**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 HBR Blog [“Presentation Tools Beyond Next Slide.”](http://blogs.hbr.org/2014/04/presentation-tools-that-go-beyond-next-slide-please/)

* 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: “Game Day on ESPN,” “Speed Up Your Coverage On ESPN,” “Move Fast Hit Hard On ESPN” or “Leading the Mobile Revolution on ESPN.
	+ 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.
* The **second slide**, should be titled **“(Prospect’s)** **Marketing and Advertising Goals”** and should contain a partial list of the prospect's marketing and advertising goals. 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, pain points, and problems (challenges) which makes the insights and solutions you will present later much more credible because you are demonstrating you understand the prospect’s business challenges.
	+ Never talk about or present your business first. You must set the stage by defining the prospect’s problems and then offering solutions.
* The **third slide** should be a description of the prospect's **“Primary Customers/Target Audience”** (psychographically, geographically and behaviorally). You might need two or three slides to fit in all the information, but remember to be text light and visually heavy.
* The **next slide** (#4), titled **“(Prospect’s)** **Challenges**,” should contain a list of the prospect's challenges in achieving its marketing and advertising goals.
* The **next slide** (#5), 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 current creative executions.
* **Next** (#6), 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. The purpose of this slide is to show that you have gone to the effort of doing research on the prospect’s business.
* Next, an **“About Us”** (#7) slide that tells your story—size, locations, unique visitors, ratings, etc.—a slide(s) 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.
	+ 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.
	+ If you are responding to an RFP, include all the required information from the RFP.
* Next, a “**Solutions”**(#8)slide that identifies the opportunities that are solutions to the prospect's challenges (problems). “Solutions” slides are the big pay-off. They contain the Big Idea if you have one. All previous slides should contain information that logically points to your solutions/Big Idea as the obvious answer.
* A **“Benefits”** (#9) slide that shows the benefits of your solutions (schedules, campaigns, packages, etc.) 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”** (#10) slide that lists the advantages of your solution over your competition.
* An “**Investment”** (#11) slide or slides that show three proposals that include the number of projected impressions and the cost of each proposal. See Chapter 12: Proposing of *Media Selling, 5th Edition* for how to structure your three proposals.
* Show prospects specifically how the solutions will make their business more profitabl**e**. Use an “**ROI Analysis”** (#12)if appropriate and measurable. If you do not have both price and cost information, do not include this slide.
* Show relevant **“Success Stories”** or **“Case Studies”** (#13) if they are available.
* Show a **“Terms and Conditions”** (#14) 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”** (#15)of the main benefits and solutions. Remember the Rule of Three and keep your Summary to three points if possible, and in any case show no more than five points.
* A **“Next Steps”** (#16) 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.
* Include an **Appendix** containing numbers and supporting information, including research.