Board Packs and Presenting to Owners

CertiFi micro-credential

1 course · 5 lessons · about 3 study hours · issued 28 Nov 2026

CF-11

Board Packs and Presenting to Owners

About 3 study hours · 5 lessons · pass mark 70% · AED 299

Get decisions, not nods. Following an Abu Dhabi building-materials distributor, you will learn how owners and boards use financial information, structure a board pack, write a decision paper that leads with the recommendation, present numbers with confidence, and handle tough questions and bad news in the room.

On completion, you will be able to:

- Explain what owners and boards need from finance and how it differs from management reporting
- Structure a quarterly board pack with a clear agenda and decision items
- Write a one-page decision paper that leads with the recommendation
- Present financial information clearly, using the right level of detail
- Handle questions, challenge and bad news while keeping credibility

Learning outcomes by lesson

1. What owners and boards need from finance

- Explain the difference between management reporting and board reporting
- Describe the typical governance set-ups in UAE SMEs and family businesses
- Identify what an owner or board is responsible for deciding
- Set the CFO's role in the boardroom

2. Structuring the board pack

- Build a board agenda that puts decisions first
- Structure the board pack and its appendices
- Write the CFO report
- Set a timetable for preparing and sending the pack

3. Writing a decision paper

- Structure a decision paper that leads with the recommendation
- Present options, numbers and risks fairly
- Use NPV, payback and cash impact appropriately
- Write in plain language

4. Presenting numbers in the room

- Plan a short presentation that supports the pack rather than repeating it
- Use charts and one-number messages
- Adapt to owners, family members and outside board members
- Manage time and keep the discussion on track

5. Questions, challenge and bad news

- Prepare for likely questions
- Answer questions clearly, including when you don't know
- Deliver bad news early and well
- Keep independence and integrity under pressure