

# ELEVATOR PITCH WORKSHEET

## WHAT IS AN ELEVATOR PITCH?

30-60 second memorable description of what you do, and more importantly how **WHAT YOU DO**, benefits **THEM**.

## WHAT IS THE GOAL OF AN ELEVATOR PITCH?

The goal is to earn a second conversation, not to convince the person you're talking to that they should hire you on the spot.

## WHEN SHOULD I USE AN ELEVATOR PITCH?

Networking events, conference calls, warm calls, anytime the opportunity arises to answer the question, "What do you do?"

## THE BASIC FORMULA

PART 1

PART 2

PART 3

PART 4

PART 5

"I'm a **INTRODUCTION.** **WHAT YOU DO.** **WHAT'S THE VALUE.** **GRAB THEIR ATTENTION.** **WHAT'S NEXT.**"

### PART 1: INTRODUCTION

Before jumping in, you need to introduce yourself. Who you are, perhaps your role with the company. Keep the information about yourself to a minimum as you haven't earned the prospect's interest or attention yet. You'll earn the right to talk about yourself later in the deal.

Examples: "I'm a Specialized Tax Consultant..."  
"I am a profitability consultant..."  
"I am a tax and expense reduction specialist..."

### PART 2: WHAT YOU DO

Have a clear and simple understanding of what the company does, it's mission and goals for the product or service. Briefly introduce this.

Examples: "We help small to mid sized businesses take advantage of tax incentives that normally only large companies can access."  
"We help businesses maximize their bottom line, saving thousands of dollars."  
"We help companies maximize their profitability and cash flow..."

### PART 3: WHAT'S THE VALUE/WHAT'S DIFFERENT ABOUT YOU

What does your company do exceptionally well that sets itself, product or service apart from others. 1-2 sentence statement about the value of the product or service to your clients.

Examples: "We use proprietary software to identify..."  
"We offer these services at no risk to you..."  
"We work with companies that most firms consider too small to do business with..."

### PART 4: GRAB THEIR ATTENTION

Now is your chance to pull the prospect in with an exciting story about a client, company founders or offer a fascinating fact or statistic about the service or product.

Examples: "On average INSERT INDUSTRY claim X\$ in benefit..."  
"Small businesses may qualify for up to \$1.25 M for the R&D Tax Credit..."  
"Clients can gain on average \$2,400 per qualified employees..."  
"These tax incentives and benefits can lower or even eliminate your current tax liability..."

### PART 5: WHAT'S NEXT

At this point you're going to have piqued interest and you can show them an example via the app on your phone and setup a time to walkthrough presentation pro.

Examples: "Here, let me show you..." "In about 10 - 15 minutes we can see what your company's benefit is..." "Let's see how much money your company is leaving on the table..."

# WRITE YOUR OWN

PART 1: INTRODUCTION

PART 2: WHAT YOU DO

PART 3: WHAT'S THE VALUE, HOW ARE YOU DIFFERENT

PART 4: GRAB THEIR ATTENTION

PART 5: WHAT'S NEXT

## WRITE IT OUT, PRACTICE IT, MEMORIZE IT

*Write down your pitch word-for-word. Start with the formula, and then tweak it so that it flows naturally. Keep it short! The tendency is to ramble ... which guarantees that people will stop listening. After writing it out, read your elevator pitch over and over, like an actor preparing their lines.*

*Remember to work in adjustments according to the potential client you're speaking to. When it flows off of your tongue, you'll sound confident and conversational.*