

Stock to Study Presenter & Team's Guide and Checklist

General tips:

- Avoid acronyms; define acronyms where used
- Never read Power Point slides
 - use the Notes Pages feature
 - printout a set of Notes Pages for use during your presentation
- When presenting from home:
 - Turnoff all possible distractions, e.g., cell phone, call waiting, email, instant messaging, anything that chimes, fans, relocate pets, wife/husband, and youngsters to another room
 - If monitoring a second computer, mute its sound
- Defer advanced or otherwise esoteric questions to be answered privately offline
- Be aware that lectures from your home without the feedback from a live audience are different.
 - Practice
 - Try to avoid a reading or monotone voice
 - Add humor if possible
 - Helpful, friendly, courteous, kind host, poll, and question handlers are a great help
- Avoid showing items that you are not familiar with, e.g., Select a Potential Low Stock Price > Other > ALT+R for Price Variance Quotient
- Timing:
 - Start on time
 - Stay on session timeline with help from host
 - Answer questions during polling as an aid to filling "dead air"

Preparation:

- Background information:
 - Value Line report
 - S&P Report
 - Plot S&P Core Earnings vs. Company Reported Earnings
 - Peer list
 - ManifestInvesting for specific stock and its industry/peers
 - TakeStock
- Select data for Stock Selection Guide
 - Value Line
 - StockCentral's Hemscott America
 - BetterInvesting's S&P Stock Data Service
- Investor's Toolkit
 - Setup a unique library just for your presentation
 - Copy other companies that you might refer to or use in the Stock Comparison Guide into that folder
 - Consider locking the stocks in that library so that you will not be surprised by updates
- File preparation
 - Save your Power Point presentations with the PPS extension
 - Export your company under study as an ITK or SSG and use to open Investor's Toolkit

Stock to Study: Presenter & Team's Guide and Checklist (Continued)

- Select backup crew:
 - Host
 - Polling
 - Questions
 - Guru, if needed

Timeline:

- 12 weeks prior:
 - Select/choose candidate companies
 - Draft script outline
 - Attend any/all available online training for presenters
 - Peruse Lessons Learned from earlier presenters
- 6 weeks prior:
 - Select company for study
 - Write initial script
- 4 weeks prior:
 - Present script for review
 - Present biographical information and photo
- 3 weeks prior:
 - Review script
 - Incorporate worthy suggestions
 - Present poll questions
- 2 weeks prior
 - First rehearsal
 - Present files for uploading for attendees
- 1 week prior
 - Dress rehearsal
- P-Day (Presentation Day)
 - Team log in early (especially the presenter)
 - Relay
 - Trust your team
 - Present
 - Handle questions that you are sure of
 - Defer difficult questions for addressing later but definitely answer them
- 1 day post:
 - Log your lessons learned
- 1 week post
 - Provide answers to deferred questions
 - Present final files for publication online
 - Present your Lessons Learned documentation including changes to this document