**The Levitan Pitch System**

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The Levitan Pitch System is included in the book, *The Levitan Pitch. Buy This Book. Win More Pitches.* The book is available at 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 Go Quiz**

You’ve been asked to be a finalist in a new business pitch. Great. Now, should you go for it? Should you spend your agency’s precious time, staff resources and cash? This is your last chance to make this critical decision.

Since there are so many moving parts to making the all important ‘Go’ decision, I developed a quick handy-dandy quiz that you and your senior team can take to help you to decide if you really want to spend the time and money to pitch this account. The quiz will even start to help you think through what you will need to say and do to win the business.

The quiz isolates a set of decision-making criteria and employs easy math to calculate your interest in actually pitching the account. You can, of course, add or subtract criteria. The point is to use some gray matter and time to make the right call. You do not have to pitch every account that comes knocking. In fact, don’t.

A note about your people: Since this is a strategic decision, and you really don’t want to show your staff that you are taking a quiz to make the decision, I wouldn’t put this quiz in front of the agency or the pitch team. It’s just for management. OK, maybe you could share it after the fact to show that you are actually thinking through the Go decision-making process.

Each question has three answers ranked from 0 to 3. There is also a bonus question related to incumbency. If your total score is over 10 then you have no choice but to go for it. A 4 to 9 score is where you will have to use your gut and personal experience to make the decision. 3 or less and I’d think hard about ditching the pitch and instead take everyone in the agency out for a beer.

Note: All client, pitch and agency motivations are different. You might want to modify this list depending on your own situation.

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**1. Do you know the decision maker?**

0 – You’ve never talked to them.

1 – The client came to you through a personal referral.

2 – You are on a first name basis with the client. Maybe you’ve worked together in the past.

**2. Do you have any history with the company?**

0 – Never crossed paths.

1 – You worked with someone at the client who can vouch for the quality of your agency.

2 – You worked directly with the client or one of their brands in the past.

**3. How professional is the client’s agency selection process? Answer either the client or the agency search consultant questions only. (A or B, not both.)**

1. **Is the person running the pitch experienced?**

0 - They have never ever run a pitch before.

1 – They are acting professionally.

2 – They have run pitches before and even sound like they are using the 4A’s and ANA pitch guidelines.

1. **Is the client is using a search consultant?**

0 – You don’t know the consultant.

1 – You have pitched the consultant in the past but lost.

2 – You have won business from the consultant.

**4. Is the client in a category that your agency has targeted?**

0 – No.

1 – Yes.

2 – Yes, and we have a dedicated business development effort to add clients in this specific category.

**5. Do you have direct category experience?**

0 – You have none. Um, what’s a Widget?

1 – You have worked with a similar company or brand in the client’s category.

2 – Youare perceived as being a leading expert in the category. This is probably due to prior client experience and recognized thought-leadership.

**6. Do you know the client’s budget and / or how they plan to compensate the agency?**

0 – You

have no clue, and the client isn’t forthcoming.

1 – One budget seems low, but you are willing to gamble.

2 – We’re in the money!

**7. Is the client looking for a “hot” award winning creative agency?**

0 – You are creative but are not known for this.

1 – Recent campaigns have gotten you some industry attention.

2 – You have shelves full of Clios and were recently named to the ADWEEK Agency of the Year Something list.

**8. Do you pitch well?**

0 – Pitching hasn’t been an agency strength.

1 – You have won a third of your pitches.

2 – You are so good at pitching that you have to pinch yourself.

**9. How strong is your agency competition?**

0 – They really kick ass, have a very high pitch batting average, and you should be worried.

1 – They are very similar to you.

2 – They look weak.

**Ladies and gentlemen, your score is \_\_\_\_\_.**

As a reminder: If your score is over 10 then you have no choice but to go for it. 4 to 9 is where you will have to use your gut to make the decision. Less than 3? It’s Miller Time down at your local.

**A Bonus Question: Are you the incumbent?**

Just to complicate matters, are you the incumbent agency? If so, you need to think through why your beloved client has put the account up for grabs. Here is my simple litmus test.

1. You have no clue why the client has put the account up for review.

Um, without knowing why I’d back way off. It has been reported that only 10% of incumbents keep their account.

2. You are the incumbent, and this is one of those pre-scheduled procurement-driven reviews. You know that the client loves you.

I’d go for it.

**OK, Go.**

If the client has passed your Go Quiz then it’s time to get to work.

Good luck!

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

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

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