

The Pitch Collection

What you need to know to win pitches.

The Pitch Collection strips away the myths and urban legends of pitching. Such as 'the best work wins'. That's rubbish, the company or person that wins the pitch is the one that is chosen. And sometimes the company chosen produced the best work, and sometimes not. If that comes as mildly surprising (as it did to me when I first heard it), this collection will help you gain insight into a process that can be as confounding as wooing a lover. I trust you will find some advantages, the odd 'aha' and embrace the fact that pitching is just one of those things that human beings do that can be as confounding, confusing and exhilarating as your first date.

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Chapter 1

The Pitch: 20 ways to chat up a new client.

“They couldn’t hit an elephant at this dist ...” were the last words of General John Sedgewick as he unwisely raised his head over the parapet during the US Civil War. I think we could all concur that he got it wrong. When we accept the challenge of a new pitch, we stand the chance of getting it wrong. But it’s not the getting it right or wrong that’s important, it’s the *getting it*. So here’s 20 ways not to get your head shot off.

1. It’s a GAME. There is no way any rational human being can make a qualified decision in one hour whether you are the right person to work with or not. Our divorce rate is 50% - and that after an extended courtship. So don’t ever think a pitch is anything other than a game.
2. This is still my personal favourite - start working for the client before the pitch. When you walk in the door on pitch day, you should already have a working relationship. It’s easy - just start working - no one’s going to sue you.
3. This is like poker, so you’re allowed to bluff. When you are asked if the presenters are the team that will work on the business say yes. It doesn’t matter if they do or don’t – the client will be lucky if the agency still has the same name in a month. And the time it takes some clients (especially government) to make a decision, half the team would probably have moved on. The half-life in advertising is usually a fraction of the clients’ business, so don’t bother to explain. Just say yes. It’s a game.
4. The creative work cannot win a pitch, but it plays an important part in stimulating an emotional reaction. That’s handy, because the final decision is an emotional one. Don’t use the creative to show how creative you are – use it to leverage an emotional response.
5. When presenting past successes, share the kudos with the client you did the work for. Tell them how fantastic and brilliant and clever that client was. Don’t tell them how brave the client was to get you to do such great work. They will take your attitude of past relationships as an indicator of future relationships.
6. Understand their business. This does not mean you have to know how to spot-weld a door on a car, but it does mean that you can speak as an insider. “They don’t understand our business” is often the reason the account went to pitch in the first place.
7. Agencies that pride themselves on communicating well with consumers can be unsympathetic to the audience in the pitch. The consumer target market is important, but of more importance is the target market that the client actually deals with on a personal basis, such as key accounts and field staff. They know their names. Mention them. There’s nothing like saying “Well Barry in KZN felt he needed a greater emphasis on widget number 6, even though there was the O/S for June due to the power failure”.

8. Present as a team. If you don't like each other then don't expect the client to.
9. Don't show the fancy proprietary models unless you can show that you practice what you preach. Someone once said there are only three rules to pitching: relevance, relevance and relevance. I'm not sure that's totally relevant, but always remember to keep the frequency on 'wii-FM' – what's in it for me.
10. Don't ever say "I know awards aren't important, but ...". They aren't important to the client – if they didn't think you could do the work they would not have invited you. If you're going to use a showreel that is emotionally moving, then use it just for that – move them to vote for you, but don't ask them to cheer your creative brilliance – they don't care.
11. There is no such thing as 'conditional enthusiasm'. You either want the account or you don't.
12. Few agencies can demonstrate that they have a real purpose beyond making money. And spare me the pro bono list. Maybe you don't need a reason to work beyond the kid's school fees and braces, but please don't go for mission statement failure, which is a collection of words that no sober person could really salute. Just let the client get to know who you are as people.
13. Please, please, please don't waffle on about yourself and show that map of the world with all the dots on it. Rather talk about the client. The client cringes at the words "... and now a little bit about ourselves". They are not interested in your world rankings and how the hierarchy works. Don't waste time on this at the expense of the main event. I won a pitch last week and realised I forgot to talk about us. Oh well, win some lose some.
14. Don't assume that the client has intelligence equal to yours. He may have more. If you're going to go into great detail about the market, find out how much they know first. The 100-slide market appraisal is like pulling teeth.
15. After several presentations, the client can't remember who said what. They will remember a strong idea. And here's the amazing truth; It doesn't matter if it's wrong, it just has to make an impression. You are not going to be employed for getting it right, you win because they think you can get it right.
16. PowerPoint can force you into a linear presentation that then becomes a commitment to 'get to the end of the deck. The client then enters a countdown to escape. They will hate you for reminding them of boring lectures or even worse - school.
17. Assume that just answering the brief is something the other agencies will do. Answer the brief accurately, but that does not mean you have to accept some of the benign claims in the brief. On the contrary, if you feel you know enough to disagree with the brief, you're already adding value.
18. A presentation is like an ad – a bold proposition that promises a clear benefit. Then give them something definite – what you are going to deliver, when it will be completed and how much it will cost.
19. People choose to work with people they like. We tend to like people who like

- us. Like the client. It's easier to like someone when you're in control, which depends on you doing three things before the pitch: rehearse, rehearse, rehearse.
20. Sometimes the best new client is an old one – if you can't be with the one you love, love the one you're with.

Chapter 2

There is only one rule to pitching.

Pitching for new business is an exhilarating experience for the agency, energising it with a challenge that results in a label we all yearn for: *The Winner*.

The process is as challenging and exhausting as your first driving lesson. But you quickly learn to explore new horizons as you guide your vehicle in a symphony of gear changes, acceleration, deceleration, right turns, left turns, the reverse and lipstick application. Pitching is like learning to drive all over again.

When you're invited to pitch, the client may not know it, but he/she will be turned on by only one thing. I don't use the word 'turned on' loosely, but in the biological sense – they will be driven by an innate need to partner with the agency that delivers best on something. Rather than call this 'something' Factor X, the term that defines it best is entropy; the degree of disorder in a system.

People do not respond to disorder, especially if they're paying. When I eat at the Spur, the manager asks me if everything is in order, because he knows that's what I want. We do not crave disorder. It's a people thing. We look for order in everything in our lives, and yes, even ad agencies. We want, crave and desire negative entropy. That's how we are.

To reduce disorder, your pitch must begin with the lowest degree of entropy you can find. This is NOT a quest for the golden consumer insight that we so often rush off to do, by exploring the end-user experience in a focus group.

The process is simple, as most processes that reduce entropy are: get to know the entire distribution channel (including the final consumer) and how the channel members relate and work with each other. Just follow the flow of goods from inception to consumption and you'll find all the insights you need. You must know how the client makes his/her money. You must see the picture. Then you must show the client the picture.

After that you can show the client anything, because everything you share with him is not new. It's just exciting.

Chapter 3

If you want to win a pitch – understand how to signal.

You are pitching on a new airline account. You have the option of hiring a Jumbo Jet to fly over your offices at an appointed time (in the presence of the client) to show you enormous faith and commitment, or to make a TV ad you really believe the client should be flying. Which is the prudent choice? The fly-past or the ad?

Although there are arguments for both sides, Game Theory provides an elegantly simple and specific answer – and what gets me all hot and sweaty is that I have seen it work.

Firstly, we need to understand a smidgen of Game Theory -beyond what Russel Crowe managed to convey in the movie *A Beautiful Mind*. The concept that we need to understand is the 'signal';

Signals are actions that are costly to you, but get other people to infer that your actions will cost you more if you are lying than if you are telling the truth.

A simple example would be the 10-year guarantee – a signal that says the seller expects the item to last for 10 years, or is prepared to forfeit the repair cost if it conks out before then. We cannot know the quality of the item (whether it is good for 10 years or not) – we only know that the seller has the confidence to carry the risk for 10 years. From that we infer the quality.

The game of love also finds application in Game Theory: the gift of a diamond ring signals that the suitor has in mind a long-term relationship and not just a one-night stand. An expensive ring is not a prerequisite for a healthy relationship - on the contrary, the most cited reason for disagreement is financial stress - something the HP payments on the ring don't help. But the ring signals your desire to commit to a long-term relationship, thereby consummating the trade. Signals need not carry any direct benefit in themselves. Wining and dining a new prospect, or lavish promo material, are not directly related to the quality of the product, but they tell the recipient something important: You have enough faith in your offering that you are relying on an ongoing relationship to cover the money you've spent.

So, do we go with the fly-past or the ad? Although the fly-past is most enjoyable and impressive, it does not do what the ad does: Position my risk in the future – I will only recoup it if we move forward together, whereas the fly-past just shows how much I care on the day.

However, both are pitch 'actions', many of which combine to result in the win, the latter going to the agency that delivers the highest degree of 'pitch clarity'.

Chapter 4

Briefed on Thursday, Won on Monday – The seven-step programme for winning pitches at short notice.

There I was, thinking about the glorious weekend ahead, where I would do nothing but daydream about Keynesian economics, hemispheric lateralization or naked women and beer. The mind is a wonderful thing.

Then the call came; “We pitch on this Monday, so creative need to be briefed tomorrow”. I wanted to retort with “Your point is?”, but decided I wanted the money, so I closed my mouth and opened my mind.

These are the steps:

Step 1 : Panic

You have no idea how to start, so you begin on a quest to gather intelligence.

That’s good, because as Piaget said; intelligence is what you use when you don’t know what to do.

Then get over it, because you need to get going – remember, the earlier you start, the greater the degree of pitch clarity.

Step 2 : Use your network

Let’s say that the pitch was for a chain of pie shops – Royal Pies – you send out a request to your resources – you may have a specialist retail division somewhere in the world, or one of your other offices may already handle a pie chain. Keep the brief focused – make it easy for them to understand what you need (and that the 2 minutes it takes to look for a document or presentation could mean lots of dough for you). Do not promise sexual favours in return – you have no idea what they look like (or where they’ve been).

Step 3 : Go primary

Primary data is information that is gathered ‘first-hand’ – things like internet surveys, or focus groups.

a) Do the internet survey – however brevity is key – make it easy for the

recipients to complete. Keep in mind that they may not be the existing user, but it allows you to talk about the potential market with some form of authority. For instance, heavy Royal Pie users are species *Homo sapiens*, genus *Normalis* - usually not found in marketing.

b) Frequent pie users were mainly blue-collar workers, so we collared the cleaning staff into a focus group in exchange for pies at lunchtime (Thursday). If you’re not good with people, get someone who is. It is just a chat, however a clear structure is important – the discussion guide should have a logical flow, as per the exhibit below.

Royal Pie Discussion Guide

Intro

XXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Food

XXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Fast Food

XXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Pies

XXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Royal Pies

XXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

- c) Next, look for the strong ‘nodes’ – people who have a great deal of knowledge about the market – who see the results of communication efforts all the time. In this case, it’s the franchisees. I asked for the names of 3 good stores and 3 poorly performing ones. I then used the magic formula:

pick + up + the + phone = amazing intelligence.

Step 4 : Go secondary

Secondary data is information gained from existing research – things like the copious amounts of meaningless research provided by the client, case studies or journal articles. I begin with an online search, using a funnel methodology. In other words, I use a shotgun approach on Yahoo or Google, beginning with a specific search term, becoming less specific (more desperate) as I go. So I would type in “How I won a pitch for a pie chain in two days”. Chances are you may need to refine your search, but you will probably get a fair amount of info on retail pie chains. If you subscribe to certain databases, that’s great – WARC is an important resource (it has exactly what I need – communication case studies per industry category), but many universities offer a search service for a very small fee. They can usually oblige within 24 hours, emailing you the results. However, the results are usually, how shall I say ... academic?

Step 5 : Relax

Sit still. Mull things over. It only takes a few minutes and helps immensely with the clarity of the final result. Maybe do something to distract you. Then get dressed and carry on.

Step 6 : Wrap

Brief creative and put your presentation together.

Step 7 : Serve

Chapter 5

The 10 Don'ts of New Business Pitching

Presenting to an audience for the first time can make us do some strange (and often unnecessary) things. Here are ten pitfalls to avoid should you want to win the hearts and minds of new clients.

1. Don't organise your thoughts during the presentation. A symptom of this is to revisit the brief to "make sure we're all on the same page". There's really no point in this other than to protect yourself. Only sissies repeat the brief.
2. Don't even repeat the problems the client is facing – you're not pitching to be his/her secretary – let them keep their own lists.
3. Don't show the client how well you know their business by describing it. For heaven's sake, why tell the client he has 5 000 employees in 50 locations worldwide? It just reinforces how little you know.
4. Don't hold back. You don't need to get it right, you just have to show that you could get it right. Take your idea all the way.
5. Don't have more than one central idea.
6. Don't show your hard work – show the results of your hard work (which is usually less work). You will never get the account for being a hard worker. It's just not sexy I'm afraid.
7. Don't fall on a sword this early on in the relationship. To disagree vehemently at such an early point just reminds the client that you live in separate worlds.
8. Don't make suggestions for sweeping changes without considering the ramifications at an operational level. You can change the logo of a TV show quite easily, whereas a chain of grocers would require millions in signage costs.
9. Don't tell them how much research you still need to do to be able to do what you need to do. Work with the little you know. It's OK not to know everything. It's not OK to tell them how great you could be if you knew more.
10. Don't get emotional. It's OK to be passionate, but if you're going to take each

pitch personally, you're going to lose the most important ingredient: fun.

Chapter 6

Martin Luther King, Bill Clinton, Coco Chanel, Jack the Ripper and PowerPoint.

What might have been if Dr Martin Luther King Jr. had faced his audience in the hot summer of 1963, not with the words "I have a dream," but instead, "I have a ... PowerPoint presentation". Or Winston Churchill read "We shall fight them on the beaches, and the rest of the areas on this slide." The world would probably be a very different place.

Jon Steel, the author of 'Truth, Lies and Advertising' (and lately, 'Perfect Pitch'), reminds us that – if it's a pitch – being right and being the best are admirable qualities, but that's not what it's about. You're there to get hired. To be chosen.

We seem to have forgotten ourselves as we read off slides, hand over the summary document (a paper printout of the presentation, with disc) and then wait for the client's feedback. Somehow we have forgotten the most important ingredient of a presentation – its spirit. But we often kill it off right from the start – from the first PowerPoint slide followed by a cacophony of headlines and bullet points that scream so loud - that they say nothing. Many users of PowerPoint are doing to the art of presentation what Jack the Ripper did for the art of dissection.

If there's one thing that represents the bulk of PowerPoint crime, it's just that: The One Thing. How many presentations have you walked (or crawled) out of, and remembered more than one point. Even yesterday's presentation – can you recall more than 1 or 2 points? Bill Clinton won his campaign on his understanding that, no matter how much detail you impart, it's always about 'The One Thing'. That's why, on the front of Clinton's campaign war room was a piece of paper pinned to the wall, which read: "It's the economy, stupid!" Every time Clinton became engaged in public debate, he always reverted back to the economy. The message was simple – with Clinton in the White House, the population would prosper; with Bush, well, things would continue to get worse.

Coco Chanel believed that the hallmark of a great dress was that it didn't draw too much attention to itself. So, if a woman walked into a room and everyone said, "What a fabulous dress!" she had failed. Success came when the woman walked into the room and people said ' "You look fabulous!" In the same way a presenter fails if people say "What a great presentation!" They should rather say "What a great message".

And you know what they do to the messenger.

Reference: Jon Steel. Perfect Pitch. John Wiley & Sons.

Chapter 7

Why Marcia Clark let OJ walk: the 4 presentation errors you can't afford to make in a pitch.

The OJ trial was weird. Although I don't have any of the specifics, I do know that DNA can't jump and that if you're innocent you don't go driving away in a white Bronco with the entire police force on your tail. But that's besides the point. I was not a juror and OJ was found innocent. Marcia Clark, on the other hand was guilty – of making the four key errors in her pitch to the jury.

Error #1: Not listening to the audience

Marcia Clark had lots of experience with black female jurors – she had noticed that when it came to prosecuting a violent offender, it was these women who knew more than any other, of the destructive effect on society, and would nod knowingly in support of putting these offenders away. But something had happened to society. And that something was Rodney King. Police brutality towards blacks was now on the radar. The issue of violence was no longer black and white. It was white on black. Clark knew this when the trial started, but it takes a lot for a person to change the strategy that has always worked for them. So, she proceeded with the strategy of fighting violent offenders - when it had become violent policemen.

Error #2: Not recognizing the real destination

Marcia Clark spent 23 weeks presenting evidence to prove that OJ Simpson killed Nicole Brown Simpson and Ronald Brown. "It was premeditated murder," she said, "That is what I will prove."

She could have done that on day one. Her real job was to return a guilty verdict. As we know, from the clear message on our cigarette boxes – knowing and acting are two very different things. We know smoking will kill us eventually. But we smoke. We are not ignorant – it's just that belief and action are two different things. The OJ defense knew this, so all they had to do was make it uncomfortable for the jurors to return a guilty verdict. Marcia Clark's venomous questioning of witnesses and her desire for all the details just made it that much easier to vote for the nice guys – and that happened to be the defense.

Error #3: Lecturing

Marcia Clark did not leave out a single detail. That's a pity for two reasons – firstly it reduces the audience to a passive spectator – they don't have to be engaged in anything. They're not involved. Secondly your audience feels dumb. The jury preferred to vote against the person that felt distant and made them feel stupid. Just as a client in a pitch would.

Error #4: Boring the audience

Marcia Clark told the story of DNA. She described in excruciating detail how the Restriction Fragment Link Polymorphism Test done in lab 1 differed from lab 2. She even provided the impressive statistic that the blood on OJ's sock belonging to anyone other than his victim was one in 21 billion. Golly gee whiz.

The defense preferred to tell a story. One of lies, corruption, ineptitude and police bigotry. And then, of the glove that OJ showed was too small to get his hand in, Johnnie Cochran said: "If it doesn't fit, you must acquit." And after deliberating for less than four hours, that's just what they did.

Reference: Jon Steel. Perfect Pitch. John Wiley & Sons.

Chapter 8

How PowerPoint downed the Space Shuttle

Columbia, orbited the earth for 2 weeks with an unknown hole in the wing due to a foam strike (the latter which NASA did know about). The craft burned up on re-entry, killing the entire crew. It also killed PowerPoint at NASA. These are the six cognitive traps that PowerPoint is so good at – and all six appear in a key slide that was used in a presentation by Boeing while Columbia was damaged but still flying.

This is the slide:

Review of Test Data Indicates Conservatism for Tile Penetration
<ul style="list-style-type: none">• The existing SOFI on tile test data used to create Crater was reviewed along with STS-87 Southwest Research data<ul style="list-style-type: none">– Crater overpredicted penetration of tile coating significantly<ul style="list-style-type: none">• Initial penetration to described by normal velocity<ul style="list-style-type: none">– Varies with volume/mass of projectile (e.g., 200ft/sec for 3cu. In)• Significant energy is required for the softer SOFI particle to penetrate the relatively hard tile coating<ul style="list-style-type: none">– Test results do show that it is possible at sufficient mass and velocity• Conversely, once tile is penetrated SOFI can cause significant damage<ul style="list-style-type: none">– Minor variations in total energy (above penetration level) can cause significant tile damage• Flight condition is significantly outside of test database<ul style="list-style-type: none">– Volume of ramp is 1920cu in vs 3 cu in for test

These are the cognitive traps:

1. Festival of Bureaucracy

There are 5 different levels to this slide (counting the headline). The first three sentences are all in big print and tell you not to worry. Read further down, and you

should worry – big time. By the way, SOFI means foam (or for the tech-heads: Spray On Foam Insulation). The word ‘Crater’ refers to the model they were using to evaluate how bad the foam strike was.

2. Conclusion as headline

We often want to get to the bottom line. PowerPoint is the opposite – it allows us to present a conclusion as a headline, reducing the motivation to follow the details of the story. The headline says everything is OK. The content says otherwise.

3. Choice of Words

The word ‘significant/ly’ appears 5 times. But read down the slide, and ‘significant’ changes from describing a conservative outcome to a disastrous one. But the one that comes first sets the tone in this busy world of ours.

4. Relevance

If you read the last line, it tells you that all the data presented is irrelevant – it falls outside the scope of the Crater model.

5. Inconsistency

The same unit for volume (cubic inches) is shown in a slightly different way each time. Things can get out of hand in aerospace engineering when things are inconsistent – such as crashing a \$250 million spacecraft into Mars because of a mix-up between metric and the old pounds-and-ounces system. Oops.

6. Shrinking away

We tend to shorten sentences into ‘bullet points’ for PowerPoint. Sometimes this results in a sentence only its mother could love. What the heck does “Initial penetration to described by normal velocity” mean? Why is it there?

When you get whacked on the side of the head, it’s the fact that kinetic energy is velocity *squared* that hurts so much. In the same way, we can increase the energy of what we want to convey by using cognitive traps in presentations. However, lies are like shipping and handling costs – it will get you every time.

Reference: Edward Tufte. PowerPoint Does Rocket Science: Assessing the Quality and Credibility of Technical Reports. <http://www.edwardtufte.com>

Chapter 9

Belief is not action – the ‘uber’ legend of pitching

Most people really believe that smoking causes lung cancer. No one wants lung cancer, but people still smoke. When we sign up for the gym, we sincerely believe we will go three times a week. Most don't. This naivety of expectation seems built in - we cling to the expectation that if people believe something, they will act accordingly. It's not true.

When we pitch to another party, we want them to do something – lend us money, marry us or appoint us. If you think that the key to persuasion is to present the facts decorated with your insight, foresight and outtasight creativity, then you support the paradigm of belief resulting in action. However, people don't necessarily act according to their beliefs. They may believe you do the best work, but that does not mean they will act to appoint you.

Facts and presentation can make a difference, but essentially clients are looking, not for good work, but for good people. The final decision will be made similar to the way you committed to the biggest purchase of your life – your bond – dictated by your feelings. People make the final decision, not from a belief in you, but a belief in their feelings that you generate – feelings of trust, confidence, hope, ambition and desire. It's not about what you say. It's what your presentation says about you – that you'd be good to work with.

Here are 10 tips to increase your chance of converting belief into action when pitching:

1. It's not about the work – it's about creating the impression that you would be good to work with in the future.
2. The most important thing you can be is clear.
3. Point 2 above is probably the most important point in the entire list.
4. It's so important, that I have dedicated three points to it.
5. Don't deviate from who you are: people fall in love with character, not perfection.
6. Your aim should be to be remembered for one thing after the presentation. That means a degree of risk, but you are not hired for getting it right – you are hired because they think you could get it right.
7. Your audience don't need to be fully informed – let them fill in the gaps, but make sure your story has a clear structure with dots that are easy to connect.
8. Don't think in terms of a polished presentation – think in terms of polished thinking.
9. Empirical evidence shows that having specific knowledge about the prospective client's industry makes no difference to the result. The challenge is to show you know your business and have a valuable contribution to make in a future relationship.
10. Rather than working out what you want to say, find out what they need to hear. Subtle difference, powerful advantage.