

Briefed on Thursday, Won on Monday – The seven-step programme for winning pitches at short notice.

There I was, thinking about the glorious weekend ahead, where I would do nothing but daydream about Keynesian economics, hemispheric lateralization or naked women and beer. The mind is a wonderful thing.

Then the call came; “We pitch on this Monday, so creative need to be briefed tomorrow”. I wanted to retort with “Your point is?”, but decided I wanted the money, so I closed my mouth and opened my mind.

These are the steps:

Step 1 : Panic

You have no idea how to start, so you begin on a quest to gather intelligence. That’s good, because as Piaget said; intelligence is what you use when you don’t know what to do.

Then get over it, because you need to get going – remember, the earlier you start, the greater the degree of [pitch clarity](#).

Step 2 : Use your network

Let’s say that the pitch was for a chain of pie shops – Royal Pies – you send out a request to your resources – you may have a specialist retail division somewhere in the world, or one of your other offices may already handle a pie chain. Keep the brief focused – make it easy for them to understand what you need (and that the 2 minutes it takes to look for a document or presentation could mean lots of dough for you). Do not promise sexual favours in return – you have no idea what they look like (or where they’ve been).

Step 3 : Go primary

Primary data is information that is gathered ‘first-hand’ – things like internet surveys, or focus groups.

- a) Do the internet survey – however brevity is key – make it easy for the recipients to complete. Keep in mind that they may not be the existing user, but it allows you to talk about the potential market with some form of authority. For instance, heavy Royal Pie users are species *Homo sapiens*, genus *Normalis* - usually not found in marketing.
- b) Frequent pie users were mainly blue-collar workers, so we collared the cleaning staff into a focus group in exchange for pies at lunchtime (Thursday). If you’re not good with people, get someone who is. It is just a chat, however a clear structure is important – the discussion guide should have a logical flow, as per the exhibit below.

Royal Pie Discussion Guide

Intro

XXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Food

XXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Fast Food

XXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Pies

XXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Royal Pies

XXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXX

- c) Next, look for the strong 'nodes' – people who have a great deal of knowledge about the market – who see the results of communication efforts all the time. In this case, it's the franchisees. I asked for the names of 3 good stores and 3 poorly performing ones. I then used the magic formula:

pick + up + the + phone = amazing intelligence.

Step 4 : Go secondary

Secondary data is information gained from existing research – things like the copious amounts of meaningless research provided by the client, case studies or journal articles.

I begin with an online search, using a funnel methodology. In other words, I use a shotgun approach on Yahoo or Google, beginning with a specific search term, becoming less specific (more desperate) as I go. So I would type in "How I won a pitch for a pie chain in two days". Chances are you may need to refine your search, but you will probably get a fair amount of info on retail pie chains.

If you subscribe to certain databases, that's great – WARC is an important resource (it has exactly what I need – communication case studies per industry category), but many universities offer a search service for a very small fee. They can usually oblige within 24 hours, emailing you the results. However, the results are usually, how shall I say ... academic?

Step 5 : Relax

Sit still. Mull things over. It only takes a few minutes and helps immensely with the clarity of the final result. Maybe do something to distract you. Then get dressed and carry on.

Step 6 : Wrap

Brief creative and put your presentation together.

Step 7 : Serve**About the author**

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