

IMPACTFUL INTRODUCTIONS

EXAMPLE INTRODUCTIONS AND A FORMULA TO HELP YOU PLAN YOUR INTRODUCTIONS FOR EVERY SCENARIO

COMPLIANCE MANAGER

My name is Susan Smith and I am a compliance manager. I've worked in compliance for 5 years and I am an expert in financial crime across a number of jurisdictions (or relevant expertise to the context you are in).

Or...my role on this project is to ensure we are meeting regulatory requirements as well as keeping our clients at the heart of our business.

Or... I recently completed a project rolling out regulatory and conduct risk policy across the organisation reducing our risk exposure.

FINANCIAL CONTROLLER

My name is Catherine Smith and I am a financial controller. I've worked in finance for 8 years and I'm experienced in working with non-uk entities and managing legal work including shareholder agreements.

Or... my role on this project is to optimise the overseas tax structure and evaluate new opportunities.

Or... I recently managed an M&A programme for finance looking at how to integrate the finance function globally.

SENIOR UNDERWRITER

My name is Sharon Smith and I am a senior construction underwriter. I specialise in large multi-year energy projects, supporting clients with tailored insurance solutions.

Or ... I am a senior underwriter in the energy team. We insure 75% of the world's largest financial institutions so have the technical knowledge and industry expertise to support your business.

Or ... I lead a team of underwriters driving client service, efficiency and profitable growth in our Accident and Health portfolio.

PROJECT MANAGER

My name is Amanda Smith and I'm a project manager. I am leading an innovation programme creating a technology solution that will enable our clients to access their claims data in real time.

Or... I work directly with clients as part of our advisory service, helping them to utilise our software to streamline their business processes.

Or... I recently delivered a programme transforming the way the business delivers energy solutions to our clients.

DRAFTING YOUR IMPACTFUL INTRODUCTIONS

Meeting Context:

My name is _____ and I am _____

Or... I've worked in _____ for _____ years

Or...I am an expert in (insert your specialty)

Or...My role on this project / team is to (insert your role)

Or... I recently completed a project which (insert relevant success story)

Or... My team recently (insert relevant team success story)

Or...I'm here today to (insert the reason you're in this meeting)

Or...My priorities are to (insert your business objectives that are aligned with this audience/meeting)

Or...I joined this workstream in order to (insert the value / insights you intend to add)

