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| --- | --- | --- | --- | --- |
| **Investor Pitch - 3D design tool** | | | | |
| **Audience:** | |  | | |
| **Objective:** | |  | | |
| **Topic**  **(Theme/Title/Main Message)** | | | **Benefit / Value to Audience** | **Proof/Discussion**  **(How can we prove this?)** |
| Headline | Provide vision and plan to secure funding to build the most user friendly 3D design tool | |  |  |
|  | **Characteristic**  **(Sub-message/points and/or**  **unique characteristics)** | | **Benefit of this sub message or characteristic** | **Proof of how the sub-point or characteristic delivers the benefit you’re claiming** |
| Thread 1 | Educate on general design market (focus on 3D printing) (why we are doing this) | | 1. Massive 3D design market as 3D technology becoming a commodity 2. Easy of use 3. New design methodology 4. Flexible pricing model | 1. Design market analysis 2. 3D printing market analysis 3. 3D printing process 4. Competitive analysis 5. Current challenges 6. Company description |
| Thread 2 | Background/experience (why we can do this) | | 1. Resolve current industry challenges/pain points 2. Providing a platform for intelligent design 3. Extensive industry/market knowledge 4. Extensive development experience | 1. Vision (3D intelligent design) 2. Personal profiles |
|  | Plan and execution plan  (how we going to do this) | | 1. Our understanding on how to realize the vision 2. Timing and priorities of execution | 1. Sales model 2. Roadmap 3. Development plan 4. User projection 5. Organization |
| Thread 3 | Financial request  (what we need to do this) | | 1. What it takes to realize the vision | 1. Financial projection 2. Financial request |
| Th**read 4** |  | |  |  |
| Thread 5 |  | |  |  |
| **Summary** |  | |  |  |

**Using the Storyboard**

**This is the process for building a Storyboard. It is important to follow these steps exactly in order to get the best results:**

Remember the three things you must know to start:

1. Who’s in your audience?
2. What outcome do you want? What do you want this audience to do when you finish presenting?

Make sure when you finish building your presentation, it is directed at your audience and compels them to take the action you want.

For each row through the storyboard (called “threads” of your message), you need to follow the following 4 steps. Note that the first thread is treated a little different than the subsequent threads, but the process of building each thread is the same.

Step 1 – Topic/Characteristic. In your first thread, most people find that they need to “frame” their presentation for their audience. Framing helps the audience understand your overriding theme or provides context to the presentation. Everything else you present with then roles up underneath this headline or frame. In that case, the topic you are speaking on or the name of the product you will be presenting goes in this box. If everyone in your audience already knows what your topic is all about, then there is no headline. You will just go right to providing characteristics that are the reasons they should accept your idea, or buy your product. In this case, and for the remainder of the threads if you do a headline, determine the unique characteristics of your product or topic that you want your audience to remember. Brainstorm them and place the top 4 (5 if you don’t use a headline) in the boxes under the column labeled Main Message/Theme (left column).

Step 2 – Benefit. The second step is to ask yourself “Why would my audience want this?”. What do they get out of it? What does it do, fundamentally, for them? What benefit do they receive by using it? What problem(s) does it solve? When you tell your audience that you have some unique thing, they are sitting there saying “So what”. You have to answer that question. So, what do they get if they have this thing? For Characteristics, what benefit do they get from that specific characteristic?

Step 3 – Proof. Develop proof for your thread. Ask yourself “what would you see, hear or experience that would prove that your topic or characteristic delivers the benefits”?

Step 4 – Define your Main Message/Characteristic . You must define your topic and each of the characteristics or sub-messages. There are many ways you can do that, how you do it is up to you. But remember, the best way to define something is in a way that’s 1) interesting, 2) portable and 3) provides perspective into your idea.

Now that you have developed each thread, you are ready to finish your presentation.

Step 5 – Summary. Your summary should be delivered by re-stating your threads in the opposite order in which they were presented. Start by reminding your audience of the definition you gave them for Thread 4, followed by the Characteristic for Thread 4. Then remind them of the definition you gave them for thread 3, followed by the characteristic for thread 3. Repeat this until the last thing you mention is the topic you started with in your Headline. Don’t forget to say “what do you think” when you’ve finished your summary.

Step 6 – Call to Action. After you say “what do you think”, there will be some discussion. This discussion will help you determine if you can ask for what you had plan to ask for, or if you should ask for something else. But you should ask them to take some action at the end. If you get what you wanted, or more, then your presentation was successful. If you don’t you should re-evaluate to determine what you may have done wrong.

**Sanity Check!**

**You should ask yourself these questions once you’ve completed the development of your presentation. If the answer to any is no, you should address the problem before you present this to your target audience.**

1. Did you complete columns 1 and 2 (Topic/Characteristic and benefit) before moving on to the other columns? This is the core of your message – what you have and what they get from it. If this isn’t correct, don’t present.
2. Do your benefits create a bridge between a business benefit and a specific, tangible problem you can solve?
3. Are your benefits appropriate for your audience and important to them? A VP of Engineering probably doesn’t want to hear about how you can save IT costs. But the CIO might if it is one of his key business issues.
4. Do your characteristics make you unique? Don’t spend time on “me too” items or things that don’t have any business impact.
5. Are your characteristics really about you? Remember, column 1 is always about you. Column 2 is about the audience. Never shall the two cross.
6. Are your benefits really things the customer cares about? Or are they features of your product/topic?
7. Are each of your Topic/Characteristic definitions interesting, portable and do they provide perspective into your topic or characteristic? If not, your taking a risk that you are just throwing a glass of cold water in the face of your audience. That might get their attention, but it isn’t very valuable.
8. Are you using variety in your definitions? Don’t just use analogies every time; they will get old real fast. Mix it up and use as many different methods as possible.
9. Do you have enough tangible proof? If not, can you prove they need it? Remember to think of your audience. Different levels in an organization will require different amounts and types of proof. Lower level people tend to want details. The higher you go, the more general and business oriented your proof should be.
10. Does your presentation address all three learning types – Visual (55%), Kinesthetic (25%), and Auditory (20%)?
11. Are you spending most of your delivery time in the proof box? Remember, that’s where learning happens. You are only doing the other three boxes for the purpose of getting attention and interest so that they can learn. Learning is where you spend your time.
12. Do you have a clear call to action defined? You present for a reason, what is it?
13. Have you practiced your presentation? Remember how much Body and Voice impact your message.

Make sure that you fix any of these problems before you deliver to your intended audience. You’ve worked hard to get this opportunity to present. Make sure you are properly prepared to get what you want!