



MFS ADVISOR EDGE™

# Introduction



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## Advanced (k)<sup>®</sup> Building a standout approach

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# Building a standout approach

The key to presenting anything involves being able to communicate clearly and in simplified terms — while highlighting relevant points that make a difference to business decisions. *Building a Standout Approach* aims to help advisors prepare for presentations by looking at

- **the presentation content**
- **the structure and flow of the presentation**
- **how the presentation is delivered**

## Goals in Building a Great Presentation

1. **Determine the presentation type** – Audience, usage, dynamics
2. **Identify potential topics to cover in the presentation** – Build your table of contents
3. **Determine the flow** – Separate and sequence your topics in logical order
4. **Build the content** – What will you present to your audience?
5. **Build the script** – Determine the scripting for each page as well as the choreography of delivery

## Things to Consider

- The needs of plan sponsors change regularly and vary even within the same pension committee based on the audience (*e.g.*, HR has different needs and objectives than Finance).
- It's not about you. It's about them.
- Preparation is key.
- How you differentiate yourself and the services you provide impacts what you say, what you show the prospect and how you deliver the message.
- Be creative in the approach and construction.
- Follow up with information, not as a "check in." During the presentation, think about methods and topics that you can use to create a natural post-presentation followup communication. That way you'll have a reason to connect with something of value instead of just "following up."

The way in which your content is delivered can make or break a presentation. Your (and your team's) professional standing with a client or prospect can be amplified if the team makes a good presentation, and conversely can be diminished if the team makes a bad presentation.