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Speech Improvement  
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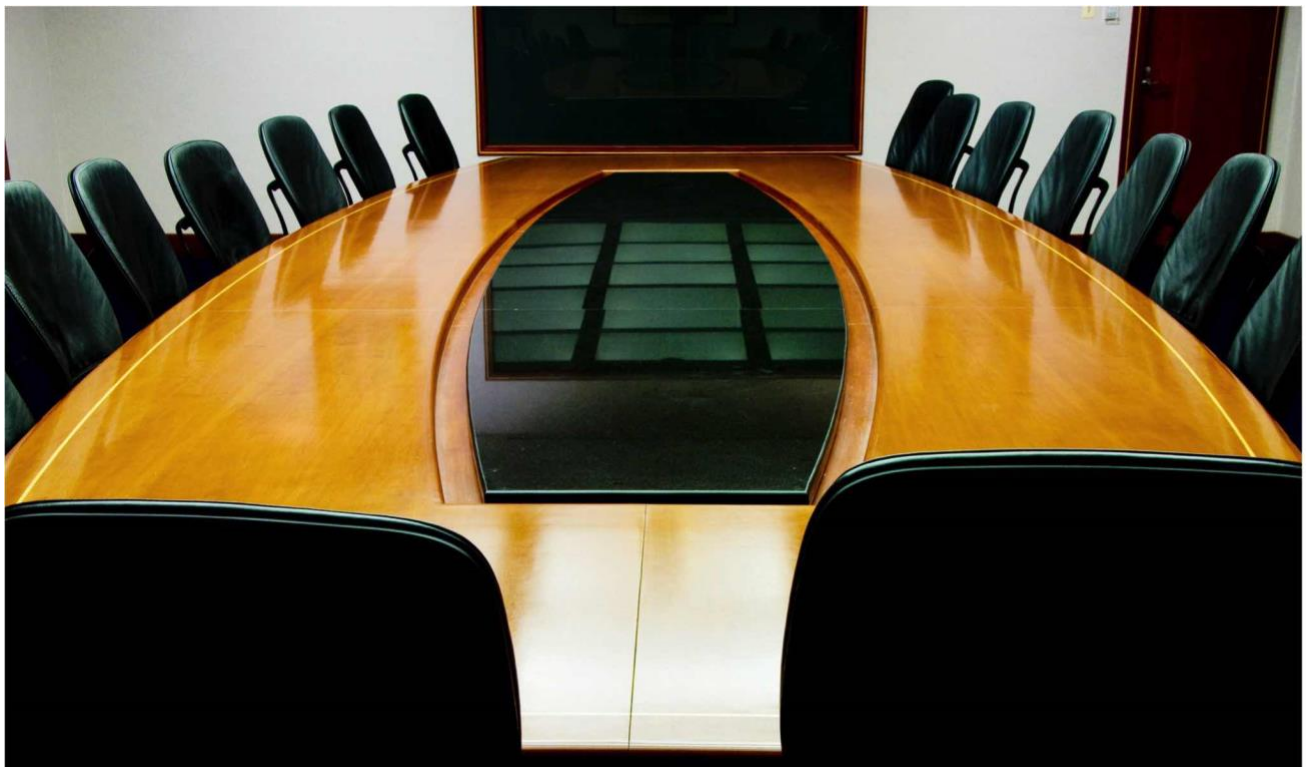
# Five Reasons Investor Presentations Fail

And how you can avoid them



## Table of Contents

<b>Introduction: Why This Matters.....</b>	<b>4</b>
<b>The Five Big Challenges We Hear from CEOs .....</b>	<b>5</b>
<b>Why Listen to Us? .....</b>	<b>6</b>
<b>Our Advice and Strategies .....</b>	<b>7</b>
<b>Practice, Practice, Practice .....</b>	<b>12</b>
<b>In Conclusion .....</b>	<b>14</b>
<b>Appendix A: Checklist for Your Investor Presentations .....</b>	<b>15</b>
<b>Appendix B: Meet the Authors .....</b>	<b>17</b>
<b>About Us .....</b>	<b>19</b>



This e-book was written by the team of Executive Communication Coaches at The Speech Improvement Company. Visit us at [www.speechimprovement.com](http://www.speechimprovement.com)

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## Introduction: Why This Matters

Formal business presentations are among the most powerful, productive, and valuable means of securing funding, gaining approval, and/or advancing your business. However, they differ from casual conversations, update meetings, and informal business interactions. There are unique requirements, expectations, and challenges. Likewise, specific behaviors help or, in some cases, hinder ultimate success.

The Speech Improvement Company recently conducted face-to-face interviews with senior executives to learn about their challenges when giving or receiving these types of presentations. We have integrated that data with the latest research across various industries. Additionally, we have combined those insights with our experience gained from more than 60 years of training and coaching thousands of business leaders, as well as from more than 2,500 formal business presentations.

We've learned that many executives and teams are poorly prepared to deliver important messages effectively during formal presentations. For example, it could be simple nervousness or lack of confidence on the part of one or two presenters, poor team coordination, difficulty conveying complex data, ineffective use of support materials such as visuals, or difficulty handling questions confidently and competently. These are some of the key challenges CEOs and others face when they are responsible for formal presentations.

In this report, we will identify the five most frequently reported areas of challenge found in our research. In addition, we will provide our advice and strategies to strengthen each of these five challenges and ensure high impact during these critically important business presentations.



# The Five Big Challenges We Hear from CEOs

We train and coach companies worldwide. These companies, regardless of size, share the same hurdles when delivering critical formal presentations. Here, in no particular order, is a brief look at the results of our recent survey and interviews with corporate leaders across a variety of industries. The five most frequently reported areas where formal presentations fall short:

## 1. Presenting technical information to non-technical people.

The content of your presentation may be, by its very nature, highly detailed, complex, and often technical. Your listeners may not have the same level of knowledge as you. The challenge is finding the appropriate way to convey the essence of your technology, research, methods, results, history, or strategy in a manner that demonstrates its efficacy and why it deserves acceptance and support.

## 2. Not being perceived as a passionate, competent, and cohesive leadership team.

Passion, Competency, and Cohesion – These elements make for a compelling presentation when demonstrated by the entire team. However, maintaining these characteristics and interactions can be especially difficult when the stakes are high and pressure is evident. For example, passion means exhibiting confidence and commitment through language and nonverbal behaviors. Competency means demonstrating comfort with all aspects of the topic and its implications. Competency also means being able to respond to questions with sound confidence and skill. Cohesion means much more than appearances or addressing each other by their first name. Critical listeners want to know, *"Do they work well together? Do I trust that this team's research, strategy, and skill will produce positive results?"*

## 3. Some presenters are not good speakers.

Your presentation must not ride on the coattails of one or even two good presenters. For many C-level executives or others, delivering formal presentations may not be a strong communication skill. Astute listeners will identify weak presenters who are unable to deliver what they introduce. Such speakers/presenters may need help learning to be effective in formal presentations, whether intended to inform, persuade, or both. You can genuinely "knock the ball out of the park" when each member of your presentation team speaks with confidence based on competence with both content and the process of presenting.

## 4. Failing to present a clear, concise, convincing story.

Part of showing a strong team is that each presenter must understand and agree to a central, simple theme both for the overall message and their specific contribution. A theme statement (sentence) should consist of approximately six to ten words. Consistency means being able to present that

theme several times during the presentation. It must always reinforce the main message(s) and build on or reference what the other presenters are saying. Concise and conviction mean that each speaker should be able to present their content in a short, evidence-based manner. Additionally, this well-crafted, convincing messaging must be supported by salient data without feeling like a “sales pitch.”

#### **5. Not using support materials effectively to enhance the content.**

This may be the most egregious mistake that senior-level presenters make when speaking. It is one of the most frequent challenges we heard from senior leaders in all our interviews. Typically, slides or videos are used to support the messaging, but all too often, the design is too dense, making it unclear to listeners. When the listener's eyes glaze, you can be sure your presentation is going off the rails. Although helpful, the answer is NOT simply to reduce the sheer amount of information on any given slide or video. Also, poor lead-up, introductions, and timing of these visual aids often create an automatic disconnect with the listeners who are trying to interpret a newly displayed visual rather than listen to the presenter.

Despite these five common challenges, you can deliver stand-out formal presentations. There are best practices for all five challenges. You can begin by reviewing the following advice and strategies, which address the challenges introduced earlier.

## **Why Listen to Us?**

The Speech Improvement Company's 60+ years of demonstrated authority and authenticity ensure that the content in this document contains proven, real-world, actionable lessons you can use today. Our latest research on this topic is in this document and reflects our dedication to providing high-quality, timely information.

Our efforts and works have helped more than a million people worldwide. We have a deep understanding of human behavior and communication. Our coaches are experienced, knowledgeable, and personable professionals.

- We have published 13 books on leadership and management communication.
- We are not a PR firm that also "drills" presenters.
- We do not use theatrical techniques. This is not acting.
- We know that our work is not about us. It's about helping others.
- We've honed our techniques and earned our longevity serving discerning firms such as Apple, Bank of America, McKinsey & Company, Pfizer, Sony Music, Bain Capital, and Google.

## Our Advice and Strategies

To avoid these pitfalls, here's what we teach and practice with our clients:

### **Challenge #1 - Presenting technical information to non-technical people**

On the one hand, there is the normal tendency to 'dumb it down.' On the other hand, it is crucial to recognize that although listeners may not be technical experts, they are very interested in knowing that you and your team *are*. Communicating this information is your responsibility. The extent to which you can accomplish this will dictate your success.

In preparation for the presentation, identify the technical information essential to understanding and why it is vital.

Is it intended to inform, educate, motivate, persuade, challenge, etc.?

Decide where it should be presented and who should present it.

Determine how it should be presented, i.e., how it should be introduced, explained, and justified.

Would a visual, such as a slide, video, or model, be helpful? A common mistake is made when using slides. The slides are filled with data and are not designed for clarity and learning.

Remember that while the "takeaways" from your research may be obvious to you, others may not understand them; thus, you may need to explain them to the listener. The presenter must also be able to provide information that will be fresh to the audience. That includes everything from adequately pronouncing technical terms to introducing new data efficiently and keeping the presentation in sync with the slides. If ignored, a technical presentation will likely fail because one or more listeners will be "lost in the weeds."

### **Challenge #2 - Not being perceived as a passionate, competent, and cohesive leadership team**

It is well known that "products don't sell, people do." While this adage may not be as accurate for modern-day listeners, it still holds much truth. Listeners will have a pervasive need to understand the technical validity of your work.

However, most listeners are equally focused on the leadership team involved with the topic. They want to know that each team member demonstrates three key characteristics: passion, competency, and cohesion.

Passion does not mean talking louder and faster. It means allowing the authentic joy and excitement you have about what the product, project, program, or service will do. Smiling and using emotional language are two natural ways to show passion. Don't be afraid to use them.

Competency should be demonstrated throughout. While listeners may have seen your written introductions and done their research before your presentation, it is advisable to start with a brief description of each team member's qualifications and why they have a seat at this table. Competency will also be judged by the value and effectiveness each leadership team member brings to their presentations.

Cohesion is a crucial indicator to listeners. They want to know that the leadership team for this project, product, program, or service can work comfortably together to capitalize on their ideas, accelerate development, and build a strong, sometimes new, process to succeed. It is important to show familiarity with one another through how you refer to each other and each other's content.

Short transitions such as "Alex will cover..." or "as Margaret said..." will give the impression of team unity and comfortable, productive interactions. It is also worth remembering that team member cohesion starts in the parking lot or the lobby as you assist one another with materials, coats, etc., listeners are watching and assessing you as you arrive, when you depart, and at every turn, not just when you are presenting.

### **Challenge #3 - Some presenters are not good speakers**

It is not enough to have one person on the team who is a terrific presenter. Everyone needs to be effective; otherwise, the presentation will only be "as strong as the weakest link." Often, especially with newly formed presentation teams, there is one outstanding communicator; the false hope is that person can carry the presentation.

So, how do you evaluate other team members' presentation abilities? Look for them going too far into the details, appearing nervous, not making eye contact, not connecting with listeners, not responding to questions concisely, being too dependent on slides, lacking passion, or just looking like they do not want to be there. If you see any of that, you have a problem and need to fix it with proper training and coaching.

Some of those characteristics may not be an issue in an academic environment, but they won't cut it in a critical business presentation. In academic speaking, technical detail is encouraged, while emotion and bias are frowned upon.

Everyone on your presentation team must speak with a high level of comfort, passion, and confidence in each other, the team's vision, and the team's ability to execute it. If you find yourself facing this challenge, invest in training or coaching that will elevate presenters to

a high level of presentation effectiveness, one that gives the leadership team the confidence and peace of mind to put any of them in front of listeners.

#### **Challenge #4 - Failing to present a clear, concise, convincing story**

This seems almost too obvious to be a serious challenge. Yet, in virtually every interview we did with executives, every research study we reviewed, and most of the presentations we have coached, it emerged as one of the most critical elements of a successful business presentation. You should be able to state your entire case in a few simple, declarative sentences. Listeners will give you little time and attention if you cannot quickly state why your team is the right fit.

One major executive who hears more than 300 presentations a year told us that he tunes out if he does not hear a clear, concise message within the first two minutes.

"Clear and concise" means that you should be able to communicate your research, plans, and ideas in simple layman's language. Using terms that are familiar to you, often technical terms, may not be as effective. As stated earlier, this does not mean you must "dumb it down." It means focusing on the most important information they should take away and recall when making decisions.

Imagine that they had forgotten just about everything you said. What, then, is the one thing you would want them to remember? This is called the theme of the presentation. There should be a theme for the presentation, and each speaker should have a theme statement for their presentation. Each of those themes should reinforce the presentation's overall theme. A nuance here is that each time the theme is repeated in the presentation, no matter who says it, the exact words and emphasis should be used.

To help the listeners follow you logically, here is a powerful but simple four-step process for organizing both the overall presentation and each of the individual presentations:

First, tell your listeners what you will present. Include things like the major topic headings, who will be presenting that information, whether slides or video will be used, how much time you anticipate, how you will handle questions, and any other relevant information.

Second, please give them a good reason to listen to your presentation. Be able to answer the question in their minds: "What's in it for me?" Your presentation will likely fail if you cannot communicate solid content and rationale with these two steps.

Third, present your case in an organized, logical fashion, using hard data, examples, metaphors, and stories.

Fourth, summarize and emphasize the most important points you have made. Conclude your thoughts with appropriate actions to be taken.

Other data will be judged as convincing depending upon how well it supports the case you will make in stating: 1) the problem; 2) the solution you have identified; and 3) the analysis regarding the obstacles.

### **Challenge #5 - Not using support materials effectively to enhance the content**

The keyword here is "support." Most likely, you will be using slides during your presentation.

While we have coached teams that found it more productive and applicable to use demonstrations, videos, flip charts, or models as visual aids, slides are the most frequently used visual aid.

Remember that any visual aids should truly support the speaker in conveying the message and helping the listener understand the content.

That seems so logical. Nonetheless, a very common mistake that speakers make is using slides that are too dense, too busy, and too cluttered with information. We see it all the time; this may be important data, critical to understanding, and the most convincing information. Yet, inappropriately presenting them can be deadly.

When speaking clearly, the average American English presenter speaks at 183 words per minute. Human beings can think about 600 words per minute. Therefore, while the speaker is talking, a listener can hear the speaker, understand what is being said, and, in the back of their mind, have around 400 extra words per minute available for other things.

However, if the speaker brings up a slide with lots of text or other content, the brain needs to use that extra 400 words per minute capacity to process it, and it does not like it. It is too much work. Some listeners will not do it past one or two slides, so they end up zoning out.

Slide content should be minimal. Even for a scientific presentation, you may not need detailed, annotated, highly technical images to help convey complex ideas. To help get a handle on this, ask yourself, "Where would a visual aid help me as I communicate my ideas?" "What will help my listener clearly understand my message?" "Do I really need visual support at this place in the presentation?" This simple technique helps eliminate useless information that finds its way into many presentations. With these things in mind, you will find that a few simple, powerful visuals are all that's needed.

Furthermore, to be more effective when presenting with slides, every presenter needs to utilize the following three techniques:

1. **Synchronization.** The speaker needs to be in sync with the visual aids. Your listeners should see it as you speak, not before or after. Bullets should appear as you discuss that specific topic or idea. Use "builds" or "animations" that allow the speaker to control the timing of what appears and when it appears.
2. **Introduction and set-up.** Being organized and well-practiced is important for this. Always introduce the next topic and set up the accompanying visual before showing it. This is the secret sauce that Steve Jobs used to create anticipation in his riveting keynote presentations. It sounds simple, but it takes some effort and practice.
3. **Talk and do.** This is the ability to talk while doing other things. For example, if your computer crashes, can you continue your presentation while it restarts? Alternatively, if you are demonstrating something or using a physical model, can you talk effectively while doing that? If a speaker cannot 'talk and do', it may show incompetence and produce nervousness.



## Practice, Practice, Practice

A word about the need to practice: understanding and implementing these communication strategies in your business presentations is a start, but effective speakers are like athletes or musicians: they need to practice what they have learned.

Not only will you deliver a more focused, confident, and ultimately successful presentation, but you will also be better prepared for the inevitable complications that will arise, such as:

- You were scheduled for a half-hour, but when you arrive, you are told you only have 15 minutes. With little to no time, your multiple speakers need to collaborate and cut the presentation appropriately.
- One member of your team cannot attend a very important presentation, and someone must cover for him/her.
- Technology fails you; the projector cannot connect, the power is out, in other words, no slides, no video.

There is truth to the old adage, "You can't learn to swim by reading the book." For the same reason, presenters must practice individually and as a group. The concept of group presentation practice sessions is often underutilized, based on the wrong-headed notion that intelligent individuals in an organization can practice on their own time and come together when it's time to go live.

This overconfidence rarely leads to successful outcomes. Patching together individual presentations will often make them appear disjointed. The interactions are absent; it is not always clear how the individual presentations support the central theme.

Usually, the messaging is askew, the language is different, the "seams" will show, and it does not flow well. When a presenter can't attend, others cannot easily cover for them, and the overall presentation suffers.

Despite the difficulty of aligning the schedules of busy listeners, the need to prioritize and schedule multiple formal group presentation practice opportunities cannot be overstated. Suppose selected team members are reluctant to practice a presentation more than once or twice. In that case, some good questions to ask as a team are, "Are these presentations absolutely critical to the success of our venture?" "Do we believe that we already have the best presentation these listeners are going to see this week, month, or quarter?" "Are we going to waste all that time, energy, and personal capital that got us in front of these listeners?"

And if you dare: "So what else are you doing Tuesday afternoon that is absolutely, undeniably, and so clearly essential to the success of our business that it cannot be moved?" ...IS this a joke? This is dated language and quite negative.

Do not let egos stand in the way. No one is so good a presenter that they do not need a lot of practice with the other team members.

For most CEOs, the best course of action is always, "It's looking good, but let's run through it a few more times."

Our checklist in Appendix B will help you plan and practice outstanding business presentations.



## In Conclusion

In this e-book, we are sharing with you the combined results of this latest research, including 1x1 CEO interviews, and personal one-on-one research interviews with other business leaders, with our 60+ years of experience coaching thousands of investor and business presentations. This new information makes it clear that in formal business presentations, particularly those involving investor elements, there are five specific challenges that are not being met effectively.

These five major challenges are:

1. Presenting technical information to non-technical people.
2. Not being perceived as a passionate, competent, and cohesive leadership team.
3. Some presenters are not good speakers.
4. Failing to present a clear, concise, convincing story.
5. Not using support materials effectively to enhance the content.

The responsibility of meeting these challenges falls directly on the entire presentation team to demonstrate the following:

- Use professional understanding when conveying technical data.
- Display knowledge and confidence, especially in handling questions.
- Demonstrate the ability to interact and work well together.
- Show competent speaking skills to engender listener confidence.
- Comfortably tell a clear, concise, convincing story.

Each challenge has best practices that strengthen individual speakers and leadership teams in any formal business presentation, and especially during investor settings.



## Appendix A: Checklist for Your Investor Presentations

### **Presenting technical information to non-technical people.**

- Does the team have someone capable of updating the technical data to match current knowledge?
- Does the team understand why particular technical data is being utilized? (education, persuasion, etc.)
- Does the team know who is best suited to answer specific technical questions?
- Does each speaker know how to present technical data with visual support? (see Challenge #5)

### **Not being perceived as a passionate, competent, and cohesive leadership team.**

- Does the team recognize these characteristics in each speaker?
- Does each speaker recognize personal strengths and limitations with these characteristics?
- Does the team have plans for demonstrating these characteristics in both content and process?
- Are team members prepared to cover for an unexpected teammate absence?
- Does each team member recognize the listeners' needs for each of these characteristics?
- Does the team have plans for how to portray these characteristics when not speaking?

### **Some presenters are not good speakers.**

- Does each team member recognize personal strengths and needs as a presenter?
- Does each team have plans to utilize individual speaker strengths?
- Does each team member have the skills to use support material (slides, video, etc.)?
- Does each team member demonstrate comfortable interaction with teammates?
- Does each team member have the skills for handling questions?
- Does each team have plans to strengthen the needs identified in this challenge?

### **Failing to present a clear, concise, convincing story.**

- Does each team member know and understand the team theme?
- Does each team member have plans to incorporate that theme into their individual content?
- Does each team member have the ability to tell the story of the content in four simple sentences?
- Does each team member have their content organized using the four-step process?

- Does each team member know what part of the team story they are telling and why?
- Does the team have a person who can listen and provide objective, constructive feedback?

**Not using support materials effectively to enhance the content.**

- Does each team member recognize this issue as a key concern for every listener?
- Does each team member realize that they are not 'human aids' to the slides, video, etc.?
- Does each team member have a purposeful, consistent plan for using visual support?
- Does each team member have sufficient skill in the preparation of visual support materials?
- If a non-presenter is preparing visuals, has a team member been designated to oversee, review, and revise?



## Appendix B: Meet the Authors

[Dr. Dennis Becker](#), our founder, has helped thousands of men and women from all walks of life. He has an extensive list of clients in corporate, public, and private settings; he also works with political, sports, and media professionals. In addition, he coaches professionals for appearances on major broadcast networks, including CNN, CNBC, and CFN.

Dr. Becker has developed his unique and insightful approach to helping clients overcome their fears of public speaking and refine their communication skills.

As a speaker, Dr. Becker has appeared before hundreds of clubs and organizations, from local community groups to national associations. He has been featured on radio and television programs as a guest expert or motivational speaker. He hosted a syndicated radio series called Talking About Talking. He is currently a co-host of a podcast focusing on controlling manipulation. He has authored nine books on Communication and instructed at both Harvard and MIT.

Dr. Becker completed his undergraduate degree in Speech Communication and Broadcasting at Emerson College in Boston, his Master's in Rhetoric and Public Address at Emerson, and went on to earn his Ph.D. in Media Communication from The Union Graduate School in Cincinnati, Ohio.

[Robin Golinski](#) is an energetic and accomplished coach and trainer at The Speech Improvement Company. Her intuitive and upbeat personality accentuates her insightful and practical communication skills.

Robin saw the power of storytelling and humor as effective communication tools for influencing and persuading others. Among Robin's many accomplishments are co-author of The Handbook of Communication Training, co-author of Outwitting the Manipulator: Protecting Yourself in Real-Time, co-host of a podcast focusing on controlling manipulation, and former Chair of the National Communication Association Training and Development Division.

In addition to serving many corporate clients, she has been a trainer for Harvard Schools of Medicine, Design, and Engineering. Robin received her B.S. Marketing Degree from Oakland University; she is nationally certified by the Instructor Training Institute and an active member of the National Communication Association.

[Laura Mathis](#) is a Senior Coaching Partner with The Speech Improvement Company. She is a past TEDx speaker and published author, with more than 20 years of experience helping professionals strengthen clarity, confidence, and executive presence in high-stakes communication settings. Her coaching spans thousands of leaders across private equity,

real estate, venture capital, insurance, commercial real estate, medical manufacturing, life sciences, and other sectors, with a focus on senior leaders and investor-facing professionals.

She is trusted by top organizations of all sizes, including Fidelity Investments, Bank of America, Audax Group, Putnam Investments, Arrowstreet Capital, and many others.

[Dr. Ian Turnipseed](#) is an experienced Senior Coaching Partner with The Speech Improvement Company. He has been involved in public speaking and training for the past 25 years as a speaker, presenter, coach, trainer, and researcher.

Ian has coached over 400 conference speakers across multiple industries, including retail, financial services, and life sciences. He has taken their presentations to a higher level by addressing their public-speaking challenges, such as controlling nervousness, simplifying complex (and often scientific) information, genuinely connecting with listeners, and being more authentic.

Dr. Turnipseed holds a Doctorate in Mass Communication and Media Effects with a specialization in Cognitive Psychology from the University of Alabama. He also holds a Master's in Rhetorical Theory from the University of Alabama and an undergraduate degree in Journalism from Clemson University.



## About Us



Since 1964, the professional Speech Coaches at The Speech Improvement Company have touched thousands of people worldwide. We are a woman-owned business and the oldest speech coaching firm in the United States.

We support an international clientele, including Fortune 500 executives, business professionals, politicians, professional athletes, entrepreneurs, and private individuals in strengthening their communication skills. We work with leaders of countries, companies, and people throughout organizations. Our coaches are formally educated at the graduate level or beyond in all aspects of human communication and cultural understanding. We have both the educational background and the real-world experience to identify speaker strengths, uncover areas of need, and evoke behavioral change.

To date, we have written 13 books on communication and published them in five languages. We have instructed at Harvard University, MIT, and other world-class institutions, and have conducted pro bono work for non-profit and community organizations. Our coaching team attends monthly development days to stay apprised of the latest research, theory, tools, and trends in human communication.

### What Topics We Cover

Our focus is on helping clients strengthen communication skills for application in both business and personal settings. While each client interaction is unique, our most popular areas of focus are the following five:

- Leadership & Management
- Public Speaking
- Sales Communications
- Customer Service Excellence
- Accent Modification

### Our Clients

We've delivered group workshops and one-on-one executive coaching to thousands of clients, from the world's largest pharmaceutical firms to mid-sized retailers, small manufacturers, and tech startups. They all share one challenge: the need to speak clearly, persuasively, and with confidence in any setting. Some of our well-known clients include:

Pfizer  
Goldman Sachs  
Apple  
Amazon

Reebok  
Kaiser Permanente  
The Nielsen Company  
McKinsey & Company

Mass General Hospital  
Bank of America  
Takeda  
The Boston Red Sox

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