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# NEVER STOP PITCHING

7 keys to winning more business.



# Executive Summary

This framework provides 7 keys for crafting successful pitches. Each key is designed to enhance your pitch’s effectiveness, ensuring you connect with your audience and present a compelling case.

<b>Key 1:</b>	Know Your Audience	<ul style="list-style-type: none"> <li>• <b>Research:</b> understand who you are pitching to, their background, needs, and decision-making process.</li> <li>• <b>Questions:</b> prepare thought-provoking questions to uncover deeper insights.</li> <li>• <b>Fit:</b> assess if the prospect is a good fit for your business and if pursuing them is worth the effort.</li> </ul>
<b>Key 2:</b>	Desired Perceptions	<ul style="list-style-type: none"> <li>• <b>Message:</b> define what you want your audience to think about you, focusing on both rational and emotional aspects.</li> <li>• <b>Takeaways:</b> identify three key points or soundbites you want them to remember.</li> <li>• <b>Feedback:</b> ask for feedback after winning or losing pitches to improve future efforts.</li> </ul>
<b>Key 3:</b>	Content Strategy	<ul style="list-style-type: none"> <li>• <b>Focus:</b> Keep your content concise and relevant, backed by evidence.</li> <li>• <b>Customisation:</b> Tailor your message to the audience’s preferences, using case studies and analogies.</li> <li>• <b>Questions:</b> Engage your audience with insightful questions to demonstrate your understanding and build rapport.</li> </ul>
<b>Key 4:</b>	Structure	<ul style="list-style-type: none"> <li>• <b>Framework:</b> Use a clear structure with a beginning (outline), middle (detailed content), and end (summary and next steps).</li> <li>• <b>News Approach:</b> Think like a news presenter, starting with headlines, delving into details, and concluding with a summary.</li> <li>• <b>Client Focus:</b> Emphasise understanding the client’s challenges over your organisation’s capabilities.</li> </ul>
<b>Key 5:</b>	Visual Support	<ul style="list-style-type: none"> <li>• <b>Relevance:</b> Ensure visual aids are relevant and enhance understanding.</li> <li>• <b>Simplicity:</b> Avoid cluttered slides; use visuals to highlight key points.</li> <li>• <b>Backup Plan:</b> Prepare for technical issues by having hard copies of your slides and arriving early to familiarize yourself with the room.</li> </ul>

# Executive Summary

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<b>Key 6:</b>	Pitch Delivery	<ul style="list-style-type: none"><li>• <b>Confidence:</b> Your delivery, including body language and self-belief, significantly impacts your pitch's success.</li><li>• <b>Team Cohesion:</b> If pitching as a team, ensure smooth transitions between speakers.</li><li>• <b>Engagement:</b> Use eye contact and direct key points to individuals to maintain engagement.</li></ul>
<b>Key 7:</b>	Rehearsal	<ul style="list-style-type: none"><li>• <b>Practice:</b> Rehearse your pitch out loud to refine delivery, pacing, and content.</li><li>• <b>Focus on Audience:</b> Shift focus from yourself to how the audience is reacting.</li><li>• <b>Prepare for Questions:</b> Anticipate and plan responses to potential questions.</li></ul>

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# Introduction

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Hi, I'm David Morrison Jones

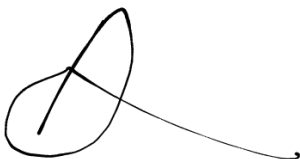
I've been a Management Consultant for over 29 years. During this time, I've spent 24 years coaching clients to pitch products, services, ideas, and themselves. Over the course of my career, I've worked with a diverse range of organisations from ad agencies to start-ups, small companies and large multinationals. The one thing that I've seen across all the high achievers I've met is that whether it's themselves, their ideas or their company, the best of the best are always pitching something.

## **This report 'Never Stop Pitching' will assist you in:**

- Pitching for new business
- Pitching to get investors for your start-up
- Pitching to advance your career
- Pitching as a Team

Over the next few pages, I will share the 7 keys framework to successfully winning most of the pitches you will make. I've deliberately kept this report short and simple. You should be able to read it right through in 25-30 minutes. Along the way take lots of notes and ask yourself , "how can I use this idea or tip or key to make my next pitch a whole lot better?"

Before we start, I have some good news for you...



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# Introduction

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The good news is that by making some tiny changes in how you pitch, you can significantly improve your results.

## **Here's a good example:**

A colleague told me at the gym recently that he had an upcoming performance review. I gave him 4 simple tips based on the 7 keys outlined in this guide. 3 weeks later he told me these 4 tips helped him to prepare well for the review. And secured him a substantial pay rise. I encourage you to read through the guide several times and try some of the ideas. You'll be delighted at how well they work.

## **Mike's Success Story**

Mike, a senior manager wanted to shift to a role in a new, more vibrant industry sector. While waiting for the right opportunity he perfected his pitch using the 7 keys. After a promising interview with the COO and Chairman of another business, he was very excited by the opportunity, but he felt that he could have answered some of the questions better.

I reminded Mike that "you never stop pitching" and I encouraged him to send the COO and Chairman an email with some of his thoughts. Mike sent an email sharing his passion for the role and expanded on two of the ideas he had discussed in the interview. In other words, he gave them a bit of added value.

Four weeks later, Mike was enjoying a coffee with the COO having signed a contract to work with them. When he asked the COO what made them choose him, the COO's replied "we were compiling our shortlist when your email arrived. We read it, looked at each other, and knew you were the right choice".

**Lesson:** never stop pitching.

# Key 1: Know Your Audience

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*“The will to win is important, but the will to prepare is vital” –*

*Joe Paterno*

Success in pitching comes from extensive preliminary work. **It’s all about the research.** Because the pitch is about the client and their challenges, NOT about you and your credentials. Later in Key 4, we will uncover how to use content that builds your credibility without using a credentials pitch.

Here are some of the things you need to find out...

## **A. Identify the prospects:**

- Who will you meet?
- What is their background?
- How can you build rapport and a relationship?

## **B. Understand their needs**

- What is important to them?
- What do they expect in terms of content?
- What’s their level of expertise?

## **C. Know all the decision makers and key influencers:**

- Are they a decision maker or a key influencer?
- Are there external influencers, such as an accountant?
- What is the decision-making process?

## **What are the 3 thought provoking questions you plan to ask?**

Q1:

Q2:

Q3:

Is there anything we can give them beforehand that will ensure the meeting is more productive?

**Failing to identify all the key decision makers can be very, very costly!**

# Key 1: Know Your Audience

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## The \$60 Million Lost Sale

I was helping a newly privatized government organization pitch for \$60m of new business. After several meetings we were told by the potential client that we were looking like a much better option than every other business that they were considering. Then we hit an unexpected snag.

What we hadn't identified was that one of the key decision makers was our own CEO. We believed he would be happy with new business, but we failed to recognize his risk aversion due to his impending retirement. We didn't address his fears and he made the decision to stop the business from progressing any further with the \$60 million pitch. Ouch.

**Lesson:** ensure you cover your own internal politics and align with all key people.

### Ask about the decision-making process:

This often reveals the actual process and who else needs influencing and it can give you clues on how best to present when pitching.

A commercial real estate firm was pitching to a multi-national tech company for the exclusive agency to scope the market for new premises. After asking about their decision-making process, we discovered that the CEO loved Mind Mapping. As a result, we ended up using mind maps in our pitch, which made it easier for us to win.

### Find out if it's a good fit for yourself, too:

Key 1 is also the step to ask questions and gather information to work out how difficult it will be to win the business versus time you could invest in other new business opportunities. Here are some of the questions you want to get answered:

- Urgency/magnitude of the client's need?
- What level of authority do we have access to?
- Do we know the key personnel, rapport?
- Current satisfaction with current suppliers?
- Who are we competing with?



## Key 2: Desired Perceptions

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In today's content saturated world, your pitch message **must stand out**. When the decision makers are asked by their peers why they appointed you, what will they say? What will be the one, two or three reasons they give? These can be both rational and emotional. These key points should flow through your pitch and become a theme in all your interactions with the prospect.

One objective from your meeting might be to ensure you get another meeting. This allows you to continue to build the relationship and improves your understanding of their pain points.

**Tip:** For job seekers, what words would you like the selection panel to use to describe you, after you have had an interview?

### **First, identify three takeaways:**

- What are the 3 things you want them to think about you?
- What are 3 soundbites you want them to recall?

**Example:** It might be that you want them to see you as being creative, focused and knowledgeable.

### **3 Soundbites Case Study**

A third-party logistics company was pitching to a new client. Their main competitor was a large overseas multinational. They found out that the client wanted to switch suppliers because of poor after-sales service and a perceived outdated warehouse management system.

After learning this, we decided we wanted to promote ourselves as accessible and innovative. Our pitch involved meeting the customer service team and taking them through our 5-year development program.

**Lesson:** the take-outs are a guiding star for deciding on the content for your pitch.

**Tip:** When we fail to win a pitch, we often look for answers. However, it's important to enquire when you win as well. The client will feel more at ease sharing insights, not only about your pitch, but sometimes also about where your competitors excelled.

## Key 3: Content Strategy

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This is the content part of the pitch. A common (and very costly) mistake that people make is starting with this key, the content. However, this key is immensely more effective once you understand who you are pitching to and what you want them to think. Only then can you tailor the content of your pitch...

### Here are some key points to consider with the content:

- **Less is more** – avoid overwhelming the prospect with too much information. Use the right amount of the right kind of content to make your case. Make sure you back up your statements with evidence to prove your point.
- **Tailor your message** – some are persuaded by hard data, others by anecdotes, references, analogies, or case studies.

### How to write a case study? Follow this simple structure:

- *Situation* – paint the picture
- *Action* – what we did.
- *Result* – for the client.

### Example Case Study:

**Situation** – a business decided to implement a new IT system choosing both the system and the vendor. The project was estimated to take 9 months and cost \$300k. However, after 14 months, the project was over budget and there was no completion date in sight. The relationship and trust between the business and vendor had deteriorated

**Action** – I reviewed the contract and discovered all the clauses favoured the vendor. The business had signed this contract without consulting a lawyer, which left them with limited options.

**Result** – A new vendor was appointed under a new contract that I vetted. The project was then completed to the satisfaction of both parties.

## Key 3: Content Strategy

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*“When you talk, you are only repeating what you already know. But if you listen, you may learn something new.” – Dalai Lama*

### **Ask great questions:**

This is one of the big secrets of key three. As Voltaire said, “judge a man by his questions”. The best pitchers ask great questions to identify the need, develop the relationship and demonstrate the value. The informed questions they ask build their credibility and make the buyer think.

Remember, we have 2 ears and one mouth. Good quality questions get the other person involved; and everyone likes a good listener!

### **PowerPoint slides don’t replace insightful questions like these:**

- What are your priorities for this year? What obstacles do you foresee?
- What would you like to know about us?... Can you elaborate on that?
- You’ve mentioned several issues. Which is the most important and why?
- What other solutions have you tried?
- What is the driving force behind this initiative? Why?
- What would “better” look like?
- We plan to cover the following areas in our pitch. What would be most valuable?
- We only have 10 minutes left. Is there anything else we should discuss?

### **The Real Estate Ad Campaign**

I was working with a magazine publisher to get new clients. They were pitching to a real estate company and weren’t making much headway. I got them to go back to the decision makers and ask, “what brands outside of real estate do you see yourself as being similar to?”.

Interestingly, the brands they listed were those of banks and airlines. We went back and took them through a presentation on a campaign we had put together for a bank.

They ended up loving the pitch and agreed to come onboard.

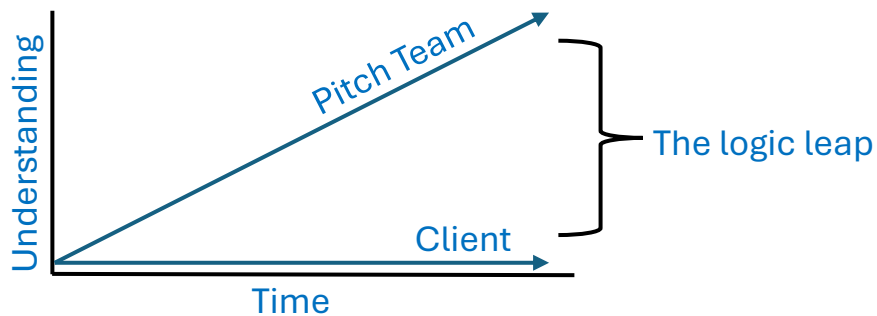
**Lesson:** asking questions can often be the secret to unlocking the value proposition.

# Key 3: Content Strategy

## The Logic Leap:

The logic leap is the gap between what the client wants and what the solution that the pitch team offers and usually arises due to a lack of communication.

- **Initial Meetings:** The pitch team meets with the client to learn about their problems.
- **Growing Understanding:** Over time, the pitch team's understanding of possible solutions increases, shown by the 45-degree line.
- **Client's Perspective:** During this period, the client is unaware of the progress the pitch team is making.
- **Proposal Presentation:** After several days or weeks, the pitch team presents their proposal. There's a risk that their understanding may not match the client's expectations.
- **Avoiding Surprises:** To avoid this "Logic Leap," keep communicating with the client throughout the process. Set the expectation for continuous dialogue, ask more questions, and share your ideas to ensure alignment.



## How a PR Firm lost a Business Opportunity

A PR agency had developed some creative ideas for an accounting firm that were looking to refresh their marketing. Unfortunately, the PR company hadn't involved anyone in the accounting firm in the development of these ideas to check they were on the right track.

During the presentation, it quickly became evident that there was a huge gap between what the PR agency had developed and what the accounting firm expected. The end result was no sale.

**Lesson:** it's important to talk often to the client, giving them regular updates and to really listen. By ensuring that everyone knows what to expect and by tailoring ideas to fit, you can avoid the logic leap and improve your chances of winning.

## Key 3: Content Strategy

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### Ask the client what they like about their current service:

When starting a relationship with a new client, it's important to understand their problems. However, you might not have built enough trust to ask directly.

An alternative approach is to start by asking what they like about their current product or service. This makes them feel comfortable and naturally leads them to share what they think is missing or what needs improvement.

### Replacement IT System Pitch

In the lead up to a pitch for a prospective client about a new IT system, we asked the prospect what key features they liked about their current IT system. In this situation the potential client said that the point-of-sale part of their IT package was fine, but the report generation and analytics functions were poor. This meant that they didn't have visibility or control of the business.

This feedback helped us tailor our pitch content and in response, we made an effort to highlight our reporting functionality, which ultimately led to us winning their business.

**Lesson:** every pitch is unique. Asking questions is often the secret to unlocking the value proposition.

### So what?

As you prepare your content, it pays to think like the client and ask yourself, "so what?" If you put yourself in the client's shoes, does this have any relevance or not?

For example, a statement might be "we have 30 years of experience!" So what? Does this have any relevance for the client?

# Key 4: Structure

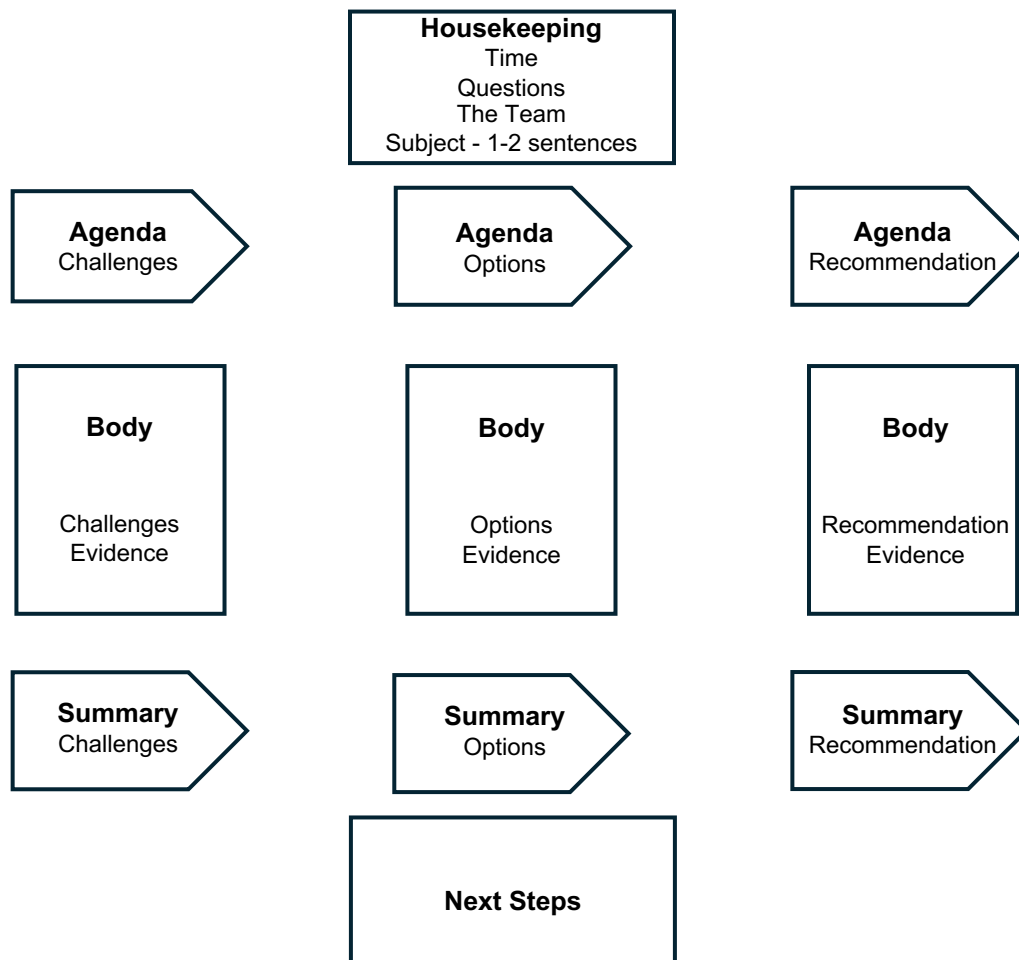
Different structures work better depending on your prospect, their preferences and the subject matter you are pitching. Over time, I have developed over 60 different structures to cover a wide range of subjects and client preferences; however, at the core of each of these variations remains ‘the basic structure’.

## The basic structure:

Every pitch/meeting has a beginning, middle and end.

- *Beginning* – outline the subject and agenda
- *Middle* – the body of the meeting: present content, questions and interaction
- *End* – summarise key points and outline next steps

A common mistake at the beginning is to give an overview of your organisation and its capabilities, but what the prospect is far more interested in is whether you understand their challenges, whether you can deliver a solution, and whether they trust you.



## Key 4: Structure

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### Think like a news presenter:

Think of this outline like a news bulletin: start with the headlines (beginning), delve into the details (middle) and conclude with a summary (end). Also, it's important to link sections of the of the pitch in a conversational style.

Instead of: "My agenda for today..."

Try:

"What I'd like to cover is..."

### Analytical Experts Pitching To Their CEO:

I was working with some analytical experts who needed to pitch to their CEO for resources. Initially, they planned a detailed lengthy pitch.

However, by focusing on the CEO's preference for concise, high-level information, they delivered a much shorter pitch with the key recommendation upfront, supported by relevant content.

The client got exactly what they wanted.

**Lesson:** we often communicate in a style we are comfortable with. However, to be successful, we must adapt our pitch to effectively communicate with people who think differently.

## Key 5: Visual Support

Although they don't mask weak content and poor presentation skills, visual aids - especially props - are one of the best techniques for adding interest and variety to your pitch. Visual aids tap into the sense of sight, and the visual sense is more powerful than the auditory. As Confucius said, "I hear, and I forget. I see, and I remember".

Before deciding on your visuals, ask yourself:

- Is it relevant? Is it interesting?
- If it's a slide, is it clear, readable and simple?

### **Avoid "Death by PowerPoint":**

It's important to use simple, impactful slides, which use visuals to highlight and enhance key areas. It's equally important to consider who the prospect is, what they expect and your objectives. If you can, try to involve the prospect and make the pitch interactive wherever possible.

You should always have a back-up plan, such as hard copies of your slides in case of technical failures. If possible, arrive early and check out the meeting room in advance to prepare and feel more relaxed. Big players take to the playing field for a big match, often arriving early to take in the atmosphere so that they don't get overawed by the occasion. It's the same for us in a pitch as well. **Know the room.**

### **3 mistakes people make:**

- Too much information on a slide
- People cannot read the visual due to the font sizing
- Presenter talks to the visual rather than the audience

### **Case study for using visual aid**

We recently worked with an electric bike manufacturer to pitch a new line of E-bikes to a group of independent bike retailers. To make our pitch engaging, we used a mix of PowerPoint, flip charts, and the actual bikes for them to try out.

After the session, we gave them a handy tip sheet with simple techniques to help them sell any bike when a customer walks into their shop.

**Lesson:** be creative and leave them with something they will find valuable.



## Key 6: Pitch Delivery

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Great delivery is crucial – it encompasses your appearance, your body language, posture and self-belief. 53% of what people remember from a pitch is the “how” of your confidence, control, or lack thereof.

**Tip:** use the ‘magic pause’ often in your presentation. Say something or ask a question and then pause for a few seconds. This immediately gets a lot of attention.

### **Team cohesion:**

If pitching as a team, you need to ensure seamless transitions. In a 4 x 100 metre relay race it’s not always the four fastest individuals who will take gold, but often the team that smoothly passes the baton to the next runner.

Instead of “let me pass over to Carolyn”, try something like this...

“As you can see, we have a compelling strategy - the execution will be led by our implementation manager, Carolyn”.

### **The importance of body language:**

‘How’ you say something is more important than ‘what’ you say. People often don’t remember exactly what you said, but they do remember the overall impression that you made. By paying attention to individual components, such as voice; eye contact; movement; and hand gestures, you can control the overall impression you make.

**Tip:** direct key points to individuals by their role with eye contact. For example, “let me show you how easy it is to set up the minimum and maximum stock levels in the inventory system” directed to the inventory manager.

### **Ask yourself:**

- What are you going to do to make sure your pitch gets attention?
- What will you do to make your body language show that you are confident, relaxed and in control?
- When will you practice?

## Key 7: Rehearsal

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*“A good presenter focuses on themselves and what they are going to say. A great presenter focuses on the audience and how they are reacting to what is being said.” – Dale Carnegie*

Due to time constraints, very few people actually rehearse their pitch. As a result, those that do, even if just for just 15 minutes, can really elevate their pitch versus the rest of the pack. When you take the time to rehearse, you ensure that you feel confident on the day and can easily focus on the other party rather than focusing on yourself. In sports and theatre, rehearsal ensures peak performance, and it's the same with pitching.

At the very least, I would encourage you to rehearse the beginning of your meeting. This will ensure that you get off to a great start, which creates a momentum that you can build on, instead of floundering after a muddled start. First impressions are made in a fraction of a second.

### **How to practice effectively:**

The written word differs from the spoken word, so it is essential that you go through the pitch out loud and not just in your head. Going through your pitch out loud will also allow you to figure out where to pause, as well as who to make eye contact with and when.

It's also important to practice pacing. If you can, go through your pitch its entirety and see how long it takes and ensure that the pacing feels right and that you have enough time at the end for questions or small deviations from the structure. It pays to control your speaking cadence. For example, pausing after a question allows the prospect to respond and shows confidence.

**Tip:** when preparing for questions, write down those you dread and plan for those.

### **Ask yourself:**

- Which part of your pitch are you going to practice and rehearse?

# Final Thoughts

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Mastering the art of pitching is an ongoing process.

By understanding your audience, setting clear objectives, crafting a compelling narrative, using visuals effectively, maintaining dynamic delivery, and rehearsing diligently, you can enhance your pitch's impact and success. By implementing the 7 keys and insights shared in this report, you can elevate your pitching skills and increase your chances of winning pitches and advancing your career.

## **Recommended reading:**

*Life's a Pitch* - Philip Delves Broughton.

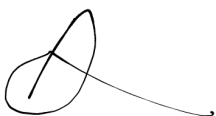
This book is a great read, which focuses on successful salespeople from different backgrounds. It has a wide range of pitching techniques from carpet salesman in Marrakech to Boeing selling aircraft to the aircraft operators of the world. The book has a tonne of great stories which bring pitching to life.

## **Free 'Improve my Pitch' consultation:**

If you have an important pitch coming up soon, book a free 'improve my pitch' consultation. This will take between 20 and 30 minutes and will give you some helpful and practical tips which you can use immediately to make your next pitch better. This is with my compliments, and I know you will find it very useful.

To book your consultation, please contact me using my contact details at the bottom of this page.

Thanks for reading Never Stop Pitching, I hope that you've found it useful. If you did, or if you have any questions or comments, I'd love to hear from you.



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