

# Peregrine®

communicate.  
words.  
pictures.  
actions.



## Pitch Perfect

Peregrine's process for  
creating the perfect pitch

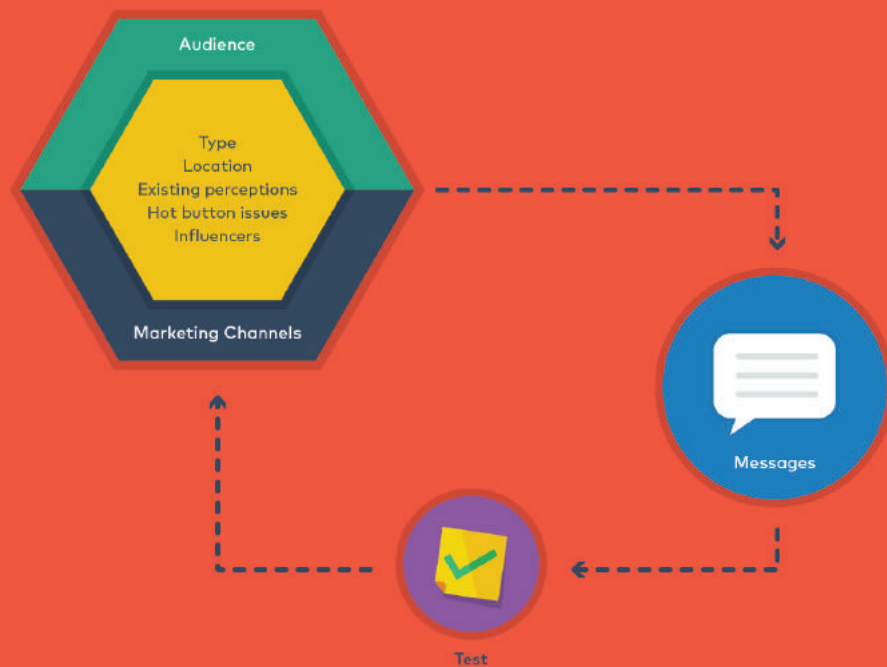
[www.peregrinecommunications.com](http://www.peregrinecommunications.com)

**A pitch is not an information dump. It's a process of filtering information down to the points that prove your big idea, your 'edge'.**



## Five key ideas behind creating the perfect pitch

- 1** The 50-page "leave behind" is different from the visual aids that support your pitch. To be effective, you need to create a relevant, clear and memorable structure which allows the audience to navigate your investment story, remember it and, better yet, repeat it.
- 2** A pitch is not an information dump. It's a process of filtering information down to the points that prove your big idea, your 'edge'. Think of yourself as a barrister presenting your case to a jury.
- 3** The pitch is part of a process. The context for the meeting and its outcome are key. It's just as important to plan for before and after the pitch as it is to plan for the pitch itself.
- 4** Humans are emotional creatures. We make decisions based on gut feeling and rationalise after the fact. This means that you have to connect emotionally with your audience. You must demonstrate passion and excitement about the content of your presentation.
- 5** "Go Big or Go Home". You need to put in the time to tune your ideas and to rehearse your presentation of them. Getting face time with investors is difficult. You can't waste the opportunity.



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## The start point to creating the perfect pitch is to understand your audience and the context

- 1 Who are they?
- 2 What is their level of understanding?
- 3 What are their 'hot buttons'?
- 4 Who influences them (e.g. consultants)?
- 5 What are the barriers/obstacles which need to be dealt with?  
Their existing perceptions?
- 6 How do you communicate with them prior to and after the pitch?  
What are their communications channels?
- 7 What do they need from you in this presentation?

To get to the heart of these questions, think about the last 20 meetings with investors. What did they ask? What were they concerned about?

Investors / Audience Type	Locations	Existing perceptions (e.g. what do they think now, either as a support or as a blocker/ negative towards you)	Hot buttons (e.g. what motivated them to choose you)	Influencers (e.g. consultants, intermediaries, colleagues)
e.g. Family office	Switzerland			

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On the basis of this  
work you are ready  
to construct your  
story. —————→

“  
**Avoid presenting a story  
that feels like it was  
written by someone else.**

# Constructing your story

Think about four elements when creating your story:

## **It must be authentic**

Connect your team and individual edge or “DNA” to your corporate DNA. Avoid presenting a story that feels like it was written by someone else.

## **Relevant and Essential**

Differentiate your strategy and own the space. Avoid generic language and a dumbed-down approach.

## **Emotional Connection**

Identify and push ‘hot buttons’, communicate and demonstrate personality. Tell stories and anecdotes. Avoid purely rational arguments and focus on benefits and functional values.

## **Powerful Communication**

Utilise a joined-up, leveraged and integrated communications strategy before, during and after the pitch. Avoid separating individual communications and risking confusion.



“Every investment has a story and, as Professor Robert McKee wrote, *“stories are the currency of human relationships”*, and good story telling is about creating a clear and memorable structure which allows the audience to navigate what you are saying and remember it – and even better – to want to repeat it!

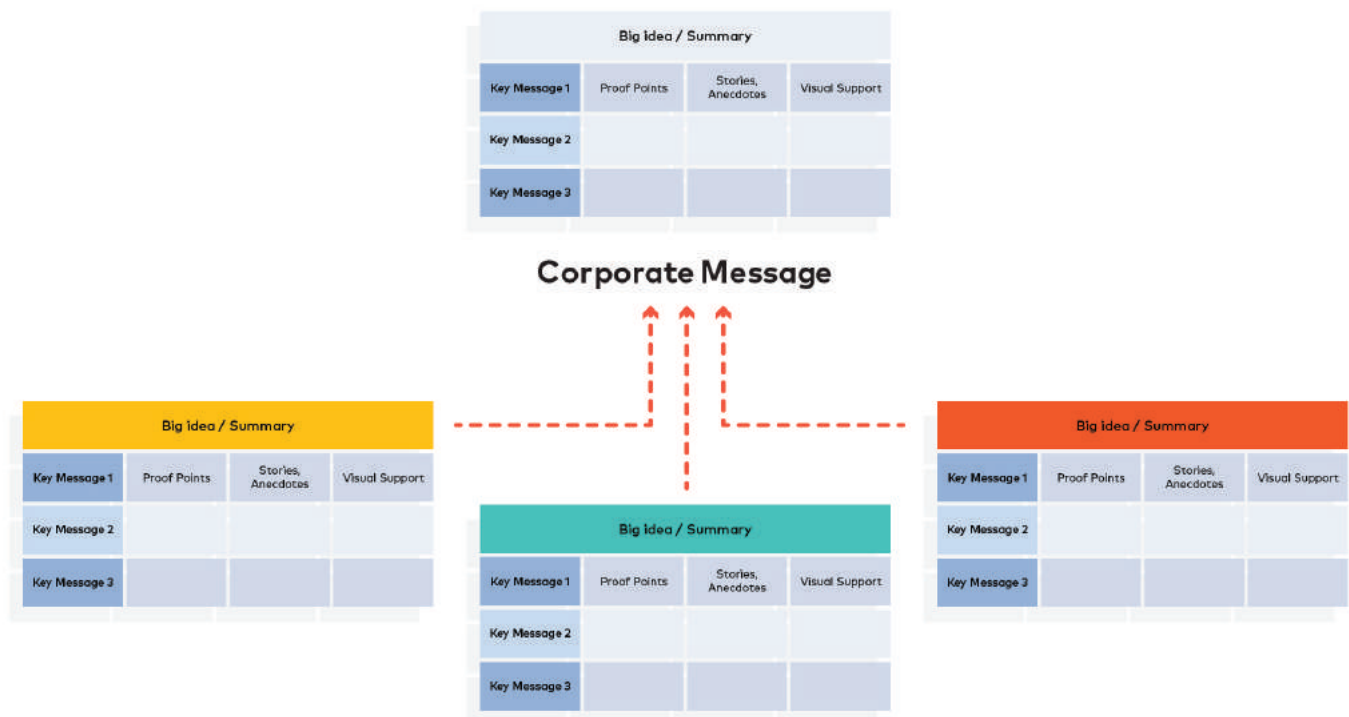
It is extraordinarily helpful to organise the story into a matrix (see the tables below) which includes key messages, proof points, anecdotes and case studies which helps make the data 'come alive', and visual supports (think ... if you only had a picture to make this point, what would the picture be?) and a summary of all of this into a 'big idea' at the top of the message matrix.

A simple structure might be:

- Market opportunities and drivers of those opportunities
- Differentiated strategy to take advantage of these market opportunities
- Team, resources etc. available to implement the strategy

...And the 'big idea' which summaries all of this (in dotcom days this was often referred to as 'the elevator pitch').

The way to build this message structure is to start at the fund level and work up to a corporate message set.





“Woodrow Wilson famously said: *“If I am to speak for 10 minutes, I need a week, if fifteen minutes, three days, if half an hour, two days, if an hour, I am ready now.”*”

## And you are now ready to design supporting visuals for your pitch meeting

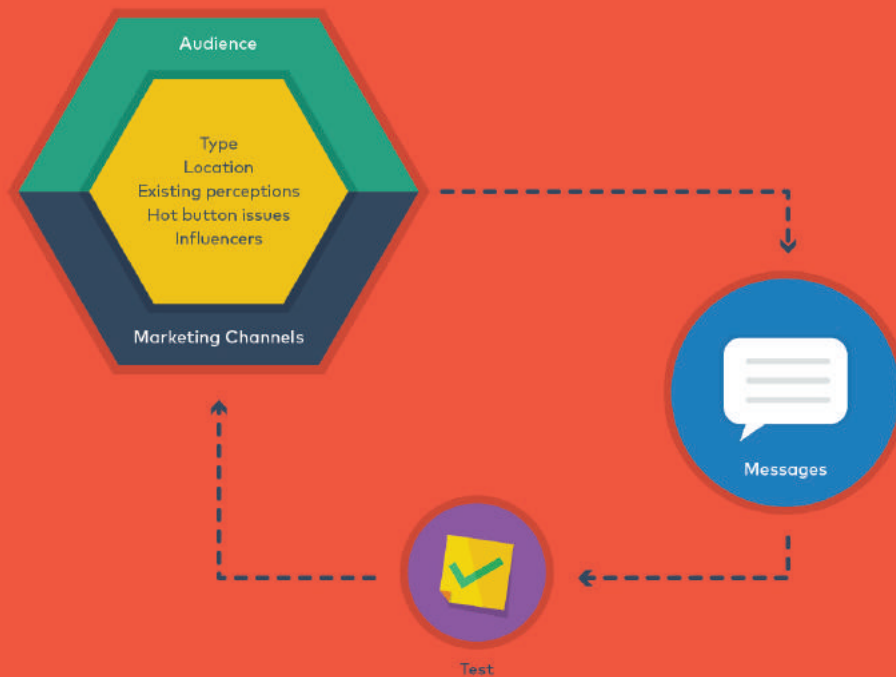
Stick to some basic rules:

- One idea per slide
- Keep it simple
- Turn words into pictures
- Value Brevity
- And make it look great

Brevity takes time and planning. Woodrow Wilson famously said: *“If I am to speak for 10 minutes, I need a week, if fifteen minutes, three days, if half an hour, two days, if an hour, I am ready now.”*

The same goes for the pitch.





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## The next step is to test your pitch


Consider whether the story's framework presses the audience's hot buttons; whether the story is relevant; whether it's actionable; whether it's memorable.

Pay careful attention to the story's big idea. Is it differentiated clearly?

Does the story include rational and emotional appeal?

Does the story get the audience to your goal? *I want them to...*

## And finally, practice and present your pitch to colleagues →



**Be passionate and upbeat about the content of your presentation otherwise a speaker risks disqualifying the material as uninteresting.**

## Practice and present

It's important to engage the audience by maintaining eye-contact and not reading off slides.

The slides – probably a maximum of 5, should be visual supports to help the audience navigate your story and help your audience to recall your message.

If needed, use your computer as a teleprompter by displaying your notes on it.

Get across what you're presenting that day in three main points. Funnel those three points into one big idea.

Avoid overloading your audience with information; a common by-product of nerves.

Be passionate and upbeat about the content of your presentation otherwise a speaker risks disqualifying the material as uninteresting.

Do this through positive body language, such as eye-contact and mirroring.

Sign-post the presentation's structure. Tell the audience what you're going to tell them, tell them, and then tell them what you told them.

**“Passion for your big idea should drive you to invest in its communication.”**

Avoid complex language and jargon and use sensory language that evokes feelings and helps to educate. Above all else, use language that is suitable to the audience. Keep your sentences short. Use active verbs. Present one idea per sentence.

Passion for your big idea should drive you to invest in its communication.

Think of Donald Trump's presidential campaign. It was designed around an authentic message, targeted at a specific audience, and wrapped around a strong emotional idea. *"Make America Great Again"*.

Trump's slogan was so effective, can anyone remember Clinton's?

The same goes for Brexit. The Leave Campaign's message *"Take back Control"* still sticks in peoples' minds. Can you remember the Remainers's slogan?

**Summary** →

## BRAND CONCEPTION / CONTENT CONSTRUCTION



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## CONTENT DESIGN & DISTRIBUTION / DELIVERY



## In summary

A pitch is designed to create a specific outcome, it's designed to persuade people to take action.

It's also part of a continuing process. Just because you communicated your idea once doesn't mean that you're done communicating with those investors.

A one-off presentation will not be good enough.

That's why it's important to accompany your pitches with a content marketing strategy which powerfully and consistently communicates and reinforces the key messages. ■