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Interacting with the Board as an Executive: What You Need to Know

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Introduction

C-Suite executives and key management at both private and public companies should expect to be invited to present to the board. At larger companies, it may be on a regular cadence; at smaller, private companies, these interactions may be more informal and happen irregularly.

Today's board directors are expected to know senior management teams, including mentoring key executives and understanding operational strategy. Invitations to present should be viewed as mutually beneficial: it's an opportunity for executives to gain increased visibility, and for boards to gain the invaluable insights they need to maintain a pulse on the company's strategy, operations, and culture.

In this guide, we share best practices for presenting to the board, including how to prepare, tips for success, and approaches to ensure a seamless follow up. Most of the tips and guidance shared in this guide have been sourced directly from within Athena Alliance, an executive learning community that makes it easy and accessible for women leaders to learn from their peers.

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Before the presentation: do your planning and research

Take the time to research the board and understand the dynamics at play. So much of board work occurs in between meetings, driven by relationships and side conversations. Understanding who is at the table, their backstory, their motivations, and their core areas of expertise will shape your presentation and make you a more informed, prepared speaker.

Consider your assignment at its core. Gayle Fuigett is an Athena member who has presented to the board countless times during her three-decade run as an executive at General Mills. She says it all begins with considering your objective:

"What are you trying to do? Make sure you are engaged with your sponsor to understand, is this a decision-making presentation? Am I going to call for a decision at the end? For me, it was typically an alignment presentation."

Understand who sits around the table

Read as much as you can about each of the board members. How long have they been involved, what are their strengths, what is their business or investment philosophy? Do they have personal agendas or passions? How are they connected to the CEO and other board members? What motivates them, their decision-making, and their worldview?

Knowing where they are coming from can help you proactively understand their potential concerns, objections, and perspectives. This research will be enormously useful in interpreting their questions and comments and ensuring you are taking in the information with the right lens.

Learn what's happening behind the scenes

Gain a grasp on the broader landscape through the eyes of the board. Leverage your direct manager and other senior peers/colleagues to paint the picture of the broad business landscape. What is the board concerned about? What is happening with the business most broadly? If they are asking you to present to the board, what ignited their interest? Note that it may be a regularly scheduled presentation, or that a shift in the business – such as a slowdown in growth or a new product launch – sparked their intrigue.

This effort to understand the "behind the scenes" is a must to get alignment on issues and desired outcomes, before the meeting. For example, if they are investigating potential partnerships or are considering an acquisition, it's good to understand if they may be open to new ideas, or perhaps they are seeking validation.

Athena member Barbara Nelson, public company baord member and former CEO/GM, underscores the importance of alignment and understanding each board member. In a recent Salon, Barbara described a friend who joined a company that was in a turnaround.

"[The] board chair told her what they thought was the issue. She then met with the different board members, and they all had a completely different point of view about what the company was trying to achieve and what the hurdles were. There was a complete lack of alignment around what the issues were. And this is not uncommon, especially in private companies."

Socialize bad news before the board meeting

If metrics are down, if there's been a major customer loss, or a product roadmap mishap, strive to socialize the news before the meeting. You're still sharing the news – but you're giving your audience time to digest it, consider their questions and concerns, and form a thoughtful response. This keeps your facetime at the meeting efficient and positive.

Get your leader's buy-in

Before you present, make sure your direct manager/leader knows what you're going to share, and that you gain his or her approval. They will offer a unique perspective on the potential politics tied to the board meeting or what is happening behind the scenes, influencing your tone in the boardroom. Ensuring your leader is bought into your presentation also keeps them tied to your perspective and aligned with your message.

If you have time, share your slides in advance

This is not a keynote presentation – instead, your slides are meant to ignite a productive discussion. Sharing your slides in advance is considered polite and gives attendees time to take notes, mark down questions, and absorb the information. It's also the key to driving efficiency during the actual presentation.

During the presentation: maximize your time and be efficient

Boards should serve as a competitive advantage and a resource or tool for the success of the business. It's important to respect the board's time – in the broad view of governance, your presentation is one slice of their oversight responsibilities. That said, know that the board members have intent: that they want to learn what you have to share and are interested in understanding your perspective as a member of the management team.

Start by (re)introducing yourself

Even if you know every board director, take just two minutes to introduce yourself and give an overview of your areas of expertise, your current role and responsibilities, and key points – such as how long you've been at the business or key milestones you've guided the company through. This introduction, even to directors who you may intimately know, sets the stage for credibility and reminds directors of the unique perspective you hold of the business.

Get to the point

The goal is to not read the slides back to your audience, it's to get to the key slides in your deck – the ones with the most critical data points or takeaways. Assuming the board has already reviewed your deck, your job as presenter is to be efficient and to take the in-person time to elaborate on the most important slides, and to use the rare in-person time wisely.

One CFO who has presented to boards on countless occasions encourages presenters to think less about the hard data and more about the story behind that data: "I stopped presenting financials," she said. "I would just email them. My slides were built around trends and charts and relied heavily on visuals. It's much easier for people to digest visual information. I also spent the time to tease out trends so board members can get their heads around something in a very easy and quick way."

Remember what you previously committed

If you've met with the board previously, or already shared a plan, what did you promise? What commitments were made and how are those going?

Starting with what was last agreed upon keeps the conversation on track and manages expectations. If board members have questions related to any number of items that you all previously agreed to were not a priority, this is a tactful way to get that point across, while still sharing essential information related to what's happening in the business.

Avoid bright shiny objects

Like above: remind your CEO and board of your original strategy and intent – what you have set out to do and what buy-in you've achieved. Startups in particular run the risk of getting constantly derailed by "shiny objects" – new projects, competing priorities, a lack of focus. Reminding the board of your core strategy and the roadmap forward helps to avoid topics of conversation that can derail from your plan.

Be concise and open

Practice sharing information in a concise, decisive manner. Not only is this great for your executive presence, but it's appreciated for its efficiency. And, go into the meeting with an open mind – to questions, to feedback, to new perspectives. Remember that the board governs the business but may not understand the day-to-day business operations. Respond to questions respectfully and assume good intent.

Gail recalls how she practiced her presentations repeatedly to ensure she was on time and precise. Her advice to others: "Do a dry run, if you can, in front of peers, and what I mean by a dry run is literally timed. If it was a 30-minute presentation, I would set my phone for 30 minutes, turn it upside down and then practice from the first line and present the whole thing, three times through."

After the presentation: thank you and follow up

A thorough approach means you're not just doing the homework before you present – you're also following up, individually, with each board member.

Follow up notes

Send a private thank you note asking for feedback. Re-attach the presentation as you see necessary. Board members may have asked for additional information or reports to support what you presented. This is the time to share that information, or – if it is going to take substantial time to gather – reiterate that you heard their request.

Reconnect with your leadership team

It's also fitting to reconnect with your direct leader and other non-board member attendees to gather their feedback and perspective. Depending on the topic and the board discussion, your operational strategy may need adjustment. Quick follow-up across the team ensures organizational alignment.

Executives, are you prepared to interact with the board?

Athena Alliance members gain access to a vast range of live and on-demand Salons, ranging from presenting to and interacting with the board to financial acumen, how to achieve a board seat, societal issues, industry knowledge, and more. Additionally, members benefit from peer-to-peer mentoring, live one-on-one coaching, and access to board and executive opportunities – only available to Athena members.

If you're a member of Athena, you can log in to watch the full recordings of these recent Salons that speak to how to present to the board below:

Presenting to Private and Public Company Boards	Presenting to the Board and the C-suite

Consider coaching to finesse your presentation skills

Athena Coaches come from a wide range of disciplines and backgrounds – but they all come to Athena with practical, real-world experience in the executive realm. They know what it takes to succeed as a rising leader, in the C-suite, and in the boardroom, including navigating difficult conversations, politics, maintaining executive presence, and delivering a pointed, powerful presentation.

Every Athena membership includes two hours of coaching to start mapping your executive journey. You can then schedule additional coaching hours to get one-on-one support as you need to make the right impression in the boardroom.

About Athena Alliance

Athena is the premier executive development platform for senior-level women, offering a powerful networking community, resources, executive education, and coaching to help women advance and excel in their careers. Join now at

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