

Pitching to Win

"We won a £30 million pitch... another win for the training"

CHALLENGE

Smith & Williamson were looking to optimise their pitch win-rate by developing a more targeted approach to their sales presentations and client pitches.

SOLUTION

We began with a pioneer programme for a team who regularly pitch. We designed and delivered a bespoke workshop where, through a blend of coach led learning and practice, the team explored how to structure their pitches around the client's situation and needs and deliver a presentation that was specifically targeted to the client's objectives and values. We explored the importance of understanding the client's needs and what they were trying to achieve with their investment.

Following the success of this workshop, we have delivered a number of pitch workshops and presentation courses to different teams in Smith & Williamson. We have tailored our workshops to suit teams' specific requirements, shifting the focus between planning, rehearsal and delivery to meet each team's area of needs. Our specialists have even worked alongside teams to help them prepare and rehearse for specific key pitches and presentations

RESULTS

The workshops have given Smith & Williamson a consistent approach for creating, rehearsing and delivering targeted pitches and presentations, that reflect each client's specific needs

"Our team won the pitch for £30m which they started to practise during the January training course. The feedback was that although we were very similar to our competitors we concentrated more on the client and seemed to want it more, which just gave us the edge...I count this as another win for the training!"

Partner, Smith & Williamson

FEEDBACK

"Really useful, engaging and practical day. I will definitely apply the techniques I learnt and the Bigrock facilitators were great!" - Investment Manager, Smith & Williamson

"Very helpful, especially as the exercise examples are very relevant to the firm and my day to day job." - Investment Manager, Smith & Williamson

"Enjoyable and informative - Good for all levels of experience." - Investment Manager, Smith & Williamson