



MATT MURPHY

CLIENT: Confidential

PROJECT: Sales presentation audit

OBJECTIVE: Using a proprietary evaluation model, review the pitch deck used by an IT monitoring company during its initial sales meetings with prospects

SUMMARY: This document extract contains select pages from the walkthrough of the audit findings

TEMPLATE AND VISUALS

Observations

- Good use of white space on most slides by not cramming in content
- Adjustments to the header and footer can create more space and highlight each page topic
- Current imagery is a mix of photos and outdated graphics (e.g., Clip Art)
- Without indicating the audience on the cover, the presentation can come across as generic
 - 59% of prospects are turned off by a generic sales pitch (*NewVoiceMedia*)

Considerations

- Larger headline text (top left) would help readers instantly recognize what each page is about
- Footer
 - Shrink and relocate the Client logo to the top right for more space in the body
 - Consider an Client /prospect logo “lockup” as a visual reminder of your potential partnership
 - Remove “U.S.-based” language to create more space for important body content
- Use stronger, more consistent graphics and images for a sleek, modern look and feel
- Add page numbers for easier page reference, especially for remote viewers

Takeaway

A slight rearrangement of certain features in the header and footer as well as an update of your graphics can improve an otherwise clean and uncluttered template

NOC Services Overview

Client Logo

About

- Founded in 1970, Client is 100% U.S.-based
- Client provides Customized NOC services. This is an ancillary to our business. THIS IS OUR SOLE FOCUS
- Client is developed in-house, in-time, based and mobile friendly
- Our best technicians are highly experienced in U.S. based network operations and management. They manage and administer the Client platform so you don't have to.

Availability & Data Polls

Client monitors availability, application performance & data metrics (CPU, memory, bandwidth, etc) with flexible thresholds, alerting and reporting options. We utilize a variety of polling methods including ICMP, SNMP, TCP, HTTP/S, WMI, JSON, CLI and XML.

Client Logo

Typical Outage Flow

Client combines automated alerts with telephone calls from our NOC to alert you to network outages or impairments. Our built-in trouble-ticketing platform keeps tabs on everything.

```

graph TD
    A[Outage/Impairment] --> B[Automated Alerts (email/SMS)]
    A --> C[Client NOC Alerts]
    A --> D[Client Ticket Generated]
    B --> E[Client verifies the outage to minimize false positive alerts]
    C --> E
    D --> E
    E --> F[If outage persists, alerts & calls repeat hourly unless silenced]
    E --> G[Client NOC calls through a phone tree]
    F --> H[Outage Resolved, Services Restored]
    G --> H
    H --> I[Ticket updated at each resolution]
    I --> J[Ticket Closed]
  
```

Client Logo

Providing 100% U.S.-Based Expert NOC Services

SAMPLE TEMPLATE OPTIMIZATION

Cover

Network Operations Center Overview

Prospect Logo

Client Logo

- Main term (NOC) spelled out to clearly indicate the service up front
- Prospect logo added to make the audience feel as though the presentation were built just for them (even if it wasn't)

Body

About

Logo Lockup



Founded in 1997, Client is 100% U.S.-based.



Client provides Outsourced NOC services. This isn't ancillary to our business. This is our sole focus.



Client is developed in-house, Internet-based and mobile friendly.



Our NOC technicians are highly experienced in IP-based network operations and management. They manage and administer the Client platform so you don't have to.



Client installs in less than an hour. Fully operational in 3-4 weeks per site, with most configuration done by Client personnel.

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- Headline size increased
- Client logo shrunk and relocated to the top right corner as part of a lockup to show you took the time to customize the presentation and to subtly emphasize the future partnership
- Footer text removed to eliminate body clutter
- Body content pulled down to make better use of page space without the footer
- Added page number to the bottom right corner

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PRESENTATION NARRATIVE

Although the presentation contains valuable information about the service, it doesn't seem to follow a clear storyline that progressively builds the case for your service as right solution to your prospects' needs – consider the following sequence for a potential restructure

1. Include an introduction or context slide to set the scene
 - Establish the purpose / what brought you together, identify the prospect's need or challenge, and go over what you will cover in the presentation
2. Use the About page as a chance to not only introduce your business, but to elevate the prospect right away – place them at the center
 - Immediately differentiate **Client** from competitors by explaining your business through the context of the prospect
 - E.g., “We are 100% U.S.-based to better meet your communication and security needs”
3. Smooth the transition to technical features by using your value proposition to better set these up as the right solution
 - E.g., “And now we'll show you how we use this experience to address your need....”
 - Sharing your approach to creating a custom solution primes them for what's to follow – i.e., an explanation of how that solution will then help them
4. Once into the technical portion, make sure it flows logically, focuses on the most relevant features, and can be readily understood
5. Concluding pages should summarize the benefits, propose the partnership structure, and outline next steps specific to that prospect (similar to how they do now, but with certain modifications)

“OPTIONAL TIER-2 SUPPORT” PAGE

Observations

- Descriptions in the top section set up benefits well
- However, they could use a stronger close (e.g., “our staff are experts on both Linux and Windows patching *to protect you regardless of your OS,*” etc.)
- Very text-heavy if used for live presentations, better for leave-behind documents

Considerations

- If your capabilities here are more robust than those of your competitors, indicate this
- Each section could be broken into its own page
 - The activities in the top section may lend themselves well to visuals
 - Case studies are strong ways to back up your sales message and should be featured on their own page(s)
 - Consider dedicating a full page to a prospect-relevant case study that outlines problem / solution / results and place the others in an appendix

Optional Tier-2 Support

Ongoing Tier-2 Support Activities – Here are just some of the things our Tier-2 team can do:

- [Server Patching](#) – our staff are experts on both Linux and Windows patching.
- [Configuration Backups](#) – we can back up switch and router configuration files.
- [VM Provisioning](#) – we can spin up, or tear down VM servers at your direction.

Project-based Tier-2 Support – Talk to us about your special projects! We've recently completed the following projects for customers:

- [Load Balancer Migration](#) – We migrated hundreds of virtual servers and backend nodes from older Stingray platform to enterprise F5 platform.
- [Physical Inventory Audit](#) – Wrote PowerShell scripts to generate inventory of over 600 physical servers; documenting model numbers, host names, CPU count, processor speed, allocated memory, etc.
- [Network Storage Migration](#) – We researched, coordinated, implemented and tracked network migrations from older NetApp storage appliances to a new Compellent system. This migration affected 100+ network shares across 300+ servers. Our migration avoided downtime and loss of data for public-facing web properties due to failing hardware.

Client Logo

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Takeaway: Avoid text-heavy pages for presentations, look for opportunities to support with visuals, and leverage the “social proof” advantage customer “wins” (case studies) bring – i.e., “I have the same problem, and if this worked for them, it will work for me”

“TYPICAL OUTAGE FLOW” PAGE

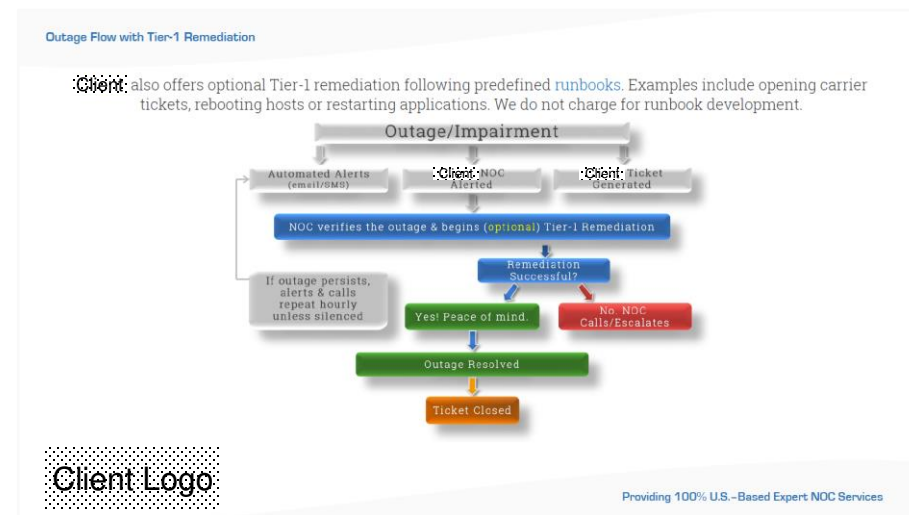
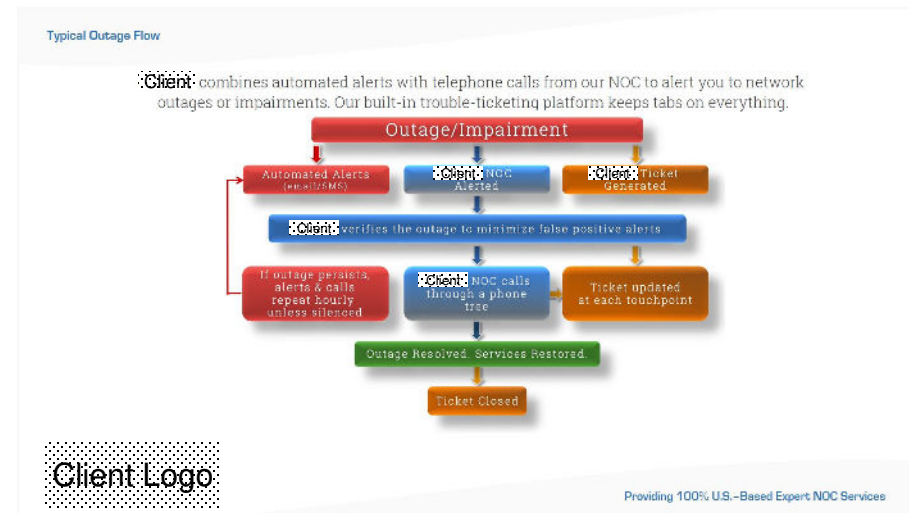
Observations

- Diagram spacing impedes upon the intro statement
- Boxes use outdated features such as bevel and shadow, which are unnecessary and disrupt the visual

Considerations

- Removing/relocating footer content would create more space to move the diagram down (see recommended template page)
- Update the diagram to create a cleaner, more viewer-friendly look
- Possibly include a color key for reference if appropriate or helpful for the audience
- Include any relevant metrics that build your case (e.g., speed, success rate, etc.)
- If possible, highlight whether these metrics or the general flow outperform(s) your competitors

Takeaway: See next page for potential page restructure



SAMPLE PAGE OPTIMIZATION

Current Page

Typical Outage Flow

Client combines automated alerts with telephone calls from our NOC to alert you to network outages or impairments. Our built-in trouble-ticketing platform keeps tabs on everything.

Client Logo

Providing 100% U.S.-Based Expert NOC Services

Proposed page

Typical Outage Flow

Client continuously monitors your system and immediately informs you of issues as they occur.

- Multiple notifications ensure you're aware of any outages or impairments
- Reliable communication combines automated alerts with phone calls from our NOC
- A built-in trouble-ticketing platform maintains constant oversight as issues are addressed and resolved

Logo Lockup

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This sample page restructure (using the optimized page template) includes the main takeaway at the top, benefit-oriented features in bulleted form, and a cleaner diagram within more open space

PRELIMINARY SWOT

The document is a good summary of the Client platform, but implementation of certain best practices will improve prospect customization and enhance its utility as a sales presentation



STRENGTHS

- Page setup is mostly uncluttered, and with a few adjustments to the header and footer the template format would move from good to great
- Good use of benefit-oriented language in most places to drive home why Client is the best option for NOC services



OPPORTUNITIES

- Use of “you / your” is strong, but be more consistent with 1st person and integrate the prospect’s brand more into the presentation to customize it
- Consider outsourcing presentation design to redo diagrams and update the look and feel for best-in-class aesthetics



WEAKNESSES

- A clearer narrative would tie the presentation together in a way that better builds the case for Client as the right solution by the end
- You hit on various Client advantages, but firmly establish a singular value proposition up front to frame the conversation for everything to come



THREATS

- Prospects will be weighing Client against other options, so consider how to position yourself against the competition and/or industry norms
- Entering a recession, executives may be hesitant to invest in outsourcing, so keep this in mind while framing your solution as business-critical



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APPENDIX: PROOFREAD EDITS

About



Founded in 1997, Client is 100% U.S.-based.

Doesn't need to be capitalized unless part of a proper noun such as a formal service name



Client provides Outsourced NOC services. This isn't ancillary to our business. This is our sole focus.

Recommend spelling out the first time with a parenthetical and abbreviating from then on (i.e., "...network operations center (NOC) services.")



Client is developed in-house, Internet-based and mobile friendly.

Should be hyphenated (i.e., "mobile-friendly")



Our NOC technicians are highly experienced in IP-based network operations and management. They manage and administer the Client platform so you don't have to.

Recommend restructuring grammatically – for example, "Our internet-based and mobile-friendly services are developed in-house."



Client installs in less than an hour. Fully operational in 3-4 weeks per site, with most configuration done by Client personnel.

Fragment, should be in sentence form like the others – for example, "It is fully operational in..."



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