



# The Art of Persuasion: Pitches — A Primer

By Robert A. Creo

**E**arlier columns have addressed the lawyer's identity and reputation, explored self-awareness, perpetual learning, professional growth, fear and anxiety, the bargaining table and documenting the deal. This column explores best practices for lawyers to present their ideas and work product to their clients, other attorneys and the public. The focus here is on face-to-face communication in informal, non-adversarial settings when the lawyer is trying to sell services or a concept — commonly referred to as a pitch.

## What Are You Doing?

Pitches can involve a variety of goals. The prime purpose might be to get past a preliminary screen to set the stage for a meeting with a higher-level decision-maker. It may be to close a deal, obtain buy-in or to form a client relationship. It is critical that you articulate your goal, commit it to writing and keep it visible during planning and preparation for the event.

## The Science of Persuasion

### *Focus on the Eyes*

Most people process new information and are more likely to retain it via the visual sense. Our brains have evolved with sophisticated shortcuts to allow for making quick, lifesaving decisions based upon an extensive storage capacity and an ability to interpret information from specific environmental triggers. Our self-defense and survival instincts send us into auto mode when we see specific stimuli. Thus, critical data that supports your goal should be presented in a visual format that is easily understood and memorable.

### *Storytelling*

We have a biological and communal predilection for stories. Stories engage our brains. Stories evoke emotions and build bonds between people. Words, especially oral language, must be partnered with visuals and images to create an effective story, point or principle. We react to and remember what we see, but when it comes to the functions necessary for decision-making, an easy-to-follow narrative with a moral or takeaway matters.

### *Engagement, Interaction and Attention Spans*

Humans respond powerfully to two-way conversations. We desire affiliation, belonging and connection. We want to connect to and identify with the in crowd and we fear missing out. Aspects of your narrative must be sympathetic to the audience members' goals and values.

## Pitching Team

Whether people from your team are participating in person or remotely, you must determine individual roles. These must be shared and reviewed among the team to harmonize the presentation segments and to avoid dysfunction. You should also let your audience and host know, in advance, the role of team members. If they expect that a senior partner will be doing the talking, and she or he does not appear or has only a minor role, this could be viewed as a sign of disrespect if not clarified in advance. Explain the role of any attendant observers or other nonpresenters. Practice the pitch well in advance. If you find that a member of the team is not being effective during the practice run, then adjust the team or reassign the content. Larger or diverse teams or subject areas demand more preparation time.

## Data and Analytics

Many organizations pride themselves on making data-driven decisions. It takes effort to transform data, symbols and abbreviations mentally. If a date is important, say July 21, 1969, I recommend spelling it out rather than using 7.21.69 or 7/21/1969. Most people's minds mentally translate it to the words of month and numerical years to provide the context.

Author and speaker Cole Nussbaumer Knaflic has six basic lessons for transforming data and analytics into useful information for presentations:

1. Understand the context.  
This includes identifying your audience, your takeaways, communication methods and mechanisms, formality levels and desired tone.
2. Choose appropriate visual displays.  
Visuals can include simple text, tables, heat maps and graphs or charts (e.g., bar, slope,

vertical, stacked, waterfall, square, horizontal, pie and donut).

3. Eliminate clutter.  
Every line and element increases the cognitive load on the audience, so eliminate anything unnecessary for their brains to focus on.
4. Focus attention where you want it.  
Use white space, contrast, color, animation and page positioning effectively.
5. Think like a designer.  
Decide what you want the audience to do with the data (function), then order the data strategically for maximum impact and consider what forms the visualization should take (e.g., accessibility, aesthetics, thickness of lines, size).
6. Tell a story.  
A story has a clear beginning, middle and end. Use storytelling techniques, drawing on the power of emotion, repetition, suspense and narrative flow, all promoting your theme, theory or thesis based upon the data and visualization tools.

Knaflic concludes that best practices and guidelines for storytelling with data happen at the intersection of science and art.

### Pitching

If you are pitching your services, then forego all drama, video or audio clips or attempts at humor as the starting point. Focus on introductions, listening and confirming the interests and characteristics of the “buyer.” Speak authentically and encourage interruptions to spark meaningful dialogue with the audience. Get there early. Ask if there are any logistical constraints or work emergencies that have arisen since the initial scheduling that may have changed expectations regarding time management. If you have flexibility in the order of presentation, ask



the buyers where they want to start. My rule of thumb is to start with their most important concern. Thus, if fees and costs are the barrier to getting retained, start there. This may be counterintuitive since the traditional approach is to try to wow the buyer and talk about money last. I am doubtful that this works for lawyer services. Prospective clients are usually familiar with the legal marketplace and are not going to get sucked into a bad economic arrangement based upon a slick multimedia presentation. You can set the stage by noting the variety of options, such as a la carte pricing or narrower packages; however, your presentation should emphasize your capabilities based upon the full menu or scope of your services. Acknowledge the buyers’ doubts and challenges and deliver your pitch, emphasizing your strengths and the overall benefits that you can provide.

My research into human behavior has convinced me that having the courage to admit your vulnerabilities ultimately engenders strength and projects the credibility,

### References and Additional Sources

Cole Nussbaumer Knaflic, *Storytelling with Data* (John Wiley & Sons, 2015).

Doug Lipman, *Improving Your Storytelling: Beyond the Basics for All Who Tell Stories in Work and Play* (August House, 1999).

Lauren J. Silbert et al, Coupled neural systems underlie the production and comprehension of naturalistic narrative speech, 111 *National Academy of Science*, No. 43, E4687-4696 (September, 2014).

Logan Kugler, *Computerworld*, Jan. 22, 2013, Ten Tips for Giving Killer Prezi Presentations

Prezi: <https://prezi.com>



rapport and trustworthiness necessary to build durable professional relationships. Tell your own story and describe the capabilities that allowed you to get the audience. Do not demean the competition while addressing how you differ from other lawyers. You might punctuate your accessibility, reliability, responsiveness, creativity, scope, diversity, the depth of your coverage or bench, your connections or professional relationships or your internal workplace culture that results in content, dedicated and loyal associates and staff.

### Prezi

Prezi is a brand of presentation software. Instead of linear slides, like PowerPoint, Prezi features a “big picture” canvas that reminds me of a children’s board game. You can navigate up, down, left or right, along different paths, and zoom in on specific points. You can use a 3-D tool to provide depth and a powerful visual effect. Prezi offers templates and stock images that serve as metaphors and substitutes for words. For example, a photo of two deer butting heads may represent conflict or a clash of strong-willed personalities. There are autopan

functions that automatically bring forth portions of text you have created that align with your story. Videos from YouTube can be added to the path or the foreground or background. There are numerous technical functions, such as for fading in, grouping images and sizing for iPads and other devices. You can share your Prezi with others using Facebook, Twitter or a private link.

### Tools, Materials and Handouts

I recommend ending your pitch by providing concise summaries with images and bullet point takeaways. It may be as simple as a reformatting or reframing of your starting point, goals and capabilities. It

may include, on a separate page, citations to references or additional resources. I do not recommend handing out your Prezi, but any charts, graphs, tables or other compilation of data or quantitative information should be part of the package left with each audience member and decision-maker. For example, if your firm is pitching a new client, and your market differential advantage is how quickly you close files or how many trials each litigator conducted in the past three years, this data should be part of a handout. Provide these at the end and not at the start of the presentation.

Humor is difficult to achieve. I hate it when a speaker starts with a joke that is totally unrelated to the topic. A key principle: You are not as funny as you think you are. ☹

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Pittsburgh attorney Robert A. Creo has practiced as an in-house corporate lawyer and a solo and small firm general practitioner before focusing on being a neutral. Since 1979, he has mediated and arbitrated thousands of cases, including having served as a salary arbitrator for Major League Baseball, a grievance

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## TAKEAWAYS

- Identity specific roles for each team member.
- Prepare and practice.
- Package data deliberately into effective visual information, charts, graphs and handouts based upon science and art.
- Limit humor — you are not as funny as you think you are.