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

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Thursday 18 May 2017

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

Why PM Forum training?

Courses are designed and delivered by **qualified and experienced professionals** who:

- have substantial experience working with both **senior fee-earners and marketing/business development professionals** in large and small professional service firms across the **legal, accountancy and property industries** as well as a variety of client markets
- have psychology credentials and many years' experience **in learning and development** to ensure an optimum learning experience
- are **subject matter experts** in strategy, marketing, selling, client relationship management and interpersonal skills who continue to practice and are therefore familiar with the latest developments

And delegates receive a **productive learning experience** because:

- There is a balance between knowledge transfer and active learning through **interactive discussion** and group exercises
- Courses are highly **experiential** – where idea sharing and networking are encouraged
- As well as copies of the presentation material, courses also include work sheets and **supplementary materials** with guidance for further learning. Some courses have exclusive booklets tailored to the needs of delegates
- Course leaders are experienced coaches with experience in **career development** and certificates of completion are issued for use in **Continuing Professional Development** (CPD)
- Dialogue can continue after training through members-only **LinkedIn communities**
- Only PM Forum members can attend events

Venue

Browne Jacobson LLP
6 Bevis Marks
Bury Court
London
EC3A 7BA

Fees

First attendee	£225 + VAT
Second attendee	£215 + VAT
All subsequent attendees	£205 + VAT

These prices are only for attendees booked concurrently. No booking can be confirmed without payment. The fee includes: continental breakfast • mid-morning tea/coffee • folder of workshop material

Cancellations/Substitutions

Due to the restricted number of places, refundable cancellations are only accepted up to one month prior to the event (a cancellation fee of £25 + VAT will be incurred per person). Substitutions can be made at any time. PMI reserves the right to cancel with no liability beyond refund of fees paid.

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Name ..... | Name ..... | Name .....

Position ..... | Position ..... | Position .....

Firm ..... Type of firm .....

Address .....

..... Postcode .....

Tel ..... E-mail .....

Please enclose a cheque made payable to *Practice Management International LLP*
or pay by Visa/Mastercard/Maestro/AmEx *(please circle one)*

Cardholder name: ..... Amount: £ .....

Card number: ..... Expiry date: ..... Security code: .....

Signed ..... Date .....

Confirmation of booking will be sent by return along with a VAT receipt

Please return this form to: **PM Forum, 422 Salisbury House, London Wall, London EC2M 5QQ**
Tel: 020 7786 9786 training@pmint.co.uk www.pmforum.co.uk

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