**BUSINESS DEVELOPMENT PITCH MANAGEMENT CHECKLIST**

***Feedback with agency pitch teams has revealed that business development teams must be more organised when managing complex pitches. Use this checklist to avoid some of the most common issues with internal pitch project management.***

**PREPARATION NEEDED BEFORE BRIEFING PITCH TEAMS**

|  |  |
| --- | --- |
|  | Opportunity is well qualified |
|  | Clear prospect’s requirements & success criteria |
|  | Outline of the pitch attendees, their roles, and decision-making power |
|  | Timelines and deadlines prepared |
|  | Selected the best people for this pitch |

**AIMS FOR PITCH TEAM BRIEF**

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| --- | --- |
|  | Outline all key information about prospect |
|  | Questions and discussions |
|  | Agree dates for catch ups and final dress rehearsal |
|  | Agree deliverables for all key dates |
|  | Everyone is clear on who does what, when, and why |

**STRAIGHT AFTER TEAM BRIEF**

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| --- | --- |
|  | Share links to key documents and templates |
|  | Book all catch ups & rehearsals into peoples’ calendars |

**MILESTONES TO ACHIEVE DURING PITCH TIMELINE**

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| --- | --- |
|  | 1. **Thorough insights and analysis to understand the prospect’s opportunities** |
|  | 1. **Well-defined strategy and narrative** |
|  | 1. **Strong proposal for delivery of the strategy** |
|  | 1. **Forecasts and projected results** |
|  | 1. **Relevant case studies to back up our experience** |
|  | 1. **Service level needed to deliver the proposal** |
|  | 1. **Various pricing levels and options to deliver the proposal** |

**QUALITY ASSURANCE**

|  |  |
| --- | --- |
|  | Practiced and timed presentation |
|  | Verified content with prospect |
|  | Feedback from objective person |
|  | Vetted amount & quality of content |
|  | Checked spelling, design, flow & storytelling |

**AFTER PITCH**

|  |  |
| --- | --- |
|  | Internal pitch team feedback |
|  | Prospect feedback call |