



# The Perfect Pitch

Financial services firms commonly have to make presentations to clients or “pitch” for new business. Some of these pitches are now feeling old, and are not having the desired impact.

This workshop will show you how to put yourself and your firms across to potential new clients in a professional yet engaging manner. It will also give you the opportunity to refine your messages and focus on what is the most important issues to your clients.

The aim is to not only improve the content of your pitch, but your style and confidence – enabling you to land new business more consistently.

This one day course will guide you through the fundamental skills of pitching, led by an experienced consultant with a background in professional speaking.

## Benefits

Attending this course will enable you to:

- Increase your confidence and your success rate
- Understand what your clients are looking for
- Prepare effectively what you say and how you say it
- Understand how people communicate and develop strategies to adapt your message
- Plan the use of visual aids: death to “death by PowerPoint”
- Anticipate client questions and possible responses
- Practice new techniques for your pitch in a safe environment

## Agenda

<b>Pre Workshop activity</b>	• Perfect Preparation	• Delegates should prepare a 5-10 minute pitch based on a scenario provided. This should include the use of PowerPoint slides
<b>Introduction and welcome</b>	• Understand the objectives and the timetable for the programme and workshop, and how delegates will benefit	• To ensure the group is clear about the aims and objectives of the course and what can realistically be achieved in a day
<b>Introductory Presentations</b>	• Each delegate to present their pitch	
<b>Presentation Review</b>	• Group review & debrief	• Define what makes a good pitch • Describe the way in which confidence is transmitted to an audience

## Core Details

9.30am — 5.00pm



6 CPD Hours

## To Book

### Call

+44 (0)204 551 8568

(Please choose option 2)

### Email

info@thezishi.com

### Online

thezishi.com

## Your Consultant

### Phil Ingle

Phil is a specialist training consultant with a depth of business experience in financial services and combines his knowledge of the industry with creative and energetic training and coaching skills. He is fascinated with the power of good communication and works internationally to help groups and individuals improve their skills.

Most often Phil is coaching people in all aspects of communication from sales to presentations and his approach is tailored to the challenges faced by the individual in the context of the goals to be achieved. He has a wealth of relevant qualifications including an MBA (Cranfield), Master Practitioner – Neuro Linguistic Programming, Certificate of Competence in Occupational Testing, Associate of the Chartered Institute of Bankers and the Financial Planning Certificate. He is also actively involved with the Professional Speaking Association.

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## Agenda

### Cost

**£595 / person + VAT £714**

A discount of 10% per person is available when booking for 2 or more delegates on the same course in a single booking.

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Online

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### In-house Course?

This course works well as an in-house event, contact us to discuss your needs on 0204 551 8568 or email [info@thezishi.com](mailto:info@thezishi.com)



ZISHI Cornerstone



The CPD Standards Office  
CPD PROVIDER: 21020  
2016 - 2018  
[www.cpdstandards.com](http://www.cpdstandards.com)



<b>Essential Skills Revisited</b>	<ul style="list-style-type: none"> <li>• What are the core physical skills?</li> </ul>	<ul style="list-style-type: none"> <li>• Define the basic physical skills and their influence</li> <li>• Describe methods of improving confidence when presenting and pitching</li> </ul>
<b>The content of the following sessions will be tailored to the needs identified during the delegates presentations</b>		
<b>Key Pitching Skills</b>	<ul style="list-style-type: none"> <li>• Features, Advantages &amp; Benefits</li> <li>• Essential client questions</li> <li>• Active listening skills</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrate how to improve personal selling skills</li> </ul>
<b>Using Visual Aids</b>	<ul style="list-style-type: none"> <li>• Use of PowerPoint &amp; Visuals</li> <li>• Transmitting data</li> <li>• Influence with visuals</li> </ul>	<ul style="list-style-type: none"> <li>• Describing the effective use of PowerPoint</li> <li>• Defining ways to highlight key messages</li> </ul>
<b>Facilitating discussion</b>	<ul style="list-style-type: none"> <li>• Generating client involvement when required</li> <li>• Relating discussion to objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrating techniques to involve client</li> <li>• Relating their involvement to your pitch objectives</li> </ul>
<b>Handling Questions</b>	<ul style="list-style-type: none"> <li>• Tips &amp; techniques for effectively answering questions</li> </ul>	<ul style="list-style-type: none"> <li>• Describing methods of generating client questions</li> <li>• Demonstrating ways of answering while maintaining client interest</li> </ul>
<b>Communication Styles</b>	<ul style="list-style-type: none"> <li>• How we think – a short history</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding how people's thinking styles may affect your communication methods</li> </ul>
<b>Pitch Preparation</b>	<ul style="list-style-type: none"> <li>• Where do you start?</li> <li>• How do you finish?</li> </ul>	<ul style="list-style-type: none"> <li>• Define a method of preparing pitches so that positive results are obtained</li> </ul>
<b>Practice</b>	<ul style="list-style-type: none"> <li>• Pitch from each delegate</li> <li>• Includes questions</li> <li>• Feedback from Consultant</li> <li>• Feedback from audience peers</li> <li>• Short video playback (if required)</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstration of skills, tips and techniques by each delegate.</li> </ul>
<b>Learning Review</b>	<ul style="list-style-type: none"> <li>• Assimilation of Key Learning Points</li> <li>• Action Plans</li> </ul>	<ul style="list-style-type: none"> <li>• Review of learning and steps to ensure application</li> </ul>