



IDEAL CONVERSATIONS IN
INVESTOR RELATIONS

IDEAL
ADVISORS
**NEWS
LETTER**

AUGUST 2025

**TRANSFORM YOUR
CORPORATE
PRESENTATIONS:**

Five Tips to
Engage and Persuade

For this month's Newsletter, we review five tips for transforming your corporate presentation to make it more engaging and persuasive.

1

FEATURE YOUR
MANAGEMENT
TEAM

2

COMPELLING
SLIDE TITLES

3

SPRINKLE UNIQUE
SELLING POINTS
THROUGHOUT THE
DOCUMENT

4

SHOWCASE YOUR
TRACK RECORD

5

DESIGN AND
CONSISTENCY



lizette@idealadvisorsllc.com



www.idealadvisorsllc.com



maria@idealadvisorsllc.com



OUTKREATE

Reshape Narrative. Reimagine Design.

Is a company, based in Washington D.C. that focuses almost exclusively on making outstanding corporate presentations.

"Outkreate has worked with some of the most recognized issuers in the public markets, preparing presentation slides that reshape narratives and reimagine designs" --- Harry Shah, Founder

www.outkreate.com

We recently caught up with Harry Shah, from the premier presentation agency Outkreate. An industrial engineer by training, Harry spoke to us about his passion for storytelling and the amazing design team that supports him in making presentations more beautiful and compelling.

Indeed, in this fast-paced IR environment, it may take a full-fledged engineer to figure out how to craft information that satisfies

the needs of a public company's stakeholders. Issuers are expected to include more than just financial information in their corporate presentations, they also are expected to address topics such as track record, sustainability, guidance and strategy, just to name a few.

Add to this, the proliferation of Artificial Intelligence and the rapid updates in social media strategies make it difficult to pick and chose what to focus on.

Inspired by our conversation with Harry Shah of Outkreate and his many newsletters on the topic **see their LinkedIn page for a robust amount of information about presentations**, we came up with **FIVE** tips for **TRANSFORMING** your corporate presentation.

1 – FEATURE YOUR MANAGEMENT TEAM

Often in presentations, the Management Team is presented with a picture of the executive, their title and maybe a short bio.

Why is this important?

Companies need to highlight what makes their executive team exceptional. They need to prove that this team can lead the company, during times of crisis, and eventually help the company reach its strategic goals.



Level it up:

- **Give the slide a great name!** Try “Meet the Leaders Driving our Success”, versus merely “Executive Team”.
- **Use natural looking photos** versus the typical “suit and tie” corporate ones.
- Discuss their **prior experience** by mentioning the companies they have worked for; in addition to their title, include their trajectory at the company, their education and their responsibilities.
- Don’t be afraid to **be creative**, use interactivity or movement as well as language.

[*https://www.linkedin.com/company/outkreate/](https://www.linkedin.com/company/outkreate/)

2 – COMPELLING SLIDE TITLES

Don't lose the reader's attention. As with the executive team slides, use the slide titles to spark interest, maintain the narrative and create excitement.

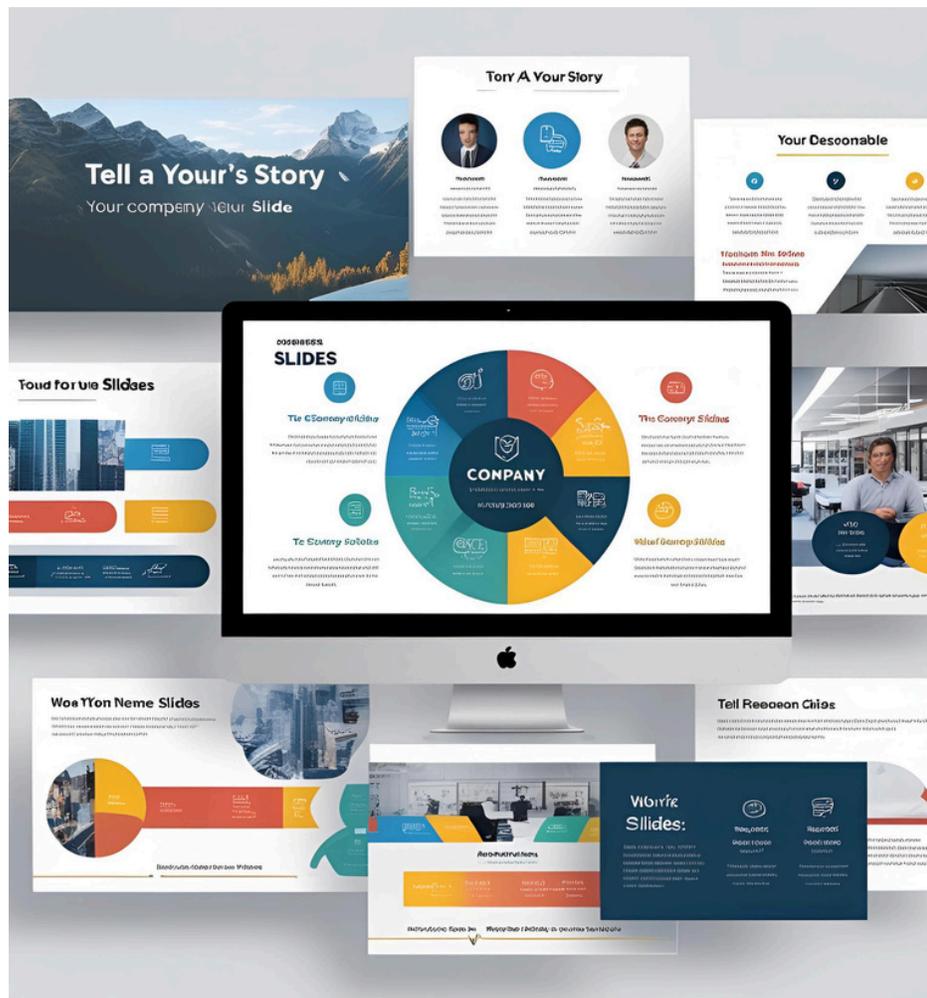
Why is this important?

Space is at a premium. Look at the presentation slides as effective, but limited, conduits for delivering valuable information. You cannot pack each slide with all the information you need to convey; it would be too busy, and you would lose the reader's attention.

Thus, you must be resourceful, and you must be selective with what data you will feature. Using headlines that are impactful but still deliver the vital information can raise the overall effectiveness of the presentation, without taking up more space. More importantly, they point to the direction you want to take them.

Level it up:

- **Tell a story with the order of your slides.** Begin with the background of the company, then move to current events, the financial picture, and finally with the future strategy. Whatever the story is, look at your slide titles as though they were the first sentence of your story on that slide.
- **Use the title to offer additional detail or motive.** For example, if you are discussing an acquisition, the headline can explain why this decision was optimal for the company. "Expanding Manufacturing Capacity in High-Growth Markets" is a lot more detailed than simply "Acquisition in Brazil".



3 – SPRINKLE THE COMPANY’S UNIQUE SELLING POINTS THROUGHOUT THE PRESENTATION

This is straight out of Harry’s playbook and we are all for it. Instead of having one slide dedicated to the company’s unique selling points, “sprinkle” this information throughout the document. This makes the presentation a much longer sales pitch that is more memorable and more effective. In other words, use the entire presentation to persuade the audience to invest in the company, not just one slide.

Why is this topic important?

As we mentioned in Tip #2, space is at a premium. You don’t want to waste time and attention on obvious slides that are telling the audience why they should invest in them. Instead, use all the slides to show them.

Level it up:

- Keep your Unique Selling Points in mind when crafting your slides, and strategically **weave the message** into the content, as well as the speech.
- Don’t be afraid to use the title slides to state the **Unique Selling Points**.
- The investment thesis supports the **final objective** of attracting potential investors, so do not forget to write down this.
- **Highlight bullets** along the presentation to point where an specific selling point is wrapping up towards to support your investment thesis, this will show congruence between your goals and your results.
- **Point to facts** that make the company unique and extraordinary, this is no time to be modest about your company’s achievements!
- Include specific **financial figures** whenever possible, for reference or to highlight performance that is above the industry average.



4 – SHOWCASE YOUR TRACK RECORD

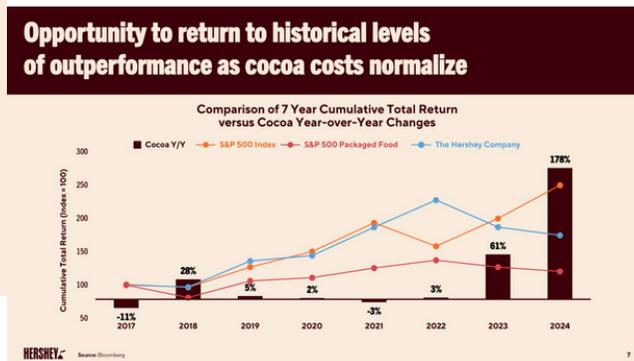
This is especially true for newer issuers or if your company is presenting to an investor or analyst that may not be as familiar with your company as others. Remind your audience not only of the financial picture today, but also *how far you have come in the last 5 years and then tie this performance to the future*. This will create a nice segue for you to discuss your strategic direction and growth potential later.

Why is this important?

Understanding that the company is capable of remarkable things will make the future goals much more credible. It is important to note what has happened in recent years. Going back to the time of the company's inception is interesting but not indicative of future success. Focus on the steps you have taken in the past few months, quarters or years, to set up the company for its future. Have you acquired new products? Perhaps, you have shut down unprofitable operations or completed a capital offering. Putting all the pieces together sets up the future in a more compelling manner.



Source: The Hershey Company



Level it up:

- **Turn data into a story.** Avoid enlisting achievements and instead weave a narrative to connect the before and after, use milestones, include real examples. Investors love the “Return on Investment”, for instance.
- **Visuals make track record memorable.** Use timelines, show metrics, mention a case study when presenting.
- **Include social proof** with client testimonials, or top client logos
- **Use dynamic features** when presenting, for example a short video clip or live polls if you are at a conference
- **Anchor the track record** to the company's strategy for future growth: “then – now – next”
- The most important: **Speak with confidence!**

5 – DESIGN AND CONSISTENCY

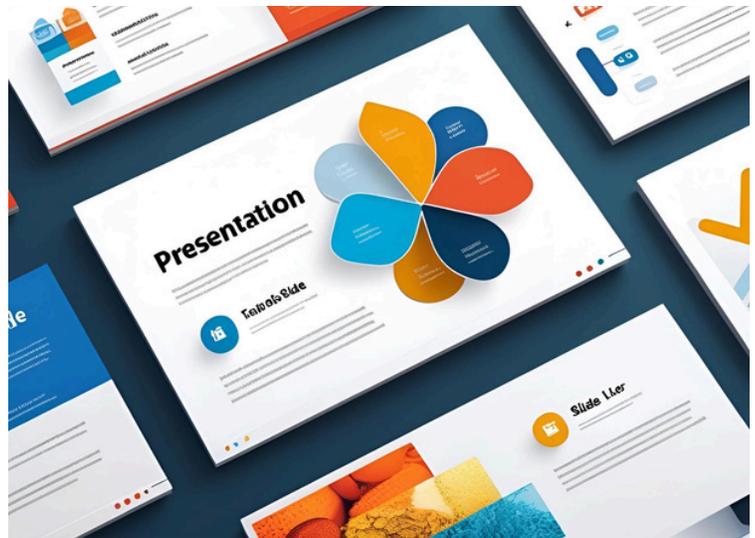
Humans are a curious breed; we like beautiful things. Thus: make your presentation beautiful. More than the use of images, make the slide clean and pleasing to look at. Use the company colors to your advantage to create visual flow from one slide to the next. Above all, ensure that your corporate image consistently flows from presentation, to website, to social media platforms and all the documents in between. This includes sticking to certain fonts, graphics, colors and logos across all materials.

Why is this important?

Consistency is important. Ideally, you want your audience to see images and immediately tie that into your company. Think about the use of golden arches of McDonalds, or the modern simplicity of the Apple brand. Try to make your company as recognizable as possible, keeping your design consistent raising brand awareness among your audience.

Level it up:

- **Create a Brand Book** (if you don't already have one, they are also called Style Guidelines) with the exact colors you will be using across all materials. Include approved logos, use of and font selections.
- **Discuss with your public relations** and publicity teams what images you are promoting each month or each quarter. For example, if your company is featuring its 50th anniversary across all channels, then use that imagery in your investor relations presentation, as pertinent.
- **Generate slide templates.** To keep the presentation consistent, you may want to create one basic presentation that you will be using for general purposes and also have slide templates that you can bring in for the quarterly earnings call or for investor events. In this manner, you are not doing all over again for each situation, instead you have a format that can extend to a variety of situations.



THINGS TO CONSIDER WHEN CRAFTING YOUR MESSAGE AND PRESENTING YOUR COMPANY

- Who is your target audience?
- How much knowledge does this party have about your company?
- What is the purpose of your presentation?
- Where are you going to present or to post it?
- Be prudent in managing forward looking statements.
- Share a pdf version to ensure integrity of the original format and to prevent unwanted modifications.

WE CAN HELP YOU CREATE AND FINE
TUNE YOUR PRESENTATIONS.
CONTACT US:

