

How to Present Like You Belong in the Room

Episode 13 Companion Download

Executive Business Reviews are strategic conversations where your preparation meets your facilitation skills. This guide provides the systematic approach to leading EBRs with confidence - not as a presenter reading slides, but as a trusted advisor facilitating business dialogue that drives decisions and outcomes.

The Fundamental Shift

From Presenter to Facilitator

The fundamental shift that transforms EBR effectiveness is understanding that you're not there to present at executives - you're there to facilitate a strategic conversation with them. This distinction is outlined in Chapter 6 of The Executive Business Review Playbook.

Presenter Approach	Facilitator Approach
Shows up with a script and sticks to it	Shows up with a structure and adapts to the room
Talks for 60 minutes, opens for Q&A at the end	Pauses every 5-7 minutes to check for alignment
Defends slides when challenged	Welcomes challenges and explores them with the group

The 5 Executive Questions Framework

Every effective EBR must answer these five executive questions. This framework is taught in Chapter 5 of The Executive Business Review Playbook:

1. Do you understand our business?
2. What outcomes have you helped us achieve?
3. Where are we at risk or missing value?
4. What's the plan to improve or grow?
5. What do you need from me?

If your EBR deck doesn't answer these questions clearly, the meeting won't land. The way you answer them - through facilitation, not presentation - is what separates strategic EBRs from status updates.

Six Facilitation Essentials

1. Strategic Alignment Check

The Opening That Works:

Thanks for making time for this. Before we dive in, I want to make sure we're aligned on what matters most to you right now. Based on the discovery input you provided, we know your top priorities are [X] and [Y]. Does that still hold, or has something shifted?

Why This Works:

- Signals this conversation is about their priorities, not your agenda
- Gives them permission to redirect if priorities have changed
- Establishes you as a strategic facilitator from the first sentence

Note: The discovery input comes from a lightweight pre-EBR questionnaire sent 2-3 weeks before the meeting, as taught in Chapter 3 of the Playbook.

2. Strategic Pauses

After each major section, pause and ask: Before we move on, does this align with how you're seeing things?

Why Pausing Matters:

- Creates space for genuine dialogue
- Allows executives to interrupt with what's on their mind
- Prevents 45 minutes of one-way talking followed by awkward silence

3. Translate Into Their Language

Translate every metric into language that resonates with your stakeholder's role and priorities.

Executive	Don't Say	Say This Instead
CFO	We've increased adoption by 40%	We've eliminated \$200K in manual process costs by getting your team using the automation features you're paying for
CIO	We've reduced support volume by 30%	We've cut the time your IT team spends troubleshooting our platform by 15 hours per week, freeing them for strategic projects
CISO	We've improved your security posture	We've closed 87% of critical vulnerabilities flagged in your last audit, directly supporting your SOC 2 compliance requirements

4. Surface Problems Proactively

When you surface problems before they're asked about, you demonstrate ownership and build trust.

The Script:

I know there were concerns about [issue] last quarter. Let me show you where we are now and what we've done to get back on track.

When Asked a Tough Question:

That's a great question. Here's what I know right now, and here's what I need to confirm with my team. Can I follow up with you by end of day tomorrow?

5. Read the Room and Pivot

Your slides are a tool, not a script. Watch for signals and be willing to adjust your approach in real-time.

Signal	Your Response
Someone keeps checking their phone	I want to make sure we're covering what matters most. Is there a particular area you'd like to spend more time on?
Energy is dropping	Let me jump ahead to the outcomes and we can circle back if needed
Multiple interruptions with questions	That's exactly what we should be discussing. Let's pause here and align on this before moving forward

6. Close With Clear Commitments

Never end a meeting with ambiguity. Always walk out with documented next steps and mutual accountability.

The Closing Script:

Before we wrap, let's confirm what we're all walking away with. On our side, we're committing to X, Y, and Z. On your side, we need your help with A and B. Does that work? And let's get our next check-in on the calendar before we leave this room.

Within 24 Hours:

Send a follow-up email that restates everything agreed to - creating documentation and accountability. This is outlined in Chapter 7 of the Playbook.

Systematic Preparation

The CSMs who facilitate the best EBRs aren't naturally charismatic - they're systematically prepared. Here's the preparation checklist:

- ☐ Practice opening and closing out loud (not in your head)
- ☐ Map each slide to stakeholder priorities
- ☐ Translate metrics into their language (CFO, CIO, CISO, COO)
- ☐ Identify 3-5 hardest questions and prepare responses
- ☐ Surface problems proactively in deck
- ☐ Confirm who will be in the room and their current priorities
- ☐ Build pause points into flow
- ☐ Prepare closing commitment statement
- ☐ Draft 24-hour follow-up email in advance
- ☐ Test all technology (screenshare, deck loading, backup plan)

Quick Reference Scripts

Strategic Alignment Check

Thanks for making time. Before we dive in, I want to make sure we're aligned on what matters most to you right now. Based on the discovery input you provided, we know your top priorities are [X] and [Y]. Does that still hold, or has something shifted?

Strategic Pause

Before we move on, does this align with how you're seeing things?

Surfacing Problems

I know there were concerns about [issue] last quarter. Let me show you where we are now and what we've done to address it.

Handling Tough Questions

That's a great question. Here's what I know right now, and here's what I need to confirm. Can I follow up by end of day tomorrow?

Reading the Room

I want to make sure we're covering what matters most. Is there a particular area you'd like to spend more time on?

Closing with Commitments

Before we wrap, let's confirm what we're all walking away with. On our side, we're committing to X, Y, Z. On your side, we need A, B. Let's get our next check-in on the calendar.

Next Steps and Resources

This guide is part of the EBR mini-series on ClearPath Conversations:

- **Episode 11:** How to Prepare for Your First EBR Without Burning Out
- **Episode 12:** The Slide-by-Slide EBR Breakdown
- **Episode 13:** How to Present Like You Belong in the Room
- **Episode 14:** EBR Follow-Up: The Part Everyone Forgets

Additional Resources:

- *The Executive Business Review Playbook*: Complete guide to mastering EBRs from preparation to execution
- *ClearPath CX Website*: Templates, frameworks, and resources at ClearPathCX.com
- *LinkedIn*: Connect with Mark at linkedin.com/in/markbernardin

Want more CSM frameworks, templates, and tactical resources?
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