



The one-stop guide to creating a **winning pitch**

Follow these four steps to help your agency win the work

STEP 1

Evaluate the opportunity

- **See if it's right for you**
Before you invest in a pitch, decide whether it's the right opportunity for your company and objectives.
- **Get all the details**
Make sure the brief is clear, and find out who you're pitching against.
- **Ask questions**
Don't be afraid to ask questions about the brief so you're 100% clear on what is being asked.
- **Build your dream team**
Build a core team of experts who work on every pitch. They can then bring in other relevant people when needed.
- **Focus on the right goal**
Don't aim to 'win' against other agencies, aim to deliver the right solution for the client's customers.



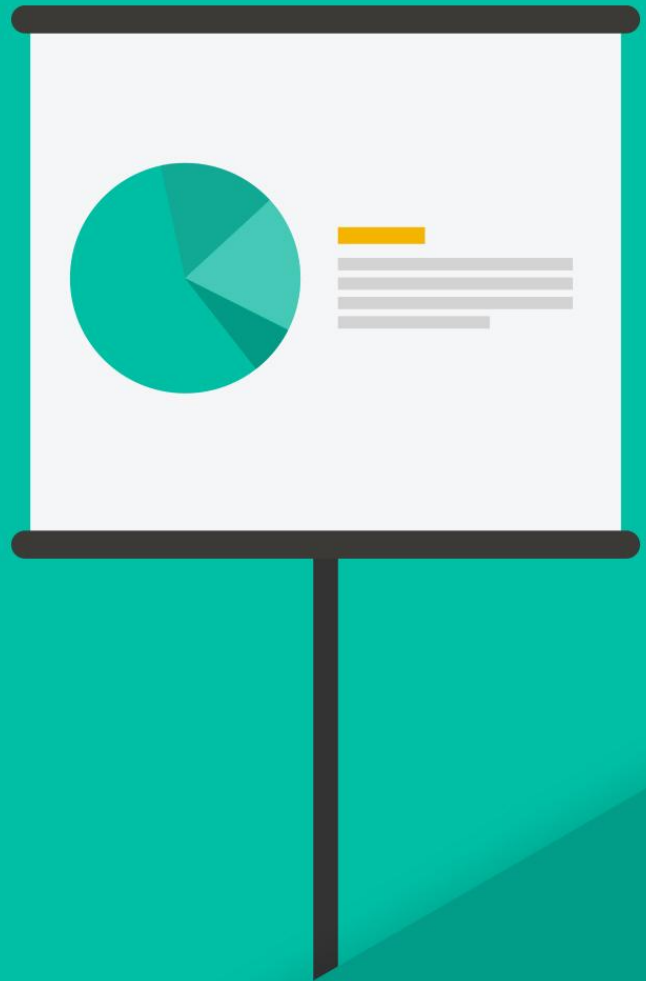
Ask yourself...

1. Does the client need what you offer?
2. Do you meet the selection criteria?
3. Can you happily work with the client?
4. Honestly...would you hire you for this work?

STEP 2

Create the pitch

- **Remember you're one of many**
Be clear about what differentiates your agency. What do you believe in and how does that influence what you offer?
- **It's about them, not you**
Focus on the client's problem and how you can help (leave the agency's ego in the office!).
- **Be realistic**
Only promise things you know you can deliver.
- **Stick to the brief - and the budget**
Make sure you know the budget and offer a solution that fits it.
- **Use the right examples**
Show relevant case studies with solid stats behind them.
- **Create persuasive leave-behinds**
They're all the client has to go on after you've left.
- **Practice, practice, practice!**
Rehearsals should start long before the journey to the client's office. Make sure everyone knows their role and there's a clear story to your presentation.



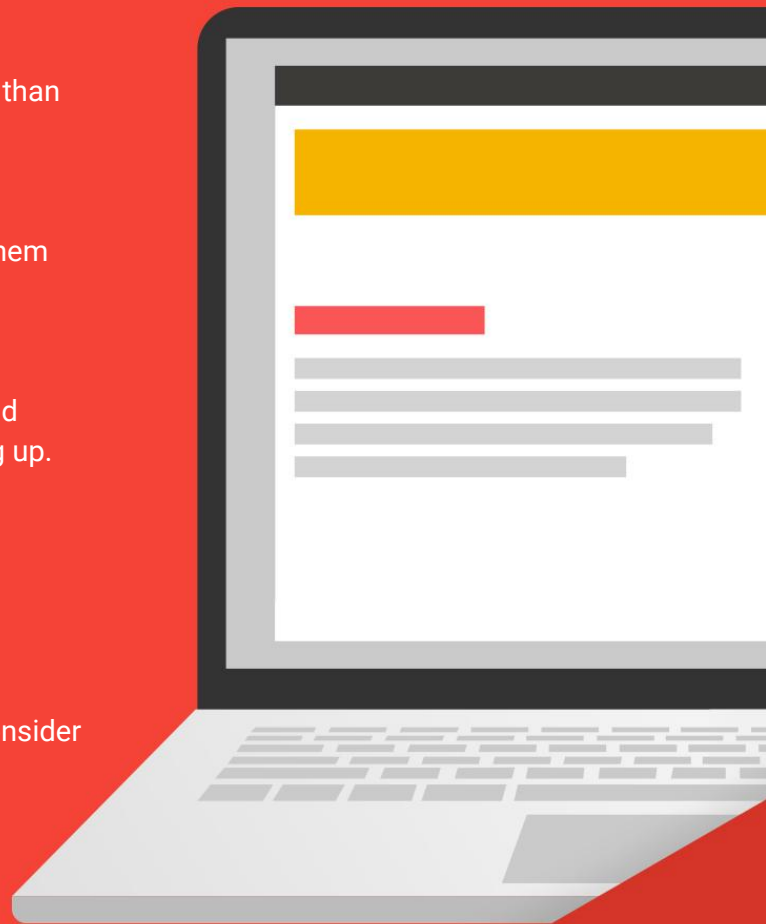
Clients' No.1 frustration in agency pitches?
Not sticking to the budget*

* [Marketing Week, 2014](#)

STEP 3

Impress on the day

- **Prep your tech**
Make sure you have back-up laptops and more than one way to access your presentation.
- **Set an agenda**
Let the client know what you'll cover, but give them the chance to add anything extra.
- **Speak with passion**
Make eye contact with everyone in the room and inject energy into your presentation by standing up.
- **Let your whole team talk**
Let the person who will be running the client's account day-to-day shine.
- **Address everyone in the room**
Make sure you're talking to the whole team - consider what each person will care about.
- **Stick to your timeslot**
There's no reason to run over.
- **Prepare for objections**
Practice answers to any questions that may come up. If you don't have an answer on the spot, promise to follow up later.



Be creative with what you present - you can break away from slides

STEP 4

End on a high note

- **Keep in touch**
Stay on good terms with the client or the pitch consultant, regardless of the outcome.
- **Follow the outcome**
If you're not successful, find out who is. It may help you decide which opportunities to go for in the future.
- **Review and refine**
If you keep getting the same outcome, have a think about what you could do differently.



What do clients want?

Strategic leadership, marketing creativity and customer centric marketing**

** [The SoDA Report, 2016](#)