#38 – How to pitch an idea

By Scott Berkun, February 2005

Coming up with good ideas is hard enough, but convincing others to do something with them is even harder. In many fields the task of bringing an idea to someone with the power to do something with it is called a pitch: software feature ideas, implementation strategies, movie screenplays, organizational changes, and business plans, are all pitched from one person to another. And although the fields or industries may differ, the basic skill of pitching ideas is largely the same. This essay provides a primer on idea pitches, and although most of my experience is in the tech-sector, I pitch to you that the advice here will be relevant to pitching business plans, yourself (e.g. job interviews), screenplays, or anything else.

The nature of ideas

Ideas demand change. By definition, the application of an idea means that something different will take place in the universe. Even if your idea is undeniably and wonderfully brilliant, it will force someone, somewhere to change how they do something. And since many people do not like change, and fear change, the qualities of your idea that you find so appealing may be precisely what make your idea so difficult for people to accept. Some individuals fear change so much that they structure their lives around avoiding it. (Know anyone exhibiting the curious behavior of being obviously miserable in their job, their city, their relationship, but still refusing to make changes?). So when your great idea comes into contact with a person who does not want change, you and your idea are at a disadvantage. Before you can begin the pitch, you have to make sure you're talking to someone that's interested in change, or has a clear need that your idea can satisfy.

Healthy and progressive organizations make change easier than stinky evil organizations do. Smart organizations (or managers) often depend on change. Leaders in these havens for smart people not only encourage positive change to happen, but expect people at all levels of their organization to push for it. It requires more work and maturity for these managers to make this kind of environment successful, but when they pull it off, smart people are systematically encouraged to be smart. Idea pitching happens all the time: in hallways, in the cafeteria, in meetings.

But since most of us don't work in these kinds of places, the burden of pitching ideas falls heavily on our shoulders.

Step 0: Create and refine the idea

The classic mistake of would be idea pitchers is to pitch the idea well before it's ready. When most people find an interesting idea, they're quickly seduced by their egos into doing silly and non productive things, like annoying the pants off of everyone they come into contact with by telling them how amazing their new idea is. The thrill of being clever is so strong that they forget the fact that there are 100 interesting ideas bouncing around for every single truly good idea. By (my) definition, an interesting idea takes a novel or creative approach to doing something, whereas a good idea is not just creative, but actually improves on a meaningful quality or attribute, in a way that can be practically applied to the world (or the project).

Good ideas include some thinking about execution and delivery. Saying "we should build cars that go 1000 mph and get 100mpg and easily fold to fit in your back pocket" or "We should make a children's movie that is very funny and intelligent for parents and children, but also has a deep positive spiritual and moral message" count as interesting ideas. They're good starts. But they won't be good ideas, in the sense of pitch-work, until there's both some logic for how to make it real within reasonable limitations, and some level of detail in how the convert the abstract idea (build a breakthrough automobile) into tangible plans (the trans warp drive I've designed improves gasoline efficiency tenfold).

So until the concepts and hard parts are fleshed out enough to demonstrate that the spirit of an idea is matched with specifics, the idea doesn't have much of a foundation. People can dismiss it quickly just by asking 2 or 3 basic questions. Always remember that moving from an interesting but vague idea, to specific and actionable is the difficult part of creation and invention. (For example, there were lots of people with the idea for making light bulbs. Edison's success was not in being the first one to conceive the idea, but in having the persistence and cunning to be the first person to solve many of the practicalities involved in engineering the idea).

Most of the time it's not worth pitching an idea until you're able to answer some of the basic pragmatic questions about it, such as: What problem does this solve? What evidence is there that the problem is real, and important enough to solve (or in the corporate world, solve profitably?) What are the toughest logistical challenges implied by the idea, and how will (or would) you solve them? Do you have a prototype, sample or demonstration of an implementation of the idea (aka proof of concept)? Why are you the right person to solve it? Why should this problem be solved now? Why should our organization solve this problem? These are all the kinds of questions someone that gets pitched to on a daily basis are likely to ask, and therefore, a good pitch-person will have done more than superficial thinking on their answers.

Step 1: What is the scope of the idea

The bigger the idea, the more involved the pitch. Big ideas require more change to take place on someone's part, and all things being equal, this means the pitch must be more thorough (or your approach more bold & risky). The stakes are higher. To convince a CEO to start a new million dollar project will take more effort than convincing your best friend to loan you his pen. As a rough guide, here's how to assess the scope of an idea, from narrow to grand:

- Tiny tweak to something already in existence
- New feature or enhancement to existing product / website / company
- A major new area of an existing product / website / company
- An entirely new, but small and simple, project
- An entirely new, but large and possibly complex, project
- An organizational, directional, or philosophical, change to an existing organization
- A new organization
- A new nation, planet or dimension of the universe (Sorry. But for how to pitch to the omnipotent forces that run the universe, you'll have to look elsewhere).

When you've identified the scope of your idea, do some research on how others pitching ideas of similar scope went about it. You're probably not the first person to pitch something of the scope you're pitching, so go find out what other people did, and what kind of success they had. Learn from their mistakes. There are books on pitching business plans, movie scripts, and of course pitching yourself (job interviewing). Do your homework: know some of the basic strategies, or industry expectations for the kind of pitch your doing. In the software development world, talk to people who have pitched feature ideas in your organization, and see what you can learn.

Step 2: Who has the power to green light the idea

Make a list of the people that are potential recipients of your pitch. This could be your boss, your VP, another company, a bank, a publisher, who knows. Base this list on two criteria: who has the power needed to implement the idea, and who you might have access to. Here's a rough guide, ordered from fantastic to depressing.

- You have the power.
- A peer in your organization has the power.
- Your boss has the power.
- Someone above you in the organization.
- Someone you know in another organization.
- Someone you don't know and don't have easy access to.
- You have no idea.
- You are paralyzed on a cold wet basement floor, and your annoying younger brother keeps poking you in the ribs with the pointy end of pencil. (See, it can always be worse).

If you have no idea who to pitch your idea to, ask around. There's no sense developing your pitch if there's no one to catch. If you don't have access to the person with the power you need, make a list of who has access to them, working backwards until you can list people you actually know. You may need to work through this network of people, and make several pitches, to achieve the results you want. Just getting to the real pitch situation may take days, weeks or months or preparation and pitching to subordinates.

Step 3: Start with their perspective

Put your pitch aside. Imagine you have mind-melded with the person you are pitching to. How do they think about the world? What kinds of things are they probably interested in? What is their typical day like? How many unsolicited pitches do they receive a day? Consider how the person you're trying to pitch views the world, and keep it in mind while developing your pitch. The better your pitch fits into their needs, perspectives, and desires, the greater your odds of being successful (or even being listened to). This doesn't mean sell out, or only create ideas that you think a specific person will like. Instead this just means you have to be aware of how your perspective is different from theirs, and improve your ideas, and how you communicate them, based on that awareness. This may help you decide who to bring your pitch to: The most powerful person in the organization might share none of your philosophy, but the 3rd or 4th most powerful person might. The later is going to be a better place to start.

Step 4: The structure of the pitch

Always formulate 3 levels of depth to pitching your idea: 5 seconds, 30 seconds, 5 minutes (Credit to Ari Blenkhorn for this simple breakdown). The 5 second version, also known as the elevator pitch, is the most concise single sentence formulation of whatever your idea is. Refine, refine, refine your thinking until you can say something intelligent and interesting in a short sentence. "My idea? It's a way to make car engines twice as efficient, and 5 times as powerful." This can be done for any idea: never allow yourself to believe your thing is so complicated and amazing that it's impossible to explain in a sentence. If you were to use this excuse on me, I'd tell you it means you don't have enough perspective on how your idea fits into the world.

If you can get enough perspective of what you're really doing, have a half-decent command of whatever language you're using, and spend some time at it, you can develop a good 5

second pitch. Practice it on friends, peers, anyone, by doing the 5 second version, then answering their questions, and then asking them to help you refine the 5 second version again. (And if nothing else, the 5 second version comes in handy at parties, when you need to quickly explain what you're doing without boring people to tears). As proof that 5 second explanations are possible, here's some diverse and complex ideas, and some simple 5 second explanations of them.

Discovering DNA	"I'm researching how human cells reproduce"
Defragmenting hard drives	"It makes computers run more efficiently"
Inventing light bulbs	"It's a way to make light from electricity."
Writing a brilliant novel	"The story explores twenty something angst in the digital age"
Improving anti-lock brake algorithms	"It improves automobile safety"

The 30 second and 5 minute versions should grow naturally out of the 5 second version. In 30 seconds, there's enough time to talk about how you'll achieve what you described in 5 seconds, or provide specifics of the 2 or 3 most significant things about how the effect described in the 5 second pitch will be achieved. Provide the next level of detail down, adding in just enough interesting detail that the listener can get a clearer picture of your idea, and gain a deeper and more nuanced understanding of what you're proposing. If you can't distill down what you're doing in 5 and 30 second versions, don't worry too much about the 5 minute version: odds are you won't get many people to listen to you for that long.

However, since some people prefer to written proposals for pitches, this gives you a chance to deliver the 5, 30 and 5 minute versions all at once. In this case it's often best to keep the same structure: start with your shortest pitch. Then provide the next level of detail down. And finally, the core of the paper or written proposal is a point by point detailing of how, giving the money & resources you need, you'll achieve what you described in the 5 second pitch.

Also, remember that you won't always have all of your materials with you when pitching ideas. At least briefly consider how you'd deal with the following different kinds of situations, and with the different asset limitations you'd have in each case.

- The elevator – you.
- The slow elevator – you, maybe something to show from your pockets.
- The lunch – (you , maybe something to show, napkins to draw on, alcohol)
- The conference room meeting – (laptop / slides / handout)

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- The executive review – (laptop / slides / handout / yes-men / splunge-men)

Sometimes it can be to your advantage to pitch with partner. Instead of one person pitching, you'll be pitching as a team. If you can find a partner who complements your skills, and who you can happily collaborate with, it's probably worth it (And though your ego may try to convince you you're better off alone, you probably aren't). It doubles your network of organizational connections, and changes the psychology you'll have when pitching. Instead of standing alone you'll be a small team, and may even out number the person you're pitching to.

Step 5: Test the pitch

The longer you spend with an idea, the more vulnerable you are to your own ego. Get out of your office / cubicle / apartment, and go find smart people you know to give you feedback. Ask them to pretend they are whoever it is you plan to pitch to (This can be fun if you can be specific, as in asking them to behave like Bill Gates, Donald Trump, or your own caricaturization of your boss). Then go through your pitch, responding to their questions (or ignoring their laughter). You won't always get the feedback you want, but you'll sharpen both your idea, and the way you talk about it. If the idea is amazing and groundbreaking and you're afraid to run it by other people, find a close friend or parent and use them.

From your pitch tests, develop a list of questions you expect to be asked during the pitch, and be prepared to answer them.

Step 6: Deliver

Surprise – I don't think there is a ton to know about actually pitching. If you've prepared well, have a good idea that you truly believe in, and manage not to get too nervous, most of the work is in the hand of whoever is listening to you. Be calm, be direct, state your case, and then listen. Like any kind of public speaking type situation, the more often you do it, the more comfortable it will become. But there isn't much magic to the actual pitch. The only people that need to resort to tricks and manipulations are those that haven't worked to understand their audience well, or don't truly believe in what they are pitching.

The best delivery advice I can offer is to make sure you spend some time preparing for a positive response. What happens if they say "That's an interesting idea. What do you want from me?" Do you want money? Other resources? A change in the project plan? A feature added to the feature list? Know what the sequence of steps are after they agree you have a good idea and be ready to ask for them. If there are other people involved who's approval you'll need, ask them to set up a meeting for you. If there is a form that needs to be filled out, make sure you have one with you.

Step 7: What to do when the pitch fails

When things don't go well, your job is to harvest as much value from the attempt as possible. Always leave failed pitches with an understanding of what went wrong. Which points didn't they agree with? Which of your assumptions did they refute? In many cases, you might learn there are criteria for green lighting ideas in your organization that you didn't know about. It's also possible they objected to something about your approach: maybe they didn't appreciate that you accosted them outside their office, waving a stack of handouts in their face. If someone else in the room was there observing the pitch, ask for their feedback. In short, get as much learning out of completed pitches as you can. Recoup your investment in the failed pitch by mining any lessons out of it that you can apply next time.

From a tactical perspective: who else can you give this pitch to? Every organization has lots of people at peer levels of hierarchy. Would any of them be interested? Go back to your list from Step 2. Consider compromising on how much power is needed to make your idea happen, or how to split your idea into smaller ideas. Maybe focus on the first small piece of your larger idea, and revisit the rest after you've had some initial success.

Step 8: Do it yourself

In every creative industry you can find people rejected by the system who went off on their own, scrapped together their own resources, and made amazing things happen. Scrappy small budget films like Napoleon Dynamite, Clerks, Pi, happened only because a small group of people believed enough in their ideas to make the sacrifices, and do it themselves. Books and novels can be self published. Business can be started on small business loans or second mortgages. There is always a way to do it if you are sufficiently compelled by your ideas to take on risks, and make use of your own (unpaid) time.

If your idea is related to web or software, it's entirely possible to make a prototype using Flash, HTML or other development tools. Go crack open some books, or if you have the money, go hire someone to make a demo out of your sketches and rough plans. Don't ever allow yourself to believe that there is only one way to make ideas real: if you're truly creative, you can apply the same talent used to come with your idea, to the problem of how to make your idea real.

References

Business plans that win, Pitching Hollywood – There are many books on developing business plans and pitching screenplays. I've yet to make any exceptional finds here, but these are decent places to start.

Changing Minds – Howard Gardner provides a science based framework for how an individual changes the minds of others. More about general science and psychology than a practical guide.

Influence: the psychology of persuasion – A classic book on the basic psychology of persuasion. More about advertising and environment than one on one pitch-work, this books offers a framework for how individuals are influenced by the context messages come in, and how the messages themselves are designed.

About the author:

Scott is an independent author and public speaker for hire. His work as a writer and public speaker has appeared in The New York Times, The Washington Post, Forbes, Wired magazine, and on National Public Radio. He has taught at the University of Washington, blogs for Harvard Business, and has appeared as an innovation expert on CNBC and MSNBC.

He is the author of two bestselling books, Making things happen (Formerly titled The Art of Project Management) and The Myths of Innovation, a book about the true lessons we can learn from the masters on creativity and managing innovation.

He's an excellent speaker for hire, and frequently performs interactive talks and workshops for organizations, conferences and the occasional living room couch.

Scott grew up in Queens NYC, studied design, philosophy and computer science at Carnegie Mellon University, graduating with a B.S. in Logic and Computation ('94). He worked at Microsoft from1994 to 2003, mostly as a program manager on projects like Internet Explorer 1.0 to 5.0, Windows and MSN. He currently lives somewhere deep in the woods outside of Seattle, Washington.

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