

INVITATION

You're invited to present your proposal

- Accept the invitation if you choose to – decide if you really want this
- Do you know the time of day for the pitch? Work out the logistics – can you get there in a day?
- Who else could be/needs to be involved, both in support of, and/or in the pitch
- Work out a timeline for preparation, practice, rehearsal dates up to the date – get the dates in diaries
- Set a date to bring people together to discuss/agree how to make it work and to gain commitment from everyone
- Set a date for an initial run through – gives you a focus for the deadline

Start creating the presentation

- Decide who's going to write the presentation
- Gather all the info together on:
 - Your company's history with the prospect
 - What is the brief calling for (what do they want to hear?)
 - Who will be in the audience for the presentation (names, roles, decision-makers?)
 - Which of the audience do we know? What do we know about them?
 - How/when will the decision be made?
 - What is our unique proposition?
 - What do we want to say about our:
 - History
 - Financials
 - People
 - Processes:
 - Who is the competition – do we know them? What will they be saying? When are they presenting?
 - What's the prospect's history of actually going ahead with projects like this?
 - What questions are they likely to ask (what did we get last time we pitched?)
 - What questions don't we want
- Create the presentation – you may be the prime mover here. And you may want to get others involved as well – more ideas and approaches is good
- Test the presentation as often as you need against 2 questions:
 - Is this what they want to hear? Does this match their brief?
 - Is this what we want them to know about us and our proposal?

Practice

- Practice the presentation, initially by yourselves with no audience (you're looking to see if it all makes sense, does it deliver what they need to hear and what you want them to know, will it fit within the time you've been given?)
- At this stage it'll be more of a 'walk-through' than a 'run-through' at this stage. Only when you do a practice at normal speed will you get a proper sense of the time of the presentation.
- Practice means speaking out loud on your feet in front of one person or more, so that you can get feedback on how it sounds, how you come across. Practice is not discussing it in a meeting where participants just talk about what they're going to say. If you're experienced as a team presenting your ideas and you can trust each other then you may not need the same level of practice. But it's always a good idea to run it in front of an audience.
- Practice answering the questions, particularly those you don't want. Decide who will answer which questions if you're going as a team.

WEEK BEFORE

A week before

- Check if you can get into the presentation venue before the presentation? If not get as much info as you can about what the room's like. What's the set-up? Is it board room, U-shaped with tables? How big is it? All this will give you a sense of what to expect, where people will sit, and where the presenter(s) will stand, or maybe sit, if it's a small group.
- What's the latest info on who else is presenting that day. And in what order? Where will you be in the order – can you get to be first? (If you're going to be last in a series of 5 presentations you'd better be good in order to impress them at the end of the day.)
- More practice, of everyone involved – don't let them not join in the practice if they're senior, or busy... Practice until you're bored with it. But don't get bored. That's the time to bring energy and life to the presentation and all the time you're getting to know it better. And all the time you're checking – does this say what they want to hear? Does this say what we want them to understand? Does it answer the question, why should we buy from you? What's different, maybe unique, about you? Why should they believe us? Why should they trust us? Is it clear? Is it relevant? Is it compelling?
- Create a checklist of what to prepare for the day. What to take – exhibits, slide deck (who's laptop will it be on? Will you have a back-up? A paper copy in case the technology fails), what, if anything, are you going to leave with the panel?
- Get the suit cleaned that you're going to wear on the day
- Get your hair cut if it needs it
- Book the train or plane tickets, if you're not driving

DAY BEFORE

The Day before

- Final run-through of all players – be upbeat and positive, but be prepared to make changes if you believe they're necessary
- Check your checklist of what to do/what to take – get it all assembled
- Get the car cleaned (if you're driving there) – inside and out – fill with petrol – programme the SatNav
- Clean shoes, choose shirt and tie, (or no tie – ask your coach) or blouse

PITCH DAY

Day of the pitch

- Carry out your personal plan – dress, what you're taking with you, catching the train/plane
- Arrive at coffee shop in good time if you're meeting colleagues. First one there gets coffee for all – this can take more than you want to use if you do it individually
- Be positive, upbeat. Don't use prospect's name as you discuss the day (never know who's listening). Calm anyone's nerves – suggest they focus on what they're going to say and how good it will be. Look beyond the presentation to getting a win!
- Arrive at reception in good time to register – don't sit down and read the paper - be bright, polite, friendly, keep your eyes and ears open for what's going on.
- Be prepared to meet the person who's going to walk you to the presentation room. Make polite, friendly conversation (don't talk about the pitch or the players)
- Be alert as you enter the room – say hello, introduce yourselves as you've agreed between you
- One person, as agreed, sets up the slides or other demonstration while the others introduce themselves to the group. Someone, as agreed, makes a note of names.
- Make sure water is available for the speaker.
- Take your positions as agreed
- Breathe deeply, smile, stand, take a moment to look everyone in the audience in their eyes, then,
- Start to speak and deliver your presentation
- Introduce and then handle the Q & A
- Close as best you can, according to your plan.
- Thank your hosts for their time and look forward to the result
- Whatever has happened, exit politely. Don't talk about the presentation or the players until you're well clear of the venue. Don't stand in the car park and jump up and down (if you've won) or shake your head (if you've lost, or if it didn't go well). Get in the car and drive away.

24 HOURS LATER

The Day after

- Make sure any promises (additional material, references, phone numbers) given on the day
- Whatever the result so far, write an email of thanks to the organiser
- Debrief the team, particularly if it went well. What went well, what could be improved – capture these thoughts. What questions did they ask? How well did you answer them? Was there an opportunity to close that you may have missed?
- Bear in mind that whatever you think, the real result is whether they've bought your solution or not. Sometimes (maybe, always) it's difficult to second-guess what they liked/found useful and what they didn't.

Ongoing

- Keep in touch with your coach and the organiser. Even if you've lost, that may not be the end of the story. Sometimes the winner can't deliver, or changes their mind, or the prospect changes their mind. If you're still in touch and continued to show interest then you may be considered to go ahead with the project. Even if you've lost you can find out what they did like and what didn't cut any ice. Or what wasn't clear or not compelling. This vital information will help you be successful in the next one.
- Remember those that do anything very well didn't suddenly do it. They will have had to work very hard with many failures before they got to be that good. You too can be that good!

