5 Steps to Pitching Like a Pro

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No matter how much you've prepared to pitch your big idea, you're unlikely to close on the deal if you haven't considered each person at the table. You might believe your idea can make your client or customer successful. But it's not enough for you to believe in it.

The trick is to help *them* believe in it too. Every piece of your pitch should point back to strategy and be aimed at showing them a desirable future vision of success. Today I'm giving you my winning strategy for knowing who's in the room and how to:

With just a bit of effort, you can master these tips to selling your ideas and pitching with confidence to turn each person at the table into a believer. Ready? Let's do this.

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1. The Five Archetypes: Know who's in the room

When teams come together to make a decision, each person shows up with different motivations, interests, responsibilities and decision-making power. They may even have wildly divergent ideas about what exactly is at stake. This can make decision-making more challenging – especially if you're an outsider trying to sell them a big idea. That makes it critical to know who you're pitching to.

Now, I'll introduce the **five archetypes**. You may not have each of these archetypes represented at the table, or you could have multiple people with the same archetype. Regardless, keep these archetypes in mind as you get to know your audience:

- **The Decider:** This person is responsible for making the final decision and holding others accountable. Sometimes you'll have two Deciders at the table.
- **The Money:** This is the person with the greatest financial stake in the brand –usually the CFO – but sometimes an investor or board member. For smaller projects, the Money is often a manager or vice president managing profit and loss.
- **The Dissenter:** The Dissenter comes with a viewpoint that conflicts with the predominant perspective on the team. Their value is in helping avoid groupthink, so make sure you've got a Dissenter in the room … but only one! More than that, and they can quickly distract the team from the goal.
- **The Individual Responsible :** This is the person charged with running the brand day to day. The Individual Responsible has invaluable insights into operations, capacities, opportunities and weaknesses.
- **The Builder:** The Builder is the stakeholder who usually has to live with the consequences of a decision. They're detail-oriented and have a vested interest in making sure decisions are practical, sustainable and realistic.

2. Turn adversaries into advocates

Among the five archetypes, you'll have different people serving as advocates, barriers and everything in between.

Advocates are great. They believe in you and want to work with

you. They're probably the reason you gained access to the room in the first place. But you'll also have barriers and opposition:

- A person acting as a **barrier** has a specific need or problem that needs to be solved for them to become an advocate.
- Those acting as **opposition** are in conflict with you, because they favor a different solution (which could very well be their *own* solution).

So, how can you turn folks posing as barriers and opposition into advocates?

- **Meet your barriers head on:** Connect with them one-on-one to explore how your idea can meet their unique need. The more clearly you articulate your idea as *their* solution, the better your chances of turning them into an advocate.
- **Make the opposition the hero:** Just as you did with your barrier, meet your opposition one-on-one, finding a way to make them the hero. Take a part of your idea, and make it theirs – so they can feel like they're the one helping push your solution forward.

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3. Negotiate a win for the room

The best negotiators ensure each person leaves the table feeling like they've won. But not everyone experiences a win in the same way. Here are two approaches to consider:

- **Win-Lose:** Some people need to feel like they've won – and that you've lost. If you find yourself in this space, then be prepared by having something in mind that

you can “give up” or “surrender.”

- **Win-Win:** Others thrive when there’s a win on their end and a win on yours. They get excited about the partnership and view you as a part of their internal team. Find ways to turn one side’s victory into a win for all.

4. Ask better questions

Make sure you’re asking questions that drill into the functions of the organization. Sure, they may not be immediately relevant to the project, but by doing so, you position yourself as the expert who’s already thinking a step ahead. Plus, by asking questions they don’t have immediate answers to, it creates a greater sense of expertise on your end.

Related: 4 Simple Pitching Concepts to Capture a Room’s Attention

5. Define clear next steps

Don’t leave any room for ambiguity. Make sure there’s a clear path forward. Identify not only your next steps, but also theirs. Clarify what your follow-up will look like, and offer a clear schedule for when you’ll check in next.

Let’s recap those five tips for selling and pitching your ideas to land your next deal:

1. Speak to the five archetypes in the room.
2. Turn barriers and opposition into advocates.
3. Negotiate the right type of win for those at the table.
4. Ask better questions to showcase your expertise.

5. Define clear next steps.

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