

Helping fee earners prepare the perfect pitch

Intermediate level

Delegates will develop a step-by-step approach to help fee-earners use the relevant skills, resources and processes to prepare perfect pitch documents and presentations and so increase their conversion rate.

This session qualifies for 3.5 hours CPD

Topics covered

Why choose PM Forum training? See overleaf...

- **Introduction**
 - Common challenges
 - Different types of clients and pitches
 - Relationships, Selling, Documents and Presentations
 - Marketing resources and tools
 - Typical pitch process
- **Before the pitch**
 - Explain the fundamentals of selling (including needs, DMU)
 - Conduct research
 - Assess the competition/likelihood of winning
 - Build the team
 - Establish contact with the client
- **Craft the document**
 - What type of document?
 - Structure, content and tone
 - Develop a strong value proposition
 - Brand and differentiation
 - Selling (Features and benefits) – Check reaction
- **Prepare the presentation**
 - Structure, content and timing
 - Visuals and handouts
 - Introductions and impressions
 - Handling questions and promoting dialogue
 - Rehearsals
- **After the pitch**
 - Debrief the team
 - Debrief the client
 - Build the relationship
 - Learn for next time
- **Summary and conclusions**

Eligibility

This training course is open solely to member firms of the **PM Forum**, a worldwide group of over 4,000 marketers in professional services firms. Visit www.pmforumglobal.com



Tuesday 22 May 2018

This half-day workshop takes place from 9.30 to 13.00 starting with a light breakfast.

To facilitate interaction, workshops are restricted to 18 attendees – maximum of four per firm

Trainer



Kim Tasso has worked within and for over 200 professional partnerships in the legal, accountancy and property sectors for over 20 years and continues to do so as a management consultant.

She also has direct client exposure from working with organisations in the technology, education, creative, media, real estate and not-for-profit sectors and through her work with a leading business school.

Unusually, she combines psychology, marketing and business qualifications so is effective both as a professional trainer, facilitator and coach and also as a subject matter expert in a variety of strategy, marketing, selling and relationship management topics.

She is highly rated as a trainer and coach for lawyers, accountants and surveyors and also lectures on Chartered Institute of Marketing (CIM) professional marketing qualifications for Cambridge Marketing College.

She is the author of books on growth strategies, business development, media relations and business development and a prolific conference speaker and journalist. She is commissioning editor for PM magazine.

Further information at www.kimtasso.com.

For information on other training workshop visit www.pmforum.co.uk/training

