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Corporate Procurement Strategy Tool:
Pitch Document Checklist

Overview & Purpose

Every business should have standard business communication templates to use for pitching customers. ESEs should have multiple documents completed and ready for any potential follow-up materials requested by a buyer or for proactive outreach.

Instructions
Use the checklist below to determine which documents your ESE needs to create. See the additional details and guidance for each element to build your templates.

Pitch Document Checklist

☐ Introduction Email

☐ Follow-up Email

☐ Capability Statement

☐ Pitch Deck

☐ Customer Quotes (minimum of 5)

☐ Customer Case Studies (2 minimum, 4 ideal)

☐ Leadership Background (mini-bios)

☐ Project Team Profiles

☐ Website

Introduction Email	
Purpose	*Introduce your business to a potential customer*
Intent	Pique the interest of a buyer to secure a 1:1 conversation
Include	- Goods and or Services description (hyperlink content where possible) - Business Location

	• Detail Service Areas and service model (e.g. delivery, shipping, etc.) • Value Proposition • Relevant certifications held by organization (LEED, ISO, BCorp, ServSafe, SBA, etc.) • Website URL • Direct Contact Information • **Request a meeting or feedback on your business category's buying priority.**
Avoid	• Asking questions that have answers readily available online • Requesting a meeting if there is a platform that allows you to sign up for one; or emailing to say you set up a meeting if it is already confirmed • Sending a generic message that isn't personalized to the individual • Spelling/grammatical errors; erroneous information included for another potential customer

Follow-Up Email	
Purpose	*Reinvigorate or continue dialogue with a buyer after an initial conversation*
Intent	Provide critical information to help the buyer determine next steps for engaging
Include	• Quick recap of how and where you met • Additional information requested by the buyer • Goods, services and value proposition • Relevant certifications (if you didn't) • Website URL • **Inquire about the next step ex: pitch meeting with larger team, onboarding, etc.**
Avoid	• Assuming the buyer will remember how you met – give some context • Giving too few details or omitting the details they requested • Following up more than once within three weeks - during some months, buyers could be on the road for two weeks at a time

Capability Statement	
Purpose	*Organize critical information into "one-sheet" for easy review and reference by buyer*
Intent	Give the buyer an easy reference document to use for vetting ESE
Include	- All elements from an introduction email - Company Leadership Background - Customer Quote(s)
Avoid	- Assuming the buyer will remember how you met – give brief context in the intro - Devoting too much space to leadership bios - share the highlights of their expertise or relevancy to the mission of your business and operations - Sharing a customer quote that is too specific. Select a quote that is specific to either the customer type or speaks to the expertise and quality of your business overall - Documents longer than 2 pages

Pitch Deck	
Purpose	*Provide a comprehensive document about your ESE's capabilities (this is a more thorough capabilities statement)*
Intent	Directly sell your expertise for a specific opportunity with the customer
Include	- Goods and or Services delivery model - ESE Business History & Experience - Value Proposition (Mission, Vision, Certifications) - Contact Information - Customer Case Studies - Project Team Profiles
Avoid	- Creating more than 15 slides - Using incompatible software for viewing (prezzi, Keynote, etc) - Including non-working links - Animation, video and other multimedia during live performance - Live presentations for more than 15-20 minutes

Customer Quotes (minimum of 5)	
Purpose	*Collect qualitative data from customers to share with prospective buyers*
Intent	Influence a buyer's decision to purchase from your ESE.
Include	- Quotes about the ESE's expertise and quality standards - Quotes regarding the ESE's impact - Quotes about customer relationship management (what it is like to work with the ESE) - Quotes about the customer's overall experience with the ESE
Avoid	- Violating any nondisclosure agreements (NDA) or contract terms regarding promotion - Gathering too many quotes from the same customer

Customer Case Studies (2-4 examples preferred)	
Purpose	*Demonstrate ESE's expertise and ability to complete the proposed project.*
Intent	Reduce buyer skepticism about ESE capabilities.
Include	- Similar or relevant projects - Similar or relevant customers - Examples that demonstrate your quality standards and expertise - Details on the results, including KPIs - Quote from Customer about their experience
Avoid	- Violating any nondisclosure agreements (NDA) or contract terms - Disclosing competitor information to potential buyers - Anything longer than one page (one slide)

Leadership Background & Project Team Profiles	
Purpose	*Demonstrate the expertise of individuals within the business*
Intent	Articulate and prove credibility and capabilities to meet contract needs.
Include	● Names, titles ● Specific project role if not the same as the individual's title ● 1-2 sentence bio highlighting relevant work experience, projects, etc.
Avoid	● Overwhelming amount of text – no more than one paragraph in RFQ ● Including too many personnel - balance the information based on what is most important to the customer

Website	
Purpose	*Serve as a single source of truth for everything about your ESE*
Intent	Further prove your credibility and allow buyers to find information directly instead of contacting the business development team.
Include	● Goods and or Services description ● Business Location ● Detail Service Areas and service model (e.g. delivery, shipping, etc.) ● Mission/Vision (Value Proposition) ● Organization Certifications ● Contact Information ● Company Leadership Background ● Customer Quote(s)
Avoid	● "Under Construction" graphics –if your website does not work, do not include links to it ● Leaving outdated information on the website – e.g. Copyright 2012 ● Broken links within the site ● Spelling and grammar errors