**The Levitan Pitch System**

The Levitan Pitch System is included in the book, The Levitan Pitch. Buy This Book. Win More Pitches. The book is available on Amazon.

The elements of the Levitan Pitch Playbook have been designed as ‘physical’ management tools that you will share with the individual members of your pitch team. The Playbook’s objective is to assist with the daily management of your team and to literally get everyone on the same page, as well as increase the efficiency of your pitch development process.

Use the Playbook to get past the inefficiency of the standard pitch process and reduce your agency’s collective groan when they hear that you are about to embark on yet another new pitch.

**The Pitch Creative Brief**

An important pointin the system is the objective of being highly strategic about how you craft your pitch.

Before you start down the road of creating a presentation for you pitch, complete a detailed pitch Creative Brief. You wouldn’t start a client job without one. For the same strategic reasons, do it for yourself.

Use the presentation Creative Brief to force your team to think like the client. You have their pitch document, you have determined the client’s major needs, you know their history, you did some intelligence gathering, and you studied their corporate culture and individual personalities. Use this information to think like the client. You do this for your existing clients. Just do the same thing for yourself. I have two pitch creative brief templates below. Go ahead, pick on and modify at will.

**Pitch Creative Brief X 2**

In this case, the agency has gotten to the finalist round and has determined that they will sell-in the idea of Look Brilliant. Look Brilliant works for the product (whiter than white), the consumer (the campaign helps consumers to use paper as a personal branding tool) and retailers who need to *Look Brilliant* as well.

As is often the case, this idea helped to win the account. However, it was never executed.

**1. SAMPLE PITCH CREATIVE BRIEF**

**01\_18\_12**

**Prospective Client:** Boise Inc. (Chicago HQ)

**Product/Service:** Boise® HD:P™ High Definition Paper™

**Client Target Market:** Business 2 Business

AGENCY INFORMATION:

Pitch Leader: April Donner. Management Supervisor.

Pitch Schedule: We are scheduled to give a finalist presentation on Monday March 9 in Chicago. This gives us approximately 6 weeks to write the pitch and build a leave behind. Pitch schedule and checklist is attached. Travel plans TBD.

Background: Boise Agency Search History / Insights:

Boise is looking for an agency to handle its B2B marketing with a concentration on digital and social media. The annual budget, including agency services, is stated to be $800,000.

Boise has been working with XYZ Agency in Chicago since 2008. Based on what the client has stated in the RFP and finalist pitch request documents, we assume that XYZ has not delivered strategic or effective digital / online programs. (See attached RFP and pitch request documents for detail.)

Boise is also using in-house resources for the production of sales materials and is looking to the new agency to help guide these resources.

Competitive Agencies: Johnson & Obama. A Chicago digital agency with a history of working in the paper industry.

Target Marketing, Inc. A Memphis B2B agency that worked with Boise from 1998 to 2005.

What Will It take To Win?:

We need to demonstrate B2B and digital prowess; an understanding of Boise’s distribution model and retailer motivations.

Boise has not yet leveraged social media. This appears to be a sore point.

We need to deliver a strategy that understands and meets Boise’s sales and ROI objectives (we want to look like a business partner – this is critical) and offer an unexpected must-have solution.

We need to look nimble and resourceful. This is a very important program for Boise in their market share fight with International Paper and Domtar.

THE CLIENT:

<http://www.boiseinc.com/boise.html>

Client Decision makers: Bob Hoffman, EVP Marketing

Carla Archer, Marketing Director

Boise Sales, TBD

We have been told that Boise management is counting on this team to turn around declining sales numbers and that, if they come up with a big idea, that management will fund the program to achieve success.

(See the client profile document to begin to understand each client’s personality and hot buttons.)

What are the objectives of the client’s program?

Boise’s objective is to increase sales of their HD:P™ High Definition Paper™ by 15% per year.

They need to build a stronger / ongoing marketing relationship with their business customers. Currently it is too order taker oriented.

Who is Boise’s Target market?

Purchasing executives at: OMAX, United Stationers; Staples; Office Depot, etc.

Distributors: Unisource; XpedX; Spicers, etc.

What does Boise’s target market currently think?

Boise Inc’s business customers are looking for office paper manufacturers that produce high quality product at the right price *plus* excellent sales support.

Currently Boise does not deliver a unique sales proposition. Their papers are perceived as a higher cost commodity that has not been supported by brand building marketing.

What do we want Boise’s target market to think?

Boise® HD:P™ High Definition Paper™ has a new marketing program that will help me to grow my paper sales. This is an exciting consumer-focused program in what is otherwise an under marketed segment.

The commodity nature of the paper business is a main issue. We see an opportunity to use low cost thought leadership via social media and other online programs that will create demand by the target market’s own business customers.

What is the one thing Boise has to tell its market?

Boise® HD:P™ High Definition Paper™ *Look Brilliant* program will help me sell more paper and develop a stronger relationship with my customers.

(FYI: Tom and his creative team are working up some sample creative ideas for this strategy.)

What are the support points?

The HD:P *Look Brilliant* program has elements that are structured to help HD:P (and Boise Inc) grow and deepen its relationships with its B to B customers. These elements include:

A program designed for partnerships

A micro site that offers co-promotion

A catalog and POP program that will support sales

Participation in the *Look Brilliant* email & database program

Trade show support

Inclusion in PR and other related marketing

Promotional programs and partnerships

What is the brand’s character?

HD:P is taking a leadership position. Therefore:

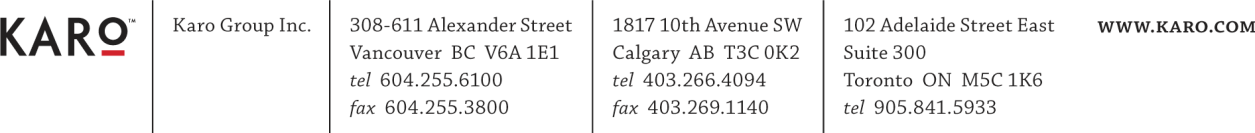
A smart collaborative leader that is focused on helping today’s business professional look and sound her best through excellence in business communications.

What is mandatory? (Tagline, logo, contact information, legal, etc.)

Brand: Boise® HD:P™ High Definition Paper™

Tagline: Look Brilliant

**2. Here is another example of an agency pitch Creative / Opportunity Brief. It comes from Karo, one of Canada’s leading agencies.**



**New Business Opportunity Brief**

Client:

Assignment:

Docket:

Date:

Team:

Karo: Collaborators:

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**THE CLIENT/BRAND BACKGROUND**

Setting the scene - what is the market context?

xxx

What is the real/predominant business problem for the client/brand?

xxx

Who are their primary target audiences?

xxx

What is the role of communication?

xxx

What is their current brand position?

xxx

How are they measuring current success?

xxx

**THE RFP/RFI AGENCY SEARCH**

Setting the scene - what is their history of relationships with agencies?

xxx

Who are they with now, and why are they considering a change?

xxx

Who else is in the search, and why might they be considered?

xxx

What are Karo’s greatest strengths for this opportunity, and what is the primary reason we believe they may engage us?

xxx

What are Karo’s greatest weaknesses for this opportunity, and what is the primary rea- son we believe they may not engage us?

xxx

Who is the principal decision maker at the client, what are his/her traits, and what experience or knowledge do we believe he/she has with Karo?

xxx

What is the criteria the client is using to make a decision?

xxx

Who else, beyond the principal decision maker, may help influence the decision in Karo’s favour, and why?

xxx

**THE PITCH**

Who should lead and participate, and why.

xxx

What are the key competences Karo must demonstrate?

xxx

What is the most important factor that may win Karo the assignment in the pitch?

xxx

What opportunities exist for us to lay the groundwork for a win before the pitch?

Xxx

What are the specific milestones from today until success?

xxx

Give me a shout if you want to discuss how to improve your new business marketing plan or pitch batting average.

If you haven’t done so yet, you could also go to Amazon and purchase your very own copy of the world’s best *how to* book on pitching…

***The Levitan Pitch. Buy This Book. Win More Pitches.***

