

Checklist for All Sales Presentations

Preparation is key for sales presentations. Tom and I often pitch together and even though we are pretty experienced we always take ages ensuring that we have a sales presentation that is aligned with the prospect company and which hits the mark. Here is the check list we follow:

Weeks before

Focused on Us	Client Focused
<ul style="list-style-type: none"> • Read proposal document • Research client • Get back to client with final questions • Initial brainstorming <ul style="list-style-type: none"> ○ the audience ○ key content ○ key themes ○ visual aids • Goals agreed • Structure presentation • Identify competition • Write presentation – 7+/- 2 main themes (ideally 3) • Create slides • Get feedback & change presentation as required 	<ul style="list-style-type: none"> • Contact client and confirm requirements • Identify length of presentation required and split between presenting and questions • Identification of make up of audience and roles • Contact other audience members from client and confirm their requirements • Read client tender document • Logistics issues: <ul style="list-style-type: none"> ○ venue ○ size of room ○ room layout ○ break out room required ○ equipment offered • Identify measurement criteria • Identify decision making process

One week before

Focused on Us	Client Related
<ul style="list-style-type: none">• Rehearse complete presentation• Rehearse Q & A• Ensure kit being used looks professional	<ul style="list-style-type: none">• Reconfirm logistics• Send précis of presentation• Circulate agenda if appropriate to all key people

Day before

Focused on Us	Client Related
<ul style="list-style-type: none">• Gather together support material<ul style="list-style-type: none">○ story boards○ visual aids○ copy of P/Point slides○ copy of proposal○ props○ posters○ laptop○ projector○ screen○ extension cable○ Final rehearsal	<ul style="list-style-type: none">• Check with client about logistics and audience• Confirmatory email

On day of presentation

Focused on Us
<ul style="list-style-type: none">• Get there at least 30 minutes early• Check personal dress• Check all IT kit & switch mobiles off• After the presentation, conduct a review (on day or soon after)