

Get your pitch guidelines into shape



As pitch practices evolve and client preferences regarding tenders change, it is vital to periodically review if your firm's pitch guidelines are fit for the 2015 challenge.

Use this checklist to evaluate whether your guidelines need a refresh.

- 1 Does your 'bid vs no bid' evaluation criteria still make commercial sense given the current financial targets of the firm, and the insight you've gained from the pitches the firm has won and lost in recent months? Yes No
- 2 Do your guidelines give clear advice on how to plan the pitch response, so that proper thought goes into understanding what the ITT or RFP is asking, the client's rationale and what the firm needs to demonstrate to win this opportunity? Yes No
- 3 Do your guidelines explain how to select a team which represents 'best fit' with the client's decision-makers, not who has availability in the firm at that time? Yes No
- 4 Do your guidelines and templates enable professionals to easily tailor your content to the client's brief – to avoid your proposals and presentations coming across as generic or bland? Yes No
- 5 Do your guidelines and templates still reflect the firm's current strengths and points of difference? Yes No
- 6 Do your guidelines and tools give professionals practical advice on how to build rapport with the client's decision-makers and influencers at the various stages of the pitch process? Yes No
- 7 Do your guidelines point to relevant case studies and credentials which professionals can draw on to back up their messages? Yes No
- 8 Do your guidelines and supporting templates enable professionals to devise proposal documents which will engage the reader quickly and effectively? Yes No
- 9 Do your guidelines give guidance to professionals on how to rehearse effectively for the pitch presentation? Yes No
- 10 Do your guidelines include advice for managing the tender or pitch presentation styles clients are seeking in 2015? Yes No

Selected four or more No's in your answers? It might be time to review your pitching guidelines.