First Creation Consulting

Professional Pitch Book Presentation Skills

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Overview

As an introduction it is important to establish exactly what is meant by a Pitch Book Presentation.

A Pitch Book Presentation is where someone uses a hard copy of a PowerPoint presentation to walk a client through their marketing pitch.

This is no longer a new way of getting ideas across to clients it has now been around for a number years. As with all new concepts it was fine to start with but over time clients have become bored at sitting there whilst someone reads verbatim the slides that they are showing them. They switch off quickly and lose interest, just waiting for the person to get to the last slide so that they can wide the session up. They are left with a real sense of why didn't you just leave it with me I could have read it myself.

Salespeople and marketers have become over reliant on the pitch book using it as a crutch helping them to rigidly stick to a structure and contents regardless if the client is interested or not.

This has left the clients dreading the Pitch Book Presentation.

As a result of this salespeople marketers and analysts have to learn how use the Pitch Book to best effect.

What the clients want is an engaging conversation around proposed ideas. The Pitch Book should be used as a framework to outline ideas and reinforce key points with graphs and charts.

The Professional Pitch Book Presentation Skills workshop has been designed to incorporate what the clients want and provide the participants with the skills and techniques to produce and present ideas, products and services using a pitch book in a way that achieves results.

This means having the Pitch Book present referring to it when required but being confident and comfortable to share ideas with the client, discuss and debate key themes, provide answers to questions and defend objections where necessary.

The Professional Pitch Book Presentation Skills workshop is practically orientated providing the participants with the opportunity to practice the required skills during simulated client exercises.

Workshop Aim:

The aim of the workshop is to develop participant's ability to effectively conduct a **Pitch Book Presentation** in a persuasive manner in order to market ideas, products and services of the firm.

Workshop Objectives:

By the end of the workshop participants will be able to:

- Understand the best practices to using a pitch book
- Identify the key skills required to effectively manage and present a pitch book presentation
- Communicate in a way that maximises the understanding of key messages
- Produce a persuasive pitch book presentation
- Develop the clients trust and confidence that you can deliver against their requirements
- Effectively manage question and answer sessions

Workshop Methodology:

The course is designed to maximise participant involvement and learning. A number of proven methodologies will be employed including:

- Trainer led input
- Group/individual based exercises
- Individual presentations using CCTV
- Individual/group feedback and coaching

Workshop Content

Introduction to Pitch Book Presentation Skills

- Using the pitch book effectively
- Positives & negatives of using a pitch book
- What the clients want & don't want

Planning & Preparing for the Client Meeting

- Planning & preparation
- Content
- Structure, agenda, 4 P's
- Effective questions
- Objections

Managing the Pitch Book Presentation

- Interpersonal & communication skills
- Audience/client participation
- Retaining control and direction
- Retaining interest
- Active listening skills

Practical Presentations Using CCTV

Participants will prepare & deliver a 10-minute presentation using a pitch book that they have delivered recently or are planning to deliver in the near future to market their ideas, products and services of the firm.

Feedback and coaching on personal presentations

Producing a Persuasive Pitch Book Presentation - Content

- Audience
- Objective setting
- Content
- Features & benefits
- Facts & opinions
- Creating differentiation
- Client focus
- Structure

Producing a Persuasive Pitch Book Presentation - Slides

- Designing the pitch book slides
- Content
- Structure
- How to use visuals
- Pit falls – Do's & don'ts
- Exercise – What works and does not work

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Feedback and coaching on personal presentations

Managing Objections & Q & A Session

- Attitude & emotions
- Types of questions
- Managing expectations
- Techniques
- Process
- Mental dexterity

Gaining Client Commitment

- Attitude, emotions
- Seeking feedback
- Timing,
- Techniques

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Review & Summary