

Pitch Presentations

Pitching for business is an increasingly important part of a Professional adviser's role and they need to be skilled at pitching to achieve results.

Pitching may be competitive or non-competitive but either way, the pitch team needs to be able to demonstrate a clear understanding of the client's requirements and be able to demonstrate they have solutions that satisfy those needs – and convince the client that they are the firm to appoint.

If the firm is involved in a competitive pitch, the final stage in the pitch process is the presentation and can often be the final differentiator for an organisation looking to appoint professional advisers. This is a critical stage; pitch teams may meet some decision makers for the first time and it is the presentation that can win the work.

This course concentrates on how to prepare a persuasive presentation and how pitch teams need to conduct themselves in a way which clearly demonstrates capability to deliver a solution, which satisfies the client's needs and does it better than the competitors.

Objective

- To learn practical techniques to deliver persuasive pitch presentations that will differentiate the firm from competitors
- To learn how to work as a team in pitch presentations.

Course Content

- How clients make decisions
- USPs and differentiation
- Managing personal impact
- Structuring the content
- Dealing with objections and difficult questions
- Delivery techniques
- Personal Development Action Plans.

Duration

1 day

Facilitation

1 trainer

Group Size

This is a highly intensive and practical course. Numbers should be restricted to 4 delegates and 1 trainer or 8 delegates and 2 trainers per course to enable each person to have sufficient time for practice and feedback. The delegates will be organised into 2 teams and there will be a number of activities where delegates will be working with a trainer in their teams.

Who should attend

Partners and Fee earners who are involved in pitch presentations.