe and in the U.S. He has also served as Portfolio Manager and Head of the Investment Committee at a European investment firm.

He is the PR and Social Media Expert for Financial Planning Association's Practice Management Center and one of RIA Central's Thought Leaders. He's an active contributor to the blogs of both these organizations and also conducts for them Webcasts on Practice Management issues.

Claudio frequently speaks at industry events and contributes articles to The Journal of Financial Planning, Investment Advisor, Broker Dealer Journal, Research and Advisor Today.

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Issued by Joe Perri & Associates Pty Ltd

Media enquiries:	Mr. Claudio Pannunzio
	i-Impact Group Inc www.i-impactgroup.com
	Tel: +1 203 532 5881
	Mobile: +1 203 243 7679
	Email: Claudio@i-impactgroup.com