

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
 Read proposal document Research client Get back to client with final questions Initial brainstorming 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 	 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: 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
Rehearse complete presentation	Reconfirm logistics
Rehearse Q & A	Send précis of presentation
 Ensure kit being used looks professional 	Circulate agenda if appropriate to all key people

Day before

Focused on Us	Client Related
Gather together support material story boards visual aids copy of P/Point slides copy of proposal props posters laptop projector screen extension cable Final rehearsal	Check with client about logistics and audience Confirmatory email

On day of presentation

Focused on Us

- 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)