

THE PERFECT PITCH

with a VIRTUAL
TOUCH

BLACK ISLE *Playbook*



ENGAGE
SCREEN TO SCREEN

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I. Current Situation

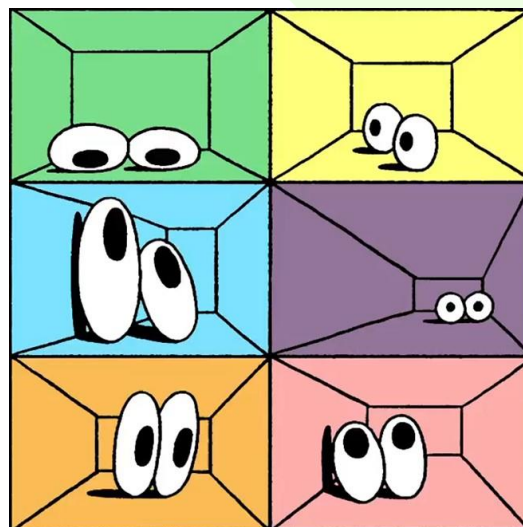
Sales meetings are the heartbeat of any business. It's where your clients get critical information, where you pitch the benefits of your offering and where important decisions are made. Amid a global pandemic, we strive to get results without being able to meet face-to-face. Instead, we are obliged to meet screen-to-screen. There are several platforms available, all that do a great job at enabling the screen-to-screen experience. Granted, but why is it so much more difficult than participating in a face-to-face sales meeting?

At the best of times, most of us are anxious speakers. Our shyness, nerves and anxiety revolve around what to say and how to say it. Those feelings do not just go away when we meet with others virtually. Our discomfort grows when we add to that the newness of these virtual platforms, the limitations of internet bandwidth and the discomfort with always being on screen.

A few months ago, we were used to letting our mind wander while watching TV. Now, it's watching us! A further complication is interpreting facial expressions when participating in a screen-to-screen meeting. Micro-facial expressions are essential to our understanding of one another. On screen, facial expressions all but disappear, are distorted or frozen for a moment due to internet connectivity. Eye contact, so critical in face-to-face communication is difficult to achieve on screen. It is hard to know where to look. As a default, we tend to look at ourselves or others' thumbnails.

Some of us are exhausted with screen-to-screen meetings. It seems that all our social and commercial interaction is on screen. Our job, family, club, church even our doctor all occurs at home, on screen.

That said, we owe it to our clients, our colleagues, our company to do all we can to make sure our virtual meetings are the best they can be. This guide will show you how to do just that.



II. Meeting Logistics

Meeting Agenda

The leader should set a clear agenda and distribute it to invitees in advance of the meeting, including:

- Start and end times, as well as time dedicated for each subject
- Dial-in information (including PIN/User ID/Password) and a back-up plan in case of a technical glitch
- Meeting purpose (outcomes or actions desired)
- Client and sales team names
- Clarify sales team roles (facilitator, recorder, timekeeper)
- List of topics to be covered
 - framed as questions to be solved
- Preparation
 - What to read before the meeting
 - What to bring to the meeting

TIP: Ask clients to submit questions/contributions before the meeting and **ask them by name to talk to their comments** during the meeting. This technique has clients engaged before the meeting starts.

III. Technical Preparations

No matter the role you play in a virtual sales meeting, it is important that you represent yourself professionally, to distinguish yourself from your competitors. Think of your onscreen thumbnail as your own TV show and produce it accordingly. That includes a few, simple technical preparations.

A. Clothing

Yes, clothing choice is a technical element in conducting screen-to-screen meetings. Some people think that because they are at home when they participate in a virtual meeting, that casual clothes are appropriate and they come in their sweatshirts, gym pants and so on. Remember, how you represent yourself is important whether face-to-face or screen-to-screen. Dressing appropriately, contributes to your presence, where dressing inappropriately takes away from it. The rule is to dress for your client. If their office dress code is business casual, then dress that way for your virtual meetings.

Here are some additional guidelines to keep in mind when on camera.

CLOTHING DO'S & DON'T'S

- Avoid stark white or bright yellow shirts/blouses/accessories; they tend to reflect light and are too vivid on camera. Instead, wear a blue, gray, pink, or beige shirt/blouse.
- Avoid black suits/jackets which tend to diminish your appearance because they absorb too much light. Instead, wear a medium colored suit, best bets are blue/dark blue, gray, and brown.
- Avoid shirts with pinstripes close together. Lines close together tend to flutter on camera.

- Avoid fabrics with complicated patterns such as checks, tight/close stripes, herringbones, tweeds, and loud plaids. Fabrics of this design tend to strobe on camera.
- Avoid short sleeve or sleeveless tops; they give an informal look and draw attention away from your face.
- Wear clothes made of natural fabrics that tend to breathe easily under the warm studio lights.
- Avoid shiny jewelry and metal tie clips, which reflect light back into the lens of the camera.
- Avoid large/shiny jewelry that may sparkle, shine or dangle.
- Avoid jewelry that rattles, clicks, and clanks such as multiple bracelets or long necklaces. They tend to brush up against your microphone, causing a distracting noise.
- Bring clothes made of natural fabrics that tend to breathe easily under the warm studio lights.
- Bring accessories (like scarves and ties) with subtle patterns.
- Bring simple jewelry. If you are unsure about certain pieces, bring alternate ones.
- Style your hair off your face to avoid shadows.
- Bring a variety of lipsticks; some will look better on camera than others. The key is to match to your blush and clothes, opting for brown tones rather than bright reds.

B. Lighting

The Merriam Webster dictionary defines “in the best light” as – “in a way that makes someone, or something appear in the best way.” This is especially true when you participate in a screen-to-screen meeting. Many people do not consider proper lighting at all, and it shows. Regrettably, it reflects on their presence as well.

The good news is you don’t have to invest \$100’s in Hollywood lighting to show up “in the best light.” Ambient light can do the trick. Face a window if you have one in your workspace. If that does not produce the desired effect, consider augmenting your space with additional lighting. A ring light such as the one pictured below works well.



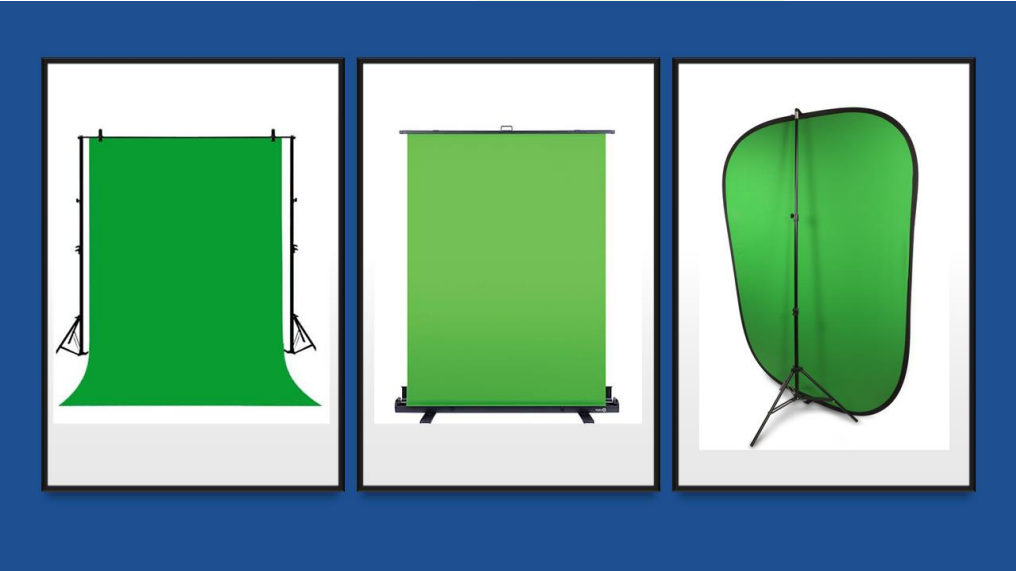
C. Sound

The quality of microphone built into most laptops is at best, variable. It always makes great sense to procure a USB microphone or a USB computer headset with microphone for your virtual meetings to eliminate echo and reduce sound distortion. Examples are pictured below.



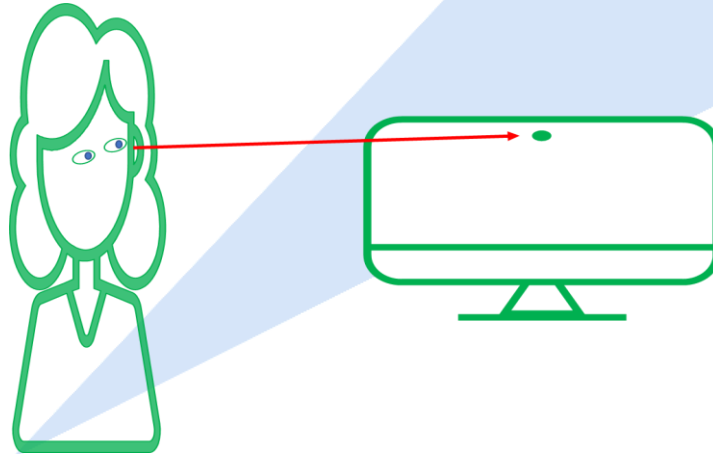
D. Background

If you are going to use your natural environment for background, ensure it is neat and any distracting objects are removed. Most web-based meeting platforms like ZOOM provide virtual backgrounds that you can substitute for your natural background. If you choose a virtual background, you should consider using a green screen like the ones pictured below. They provide stability to the background and eliminates jumpy images.

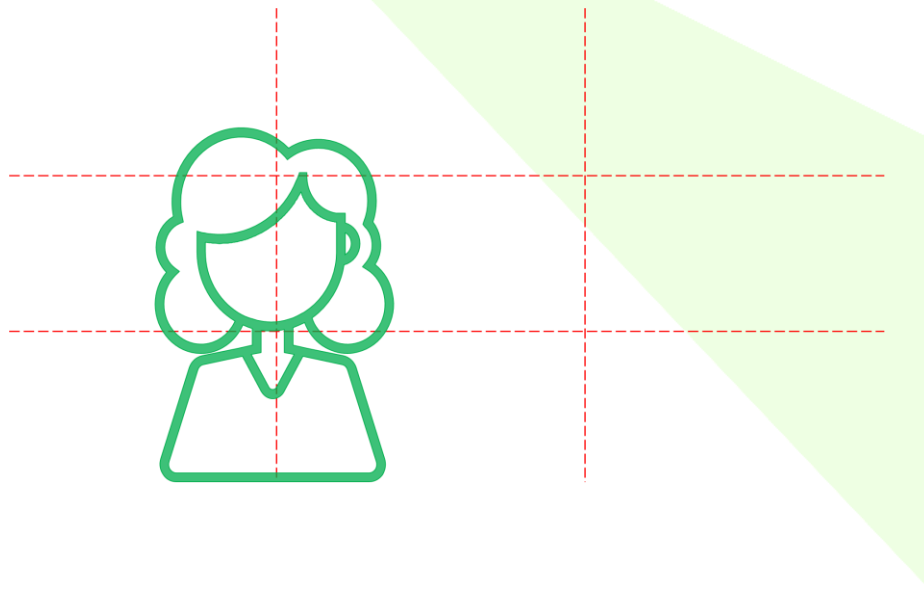


E. Your Best Angle

You want to look your best when you are on camera. Angles that are too low or too high will be distracting. The first step is to locate your web cam and raise your laptop so that your web cam is at your eye level or slightly above. You may have to raise your laptop using boxes or their equivalent. A virtual meeting needs human connection, and if your video is not relatable, it will be a distraction.



Next, establish your on-camera position. The best composition for all devices is upper chest level. Frame your position using the 'Rule of Thirds', a mechanism that photographers use to frame their shots.



Example of Great Positioning



IV. Content Preparations

Whether face-to-face or screen-to-screen, when you speak at a client meeting, participate in a key conversation, or present to a group, your goal should be to speak with impact. That means moving others to a different thought or action.

It's all about what you say and how you say it. Let's deal with preparing what you say.

Impactful Presentation Structure

When you are the one presenting, use the Presentation Pyramid to ensure your remarks are impactful from beginning to end.



Headline: Why you need me

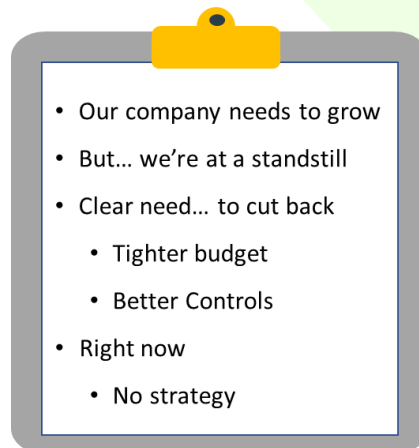
Reasons to Buy: What? Why? And How?

Evidence: Include all evidence that is necessary to support your reasons to buy... no more, no less.

Close: with a 'call to action.' Determine, who does what by when.

Masterful Presentation Notes

With masterful notes, each line is written as an idea, not a sentence because we talk in ideas... not sentences. As well, they are ideal support for the PAUSE delivery technique (to be discussed in the next section).



To prepare masterful notes, follow the guidelines below:

- First, open a Word document on your laptop and choose a large, sans-serif font. 14- point Arial font works best. Serif font such as Times Roman works well when you're reading a book, newspaper, or magazine, but it's not ideal when trying to grab ideas from a piece of paper in the middle of a virtual meeting.
- Then, set your left and right margins to give you lots a white space at the edges, something like 2.50 cms is suitable. Don't be cheap with the white space. It makes it easier to lift your ideas from the page.
- Finally, adjust the line spacing to 1.5. This will help you to easily grab your ideas in the heat of a meeting.

V. Conversation Flow

You see it in sales meetings all the time. Some sales people are always in a rush to be the first to speak and collisions occur. Their great products and services run the risk of never being heard.

The CALE approach is a simple, effective approach that when mastered and used consistently, is guaranteed to improve your sales results.



The first step is establishing a **connection** with the client by understanding your communication style, their communications style and how you relate to them. The second step is to be sincerely curious about their needs and the ideas they are expressing. To do this, you simply **ask** well thought out, respectful, open-ended questions. Third, ensure you **listen** attentively, not to respond but to understand. Fourth, now that you have heard everyone's point of view, it is time for you to **explain** yours in a concise, impactful way.

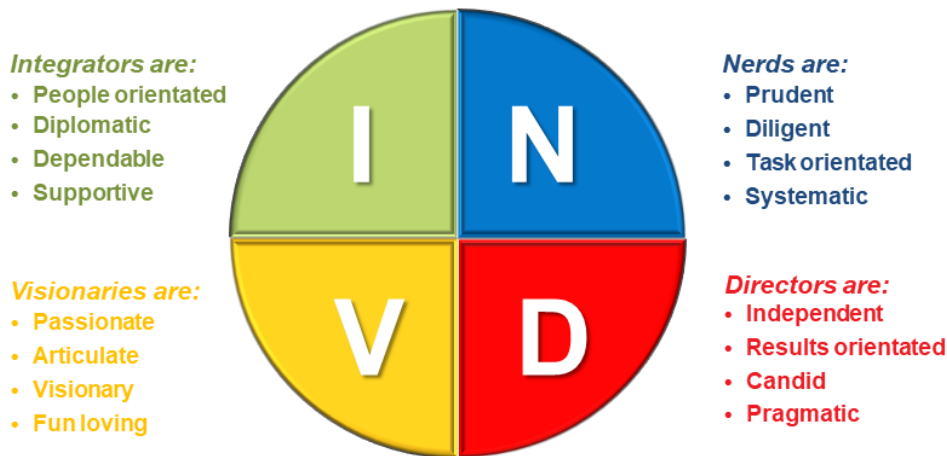
Let's go through each step in a little more detail.

A. Connect – The INDV Model

To connect with your clients, it is not only important that you know and feel comfortable with your communication style but that you can identify their communication style and know how to connect with them in the most productive way.

The INDV model is a simple yet effective tool to help you do just that. It suggests that most people can be divided into one of four communications styles, each has its own set of characteristics. Importantly, no one style is better or worse than another. As well, your style is situational, meaning that it may change based who you are talking to and what the subject is.

The diagram below gives a quick summary of the characteristics for each style. Which one are you? What are your strengths and weaknesses? How do others relate to you? How can you work better with them? To find out, complete the survey included at the end of this lesson. When you complete it, keep in mind a specific conversation, as well as those who will be participating along with you. Doing so will undoubtedly improve your sales results.



In the report, you will find two pages specific to each style. The first summarizes your style's communication characteristics, including your strengths and weaknesses. The second, breaks down how each style relates to you, what they question about your style as well as how you can work better with them.

Assessing others' communication style and understanding how to flex yours to better deal with them will pave the way to you having more productive sales conversations.

B. Ask

Some salespeople feel compelled to shout out the features and benefits of their products as soon as they can in a meeting. They assume they know what the client wants and that they have the answer to their problems. This approach is very risky.

Once you have assessed the communication style(s) of those participating in the meeting with you, the best next step is to be sincerely curious and ask other meeting attendees supportive, open-ended questions that revolve around what they really want and why. You may validate what you already know or learn something new. Either way, you're sure to engage your client at the outset, because you're demonstrating interest.

Regard yourself as a resolver whose job is to identify the solution that is right for them. In this step, you confirm the issues before you talk about what you can offer. It can be very revealing. The best questions revolve around; what? why? and how? Some questions you may consider using are:

1. What are the essential facts?
2. What are the important issues?
3. How can we best solve them?
4. What would success look like?

C. Listen

Good listeners listen to understand and not just to respond. Unfortunately, not many people are good listeners. Remember the popular TV series, "The Big Bang Theory?" Most would agree that Leonard and Sheldon are both very bright, but Leonard is a much better listener. Take a look below at the characteristics of both good and bad listeners and keep them in mind when you participate in your next key conversation. The key? Always try to be a Leonard.

Active Listening

Good Listeners	Bad Listeners
 <ul style="list-style-type: none">• Probe for clarification• Actively listen• Empathize• Summarize well• Ask "Why do you feel this way?"• Ask "What else have you considered?"• Ask "How may I be of help?"• Ignore distractions• Look...but don't stare• Encourage by nodding...slight smile• Control body movement	 <ul style="list-style-type: none">• Interrupt• Automatic listening• Respond too soon• Jump to conclusions• Ask closed-ended questions• Match client's points• Provide advice too quickly• Judge you• Take calls, texts, etc...• Fidget

D. Explain

Once you've connected with the client and uncovered the true issues by asking sincerely curious questions then listening attentively to their answers, you are in a perfect spot to explain your product and why it is best suited to that particular client.

Keep in mind the essential points you identified in your Pitch Pyramid and translated into Masterful Notes.

VI. Your Delivery

The PAUSE delivery technique, along with properly structured notes, ensures that all participants in the meeting are moved by ***you & your*** message. You appear sincere and genuine when you deliver your remarks in a relaxed conversational style because your own conversational style is your best style - like fingerprints, it is unique.

Audiences are used to hearing conversation. Broken grammar and pauses are normal to them... they look forward to it.

The principles of effective, relaxed conversation is not confined to meetings (face-to-face or screen-to-screen) but it can be applied anytime you speak (i.e. delivering presentations, a speech, updates, and briefings).

A. Pace

Pace has two elements:

- Rate of Word Delivery - this should be your normal (brisk) pace to bring out your personality
- Rate of Ideas - give the audience an idea and then let them think about it. They can't listen and think at the same time. Ideas must be delivered at a digestible pace.

The importance of the 1ST AND 2ND Pause.

- First Pause - you are seen to be thinking about what you're going to say - not slick or glib, you are seen to be in control, knowledgeable and capable; you command respect. It creates client anticipation, interest.
- Second Pause - (the "GOT THAT?" pause) - allows the team participants to think about what you just said; with eye contact (looking at your web cam) it adds emphasis and authority to the point you have made.
- The meeting attendees remember what they thought about what you said: you must give them the chance to think - in silence. Only if you involve your audience, encourage them to participate by thinking, will they stay with you.

- Superb public speaking is a physical skill – like learning how to play golf, or the piano, the principles are simple, but it takes dedicated practice to get it right.

B. Delivering Your Pitch from Masterful Notes

Staying on message throughout a meeting can be a problem for some. Many think that they can "wing it" because the subject is something they're very familiar with. Chances are, they will likely forget to mention something that is important or, they'll ramble, going from one point to another aimlessly. Masterful Notes are the most effective way to stay on message.

The question is, "How do you deliver from notes and still maintain appropriate eye contact?" The key is to hold your eye contact as you begin to deliver a thought (as if to say, "Are you paying attention?") and then after delivering an idea, as if to say, "Did you get that?"

For face-to-face meetings:

1. Look down at your notes and take one or two lines into your mind.
2. Next, look up at your web cam, pause, for a second or two, and without looking away from your audience, deliver the ideas you just picked up.
3. Pause for another second or two, still looking at your web cam.
4. Then and only then, look down at your notes and pick up another line or two.
5. Look up at your web cam, pause, deliver those ideas, and keep looking at your web cam for a second or two.
6. Repeat these steps, until you reach the end.

Give it a try. It will feel awkward at first but keep practicing. You will soon find the rhythm that works for you. You will vary the length of first and second pauses based on what you want to emphasize.

Use the diagram below for a guide.

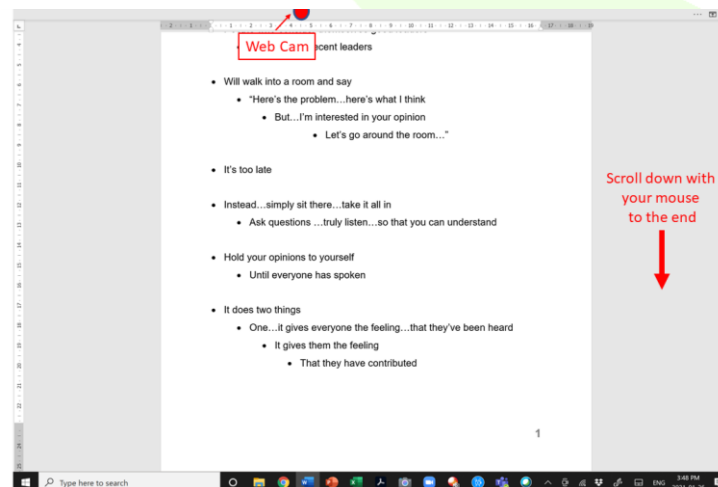
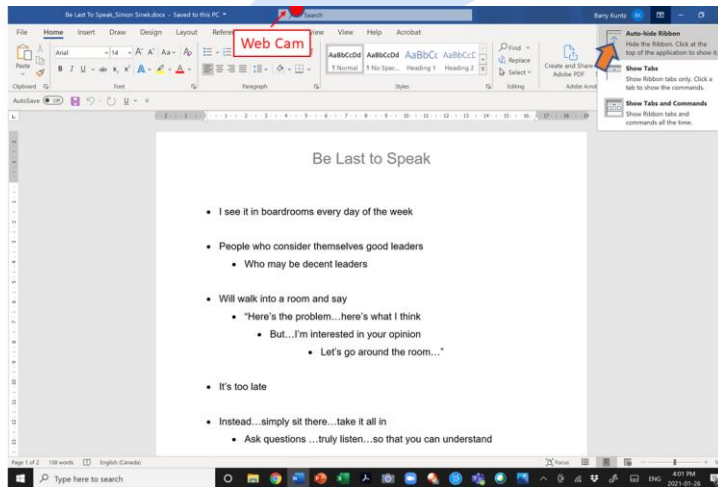
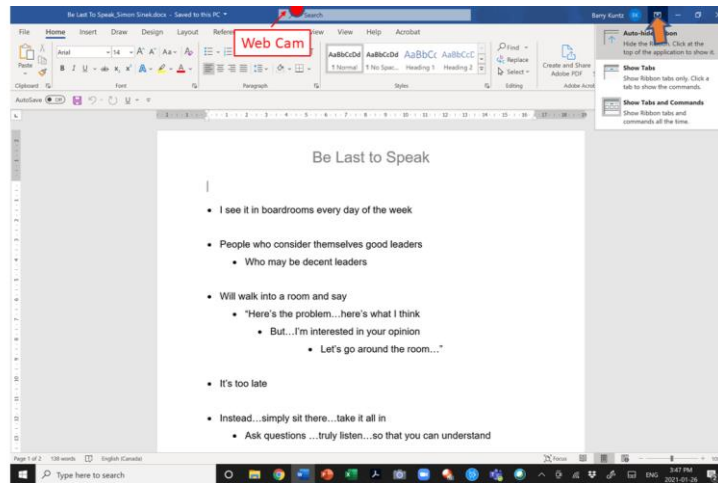


For virtual meetings:

While the above works as well for screen-to-screen meetings, you can try the following as well if you are not sharing your screen:

1. Load and display your presentation on your PC.
2. Remove the task bar ribbon and scroll through your notes as you speak

The reason this works so well is because you are delivering from the top line of your notes which (for most laptops) happens to be just below your webcam (think of the webcam as your client's eyes).



C. Interjecting

At times in a sales meeting you may want to interrupt the presenter or join the conversation to; add information, ask for clarification, or share an opinion. How can you do so politely?

First, look for an appropriate opening. Good places to interrupt are:

- When the speaker is pausing to breathe
- When they are finishing a phrase or sentence

Next, indicate that you would like to enter the conversation. In a virtual meeting, if you are on video, it may be as simple as raising your hand or notifying the meeting facilitator that you have something to say, or a question to ask.

Consider some of the following phrases to gain entry:

- “Can I add something here?”
- “Sorry to interrupt, but may I; 1) ask a question, 2) make a comment?”
- “Do you mind if I jump in?”
- “May I interject?”
- “Would you tell us a little bit more about that?”
- “Can we pause for just a second?”
- “I’m sorry to cut this short, but...” (useful when you want to end a conversation)

D. Additional Tips



Some additional techniques to keep in mind and employ throughout the meeting are:

- Paraphrase after major sections – it shows the meeting attendees that you are on the ball and it helps them distill the information.
- Direct your questions to meeting attendees by name. Knowing a question might come their way keeps them alert.
- Ask sincerely curious questions throughout the meeting and listen attentively. Use verbal nods like; “Please go on...,” “Uh-huh...,” “I see...,” “That’s interesting...,” “Yes, I understand...,” “Oh, really...,” throughout.
- Our body affects our mind so maintain good body posture throughout the meeting. It helps keep you alert.



VII. Wrap Up

There you have it; all you need to successfully participate in a virtual sales meeting. Remember, success depends on your engagement throughout, including adequate preparation beforehand. Go for it!

Appendix A: CALE Conversation Planner (page 1)

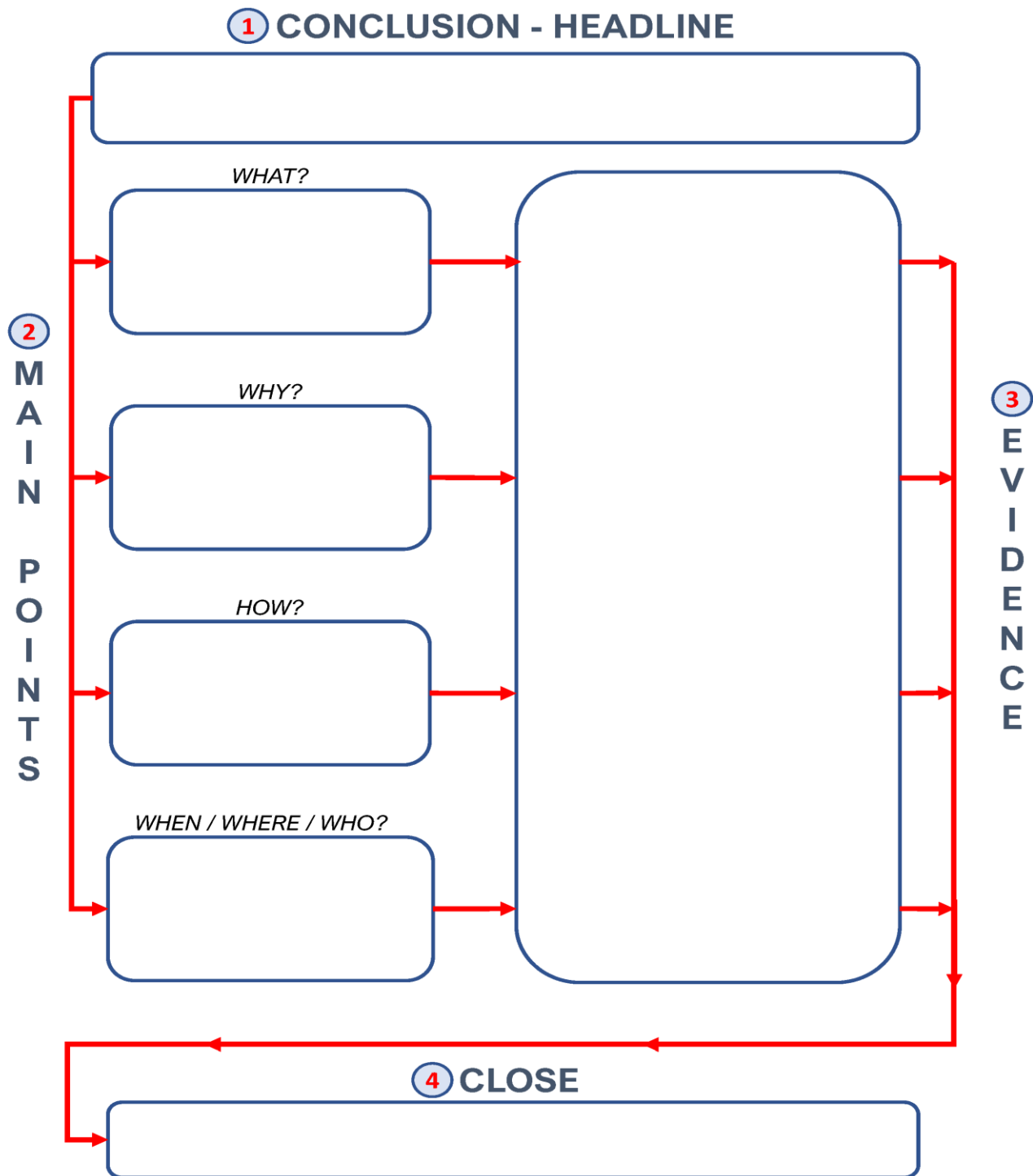
 <p>C - CONNECT Find out about the person you are dealing with. Look for common ground and build rapport – get to know them and help them get to know you.</p>	<p>1. Connect</p> <p>What issue(s) do you need to address? _____ _____</p> <p>With whom? _____</p> <p>What is your personality type? _____</p> <p>What is their personality type? _____</p> <p>How do they relate to you? _____ _____</p> <p>What do they question about your personality type? _____ _____</p> <p>How can you work better with their personality type? _____ _____</p>
 <p>A – ASK What? Why? How? Move into asking business related questions. Control the flow of dialogue and educate yourself. Understand their issues before you talk about what you can offer.</p>	<p>2. Ask – <i>What Do They Really Want?</i></p> <p>What are the essential facts? _____ _____</p> <p>What are the important issues? _____ _____</p> <p>How can we best solve them? _____ - _____ _____ - _____</p> <p>What would success look like? _____ _____</p>

Appendix A : CALE Conversation Planner (page 2)

 <p>L - LISTEN</p> <p>Make your point or pitch using the Pyramid Model. Keep it short, using the information you have gathered to focus your message on what your listeners have told you they are looking for.</p>	<p>3. Listen</p> <p>Probe for Clarification: _____</p> <p>Empathize: _____</p> <p>Paraphrase: _____</p> <p>Ignore Distractions: _____</p> <p>Leverage Verbal Nods: _____</p>
 <p>E - EXPLAIN</p> <p>Make your point or pitch using the Pyramid Model. Keep it short, using the information you have gathered to focus your message on what your listeners have told you they are looking for.</p>	<p>4. Explain</p> <p>How do I open? Why do they need me? _____</p> <p>_____</p> <p>What are their reasons to buy?</p> <p>What: _____</p> <p>Why: _____</p> <p>How: _____</p> <p>What is the evidence?</p> <p>_____</p> <p>_____</p> <p>Who does what by when?</p> <p>_____</p> <p>_____</p>

Appendix B: Perfect Pitch Presentation Worksheet

Presentation Pyramid Worksheet



Appendix C: Virtual Meeting Checklist/Evaluation

Subject _____ Date _____ Time _____

Item	Completed			
I. Logistics (Leader/Co-host)				
• Pre – Detailed Agenda sent				
• Post – Minutes sent				
II. Technical Preparations (All)				
• Clothing – business (casual)				
• Lighting – ambient & supplemental, from the front				
• Sound – USB mic or headphones				
• Background – neat & secure				
• Camera angle – at eye level or slightly higher				
• Position – rule of thirds				
III. Content Preparations (All)				
Presentations/Ideas/Questions				
• Impactful structure (content)				
• Masterful notes				
IV. Delivery (All)	Low	Med	High	N/A
• Leveraged the PAUSE delivery technique				
• Spoke in bursts of ideas separated by silent pauses				
• Solid eye contact				
• Asked supportive questions				
• Listened attentively				
• Explained concisely				
• Interjected politely				
• Used verbal nods frequently				
• Directed questions to specific participants				
• Maintained good body posture				
• Paraphrased regularly				
• Overall Participation				

Barry Kuntz

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Barry is a captivating presenter and trainer and executive coach. Known as a motivator, team builder, and collaborator, Barry is both passionate and talented at helping individuals, teams and organizations achieve their best.

Before joining Black Isle as Managing Director, Barry held senior executive positions at General Motors of Canada Ltd. in sales, service, marketing, and public affairs. His book, "PAUSE: Standout Whenever You Speak" has been widely acclaimed.

Since joining Black Isle, he has embarked on a journey that has been uplifting, inspiring, and rewarding; helping leaders to stand out, whenever they speak.

Barry has worked with senior executives from RBC, BMO, CIBC, Citibank, Barclay's Bank, Bank of Canada, Canaccord Genuity, Manulife Financial, TJX Canada, Enbridge Gas, Lubrizol, Deloitte Consulting, McKinsey & Company, Wrigley, Ontario Pension Board, Unilever, Clorox, Madison Square Garden, Coeur Mining, JLL Partners, Nissan and General Motors of Canada, as well as politicians, presidents of Canadian universities, TEDx Speakers and Dragon's Den contestants.

Barry is a graduate from the University of Saskatchewan with a Bachelor of Administration degree. He is an active supporter of numerous charities having sat on the Board of Directors for the Canadian Medic Alert Foundation, the Traffic Injury Foundation, as well as the Grandview Children's Foundation, and as a trustee for the Robert McLaughlin Art Gallery. Barry currently sits as a Director on the Yves Landry Foundation Board.