

Perfect Pitch Proccess


Nine steps in the perfect pitch process.

Pitches are “once in a lifetime” opportunities.

The “perfect” pitch process can make the difference between success and failure. It will make great thinking and great ideas even better. It can, sometimes, compensate for average ideas and performance.

The process is not the same as the process for getting campaigns out for an existing client. Here are nine concepts that dramatise the difference.

Make the process itself a winning experience.



Pitch your best people at their best

Winning is all. Pick the team most likely to win. Not simply because they are available or have “relevant” experience.

Note that sometimes the best person to deliver part of the content may not be the best person in terms of pitch performance and chemistry – assess after meeting prospect!

For people to be at their best, the pitch must have priority call on their time and energy. Release from majority of ongoing client responsibility essential (we manage it for illness and holidays).



Write your pitch winning strategy

It's not what you say, it's the way you say it. Separate content-strategy from pitch-strategy. Typically, 90% of time, effort and energy goes against content, with pitch strategy often an after-thought.

Who, really, is taking the decision? How can you identify and involve them early on? What are they looking for? What are their "pain" issues? How will they take the decision?

Who are we competing against? How are we better? How are we different? What is our story? How do we tell it? Emotionally and attitudinally.

3 Ruthless timing plan

Create it on day one. Days wasted at start can't be replaced. Fix key review dates, immovably, in diaries early – key to success.

All meetings fixed, including those with management, should take priority over all other agency and client meetings. Difficult given our client service orientation but entirely possible (think holidays).

Rehearsal dates, in particular, fixed in stone. Use them as your copy date. Bring forward early all documentation. It must not compete for time with rehearsals at end of process.

4 Progress the process EVERYDAY

Drive and control the pitch through daily progress meeting for all core team. Attendance mandatory. Hold it first thing in the morning when energy is high.

Develop meeting agenda that covers BOTH the content activity and the pitch strategy activity. Review all items daily and circulate status report.

Where possible, create a war room. Make it your team room, make it inspirational for you and for the client.

5 Rigorous RASCI

Leadership, actual and perceived, is key to winning. The team leader is responsible for delivering the pitch, and must be allowed to lead. Beware too much democracy.

Team leader's responsibilities cover both the content of the pitch and the strategy. However, a different Approver could be used for content (creative director/planning director) with managing director/CEO approving strategy.

Different Consults and Supports should also be applied to the two streams of content and strategy activities.

(RASCI - a recognised model for organising a project. The person Responsible, the Approver, the people who Support, those you Consult with and those who need to be Informed.)

6 Answer the brief!

Seems obvious, but so easy to be diverted. Make sure you answer the actual brief before going wider, particularly if pitching to committee where brave decisions are rare.

Plan and rehearse all briefing or interim meetings with prospects, and use them to listen, seriously listen. More important than talking at them. Keep on delving to understand the real issues.

Keep checking and re-checking the brief - particularly as you approach D Day. The clues for what the prospect is seeking are usually there. Where evaluation scoring known, structure presentation to match.



Keep on courting

From the first client contact the process should ensure that everything possible is done to develop the relationship! Review this daily. Constantly review “casting and chemistry”. People buy people.

Aim to have the prospect rooting for you by pitch day. Seek frequent relevant opportunities to meet. Aim to let key decision maker know how your thinking is developing before the presentation.

When pitch goes on, and on, with many stages, don't let energy drop. Stay bright, take initiatives, maintain momentum and stay on the attack.



Rehearse. Rehearse. Rehearse.

Make all rehearsals mandatory. Clear all diaries well in advance. Build forward thinking about the pitch performance into daily progress meetings.

Hold “walk-through” rehearsal at least five days in advance. Use this to plan shape of pitch experience, timings, review of space, the “theatre” needs.

Ideally target two full rehearsals. First one, two to three days in advance. Dress rehearsal minimum of 24 hours in advance essential. All cast there throughout with independent, uninvolved, pitch coach to comment.

9 Enrol and energise

Pitches are our life blood. They are, or should be, engaging and stimulating for everyone in the company. Communicate widely and often.

Identify, early on, experts and inspirational consumers who can help with questionnaires, in focus groups. Locally and across the network. Identify volunteers, who can trial product, visit outlets, research competing agencies.

Generate an atmosphere across the agency of excitement and passion for the opportunity. Prospects will sense it!