

CHAPTER 9

Planning and Pitching

You've decided on the film you want to make and done enough research to determine that it seems feasible. Now what? This chapter is very broadly called "planning and pitching" to describe a range of activities that includes pitching, outlining, and casting your film.

PITCHING

A pitch is the core statement of your film's story, stated clearly and succinctly. It confirms to you and to others that you not only have a good subject, but you have a good *story*, one that you can tell in a way that will interest others. You'll be pitching your film, revising your pitch, and pitching it some more from the moment the idea begins to take shape until you are out in the world with a finished product that needs promotion. The good news is that pitching is the single best way to determine that you actually *have* a clear, coherent story as discussed in Part I of this book. If you can't pitch your story concisely—on an elevator, say, after you've discovered yourself by sheer luck riding up four floors with the head of acquisitions or a well-connected celebrity—then chances are you're still muddling through and will be spending time and money on film elements you don't need. The ability to pitch your story effectively and briefly does not suggest that it's a simple story or a commercial one; it simply means that you have a handle on it.

On Pitching Well

An ineffective pitch introduces the topic but not the story, as in "This is a film about the ethics of genetic testing and about how some people face hard choices." An effective pitch does both: "This is a film about genetic testing in which we follow an executive making the tough decision about whether to be tested for the disease that claimed her

mother's life." The pitch works because it compels the listener to ask follow-up questions: What will she do if the test is positive? Will she let you follow her through the process? What if she doesn't take the test?

Here's another example of a weak pitch: "Four years ago, Vietnam veteran Martin Robinson decided he would scale the heights of Mount Whatsit at the age of 63—with one leg. He succeeded, and in the years since has inspired veterans' groups across America." Where's the story here? There *was* a story (his efforts four years ago), but unless you have some plan for telling it now, what's holding the film together? A 67-year-old man standing before various groups of veterans. Not coincidentally, the problem with this pitch is that it does not suggest a train (Chapter 4). Your train is the skeleton on which you hang your story and by which you hook and hold your viewer; your pitch articulates the train.

In other words: *If you don't have a grasp on your train, you probably don't have a grasp on your story—and you won't be able to make an effective pitch.*

With that in mind, a better version of this pitch might be: "Four years ago, Vietnam veteran Martin Robinson became the first amputee to scale the heights of Mount Whatsit. Now, he's going back—and bringing two Gulf War veterans, amputees who thought their best athletic days were behind them, along with him." Not a bad pitch, especially if you can follow it up with good access to these people and some information about your own skills as both a filmmaker and a mountaineer (to show you'll be capable of following them up the mountain). In many cases, the pitch will be even stronger if you show a tape that introduces your main characters, allowing people to see that they're appealing and will work on camera.

On some projects, producers pitch their stories at in-house development meetings, not once but several times as the film or series take shape. We did this during the planning of *I'll Make Me a World: A Century of African-American Arts*. Rather than survey a hundred years' worth of dance, theater, visual art, literature, and more, the six-hour historical series presented two or three stories per hour arranged in a way that moved forward chronologically. The century's thematic arc, revealed in our research, helped producers and project advisors decide which stories best exemplified a particular era, and we were careful to include a range of artists and art forms. Here is the pitch for one of three stories, called "Nobody" for the purpose of quick reference (but not titled on screen), that was to be included in the series' second hour, *Without Fear or Shame*:

"Nobody" follows Bert Williams as he teams up with George Walker and they head for the Broadway stage, where they face an audience

whose expectations of black entertainment have been shaped by 60 years of minstrel traditions. Can they reject these stereotypes and still attract a mainstream audience? This story continues through the death of George Walker; we end with Bert Williams performing with the Ziegfeld Follies alongside stars including W. C. Fields, Will Rogers, and Fannie Brice—and yet, as actor Ben Vereen portrays him on stage, still facing intense racial hostility.

The other two stories in this hour were related thematically. One was about Edward “Kid” Ory and the rise of New Orleans jazz, and the other was about early filmmaker Oscar Micheaux. Each story was conceived of as having its own three-act dramatic structure. In the editing room, they were interrupted at key moments and interwoven with the other two stories, but in the planning stage, they were kept apart in order to see more clearly that they each had a beginning, middle, end, and arc. It’s worth noting that this was also possible because these were historical stories to be built of archival material and interviews, so the structure could be significantly anticipated in advance. Our research, including pre-interviews, had made it clear which emotional moments we were driving toward, so that we knew which elements of an overall biography or history we wanted to emphasize and where we were driving to at the end of each act.

Pitching Out Loud

Giving a pitch in person can be tough. Too often, filmmakers load their pitches with parentheticals about all the information you need to know or they should have mentioned: “Okay, well, it’s about this guy (well, okay, 20 years ago he won this amazing award for scientific research, but then he thinks someone ripped off the idea), so this guy was trying to (actually someone *did* rip him off, which sort of explains his motivation but I’m going to get into that later in the film), so this guy has been working to . . .” And so on.

The point is, if you’re pitching out loud, it’s a good idea to practice beforehand. Your pitch needs to be clear, focused, brief, and attention-getting.

OUTLINES

Most filmmakers go well beyond the pitch when planning their films. The next step is an outline which, like the pitch, will continue to be revised and honed over the course of production and editing. The outline is where you begin to flesh out your train, by anticipating and

sketching out the *sequences* and the order in which they'll appear. If you're using an act structure, that also will be made apparent.

An outline helps you to see, on paper, the film as you imagine it. It should begin where you think the beginning of the film is, as opposed to the beginning of the underlying chronological story. It drives to key moments that you anticipate driving to, and it ends where you anticipate the film ending up. It should begin to introduce the characters, scenes, and materials you will need to tell your story.

Why Write an Outline?

An outline is both a planning tool and a diagnostic tool. It lets you see clearly what job a sequence is doing in your overall story and what storytelling role your characters are playing. If there is redundancy or if there is a gap, you will likely be able to see it on paper. Be careful to write the outline in a way that mirrors the film as it's currently envisioned, beginning to end, focusing on the film's story rather than its subject. Is the story about the expedition leader or about the group of retirees on the expedition? The parents waging a legal battle against commercialism in the public schools or the budget-starved principal actively courting soft-drink contracts?

As mentioned, the key difference between an outline and either a pitch or simply a research report is that an outline breaks your film into sequences. This helps you to clarify, in story terms, *why* you're filming one event and not another, one individual and not another. Trust me: It's worth doing. And frankly, you'll revise this outline (or sometimes, to get a fresh eye, start over entirely) before, during, and after you shoot and well into editing. As a consultant, one of the first things I do if I get involved with a film while it's being edited is to write an outline of the film that exists, which I use to help the filmmakers figure out what's working and what's not. This works because an outline can clearly show that two or more sequences are doing the same job, or that the first act runs for half the film, or that the film doesn't really get going until halfway through the second act.

What's a Sequence?

As discussed in Chapters 4 and 7, a sequence in a documentary is akin to a chapter in a book. It should feel somewhat complete by itself, but push you to the next sequence. It should add something unique to the story and the film: *this* is the sequence about force drift, *this* is the sequence about shock of capture, *this* is the sequence about "changing the rules" in the wake of 9/11. This doesn't mean that "force drift"

doesn't get mentioned elsewhere, but that in one sequence in particular it will be introduced and looked at more closely. The single best way to understand sequences is to watch a number of documentaries and look closely at how filmmakers break stories into distinct chapters. Sometimes these chapters are labeled ("A Few Bad Apples" and "Shock of Capture" are examples of sequence titles in Alex Gibney's *Taxi to the Dark Side*, also discussed in Chapter 15). Even if you don't identify your sequences on screen—and most filmmakers don't—it can be useful to give them titles as you work, to summarize the unique *job* the sequence is doing in your overall film.

In watching films that don't have sequence titles, you can often identify a sequence through visual and storytelling cues. The film fades to black and then up again, for example; a sequence about getting the children to the beach and back gives way to a sequence about something completely different. A shift in rhythm, a change in music, the loud emergence of sync sound all may signal the start of a new chapter. You should also sense that the previous sequence has reached a natural end, and at the same time, it tips the overall story forward.

You anticipate and sketch out a sequence during the planning of your film by thinking like a storyteller. You "watch" the film in your head and listen to your gut. What *feels* like it should come next? What questions do you want to have answered now, rather than at some other time? What window does a character suggest opening up?

Those of you who are editors or have worked closely with editors will recognize that this is also how you often work when assembling and shaping footage into an edited film. In fact, outlines come in handy throughout the editing process. It's much easier to play with alternative structures on paper to quickly see them than it is to recut the whole film, only to find the flaw in the logic of the restructure. Does the fact that it seems to work on paper guarantee that it will work in the editing room? Unfortunately—and emphatically—no. But often, the exercise helps you and your team move toward a solution that *will* work.

Thinking about Sequences

What follows is a *very simple* version of an outline for a straightforward documentary, entirely invented for the purpose of illustration. The film is called *Zach Gets a Baby Sister*. The outline presumes that because this event was very contained, shooting was under way before the outline was written (i.e., the *vérité* scenes were filmed, but not many of the interviews).

Synopsis: This short video (estimated 20 minutes) follows a five-year-old boy, up to now an only child, as his entire world changes: His parents bring home a baby sister. The film views this event through the lens of childhood, and is intended to be both humorous and thought-provoking.

Sequence 1: Tease

(My first sequence will be the tease, which I anticipate being no more than 1–2 minutes long and highlighting maybe 3–5 enticing “bullet points”/highlights from the film to come, without giving the best stuff away.)

FILM TITLE: Zach Gets a Baby Sister

Sequence 2: “On the way”

Zach’s getting ready to go to the hospital to meet his newborn sister. He’s almost five; so far he’s an only child; he’s not sure what to expect, according to his parents, but they’ve been preparing him as well as they can. He climbs into his grandmother’s car (this footage was shot) and sets out for the hospital. In the car, he talks about the baby and the fact that classmates of his have older and younger sisters and brothers. We use this discussion to cut to his classroom, a couple of weeks earlier, and the scene with the teacher talking about brothers and sisters; also, words of advice from some of Zach’s classmates, vox pops. We return to the car just as it pulls into the hospital parking lot.

Storytellers in this sequence (other than Zach): his teacher, his classmates, possibly his grandmother.

Sequence 3: “Hello, baby”

We are in the hospital room with Zach’s parents as they wait for Zach and his grandmother to make their way to the room. Zach’s parents talk briefly about the baby, the delivery, their memories of Zach’s birth. . . . Zach enters, and everybody makes a fuss over him. Then they settle Zach on his mom’s bed. The nurse enters with a bundle wrapped in pink. Matt’s dad is in tears as he looks at his son, and we follow his gaze: Zach taking in this odd little creature and then holding her, amazed, as she is set carefully across his lap. He is very, very serious. His mother asks if he has anything to say to her; his response is a whispered, “Hello, baby.”

Storytellers in this sequence: Zach’s parents, his grandmother

And so on. This is not breathtakingly good filmmaking. But something to notice: Each sequence is a chapter. Each has a beginning, middle, and end. Sequence 2 thematically is about anticipation: We see that Zach has no idea what to expect, and the primary voice in the sequence is Zach’s; we also see his school and his classmates. In terms

of plot, the sequence gets him to the hospital, where he's going to meet his sister.

In contrast, Sequence 3 is about Zach's parents, how they have tried to prepare him for the baby, how they have concerns. The primary voice in this sequence is theirs, whether or not the interviews are conducted in the hospital room or, more likely, at some other time. The point of view in this sequence is theirs, too, as they watch their son hold his sister for the first time. In terms of plot, this sequence begins with Zach at the hospital, and drives to him meeting his sister. In a 20-minute film, chances are good that this meeting is the film's midpoint.

Looking at these two sequences, I can anticipate what the next sequence should be. It does not need to do the job of getting Zach home that day, nor do we need to see his parents checking out (with the new baby). We can cut to the next best scene that tells the story we're telling. And our story is "Zach Gets a Baby Sister"—not "Zach welcomes a new baby home from the hospital."

So, for example, if the parents are planning a party, I might decide to film that. I can anticipate (and will be flexible if I'm wrong) that Zach will be excited that it's a party, and perhaps upset to discover that the attention is on his noisy, red-faced sister. This sequence would be about making adjustments, told from Zach's point of view.

Again, this is just an illustration. Take the time to look at successful documentaries and identify the sequences within them. Watch a range of films and film styles, from historical films to social issue films (compare the use of sequences in *Taxi to the Dark Side* and *The War Tapes*, for example) to traditional vérité. Sequences, also known as chapters, are structural devices that enhance, rather than limit, presentation.

How Many Sequences Should a Film Have?

There is no fixed number of sequences. If a film is 20 minutes long and your sequences run between, say, three and six minutes each, that's maybe five sequences. Also, to make your life a little more complicated, sequences sometimes have sub-sequences. You're in the midst of a sequence about a World Bank protest and you want to make a brief diversion into backstory, that's a sub-sequence. Just remember to get back to the main sequence you started, and finish it.

Historical Stories

Some funding agencies and commissioning editors require scripts—or at least detailed outlines/treatments—so that they can get a sense

of the film's approach and focus. Although these are possible for any type of film, they're easier to create in greater detail for films about events in the past. For example, here is a description of the first sequence in a short, three-act story about the transformation of boxer Cassius Clay into world heavyweight champion and political activist Muhammad Ali. Because this hour-long film had three stories in it—which were not interwoven—the opening sequence (the tease) was thematic, setting up the film overall. This example, then, describes the second sequence, the first in the story of Muhammad Ali. It was written prior to filming.

Sequence: "I Shook Up the World"

We begin the first act of our first story: Olympic champion Cassius Clay challenges world heavyweight champion Sonny Liston. Rumors are spread that Clay is spending time with Malcolm X, spokesperson for the Nation of Islam. Fight promoters want Clay to deny the rumors; he refuses, and after he defeats Liston, he publicly announces his new Muslim identity: Muhammad Ali.

PEOPLE: Edwin Pope, sportswriter; Kareem-Abdul Jabbar, student; Angelo Dundee, trainer; Herbert Muhammad, son of Elijah Muhammad.

FOOTAGE: archival of Muhammad Ali, Ali with Malcolm X, the Liston fight.

Notice that people are identified by who they were at the time of the story; this is an excerpt of a sequence from *Eyes on the Prize*, in which the storytellers were witnesses to and participants in the stories unfolding. In this sequence, basketball legend Kareem Abdul-Jabbar is speaking from his perspective at the time, as a student. Angelo Dundee was Ali's trainer in this period.

Present-Day Stories

For films of events that will unfold as you shoot, it's still possible to draft an outline based on what you anticipate happening. If you intend to follow an eighth grader through a summer at basketball camp, you can do research to find out what the experience is typically like, and what scenes or sequences offer possibilities for meaningful interaction. Do the students board at the camp or go home at night? Do they tend to form close friendships? Are there one-on-one sessions with coaches? Is there much pressure from parents? Knowing these things can help you begin to think about what a sequence will *do*, as opposed to the specifics of what it *is*. If research has indicated, for example, that you want a sequence that you're tentatively calling "The end of

innocence"—a sequence that looks at the commercial pressure on young phenoms—then you arrive on location with that focus in mind.

The same is true when considering the people you want to film. As you're doing the outline, you'll begin sketching in the names of people you need to tell your story, from those you "have to have" to those you'd ideally like. Sometimes, as you develop present-day or historical films, you won't know whom you want specifically, in which case they can be described. For example, "We need someone who was at the dance with her," or "We want to talk to people who keep the physical plant operating." An outline can help you see if your story or argument is building and if you have enough variety in casting and sequences, or if too much of your film is doing (and saying) the same thing. Over the course of filming, decisions about story and structure are bound to change, but for now you're taking the first steps in organizing your story into a workable film.

Whether or not your film is historical, present-day, or some combination of the two, this exercise forces you to think about your film's approach. If you want to follow a production of Wagner's *Ring* cycle, for example, will you do it, as Jon Else did, from the perspective of union workers backstage? Or would you see the production from the point of view of its director, or a children's group trying to make sense of the opera as part of their efforts to stage a condensed version of it on their own in school? Is your point the many months it takes to mount a production, or the tension of running such a grand show over the course of a day? Each *approach* decision should be carried through in your outline, so that someone from the outside who reads it will have a sense of the film that you are making: its themes, plot, point of view, arc.