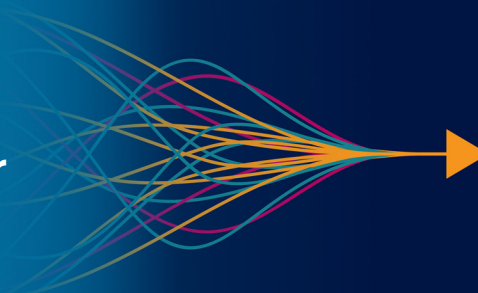




### PERSONAL EFFECTIVENESS SERIES

## The Art of Simplifying Finance for Business Partners: Frameworks for Clearer Communication Page 1 of 2



### COURSE LENGTH

Two 2-Hour Virtual Sessions or  
One Half-Day In Person

### DESCRIPTION

This course is designed to equip you with frameworks and techniques to make you a master of communicating complex ideas to your non-finance business partners. It will help you avoid common pitfalls of complexity while giving you the tools to make concepts easy and accessible for anyone. You'll learn a proven framework to ensure you keep your communication brief. You will discover the most common causes of complexity and how to avoid them. Then you will get tactics to evaluate and adapt to your audience's needs. You will learn time-tested frameworks to help you structure your communications so you are easily understood.

We will explore simple explanations of questions that are frequently asked by non-finance business partners and you will learn how to apply the frameworks you learn to any other concepts you need to explain. Finally, you'll create an implementation plan for "Simplexity" to ensure you can apply these principles effectively.

### LEARNING OBJECTIVES

- Explain the most common causes of complexity and how to handle them.
- List strategies for explaining the most common concepts you need to explain to business partners.
- Describe three frameworks for creating simple explanations to complex ideas.
- Show how to deliver clear explanations concisely

### AGENDA

- Keeping it Simple and Avoiding Complexity
  - Understanding what makes something simple: Hitting the MARC (Minimal, Accessible, Repeatable, Clear)
  - Understanding and Avoiding Common Causes of Complexity
  - Evaluating and Adapting to Your Audience
  - Influence through social capital

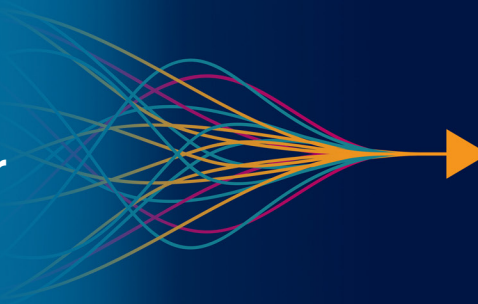
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## PERSONAL EFFECTIVENESS SERIES

## The Art of Simplifying Finance for Business Partners: Frameworks for Clearer Communication

Page 2 of 2



- Frameworks for Simplifying and Explaining Complex Concepts
  - B.R.I.E.F. maps for brevity
  - S.C.Q.A. story framework
  - Chunking
  - Using visuals
  - Using the Power of 3s
  - Tactical word choices
- Explaining Your Frequently Asked Questions and Most commonly confused Concepts
  - Financial statements
  - Financial terms and concepts (e.g. EBITDA, Cash flow vs profit, Timing differences, Budgeting vs forecasting, Variance analysis, payback, break-even, working capital, etc.)
  - Financial modeling
- Creating an Implementation Plan for Simplicity
  - Creating reference content (e.g. tutorials, checklists, etc.)
  - Super user meetings
  - Creating communication SOPs
  - Workshop specific implementation ideas
- How to Present your Simple Explanations
  - Communicating one-on-one
  - Presenting to Groups
  - Virtual communication tips

*Continued on next page*