BUAD 417 · SLIDE NOTES

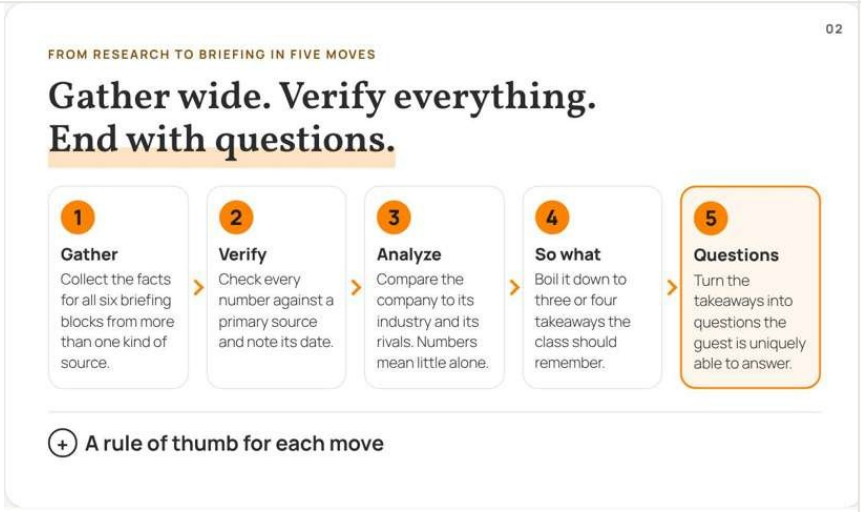
The Executive and Company Briefing

Each slide is on the left. Type or write your notes on the right. https://julesmorrisphd.com/teaching/smith-gls/buad-417/executive-company-briefing/



Slide 1

My notes



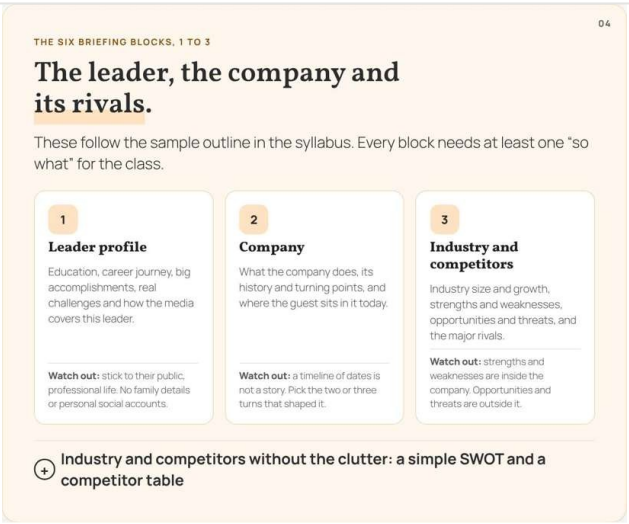
Slide 2

My notes



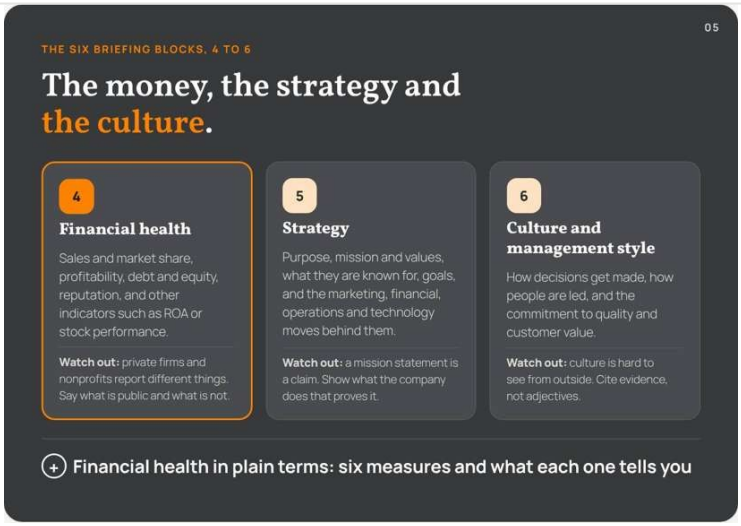
Slide 3

My notes



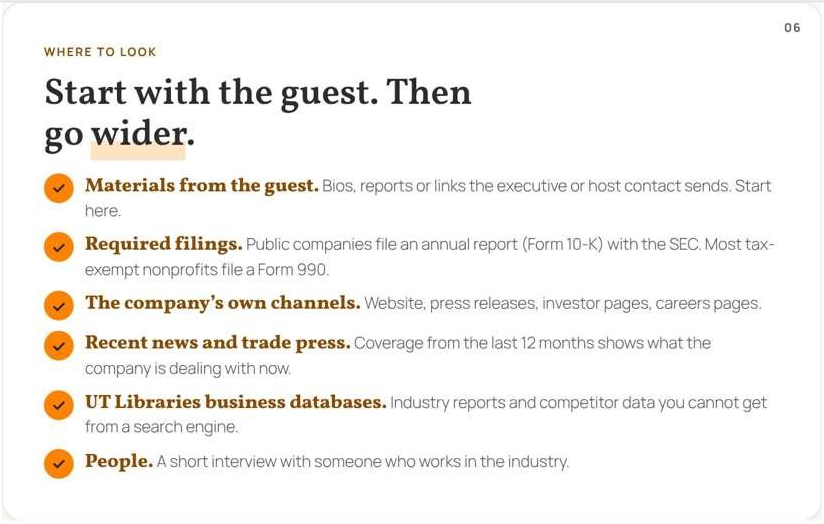
Slide 4

My notes



Slide 5

My notes



Slide 6

My notes

07

HOW TO READ IT

Check the date. Know who is talking.

1. **Check the date**
   A three-year-old revenue figure can tell the wrong story.
2. **Know who is talking**
   A press release is the company's view. A filing is required disclosure. A news story is a reporter's view.
3. **Compare, don't just report**
   Put the company next to its industry and one or two rivals.
4. **Cite as you go**
   Keep a source list from day one. It goes on your written briefing.

My notes

Slide 7

08

THE "SO WHAT" TEST

"This matters for the visit because..."

For every fact on a slide, finish this sentence: "This matters for the visit because..." If you can't, cut the fact or move it to the handout.

My notes

Slide 8

YOUR CLASS IS YOUR CLIENT

One hook and one question for every listener.

Classmates from finance, supply chain, HR and analytics will each listen for different things. Give each of them one hook and one question to bring.



My notes

Slide 9

10

RESEARCHING A LEADER RESPECTFULLY

Professional, public and fair.

- Use professional sources: company bios, interviews, speeches, news stories, board listings and professional profiles.
- Leave out family, home, health and personal social media. The guest will notice, and it is not your business.
- Report challenges fairly. A tough year, a recall or a layoff is part of the story. Present it as a leadership moment to learn from, not a "gotcha."
- Note what the media says about the leader and what the leader says about themselves. Gaps between the two make good questions.

Slide 10

My notes

11

USING AI IN YOUR RESEARCH

Speed up with AI. Then verify every fact.

The course AI policy allows AI for idea generation, drafting and research support, as long as you verify, attribute and keep your own judgment in charge.

Use AI to

- Suggest what to look for: rivals, industry trends, terms to search.

VS

Don't trust it for

- AI often gets numbers, titles and dates wrong. Every fact on a slide needs a real source you checked.

⊕ Two more rules

Slide 11

My notes