

CHECKLIST FOR CUSTOMIZED, SOLUTIONS-BASED PRESENTATIONS

By

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- ❑ PowerPoint is still the dominant presentation format used in business today, so use PowerPoint or Keynote. Limit text and emphasize visuals. See [“The Greatest Sales Deck I’ve Ever Seen.”](#)
- ❑ The **first slide** should include the **prospect’s company name, logo, and an attention-grabbing tag line** that gives a hint of your insights, solutions, or Big Idea. The tag line might refer to a profitable partnership, it might be a specific sponsorship or it might be a new creative approach: “Speed Up Your Coverage On ESPN,” or “Brighter Smiles on BuzzFeed.”
 - The first slide should also have your company’s logo, much smaller than the prospect’s logo (remember, the prospect is more important than your company from the prospect’s perspective). The slide should also contain your main contact’s phone number and email address. A small image of your company’s logo should appear at bottom of every slide.
- ❑ The **second slide** should identify a major cultural, industry or prospect challenge that your product can solve. You begin a presentation talking about what is most important to prospects, which is their business, not your business. You begin by showing that you understand the prospect’s business and challenges, which makes the insights and solutions you will present later much more credible because you are demonstrating you understand the prospect’s business.
 - Never talk about or present your business first.
- ❑ If you are selling advertising for a medium, the **third slide** should be titled “**(Prospect’s) Marketing and Advertising Objectives**” and should contain a partial list of the prospect's marketing and advertising objectives, typically as laid out in an RFP.
- ❑ The **next slide** should be a description of the prospect's “**Primary Customers/Target Audience**” (psychographically, geographically and behaviorally). You might need more than one slide to fit in all the information, but remember to be text light and visually heavy.
- ❑ The **next slide** should be titled “**(Prospect’s) Competition**” and should contain a description of the positioning of the prospect’s top one, two or three competitors.
- ❑ The **next slide**, titled “**(Prospect’s) Strategy**,” should include a description of the prospect's current **media and creative strategy**.
 - A media strategy might be: “Using primarily network television and heavy-up spot television.” If you cannot find information on the prospect’s media strategy, obviously do not include this slide.
 - A creative strategy might be: “Using Charlize Theron to show, ‘There’s a new Bud in town.’” You can search on Google or on Moat.com or find on YouTube a prospect’s and competitors’ current creative executions.
- ❑ **Next**, include a slide titled “**Insights**” that contains any new, unique insights you might have about the prospect’s business. The purpose of this slide is to educate

prospects about insights into their business or business model that they might not be aware of and that have the potential for making their businesses more profitable or grow more rapidly or reach a new audience.

- ❑ Next, an **“About Us”** slide that tells your story—size, locations, unique visitors, ratings, etc.—that tells your story *briefly*. Remember to keep text to a minimum. Use as many visuals as possible. Tell a story about who your company/organization is, what its mission is, especially if the mission is compatible with a prospect’s mission. Use screen shots.
 - The “About Us” information might take two or three slides; however, if you are selling a well-known brand such as Google, Facebook, NBC, or ESPN, your brand is familiar to your audience, so you do not need to give too much information.
 - If you are selling an unfamiliar or new product, you obviously need to provide more detailed information.
- ❑ Next, **“Solution”** slides that identify the opportunities that are solutions to the prospect’s challenges. Solution slides are the big pay-off. They contain the Big Idea. All previous slides should contain information that logically points to your solution/Big Idea as the obvious answer.
- ❑ Next, a **“Benefits”** slide that shows the benefits of your solution or Big Idea that addresses the prospect’s challenges. This slide(s) should answer the client’s WIIFM questions (“What’s In It For Me?”). The points on the slide(s) should be in direct alignment with the previous “Challenges,” “Strategy,” and “Insight” slides and be solutions to the challenges outlined.
- ❑ Next, an **“Advantages”** slide that lists the advantages of your solution over your competition.
- ❑ An **“Investment”** slide or slides that show the total cost of your solution
- ❑ Next slides should show relevant **“Success Stories,” “Case Studies”** or **“Performance Stories.”**
- ❑ Show a **“Terms and Conditions”** slide *only* if your terms and conditions are different from standard terms and conditions in your industry (AAAA or IAB standard conditions, e.g.).
- ❑ Include a concise **“Summary”** slide of the main benefits and solutions. Remember the Rule of Three and keep your Summary to three points.
- ❑ Finally, a **“Next Steps”** slide that lists what the prospect and you need to do in order to implement your proposal and advance the partnership. This slide must also include a close, an ask for a commitment or an action that moves the sale forward. The “Next Steps” slide should be the last slide. There is no need for a “The End” or a “Thank You” slide.