

UNDERSTANDING THE WHY:

Clarifying pitches on two levels!

An RFP for a pitch, or for a new project, has arrived. Hooray! Many agencies start immediately by quickly reading the brief, looking for people, and scheduling a kick-off.

But before you do, it's much more effective and efficient to thoroughly clarify the real purpose of the pitch. Consciously take a step back to understand what the client really needs to be successful: on the business

and personal levels. In this way, we significantly increase our chances of finding the right solution for the client – and successfully selling it to them.

The WHY: Business Relevance + Hidden Agenda

That's why it's best to clarify every new lead before a team is assembled or a kickoff takes place. We ask ourselves: What do the concealed briefings behind the actual RFP mean – in terms of the task at hand and personally – for the client? And what does this mean for our approach to the pitch? Here are two exercises that will help us to clarify pitches on these two levels.

CLARIFYING THE TASK LEVEL: BUSINESS RELEVANCE

If we want to help the client to implement meaningful marketing solutions, then we need to clarify the exact business and

communication goals behind the measures in the RFP. This is the only way we can define what we actually need to achieve with these measures – for the client and for ourselves.

1. What are the business goals in this situation?

In the end, the client must be more successful. We should never forget that. So, what is the business goal behind the briefing: market expansion, ROI, turnover? What exactly do they mean by „more sales“ – more buyers or more ARPU? Why do they brief certain measures? What do they expect from these and how will they determine whether our ideas have worked? This discussion elevates us to the level of business partner and creates sustainability in the client relationship.

2. What is the communication goal in this situation?

After clarifying the business goals, we also need to precisely specify the communication goals of the task: increase share of voice or loyalty? Awareness or engagement? Improving the image - but why? Based on the clarified communication objective, it is possible to determine what the briefed measures can really achieve – and what not. If necessary, we may even have to propose measures other than those originally requested.

CLARIFYING THE HUMAN LEVEL: CONNECT THINK DO

In order to work even more purposefully and efficiently, a pitch strategy (e.g., "How do we win this pitch?") and a presentation strategy (e.g., "How do we convince this client?") should be worked out at the beginning of a pitch; that is, before the internal

kickoff. This makes the game plan in the pitch transparent and concrete for all parties involved: No energy is lost on creating unnecessary work, and we don't develop the wrong solutions or ideas. We get through the pitch more efficiently, meaningfully, and more motivated. The Connect Think Do exercise lasts about 60-90 minutes: time well-invested to achieve better results through the whole pitch process – and increase our chances of success.

1. **Connect:** Hidden Agenda ("WHY?")

- What kind of person is the decision-maker?
- What is personally important to the decision-maker in this situation? What are their dreams? What are their goals? What are their pain points?
- What is important to the company (values, culture)? What dreams, goals, pain points does the company have?
- ERGO: What is this really about? What is the hidden agenda behind the RFP?

2. **Think:** Pitch strategy ("HOW?")

- According to the hidden agenda, what is essential to win this pitch?
- What do we need to special pay attention to (e.g., key focus)?
- What advantages do we have over our competitors? What disadvantages that we must overcome?
- Ergo: What do we have to say and do to be successful in the pitch?

3. **Do:** Presentation strategy („WHAT?")

- What story do we have to convey to sell our ideas/solutions to this decision-maker?
- Which elements/format/approach/emphasis/level of detail do we need?
- To which vision state ("dream come true") do we want to have transported the client at the end?
- Ergo: What kind of presentation do we need to optimally implement our pitch strategy?