

Pitch Analysis Tool

To pitch or not to pitch?

It has been tempting (particularly in recent years), for firms to feel obliged to pitch for every opportunity that comes their way. However, this can be a time-consuming and expensive process and does not take account of whether the opportunity is in fact a good fit for the firm.

This short pitch analysis tool is designed to help facilitate a discussion around whether individual opportunities should be pursued, and if so, to help identify the USPs that will set your firm apart – for all the right reasons.

Rank each area below with a score between 1 and 5:

Conflict

Is there an actual or potential conflict in securing instructions from this client?

1	2	3	4	5
High risk		Average risk		Low risk

Score:

Relationships

How strong is the relationship with this target client? Were you aware in advance that this work would be put out to tender? Do you have a personal or working relationship with anyone on the client panel? Consider whether the tender is simply an opportunity for the client to benchmark or reduce their incumbent supplier's rates.

1	2	3	4	5
Weak		Average		Strong

Score

The opportunity

Does this pitch represent a long term opportunity for the firm? Will there be the potential to cross/upsell other services to the client? Does the work represent a 'flagship' opportunity that would add credibility to the firm in a particular market or sector?

1	2	3	4	5
Poor		Average		Strong

Score

Positioning

How well is the firm positioned to secure this work? Is there a good fit with technical expertise, geography and/or specialist practice or sector group strengths? Is the level of competition low or high? Is the firm sufficiently resourced to deliver the work without adversely affecting other client work? If there are potential weaknesses in your pitch, are there ways to mitigate those?

1	2	3	4	5
High risk		Average risk		Low risk

Score

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Risk and fees

Does the opportunity represent a good commercial fit for the firm i.e. will the work be profitable? If not, is there any reason that you would be prepared to accept a loss on work for this potential client? Are there any other associated risks with winning the work, for example transfer of staff or any reputation issues as a result of working for this client? Are the proposed engagement terms compatible with your own procedures?

1	2	3	4	5
High risk		Average risk		Low risk

Score

Additional information

Note any other information of relevance to the opportunity:

Total score

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Score of 20 – 25

Pitch for this opportunity. Use identified strengths and USPs to differentiate your pitch.

Score of 10 – 20

Review the opportunity carefully to ensure that any potential risks can be mitigated and that your chances of success are proportionate to the level of time and resource required to complete and submit the pitch.

Score of 1-10

No-pitch (barring any exceptional requirement to pitch).

Please note that every pitch/no-pitch evaluation should be subject to a common sense test. It may be, in some cases, that the score from this checklist will be low, however there are 'over and above' reasons for submitting a pitch.