Pitching a Major Account
Tip Card Sheet

SpokenImpact
Creating presentations that mean business

PITCHING A MAJOR ACCOUNT

STEP # 1 – DEVELOP A PLAN FOR WINNING

Develop a strategy for winning the account based on getting the answers to these questions. We advise a pre-meeting call with the client.

1. What is the interest/challenge/pain?
2. Who are you also considering/talking to?
3. What will be the criteria for selection?
4. Who will be in the meeting?
5. What questions are we likely to be asked?
6. What topics do you want us to cover?
7. What will be the greatest objection to us?
8. What will be the format of the room?
9. What AV will be available?
10. Can you confirm the amount of time?
11. Can we access the room earlier for set-up?

A good plan requires knowing how you compare to the competition regarding:

- History with the client
- Similar project experience
- Unique point of difference
- Team's qualifications
- Objections the client may have

STEP # 2 – CREATE COMPELLING CONTENT

Here are important sections to consider:

OPENER – Story that creates connection
PROBLEM/NEED – Show unique understanding
KEY MESSAGE – How/why you are ideal
EXPERTISE – Your unique qualifications
SOLUTION – Examples/illustrations/demo
Insights to issues/opportunities
Unique knowledge or thinking
Proof solution is best
Benefits/improvements
CLOSE – Story/visual that has positive future
Show interest/ask for business

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STEP # 3 – MAKE YOUR CONTENT STICK

1. Tell a story or interesting case study
2. Use a vivid metaphor
3. Use a photo, prop or symbol
4. Provide an explanation by showing:

• Map	• Diagram
• Chart	• Table
• Illustration	• Time Line
• Comparison	• Before & After
• Model	• Process
• Demonstration	• Samples

Consider using these mediums:

• PowerPoint	• Cards
• Video	• Handouts
• Audio	• Prop
• Poster Boards	• Banner
• Tablet apps	• Placemat

- Any surface on which you can add a message (wood, box, mirror)

STEP # 4 – REHEARSE YOUR DELIVERY

- Script out presentation
- Check timing
- Memorize opener and close
- Rehearse exactly as you plan to present
- Use note card or one page with bullets as reference during actual interview
- Plan room layout and seating

Watch Team Presentation Dynamics

- Assign a lead for time/issues/questions
- Limit number of presenters if possible
- Create variety in length for each individual's presentation
- Use bridging statement between each presenter

STEP # 5 – PREPARE FOR Q & A

- Prepare answers to likely questions
- Use the "THINK 3" guideline for complicated answers (reply with 3 things)
- If unsure, ask to have question restated

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