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## How to Be a Strategic Communicator: 5 Tips

Regardless how much knowledge and experience you have, strong collaboration skills will maximize your effectiveness.

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Even CFOs who are bona fide strategic partners may still fumble when talking finance to the rest of the company. To effectively collaborate with the executive team, the board, and other departments on key financial decisions, they should tell the story behind the numbers, not just interpret them, says Suzanne Bates, founder and CEO of Bates Communications.

That may mean delegating some accounting responsibilities to direct reports and investing more time into honing communication skills, Bates says. “When you get to this level, 80% of your job is communication,” she says. With that in mind, here are five tips to become a more influential, engaging communicator.

### 1. Reach Out and Align Interests

Communication is “a means to influence,” and when done well, it can help win support for your strategic ideas, says Susan Cramm, executive coach and president of Valuedance, a leadership-development firm.

Figure out what drives people and where your interests meet theirs by asking them about their goals and projects. When Cramm was a CFO and wanted to improve operational efficiency, she approached the people who could further that goal: operations executives. She explained why improvements were necessary and how their programs could be more efficient given some additional perspective from the finance department. The operations people suggested areas where they could make cuts, and in return Cramm gave them more-tailored analytical support.

Engaging with others reveals their unique strengths and limitations, Cramm says. In one case, the vice president of operations at her company had dyslexia and needed financial statements read aloud to him. Cramm says that if she had not gotten to know him, she “would have assumed that he wasn’t interested in financial performance or didn’t want to collaborate with finance.”

### 2. Teach Finance

It’s crucial to translate its function and its vocabulary “into something that’s crisp, compelling, and accessible for people who don’t work in finance every day,” says Bates.

An example of a way to do that is to set up a brown-bag lunch or meet briefly with other departments to explain basic finance in a casual context, says Joel Garfinkle, founder of Garfinkle Executive Coaching. Be encouraging and use business terms instead of finance jargon. It also helps to speak in terms of your audience’s interests, showing it that understanding the numbers could help gain traction for its own ideas. For example, the marketing team could make a better pitch for a new initiative by analyzing its profitability, Garfinkle says.

And if you reach out to other departments before formal presentations, they will be more likely to pay attention when you do get up to the podium, Cramm adds.

### 3. Tell a Story

To keep meetings and conversations engaging, model them after the dinner-table conversations people have after work, when “all the stories come out and the real communication happens,” says Bill Maw, CFO of Liquidnet, a vendor of securities-trading systems. That means telling stories that keep your audience’s attention through humor, imagery, and other techniques.

At a workshop Maw attended, an insurance executive spoke about his company’s quest to improve Six Sigma quality. With its language of four nines, green belts, and Plan-Do-Check-Act Cycles, Six Sigma can sometimes sound incomprehensible. So instead of talking about “lean processes,” the executive spoke of his effort to shed time-consuming, bureaucratic procedures. He told a story about a little yellow form that had been used at the firm for 30 years and that everyone had to fill out, although no one knew why, Maw says. The speaker imagined the form, always beyond reach, floating along through his enormous office building and taunting him. Call it executive humor, but the audience was laughing. “I felt like I was walking around that place with him,” Maw says. “He was talking about probably one of the most boring topics, but he dragged you into a real-life story.”

#### **4. Get to the Point**

Another way to keep people engaged during meetings: don’t bore them to tears with extraneous details. Craft presentation slides to highlight broad themes, and keep presentations to no more than six slides. Putting a limit on the number of slides, by the way, does not mean crowding every tiny bit of information you can onto each slide. When a CFO unveils a 25-word introduction slide, “you can just feel the room deflate,” Bates says.

Including too much detail on slides can also tempt you to read the presentation, a mistake that can keep you from engaging with the audience. Include only important facts and numbers, and rely on an outline that allows you to speak conversationally. Fewer slides doesn’t mean the conversation has to be less substantive, though, because “people can always ask questions,” says Bates.

Keeping the slides simple sometimes means choosing graphics over words. Maw recalls a workshop instructor who used a picture of a train wreck to represent the failing U.S. economy. The message was potent. “You don’t really need to state the obvious with more facts [when] everybody knows how bad things are,” he says. “Sometimes people overkill a message, where one simple but impactful picture says it all.”

#### **5. Don’t Go It Alone**

To improve your presentation skills, seek help from all the resources your company offers, including other people, Bates says. For example, reach out to a marketing employee for help creating compelling visuals for your presentations. Or, interview key audience members before a presentation, asking them to point out your blind spots — what you might be neglecting, and what they would like you to cover. That can lead to more engaging and relevant presentations and foster more productive communication. “Most CFOs don’t take that extra step,” Garfinkle says.

Sitting through a presentation that is not tailored to its audience can be a brutal experience, Maw notes. “I’ve been a victim of that many times, where they’re not telling you what’s of interest to you. And that’s just wasted time and opportunity.”