

# Toolkit: Holding an Elevator Pitch Workshop

**Elevator Pitch:** a concise presentation designed to influence and persuade, to gain support or understanding.



## Introduction to the tool kit

**This tool kit is a guide** for anyone who would like to offer a workshop on the topic of elevator pitches.

Being able to effectively communicate the essence of our jobs, the services we provide, and the value we bring to the communities we serve is important to everyone, but perhaps especially so for archivists and records managers.

We need to speak clearly, avoid shop talk or terminology unique to the field, and figure out how to appeal to the person we're addressing and make archives and records relevant to them. If we can understand what's important to someone and communicate our idea in those words, then we win! This is an essential part of advocacy.

No matter where, or with what type of materials we work, being able to target the right person with the right pitch is critical. But that takes practice!

You know how you use research material in your work? Well, I'm the one who filed it, tagged it and organized it, so that you could find it...



## Structure

### ➤ Time

A workshop should last three to four hours. It's essential to have ample time so that everyone gets to practice.

### ➤ Number of participants

Since standing up and speaking in front of a group might *not* be everyone's dream scenario, it's important to limit the number of participants.

We suggest a maximum of 25 participants. The breakout groups should be fairly small, 3 to 5 per group, and no more than 5 groups.

It's crucial to create a safe environment where people dare to throw themselves into unfamiliar waters. This will feel scary for some colleagues!

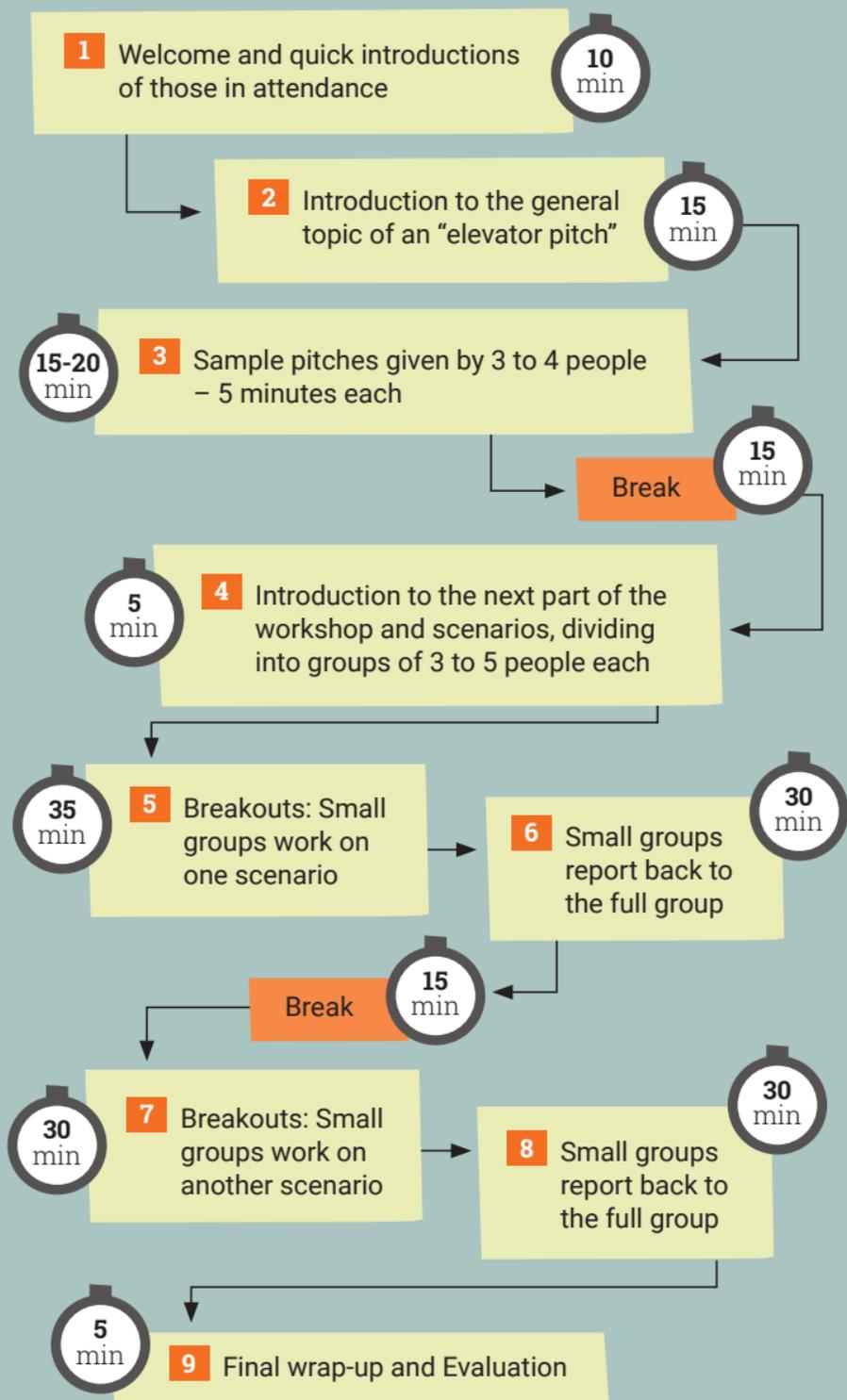


### ➤ Scenarios

Create at least four real-life scenarios for your groups to work with during the workshop. Several example scenarios are included in this tool kit.

### ➤ Outline

Here is a suggested agenda for a 3.5 hour workshop:



Explain why you do what you do,  
not just what you do.



Share your impact,  
explain who benefits  
by what you do.



### ➤ **Room set up**

The suggested room arrangement for the workshop is classroom style (tables and chairs facing the front of the room). The meeting room should have enough tables and chairs to comfortably accommodate all attendees. When it is time to break up into the small groups, the groups can assemble in different corners of the room.

## Introduction to elevator pitches

**It is helpful to begin the workshop** with context – what is meant by an “elevator pitch” and why is it important? What makes an effective elevator pitch? You do not have to be an expert yourself to prepare the introduction. There are many good resources online. Lists are always helpful learning tools. Create PowerPoint slides to highlight the key points of the introduction. Whether or not you include PowerPoint slides, write the key points on paper or boards and display them in the meeting room during the rest of the workshop.

## Sample introduction points:

Components of a great pitch

- Well-practiced;
- Compact;
- The right language, no jargon;
- Arouses interest;
- Includes a value proposition;
- Includes a story; and
- Calls for an action or response.



I manage the memory banks  
of my organization...

## Sample pitches

**It will be helpful for the attendees** to hear a few real-life examples of elevator pitches. Invite 3 to 4 professional colleagues—from different organizations or in different roles if possible—to talk about how they came up with their own elevator pitch. They should be given five minutes each. During those five minutes they should introduce themselves and explain the situation in which they had to use their pitch. Then they should share their elevator pitch.

## Sample scenarios and breakout groups

**Prepare ahead of time** at least four different situational scenarios that the small groups can work with during the breakout times. The scenarios should be simple and broad enough to apply to the work situations of the attendees. Each breakout group can be given a different scenario, or all of the breakout groups could be given the same scenario. About 30 minutes should be allowed for each breakout period, for the small groups to discuss their scenario and agree on what their pitch should be.

I help my company leverage its information assets and heritage...



### **Example Scenario 1**

Your organization just hired a new executive director and you are the head of the in-house archives department and/or records management program. There is a reception so employees can meet the new director. At the reception the new director comes up to introduce herself and asks, “What do you do?” How do you answer?

### **Example Scenario 2**

You are in charge of the records management program in your organization. During a management workshop with your fellow leaders, you’re teamed up with the head of the IT department. And he says, “So, what do you and I have in common?” How do you answer?

### **Example Scenario 3**

One of your country’s major national newspapers is doing a feature story about your organization. The newspaper reporter who will write the feature story is interviewing several department heads, including you as the head of the archives. The reporter asks, “In this environment of tight budgets, why does your organization have an archives?” How do you respond?

### **Example Scenario 4**

At a social event you unexpectedly meet a retired professor from your university (or a famous writer). Your archives has been trying to get a meeting with the professor (or writer) to talk to them about donating their papers. What do you say to this person to convince them that your archives is the best place for their personal papers?

## Reporting back to full group

**Each small group must choose** one person to report back to the full group and present the pitch that the small group created for its scenario. If more than one scenario is used during that breakout period, it is best for all groups to make their pitch for one scenario before moving on to the next scenario. After the pitches for one scenario are completed, there should be time for discussion of that scenario, so the full group can give feedback and suggestions. Then pitches can be presented for the next scenario. Allow ample time for the pitches. The objective is to learn and practice, practice and learn.

## Evaluation

**At the close of the workshop,** one of the workshop leaders will make some final observations and thank all those who participated. An evaluation form should be distributed to all participants and they should complete it before leaving. Alternatively, the evaluation form could be sent via email to all participants immediately after the workshop.

I will make sure you and your work won't be forgotten...

I preserve the past for the future...



## What to do, step-by-step

- Select one or two instructors for the workshop;
- Set a date;
- Find a venue;
- Invite people who can give the sample pitches;
- Send out an invitation—make sure to clearly describe that this is a workshop where everyone will actively participate, but in a safe environment;
- Set a limit of participants
- Create the introduction to elevator pitch as a format—include lists of key points that can be displayed in the meeting room;
- Create four (or more) scenarios;
- Create an evaluation form;
- Order refreshments;
- Set up the room;
- Greet the participants as they arrive; and
- Enjoy!



This Toolkit is produced by **International Council on Archives, Section of professional Association**, with the support of **Norwegian Society of Records Managers and Archivists**. It can be downloaded from the ICA website – [www.ica.org](http://www.ica.org)