

Speaker Preparation

For your member education session:

“Get It Together: Organize Your Financial Records”

- **Become familiar with PowerPoint slides, speaker notes, and handouts.**
- We realize some of the slides look full or “busy.” In an attempt to provide you with adequate information if you’re unfamiliar with some aspects of the topic, we chose to over-deliver. Feel free to remove some of the text on the slides if you wish, or use PowerPoint techniques such as fly-ins to keep the audience focused on the individual items on each slide.
- **Anticipate seminar length to be about one hour**, depending on the amount of discussion you allow and the time you spend on handouts. Remember that the longer the session, the more important it is to involve the participants verbally and physically to keep them interested.
- **Take two decks of cards to the seminar for use with Slides 10.** Make sure one deck is organized by suit, and one deck is shuffled. Review the “notes for structure” in the speaker notes before the seminar on how to conduct the activity.
- **If credit union does not offer online banking, delete slide 11.** If the credit union does not offer automatic bill-pay, delete slide 13. Or, tailor the slides to reflect the benefits offered by the credit union.
- Check with the credit union and **add, delete other resources as necessary**, based on products and/or services offered by the credit union.
- Coordinate with the credit union to **reserve required equipment**—laptop computer with PowerPoint installed, LCD/video projector, screen protector, and white board, if needed.
- If you are unfamiliar with using PowerPoint or video projectors, ask a credit union representative—or someone in the community—to **teach you the basics** of opening the presentation and clicking through the presentation using arrow keys. Note that the presentation is not intended for use with overhead transparencies.
- Make sure the room has at least **one outlet** so you can plug both the projector and the laptop into a surge protector.
- Ask the credit union a few days before the seminar about **preregistration numbers**.
- Coordinate with the credit union to **have photocopies made of the participants’ handouts** from the PowerPoint presentation, so that participants can take notes on the seminar outline.
- Coordinate with the credit union to **have photocopies made of Handouts 1 through 4**. Allow for 15 minutes to make these copies.
- At least one-half hour before the seminar, **make sure equipment is running smoothly**.
- After opening PowerPoint File for presentation, click **View, Slide Show** to get the full screen.
- Presentation is set to advance to next slide with a single click.
- **Repeat questions from the audience** in case other attendees couldn’t hear them.
- If you get questions from the audience but don’t know the answer, say you don’t know the answer but you’ll find out and get back to them. Take their names and telephone numbers.
- **Divert personal questions**, or those related to another topic, to time immediately after the seminar.
- Remember—this is an educational program. If anyone attempts to solicit products or services, politely stop them.