**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 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 Checklist**

Leading a pitch isn’t easy. You are juggling the client document, communications with the client or search consultant, the timetable, your people, their work, supporting materials, travel plans, meeting room plans, technology decisions and on.

Forgetting one simple thing like the cable that connects your laptop to the projector can upset you, your team and make you look unorganized in front of the client.

My advice: Don’t Forget Anything. Use this list. Assign responsibilities.

**The RFP / Pitch Document:**

Distribute the document

Have at least two people read it to determine what the client is looking for

Assign tasks based on your read

Use one of the two Pitch Creative Briefs in the Pitch Playbook

Have you discussed a post pitch questionnaire with the client?

**The Pitch Development Scenario**

Pick your team

Determine who is in the final presentation

Create a master pitch timetable

Create a rehearsal schedule

Create a budget

Build a war room

**The Client:**

Who is the decision maker?

Who else will be in the meeting?

Is a search consultant involved?

Build profiles – use the Chemistry guide in the Pitch Playbook

How will you build chemistry?

**The Presentation Venue:**

Where are you presenting?

How much time do you have?

What are the client’s pitch parameters and instructions?

What, if anything can you do to “own” the room?

Try to see the room ahead of the meeting

Find a scout if required

**Insight Development:**

Determine and schedule any strategic learning

Is research required?

Will you need to go into the field or use online research?

Will you use any multimedia or artwork for data visualization?

What will be your Wow! Moments and BHAGS?

Assign responsibilities

**Presentation Design:**

Determine how you will present

Will you use multimedia? What technology will you need?

Who is responsible for the technology?

What materials will you need?

**Copy:**

Who will write?

Who will edit?

**Art:**

Who will create any graphic materials for the meeting?

Assign responsibilities

**Presentation Tools:**

What format will you use?

What technology / equipment is required?

Will you need artwork?

Will you need to produce anything physical?

**Leave Behind:**

What will you need to produce?

A book?

Digital materials?

A 3D extravaganza?

How / when will it be delivered?

Who is responsible?

**Transportation:**

Will you need to book trips – air / hotel / car rental?

**Follow Up Plan:**

How and who will follow up with the client?

What needs to be produced ahead of the meeting?

Remember to send the post pitch questionnaire

Even if you lose, do something nice for the client

Stay in touch

**Re-Group:**

Have agency staff respond to an internal post pitch assessment questionnaire

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.***

