



25 Tips for a Winning Sales Presentation

1. Prepare, prepare and then prepare. Don't wing it — thorough preparation and attention to detail impress prospects and consultants alike. Know how to handle the different parts of the presentation if one of your team members can't make the meeting.
2. Conduct pre-meeting "intelligence." Know the reason for the search, why you were selected, whether a new investment strategy is being implemented, and the interests and concerns of the committee.
3. Create a professional show. One appointed "director" should stage, rehearse and mastermind the presentation, and everyone should follow the game plan.
4. Don't assume that the consultant has submitted identical performance numbers for your firm. If you are using more current numbers for the presentation, point that out in your remarks.
5. It is important to connect with your prospect in the first couple of minutes. In your opening remarks, make sure you understand the timeframe for the presentation, run through the agenda and ask whether there is any other information that your prospect would like covered.
6. Position your product immediately. Outline precisely how your product works and its major strengths — to educate and to erase any misconceptions.
7. Define the organizational roles of your presenters and how each would service the fund's portfolio.



8. Involve all those attending from your firm in the presentation. There is nothing impressive about a mute senior official or a marketing professional who sits idly staring into space.
9. Appear actively interested in the presentation when it is not your turn to speak. Any apathy you exhibit will weaken the overall presentation.
10. Differentiate your marketing message. Prospects want to hear your special distinctions, strengths and achievements.
11. Compile evidence of your strengths. Prove that your words are true — through substantive data such as performance numbers, statistical measures of your portfolio and portfolio characteristics over time.
12. Be aware of your weaknesses. No organization or product is perfect and addressing credible reasons, when necessary, for your weaknesses will strengthen your presentation.
13. Anticipate questions before you're asked. Have concise, positive answers ready for any sensitive issues or commonly raised objections. Keep exhibits of commonly asked question in your briefcase to hand out when needed. This will demonstrate preparedness on your part.
14. Speak with conviction and enthusiasm. If you don't consider yourself a strong public speaker, practice with your colleagues using a tape recorder or video camera.
15. Ask for questions and encourage interaction. Don't monopolize the presentation. No one wants to listen to you and your colleagues for an uninterrupted hour.
16. Don't assume you know why a question is asked. Clarify the reason for the question by asking, "Is there a particular issue that concerns you?"



17. Don't over answer. If your answers ramble on and on, you appear unfocused and insincere. Designate someone to watch your audience and break into a conversation if it appears your prospect has not understood the answer. Ask if the question was answered satisfactorily.
18. Don't be afraid to air any negatives. Ask if there are any concerns about your firm, so they can be addressed in an open discussion.
19. Emphasize that people and ideas are at the root of your firm's success. Numbers are important, but people provide integrity, judgement and intellectual vigor — and create long-term relationships.
20. Don't badmouth the competition. Negative words will be perceived as "sour grapes" and will display arrogance.
21. Expect the unexpected. If the scheduled one-hour presentation is suddenly shortened to 15 minutes, be able to adapt quickly and professionally.
22. Have the courage to be creative in content, delivery and graphics. Consider anecdotes, strong visuals, and wording that speaks to your individuality. Make sure the material is visually attractive.
23. Avoid gimmicks and jokes. You don't have to wear your serious face to the meeting, but you can't waste precious time on inappropriate humor.
24. Let the prospect know you want the business. Convey the energy and commitment you will have after you make the sale.
25. End on a high note. Again, address the prospect's needs and objectives — and how you are best positioned to meet them.