

This worksheet supports subject matter experts preparing to deliver complex or sensitive information. Complete each section before finalizing your presentation. Use it as a planning guide, not a script.

01 Presentation Overview

Presentation title

Presenter name and role

Presentation date

Target audience e.g. members, retail partners, internal staff, external stakeholders

Estimated audience size

Delivery format

02 Learning Objectives

Write 3 to 5 objectives. Each should complete: After this presentation, the audience will be able to... Think in three layers: what they should KNOW, what they should FEEL, and what they should DO.

Objective 1 Start with an action verb: identify, explain, compare, apply, evaluate

Objective 2 Start with an action verb: identify, explain, compare, apply, evaluate

Objective 3 Start with an action verb: identify, explain, compare, apply, evaluate

Objective 4 Optional

03 Content and Tone Review

What are the 3 to 5 key messages this presentation must communicate?

Compliance or industry standards this content must align to

Tone needed for this audience e.g. confident, empathetic, educational, neutral, reassuring

04 Audience Sentiment and Research

Before presenting on a sensitive topic, gather data on what your audience already thinks and feels. Use this section to document research and survey findings that shaped the presentation approach.

What strong opinions or concerns does the audience likely have going in?

Research or data gathered to understand audience sentiment e.g. internal survey, industry news, member feedback

Key findings from research or survey data

Elephant in the room topics and how they will be acknowledged

05 Engagement and Talking Points

Where in the presentation will you pause for questions or discussion?

2 to 3 talking points to help the presenter feel confident and relatable

Anticipated tough questions and suggested responses

06 FAQ and Follow Up

Top 3 to 5 frequently asked questions based on research

What follow up was promised to the audience after this presentation?

Who is responsible for follow up and by when?
