Presentations to the board of directors are high risk, high reward. This research collection offers proven techniques for three common types of presentation that will help executive leaders get what they need from the board of directors and be viewed as strategic partners.

Analysis

Presentations to the board of directors are high pressure and high stakes. Executive leaders must help the board make consequential decisions about the future of the enterprise or individual business units, but the board will usually give leaders just 15 minutes to deliver the presentation. Leaders who have never presented to the board, or do so infrequently, must learn to use this time effectively.

Leaders should follow the BOARD acronym, summarizing the overarching rules for all board presentations (see Figure 1).

Figure 1. The BOARD Acronym for Executive Leader Presentation Success

The B.O.A.R.D. Acronym for Successful Board Presentations

Avoid BORED Instead, Be

- Brief
- Open
- Accurate
- Relevant
- Diplomatic

Source: Gartner

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Executive leaders can improve their board presentations by using techniques that other leaders have proved to be effective and that are supported by psychological principles. Most board presentations fall into one of three categories:

- **Brief**: Leaders must decide on their messages and state them clearly at the onset of each presentation. Gaining additional time with the board is sometimes a sign of board interest and success. At other times, it simply means greater scrutiny or a lack of clarity in the board presentation.

- **Open**: Boards have a responsibility to shareholders and stakeholders to support transparency. Leaders should always strive to provide data regarding both successes and challenges so that the board feels appropriately informed regarding subjects in their purview.

- **Accurate**: The proceedings of many boards are either discoverable or a matter of public record, so it is critical that leaders present accurate data to the best of their ability. It is perfectly acceptable for leaders to tell board members that they do not know the answers to some of their questions and provide the information later, rather than inadvertently providing partial or inaccurate information.

- **Relevant**: Board boredom is a result of irrelevance. When leaders inadvertently focus on topics that are irrelevant to the board, the consequences can be significant. To ensure board relevance, focus on the three things that all boards care about most: revenue (mission for the public sector), cost and risk. When leaders present information through these three lenses, it is difficult to go wrong.

- **Diplomatic**: Political dynamics are the reality of every boardroom. Leaders must always be aware that the problems they propose solving were likely created (or contributed to) by someone in the boardroom. Be aware of the history of investment decisions and stay informed and current on who the board members are and how they interact with one another in making decisions.

Executive leaders can improve their board presentations by using techniques that other leaders have proved to be effective and that are supported by psychological principles. Most board presentations fall into one of three categories:

- Request for approval of proposed funding or direction
- Status report for an IT-related initiative or an IT overview
- Strategic discussion on co-creating a digital strategy
The three research documents below will help leaders create and edit each type of presentation. Every document includes five to 10 "board rules" for that presentation type. We summarize the rules in a checklist at the beginning of the document that leaders can use to evaluate their presentations, and we follow with explanations, examples and illustrations of every rule.

**Research Highlights**

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**Rules for Discussing Digital With the Board of Directors**

Boards increasingly understand how critical digital is to the future of their enterprises. When digital is on the board's agenda, it is not so much a presentation as a strategic discussion of opportunities and risks. Digital implementations require experimentation, risk, innovation and customization to the enterprise and its customers to deliver business value. This requires the executive leader to engage the board so that both the leader and the enterprise can gain an advantage from digital initiatives.

**Rules for Presenting Status Reports to the Board of Directors**

The status report is one of the most common subjects for a presentation to the board. The board may request an annual overview or an update on the status of a major initiative. The best status presentations to the board deliver business insights rather than just data. The purpose of any status report is threefold:

- Deliver insight to the board regarding the business unit's contributions to business objectives.
- Gain support required from the board to continue moving forward.
- Build the brand for the leader and the unit.

**Rules for Presenting Proposals to the Board of Directors**

Deliver insight to the board regarding the business unit's contributions to business objectives.
Most executive leaders must make proposals for funding, staff resources or approvals of strategic direction. The primary metric of success for the request for approval presentation is that the leader got what they wanted. A common challenge with board presentations is that it can be difficult, or even impossible, to determine what the board members actually want. Following a small number of practical board rules can ensure that leaders receive whatever they are requesting.

Recommended by the Author

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Toolkit: Presentation for What the Board Needs to Know About Digital Business

2021 Gartner CEO Survey: The Year of Rebuilding

Tool: M&A Buyer Presentation for Board of Directors

Tool: M&A Seller Presentation for Board of Directors