

# Business Storytelling for Actuaries



**Facilitator:**  
Bob Morand

**Presenters:**  
Ariel Chiu  
Christine Luthi  
Frederic Potvin  
Jim Klann  
Michael Larsen  
Nicholas Metaxas

2015 CAS Annual Meeting  
November 17<sup>th</sup>, 2015  
Philadelphia, PA

## WHAT ABOUT BOB...?

- Who is Bob Morand?
- And why the heck is he talking to me about business storytelling for actuaries?



## BOB IN BRIEF...



- Advertising Executive
- Improv Actor
- Communications/Presentations Workshop Facilitator

Business Storytelling for Actuaries

## What is “Business Storytelling”?

The Opportunity to communicate and connect

- with your audience...

...with an objective!

Business storytelling blends elements/devices from entertainment storytelling into the conveyance/presentation of business subject matter.

## WHY UTILIZE BUSINESS STORYTELLING?

- It creates a more intense and personal connection between you, your audience, and your message.
- Helps build your individual brand within the industry and your company.



## NOTABLE QUOTABLES

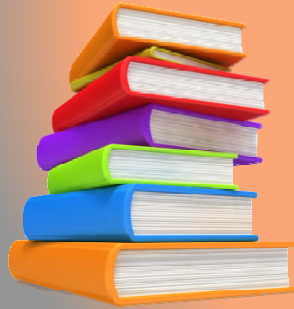
“Stories make ideas stick.”



“Data can persuade people, but it doesn’t inspire them to act.”

## STORY STRUCTURE

Traditional Story Arc:



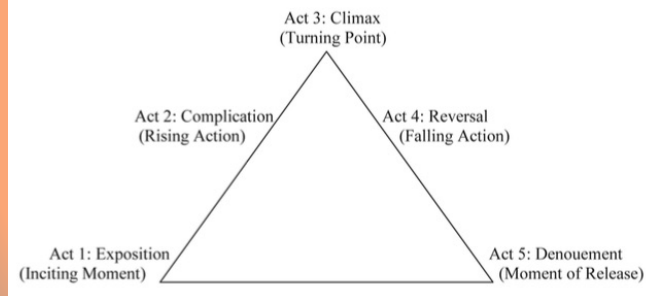
Beginning,

Middle,

End.

## STORY STRUCTURE

Figure 1  
Freytag's Pyramid



**Story Structure –Beginning, Middle and End (Story Arc from the start of mankind)**

**Beginning** – Introduces the Protagonist (You, the Presenter) and the issue at hand.

**Middle** – How you propose to deal with the issue at hand...dealing with the issue at hand...until climax: through your varied means, the issue has successfully been handled.

**End** – the aftermath of the now dealt-with issue, unfolding into the denouement, the final meaning of this journey to both you, the Protagonist, and the issue.

## **LITERARY DEVICE**

### **ANALOGY**

**- Simile**

“The company lost money as fast as a teenager with a new credit card.”

**- Metaphor**

“Google is an 800 lb. Gorilla.”

## LITERARY DEVICE

### “Hook”

- At the beginning to reel in your audience.

### “Humanize”

- Use shared experiences to make your audience empathetic allies.

### “Harmonize”



- Foster agreement through fact and familiarity.

## DELIVERY DEVICE

- Tone
- Rhythm
- Cadence
- Emotion



## DELIVERY DEVICE

- Posture & Positioning
- Audience Engagement



## DELIVERY DEVICE

### - PowerPoint Do's and Don'ts -

1. Prepare – know your material! Memorize a very short script per slide
2. One concept per slide – keep it simple
3. Use slides to illustrate – don't depend on big blocks of copy or graphs to present for you
4. Keep PP design simple and appealing
5. Don't infuse slides with overbearing graphics
6. Remember – you and the delivery of your presentation are more important than your inanimate slides
7. Hook your audience at the beginning of your presentation, e.g., a joke or a shared experience.  
Humanize yourself
8. Ask occasional questions of the audience to keep them alert and in sync with you
9. Leverage inflection (tone, rhythm, etc.)
10. Don't be afraid to be unique/different...have fun!

## HOW WE GOT HERE...

### October 29<sup>th</sup> – Webinar #1

- Introduction to business storytelling concepts. Assignment given to present via webinar a 5-minute “fun” topic with PowerPoint slides.

### November 5<sup>th</sup> – Webinar #2

- “Fun” topics presented via webinar.

November 9<sup>th</sup>/10<sup>th</sup> – Phone call follow ups between each presenter and me to review notes from “fun” presentations. Discuss CAS Annual Meeting session presentation.

## WE’RE HERE!



November 17<sup>th</sup> – Actuarial/Industry subject matter presentations utilizing business storytelling concepts.

-Enjoy!



# PRESENTATION TIME



Business Storytelling for Actuaries

## Recommendations for improving your presentation skills:

- Seek constructive criticism
- Take an acting/improv class
- Practice presentations with co-workers
- Join a book club
- Update your wardrobe
- Observe speeches
- Take an on-camera class
- Take part in group activities that require meeting new people and leadership help
- Exercise

**“If you can’t sell yourself,  
you’re going to have a much  
harder time selling your  
ideas.”**



-Bob Morand

At His Desk

September 12<sup>th</sup>, 2006