

CHRIS'LL DEAL WITH IT

episode notes



EP 23 - 6 Phases For Prosperous Pitching

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 www.ChrisKreuter.com/CDWI

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Today's question:

I've recently been promoted to a role that requires sales outreach. I've never had to setup something like this before. Plus, I don't think of myself as a good networker. What advice do you have on organizing my effort to successfully pitch potential customers?

- Broadening our asker's question: They want to setup an outreach program.
- Outreach programs have common elements, and almost always need some customization. So I'm going to offer up advice that can be applied to a broad range of instances.
- The asker's question is well timed, as I'm developing a specific outreach process to begin my search for a literary agent. So I'll use myself as an example of customizing further.

- You can apply this advice to a wide variety of outreach needs:
 - Building customer base
 - Product & service sales effort
 - Recruiting employees
 - Networking & relationship building in & around your neighborhood
 - Finding a new job (you're pitching yourself)
- I setup an outreach process around six phases:
 1. **PREPARE**
 2. **PROSPECT**
 3. **PROVE**
 4. **PITCH**
 5. **POST-MORTEM**
 6. **PUSH**

1. PREPARE

Solidify stock, situation & system before starting

- Review what you're seeking or selling, whether it be a partner, product or service
 - **Partner**
 - What are your requirements for this person and/or company?
 - What does a successful partner need to bring to the table?
 - What do you need to bring to the table?
 - Understand the expectations of both sides, so you can properly define them in your pitch
 - **Product**

- Does it exist?
- Can those being pitched access or buy the product easily?
- Is it already in the market? If so: Can you utilize existing customer testimonials and/or references?
- If you're crowdfunding or looking for a manufacturing partner - do you have/need prototypes?
- **Service**
 - How specialized is your service?
 - Is direct pitching the right process? (would most people rather find you on a specific service such as fiverr, taskrabbit, rover, etc...)
 - Who are your ideal customers?
 - Does your price point align with people's expectations? Your profitability?
 - Are you certain you can deliver? Or are there elements/risks that you can't deliver on commitments made?
 - *Can you and/or your firm cash the check your mouth writes?*
- Regardless of what you're pitching, remember:
 - People do business with people/businesses they like & admire!
 - So, what makes you likeable & admirable?
 - **PRACTICE YOUR PITCH!**
- Define your stakeholders:
 - What will they require to make a decision to go with you?
 - Business case
 - Sales Collateral (line card, one-pagers, etc...)
 - Samples
 - Pitch Letter
 - For agent search: Sample chapters / manuscript
 - What environment(s) do they live/work in?

- Stable: They need solutions that are simple, straightforward, repeatable
 - Unstable: They need solutions that can be improvised, or are highly personalized, and partnerships they can rely on to anticipate their needs
- What's your timing?
 - Short-term or one-time buy: Focus on the product - make the decision a no-brainer
 - Long term interaction: Focus on the person - what about the partnership/product/service will make their lives better? What about you will enable that improvement?
 - Nebulous end goal: Could be true of a business venture/opportunity. Is there potential for opportunity expansion, market growth, or potential add-on products/services?
- For all these questions: The better you define the goals, the easier it will be to achieve them.
- At this step, you'll also develop the system you're going to use to manage the six phases of pitching - but we'll cover this in more detail after reviewing the complete process.

Let's review this phase in the context of my agent search

- **What I'm seeking:** A partner - a literary agent. Specifically one that is strong with middle-grade science fiction.
- **What makes me likeable:** I write books that blend interesting genres, and speak to communities I'm a part of (hockey, games, public transit)
 - I'm also familiar with and capable of executing elements of the production process (working with artists, graphic design, supporting product design, even illustrating in a pinch).
- **What they'll need to make a decision:** A refined, quality pitch letter, complete manuscript (done!), brief description of me & what I bring to the table beside the work (great podcast, for example 😊)

- **What environment do they work in:** A volatile & uncertain publishing market. There's been a lot of consolidation, paper supply chains have made profitability a struggle, all paired with declines of readers & bookstores. Lots of noise makes it hard to find strong signals.
 - Therefore, I need to have a clear focus on my target agents: Put a lot of effort to tell well-researched agents that I write work in specific, narrow wheelhouses that align with their contacts & experience. For example: I won't be spamming agents en masse - ending up pitching agents who specialize in paranormal romance or something.
- **What's my timing:** I'm looking for a long-term interaction. I want an agent to represent the bulk of my work, both the current novel I'll be pitching, as well as my Rainy River Bees trilogy. In my specific case, I'll be seeking an agent who may have connections north of the border, where hockey books enjoy far more popularity & sales than they do in the states.
 - I've yet to prove this, but I'd like to think that having 4 books, ready to go, is attractive to the right agent (more opportunity to make money off my work up front).

2. PROSPECT

Finding folks for forwarding facts in the future

- At this stage, we're not targeting or qualifying who we're trying to catch. We're simply defining where and how we're going to cast our nets.
- Define the avenues at your disposal to find prospects:
 - Industry magazines
 - Networking events / Conventions
 - Personal & professional networks (LinkedIn, social media, friends of friends)
 - Referrals (consider rewards/incentives)
 - Mailing lists (beware of buying lists - many are padded & it's just a spamming tactic!)
- How will you capture potential contacts?

- What information can you enter in up front that will save you time in later phases?

Let's review this phase in the context of my agent search

- **Avenues at my disposal:**
 - Searching books with similar characteristics to mine - research their authors & agents online
 - Often they're called out in the acknowledgements in the back of a book.
 - Reading industry magazines for announcements of publishing houses signing similar books - they often list the literary agency representing the author
 - Website databases of literary agents.
 - Personal network: I've made a few friends in & around the publishing world - I'll ask for advice, connections, or trends.
 - Conventions: I'm planning to attend some literary conventions in 2023
- **Capturing leads:** I'll talk about how I plan on using an Airtable-based system at the end of the phases.

3. PROVE

Ensure evidence will enable enthusiasm

- It's tempting to go right from prospect finding to pitching. But in most cases that's a mistake.
- In this phase, you're doing your homework prior to pitching:
 - Qualify that each prospect is a suitable match for your product, service, or partnership
 - Attempt to understand the prospect's needs and challenges
 - Remember: Information about your product is likely symmetrical: They often will have the ability to look you and/or your product before deciding to buy.

- Gone are the days where you walk into a car dealership uncertain what price you should be paying for a car.
- Consider the different elements of the domains in which you're going to connect with leads. Some examples:
 - **E-mail:** We all get so many every day - do you have permission?
 - What message will grab their attention, and not waste it?
 - How likely is it that your e-mail will be considered spam and ignored/blocked?
 - **Phone:** Can be a great tool, but not everyone is comfortable being pitched via a call
 - Who is likely to pick up the phone?
 - Are you calling a business or a person? Know who the key contact is before you call
 - Company website's a great start - or at the very least know the role you're seeking so you can ask whoever picks up the phone.
 - If the key contact isn't there, be sure to ask for their name & title if you don't know it yet
 - **Online Networking (LinkedIn):** Excellent research tool, but not great for active pitching
 - Is the prospect active?
 - Do you have any shared connections that you could leverage for a personalized introduction?
 - Any common interests/employers/industries?
 - **Avoid the dreaded "Connect & Pitch"** - where you push your pitch on them the second they accept your invitation to connect.
 - Very mixed bag for pitching products & services, view it more as an advertising platform: Post rather than push. Provide content so that people who are interested might learn more if they happen look you up on that platform.

- **Conventions & Networking Events:** Wonderful opportunities for deep connection, just so much of it
 - Conventions are crazy - it can be very easy to forget most of the conversations you have.
 - Don't focus on all the features of your product or service, focus on making a personal connection
 - Ask questions, be curious: People love talking about themselves!
 - The information you get back is gold: These are the ideal hooks to use to reel them back into awareness of your product or service post-show.
 - Have a notebook in your pocket. As soon as you can after an interaction with someone, write down as much as you can remember - because you won't remember much later, no matter how good the interaction went.
 - Understand that no matter how awesome you or the conversation went - there's a good chance they won't remember much.
 - Do your homework before a show: Who's going or might be there? Rank you prospects!
 - Be systematic after a convention - don't follow up too soon, or too long after. Use the notes from your interaction at the convention as a bridge for their memory as well as your own
- **Word of Mouth:** Provide something so awesome that the customers come to you.
 - How will they be looking you up?
 - How do they get in contact with you?
 - Is there anything you can setup so that when they inquire you learn important facts that will help you prove out their potential as a customer or partner? (A web form, for example)
 - Be sure to ask about where they heard of you: Track this info!
 - This may also feed into a referral system!
- Each domain has specific expectations & challenges

- Your process needs to be flexible enough to handle all of the domains you'll pitch in.
- The domains can vary between industries: Each industry may have written & unwritten rules/norms of conducting business
 - Selling a commodity to a consumer follows very different patterns to selling services to a government agency.
 - Another Example: A call center in a foreign country will just work off a generic script and a phone list, expecting a % of quick hang-ups. I'll never find a literary agent if I use a similar technique: It's not a winning playbook in that industry.
- Helps if you dig the well before you're thirsty
 - Maybe you're listening to this and don't have anything to sell right now. Still a good idea to develop a similar system to keep up with your network. Try to help others who might need your help.

Let's review this phase in the context of my agent search

- **What I Need To Prove:**
 - Does this agent represent middle grade fiction?
 - What previous work have they sold?
 - Do their preferred genres align with mine?
 - Are they open to submission? If so: What are their policies?
- **What Domains Will I Be Pitching In:** This will be a mix - with some being spontaneous & unexpected connections. But I expect the majority of my pitching will be in 2 domains: e-mail and face-to-face
 - Literary agents will primary receive formal pitches using e-mail or web forms. Many have specific guidelines & time frames, which need to be tracked
 - I hope to attend a few literary conventions in 2023 - great networking opportunities so I need to hone a well-crafted elevator pitch. I also need to remember to listen more than I talk.

4. PITCH

Propelling prospects into purchasers

- Goal of a pitch: To compel a prospect into a conversation
 - Use the information from your research
 - Validate your understanding - if you're wrong, ask why. Get them to correct you!
- I've focused heavily on the first 3 phases for a reason. By this point you should have a strong idea of your prospect & their needs.
 - Feeling prepared will have you come off as more confident, which prospects tend to react better to.
 - Even if your assumptions were wrong, the fact that you took the effort to try is often meaningful. **A big differentiator right now!**
- It's a push-pull conversation, not push-push-push.
 - Be human rather than an automaton
 - Avoid spamming
 - People can sniff out bullshit - be your authentic self, not Joe Salesman
- For products, is there an opportunity to do a demo?
- For service offerings: Are you selling or serving? Focus on the long-term value proposition, not just what you're going to do at the start
- For partnerships: Excitement is great, but don't let it get you off the rails. The pitch is the first step in what's hopefully a long journey. Don't try to solve all the problems in one shot

Let's review this phase in the context of my agent search

- **Goal of my pitch:** I want to get them excited to learn more about my book(s).
 - I hope they'll respond with a request for a complete manuscript.

- To do that, I want them to see me as someone who is easy to work with the potential for a long-term partnership.

5. POST-MORTEM

Respectfully reviewing results & rejections

- Remember: Lots of pitches fail - don't take it personally
 - People have so much different stuff going on. Perhaps they had a bad morning, or dealing with lots of anxiety over something coming up
 - Maybe you caught them at a terrible time, where they lacked the capacity to listen
 - Did you leave the interaction in a manner that will allow you to follow up another time?
 - Perhaps the domain in which you contacted them wasn't the right one? If you e-mailed, try a call next time. If you can, try visiting in person.
 - Persistence is an underrated value in sales - I've landed customers after spending years trying to get in front of them.
- On the flip side, there's a chance the pitch failed because it wasn't a good fit.
- Or you didn't come across the way you intended.
 - If you're pitching via phone, have someone listen in on a few calls.
 - Or have them read your e-mail copy: Get outside perspective!
- Count your rejections - they mean you're trying.
 - Ask Before You Start: Why/how would you reject yourself & your pitch?
 - Practice this question across each domain you may interact with leads
- How will you capture feedback?
- See the pitching process as one continually under construction: Tweak on the fly, try to learn new things and try to apply them as experiments.

Let's review this phase in the context of my agent search

- Having spent many year in sales in multiple domains, I'm used to getting rejection. This doesn't scare me.
- My past attempts to get a literary agent were haphazard, and borne from a lack of experience.
- I'm more confident this time around, but I won't be cocky about it: I'm focused on quality connections to literary agents that I've vetted as a strong potential fit.
 - But just because I see them as a potential fit, doesn't mean they will.
- I will appreciate any opportunities I get to pitch, but I know none have any guarantee of success

6. PUSH

Converting customers into continuing collaborators

- Congratulations, one of your pitches succeeded! Have you considered the next steps?
- You need to have a plan to tie your outreach process into your existing project, business, or workflow
 - Do you announce/identify new customers to your team?
 - Will those customers require additional TLC to onboard?
 - Do you need to setup a service team to handle the new account?
 - How do you relay what was learned during the sales effort?
 - How do you and the team show value & appreciation for a customer's decision to go with you?
 - How do you reward those who helped you get the customer?
- Is there an opportunity to get feedback on what worked?

Let's review this phase in the context of my agent search

- I should only need one literary agent.
- But it would be foolish to pitch one, wait for a response, then pitch another. I'd likely be pitching for years
- I'll need to have concurrent pitches going on, so I'll need a solid system to ensure I don't double-pitch anyone, follow up with each in the appropriate time windows, and keep track of who is who.
- And who knows: I may still be pitching for years. This process will require determination & learning on the fly

Putting It All Together

- We've covered my strategies for breaking down the six phases of a successful outreach campaign:
 - **PREPARE, PROSPECT, PROVE, PITCH, POST-MORTEM, and PUSH**
- The system you use for the campaign is an important choice. It can be as simple as a notebook, or something more complicated:
 - Your company's CRM tool (Refer to EP 6 for a deep dive on Customer Relationship Management tools)
 - A separate tracking document (Notebook, Google or Word Doc, Excel file)
 - A cloud-based tool with the option to add collaborators (Airtable, Trello, Notion)
- Digital tools have a few unique advantages for the various phases:
 - **Prepare:** Many offer customization options to tailor it to your outreach plan's needs
 - **Prospect:** Options to import prospect lists & outside data
 - **Prove:** Setup prospect cards that allow you to flesh out the information/questions prior to pitching, and easily see gaps
 - **Pitch:** The ability to set automated reminders or log interactions for reporting

- **Post-Mortem:** Desktop & phone apps so you can enter notes when you're out of office (say, at a convention)
- **Push:** Potential integration with your business processes & systems to move the product or execute on the project/partnership you sold

My plans in the context of my agent search

- I'll be using Airtable for my process for a number of reasons:
 - I want to keep it separate from my primary tool (Notion) that I use to track creative work & projects
 - This is hopefully a one-off process with a defined end goal. Airtable offers an excellent Kanban view where I can group prospects into buckets by which phase of the process they're in
 - I can easily create web-based forms for contact & data entry, making it easy to log information after a conversation, saving me time.
 - It has excellent automation tools, allowing regular reports via e-mail - valuable prompts to ensure I keep up my pitching process.
 - It's very flexible, so I can modify my process without difficulty
 - It's import & export tools are phenomenal
 - There's quality APIs out there to interact with Notion if I might need it

Episode 23 Quote

From the introduction of Daniel Pink's fantastic book *To Sell Is Human*

The ability to move others to exchange what they have for what we have is crucial to our survival and our happiness.

Further Research

Recommended Reading:

- [To Sell Is Human](#) - Daniel Pink
- [Zero-Resistance Selling](#) - Maxwell Maltz
- [Anything You Want](#) - Derek Sivers

Collaboration Tools:

- [Airtable](#)
- [Notion](#)
- [Trello](#)

Popular CRM tools:

- [Zoho](#)
- [monday.com](#)
- [Hubspot](#)
- [Apptivo](#)
- [Keap](#)
- [Pipedrive](#)
- [SAP](#)

E-mail marketing campaign services:

- [MailChimp](#)
- [Constant Contact](#)
- [ConvertKit](#)