



SELL WITHOUT SELLING

There's a lot to manage when presenting your ideas to a client and too much at stake to show up unprepared. These 7 points will help you navigate difficult waters, anticipate problems and steer the conversation away from the cliff.

There is an old African proverb that says, "Don't teach a child not to play with fire, let the fire teach him." Clearly, the wise old person who said this was really giving us a metaphor for pitching creative ideas. As I look back at my career, I can definitely say that the fire has been my best teacher. Some of my earliest memories of being burned were in graduate school at Pratt Institute. Every semester, we were required to present and defend the decisions in our work. The process was called "survey." Every detail of each project would be scrutinized in a matter of five minutes, from type selection and design choice to craftsmanship and

presentation. A panel of world-class design professors would judge each detail in front of the whole student body. It all came down to this pitch, and it had to be perfect.

Some spilled blood as they sliced through fingers to make comps. Others dripped with sweat while watching their work print in large format. Many shed tears as it became clear that the orange they selected on screen wasn't coming out of the printer. And then it was my turn. Survey had gone well for me in previous semesters, and I was confident of the decisions I had made in my work despite some pretty public disagreements about them with my advisor. I had written, designed and photographed a promotional magazine as my thesis. The masthead design was a custom Spenserian-script with guidance from my distinguished typography professor Tony Disigna (it took me two months to

■ **WORDS**

DOUGLAS DAVIS

■ **ILLUSTRATION**

ROBIN BOYDEN

www.robinboyden.com

illustration.com

tighten the four-letter masthead sketch that took him two minutes to rough out). Despite the countless nosebleeds, time and effort invested in the finished design product, my five-minute presentation couldn't have been worse.

In a profession where each idea, comp or thought has to go through countless approvals, rounds and revisions, you would think there would be a more deliberate means of teaching the art of presentation. Most times, the verbal aspect of presentation is learned on the job using the trial-by-fire method I mentioned. Other times, the creative work is given to a client-facing account person who couldn't possibly present your work with the same conviction as you.

Our passion for the work is part of the gift of being creative. We are an emotional people. We're trained to channel our emotion into tangible concepts using words and pictures that achieve client objectives. Yet most of us aren't actively trained on how to manage those emotions in the context of a presentation. We walk into a room full of people we've never met before and present something we've poured countless hours of love, creativity and effort into. From the informal internal presentation to the formal new business pitch, every designer knows this comes with the territory. Knowing that the presentation is coming doesn't make giving it any easier. Most of us are juggling the stress and adrenaline of having multiple projects and deadlines. In an instant, the same emotions that enable us to create can become the worst stumbling block to finding the words to articulate what we've created. So when someone says, "I don't like it," it can sound like, "I don't like your nose." It takes active training and experience not to take it personally because it *is* personal. On top of all the emotions, it's in the forefront of our minds that if the presentation is bad, our ideas get killed.

I've made the range of presentations and mistakes over the course of my career. The main lesson I've learned in these sour pitches is that the context the ideas are presented in can actively hinder the work being presented, but it doesn't have to. Now that you've chosen the typefaces, images and colors, presenting them in a way that will increase the probability of selling them is key. Mastering this skill will help you advance in your career, gain or retain more clients and increase the probability that your work gets a fair shot at seeing the light of day. After all, this is why designers stay up working all night. Now, let's go sell it.



1. ESTABLISH YOUR POSITION

My professors at Pratt were world-famous design-gods who either worked for Pentagram or Landor, or were once partners with Herb Lubalin. We all knew who they were and why their opinions mattered. As you leave academia or gain more responsibility within a firm, it won't be as clear who's in front of you and vice-versa. In business meetings, you'll need to get to the point quickly and explain or justify your conclusion. Most

business people or marketers don't know, understand or care about the details of the creative process—that's *our* world. What they want from your presentation is a top-line understanding of why your approach is relevant and strategic—things that matter in *their* world.

Begin by answering their first two questions before they even ask them: "Who are you, and why should I listen to you?" The fact that they dropped out of Harvard to start a business, completed their MBA at NYU or inherited the family business got them to where they are and to some extent defines them. Likewise, get their attention by having a brief explanation or a few prepared sentences on why you—or your firm—are uniquely positioned to offer the right solutions to their business problem.

Here's an example I use: "Six years ago, I stumbled into a strategy meeting and realized that becoming the 'creative who understood business' would differentiate me. This has helped me to inject creativity into solving business problems vs. restricting creativity to the execution. 'Design plus business' experience gives me a complete strategic and tactical range of solutions, and I'm excited to share some insights with you today." Finding the right way to position your skills will take some work. Once you can articulate your value, it's a great way to introduce yourself and explain why they should consider your point of view.



2. KNOW WHO'S IN THE ROOM

Now that you've grabbed their attention, you'd better have a relevant point of view to share. Yet "relevant" is relative, so knowing who's in the room is essential. This will require some homework in advance—never enter a room blind. A few clicks in LinkedIn or Google should give you all you need to understand if the person is an influencer or a decision-maker within the context of your project.

What's the difference? An influencer can have sway over the project, suggest a particular vendor and usually will need to make a presentation to the person writing the check. That person is the decision-maker. As a mid-level person, he will need to manage the expectations of his boss as well as manage the productivity of the people who report to him. That said, your presentation should be transferable so that after you give him your best in-person pitch, he can take the hard copy, slide deck or leave-behind and pitch the person who can green-light the project. The visual on each slide needs supporting copy or captions associated so that the rationale for the work speaks for itself when you aren't there.

The worst thing you can do is bank on an audience member to remember what you said the way you said it when he's trying to sell it to the boss. Once you know who's in the room, you can then determine the approach based on what each person is responsible for accomplishing. In business school competitive strategy classes, marketers are taught to read case studies from the perspective of the decision-maker. In doing this, they're then trained to reach the goals of the business

problem using the information the boss had. This analytical tactic taught me to step into the shoes of a businessperson, use my discernment to sift through mounds of information, determine what factors are unimportant and arrive at viable solutions. As you present your creative ideas, know who your audience is and what their goals are. From there, you can recognize, extract and weave the insights needed for their decision into your presentation. Framing the context of the ideas with business considerations is invaluable when needing to justify and defend the work.



3. MASTER THE SETUP

I remember being in presentations and realizing that I did one of two things: spoke too much before showing the work or didn't say anything before revealing it all at once. Both extremes are a death sentence for ideas. Thank heavens that the work in each situation was sound because the presentation or context for the ideas was terrible. Talk too much and you're like a commission-based sales staff at an electronics store. You always know the difference between someone "selling" and someone who took the time to understand why you came to the store. The latter person is meeting you where you are, asking questions to understand what you need to make the decision. Not saying anything ensures that you're about to be locked into a subjective opinion struggle with everyone in the room based on who's right vs. what works to meet the marketing objective.

On the way to gaining enough presentation experience, creatives will often waste valuable time explaining or talking through information the client knows all too well. There's no reason to recite the history of the brand to its own business or marketing team. They know that much better than you do. Ask yourself "What part of this is a given? What do they already know?" Then approach your setup by offering new information. Try building your pitch on the implications of that history (e.g., how their history presents an opportunity to capitalize on a relevant emerging trend, or how this interesting tidbit about the brand's heritage will inspire a unique way to communicate to the existing customer base). Be sure your logic was inspired by factors relevant to the business problem they're facing. Think of how to leverage a particular behavior or mindset of the target, a feature or benefit of the product, a client objective, or a message the target group should understand. This will take some time.

I can point to several reasons for the bumps in my thesis presentation at Pratt, but this was the main one: I went in without preparing, practicing or thinking about any of this. Gone are the days when creativity for creativity's sake allowed for ideas that were presented as "cool" or "edgy." Design and advertising have changed from a purely idea-centric field to one that has to provide creative business solutions. Marketers now hold agencies accountable for their creative ideas, and as a result, success is measured in new customers and ROI. If you're injecting creativity into solving the

business problem, you'll need to present the idea in a way that makes the audience aware of the business or marketing objectives you factored into this solution.



4. PAY ATTENTION TO STRUCTURE

Although I wasn't involved in any way with the long-running Apple campaign "Get a Mac," I'll use it as a familiar case study for how to structure your pitch. I like to begin with the most relevant insight about the target we're trying to reach.

Insight: "The larger market share of Windows-based computers makes most people more familiar with PCs. That doesn't mean they prefer them, though, because with that familiarity comes the headaches of viruses, uniformity, clunky user experiences and crashes." From here you can lead into what I like to call the "therefore." This is the bottom line or actionable conclusion from the insight.

Therefore: "If more people knew the Mac alternative handled all the same functions in a cooler, easier and overall more enjoyable experience, they would listen." This leads us to the reason we are here in the first place: the verbal articulation of the creative concept or theme. It's tough to articulate a concept at first. You should be able to explain it in no more than a few sentences. If you can't, it's too complicated, and you'll need to either simplify the idea or the explanation. Remember, a concept isn't a description of the execution, it's the actual idea.

Concept: "The idea is to compare and contrast the differences between Mac- and PC-based platforms by personifying the computers and acting out the differences." The execution is how the concept is being communicated in what we are asked to create. Think of the concept as the palm of your hand and the executions as your fingers. Depending on how big your campaign is, the executions are all the different ways of communicating the same concept. Executions live in media channels, and this is how campaigns are built.

Execution: "TV spots, print ads, digital or any other channel will focus on a different Mac feature such as banter about connectivity or an interaction around stability and, thus, give the reason to consider switching." The benefit to the target group is a result of the feature in that particular execution. Features are tangible aspects of the product or service, and the benefits from those features are often abstract results to the consumer. It's the point of the execution and should be differentiated relative to competitors.

Benefit: "The benefit will be acted out between the characters to illustrate the ease of use, stability and connectivity." The message the ads convey should be a plainly stated takeaway that the target audience should understand after coming in contact with your campaign in any execution.

Message: "Using a Mac is just as effective as using a PC, but it's much more fun and eliminates the headaches." The objective or goal of all this is one that would be given to you in the brief or recommended as the agency/firm point of view if this were a pitch.

Objective: “Increase awareness: Make Mac computers top-of-mind when considering a computer purchase. Support the purchase of existing customers, and increase market share by enticing PC users to switch to Mac.” Again, though I wasn’t in the room or associated with this idea pitch, taking the time to write this out provides clarity, structure and flow.



5. SET THE CONTEXT

Keep in mind that the setup is also the place to try to neutralize negative client comments that could come in the feedback portion of the presentation. It’s important to anticipate hot-button words, avoid negative connotations and navigate previous failed approaches. Head off potential negative client comments like, “It looks communist” after the presentation by framing what you’ve done before you show the work. “We were inspired by diagonals used in Swiss poster design, the color palate of Constructivist cinema poster designers Georgi and Vladimir Stenberg and the visual symbolism of the strong figures used in muralist Diego Rivera’s work.” Assuming that you’ve had a sound brief to work from, like the one I detail in “11 Steps to a Great Client Brief” (HOW, May 2013), this approach gives sound strategic footing to show your creative ideas. The setup can be a powerful preamble that frames the reason that the concept or theme you’re about to present is viable or an idea-suffocating eulogy better known as *pre-ramble*. Being orderly and strategic makes all the difference.

Note: If you’re presenting in Keynote or PowerPoint, be sure to present to the audience and not the screen. If there are multiple people on your team presenting, know who’s advancing the slides and be sure they know when to advance them. And don’t read the slides to them. Focus on highlighting the main take-away of each slide in practice sessions. This is what you’ll say as a voice-over while the audience sees the content on each slide.



6. PRESENT THE WORK

Once you’ve given a clear strategic context, *voilà*, it’s time to let the work speak for itself. Read any taglines or brand manifesto copy just before showing the visuals, one solution at a time. This will be the introduction to the rest of the creative solutions. Be sure that the first thing they see is the concept that best embodies your idea. After you’ve read each element of copy, keep them focused on your presentation by turning over any previous work before revealing the next solution. It’s a good idea to comp print ads inside of the magazine, as they would be produced. This is in addition to having this same presentation on a board. Only read what’s in the work; if you did your job during the creative development and the setup, you don’t need to do anything else. If you’re reading a storyboard, read the dialog as it would be on screen vs. explaining the spot. Resist the temptation to add anything that’s not part of the

creative you’re selling to the client. After all of the work is presented, you can then turn them all over and pass comps around the room. This will set the stage for client feedback in the last part of the presentation.

My time in business school yielded these insights—but only after I had been in the room as a creative for many years selling ideas vs. creating the right context for the ideas to speak for themselves. You had your turn, now let the work shine.



7. INTERPRET THE FEEDBACK

Now it’s the client’s turn to speak. This is the part where framing the work from the point of view of meeting the marketing or business objectives and trying to anticipate the creative minefield comes in handy. Hopefully this will move the discussion away from the subjective critique or “like” and “dislike,” and toward the more objective analysis of why an idea “works” or “doesn’t work.” If your client says the words “like” or “hate,” replace them with “this works” or “this doesn’t work” in your reply. You’ll need to be sure to frame the conversation in such a way that you can get to the root of what makes the overall execution accomplish its objective or not.

This also lays the groundwork for you to draw your evaluator out by asking questions that seek to isolate the baby from the bathwater. If your client “doesn’t like” the layout or concept, you can then ask if it’s the typeface, colors, format, imagery, headlines or connotation they’re reacting to.

We often hear vague feedback that leaves us more confused after a critique. If a client, creative director or account person says, “I don’t like it” or “I like it,” try to figure out why they feel that way. If you can put your finger on what “it” is, you can look into revising that element of the design vs. starting from scratch because you didn’t get specifics.

I’ve seen so many great ideas die on the table because they weren’t presented correctly and, therefore, had no buffer against the subjective black hole.

Last, try to remember to have fun. You choose typefaces, specify colors and create concepts for a living—life is good whether you win the business or not. Present your ideas in a way that will increase the probability that you’ll get past this next round, get the business or close the deal. **HOW**

Brooklyn-based Douglas Davis enjoys being one of the variety of voices needed in front of and behind the concept, marketing plan or digital strategy. Check out his online workshop at HOWdesignuniversity.com. www.thedavisgroupnyc.com



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