

AIR FORCE PITCH DAY

Checklist

A pitch day is comprised of two elements leveraged in the commercial world – the pitch competition and the demo (demonstration) day. A pitch competition often is used by universities, companies, and startups. Such events feature a set number of firms presenting or “pitching” a business idea or solution to a panel or a group who will award seed funding to further develop the presenter’s business idea. A demo day usually occurs at the end of a startup or technology accelerator program with select companies demonstrating their business viability and possibility (i.e. market fit, customer discovery, initial sales) to a large audience of potential investors and partners. In both cases, presentations last no more than 5-7 minutes and funding decisions are made based on demonstration’s contents. The television show Shark Tank provides an example of this format.

There are many ways to conduct a pitch day. This document is intended as a reference checklist for such events regardless of the contracting and funding methods used by the sponsoring organizations.

For more requirements specific to Air Force Pitch Day please reference the Air Force Pitch Day report.



| TASK | START DATE |
|--|---|
| <p>Task 1. Investigate and Build Foundation</p> <ul style="list-style-type: none"> <input type="checkbox"/> Read Air Force Pitch Day Report <input type="checkbox"/> Review past, current and future Pitch Day events for lessons learned and possible synergies <input type="checkbox"/> Review pitch presentation examples (internet sill provides plenty of background) <input type="checkbox"/> Identify and approve Pitch Day financial, contracting, marketing, logistical support <input type="checkbox"/> Identify budget and budgeting strategy <input type="checkbox"/> Identify authorities and leadership buy in needed <input type="checkbox"/> Create charter covering key Who, What, Why, When, Where questions | <p>Initiate ~ 6 Months Prior to Event</p> |
| <p>Task 2. Conduct Pre-Event Efforts</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identify participating hosting and partnering organizations <input type="checkbox"/> Identify key functional POCs and establish “battle rhythm” <input type="checkbox"/> Hold formal kickoff meeting with all critical participating POCs <input type="checkbox"/> Develop proposal method (BAA/Topics for SBIR) <input type="checkbox"/> Release proposal announcement <input type="checkbox"/> Advertise and market proposal call and event details <input type="checkbox"/> Monitor proposal solicitation, hold Ask Me Anything sessions, and answer applicant questions <input type="checkbox"/> Identify evaluation teams and conduct evaluator training sessions <input type="checkbox"/> Identify contracting and finance teams and conduct training sessions <input type="checkbox"/> After close of proposal period, complete initial proposal evaluations <input type="checkbox"/> Conduct contractual reviews of proposals/ companies <input type="checkbox"/> Notify companies that will be invited to Pitch Day event <input type="checkbox"/> Notify companies that will not be invited to Pitch Day Event <input type="checkbox"/> Send invited companies invitation to event w/instructions <input type="checkbox"/> Conduct pitch training sessions with invited companies <input type="checkbox"/> Conduct training sessions with evaluation panel <input type="checkbox"/> Conduct training session on post-event execution <input type="checkbox"/> Develop pitch schedule for the event and collect all pitch presentations | <p>Initiate ~ 6 Months Prior to Event</p> |

| TASK | START DATE |
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| <p>Task 3. Event Planning</p> <ul style="list-style-type: none"> <input type="checkbox"/> Establish event needs, requirements <input type="checkbox"/> Determine event date and city location <input type="checkbox"/> Determine room size requirements, number of anticipated attendees, etc. <input type="checkbox"/> Research venues, applicable services, amenities, lodging agreements, perform site visit <input type="checkbox"/> Contract/deposits with chosen venue <input type="checkbox"/> Develop a registration platform and monitor registrations <input type="checkbox"/> Identify and secure speakers <input type="checkbox"/> Identify topics of interest, informational dialogue, customer-specific items, policies/procedures, etc. <input type="checkbox"/> Identify onsite staffing support needs (registration, customer service) <input type="checkbox"/> Coordinate exhibits/tabletop displays if appropriate <input type="checkbox"/> Develop event materials such as the program, agenda, attendee handouts, event signs, name badges, etc. <input type="checkbox"/> Ship all event materials to the approved venue and coordinate onsite storage if applicable (via FedEx, UPS, etc.) <input type="checkbox"/> Manage event invitations, ID priority invitees, send out invitations | <p style="text-align: center;">Initiate ~ 6 Months Prior to Event</p> |
| <p>Task 4. Media and Marketing Campaign</p> <ul style="list-style-type: none"> <input type="checkbox"/> Review Pitch Day “branding” and media products (videos, fact sheets) <input type="checkbox"/> Issue a media announcement and publication <input type="checkbox"/> Stand-up information website page <input type="checkbox"/> Publish and post social media campaign and advertisements (postings and videos) <input type="checkbox"/> Establish information and support (toll-free call line, email, website, video tutorials) <input type="checkbox"/> Develop invitation list of all dignitaries, senior leaders, VCs, etc. <input type="checkbox"/> Develop event “SWAG” if appropriate <input type="checkbox"/> Conduct photo-and-video support functions onsite during the event <input type="checkbox"/> Invite media to conduct interviews | <p style="text-align: center;">Initiate ~ 4-5 Months Prior to Event</p> |
| <p>Task 5. Conduct Event</p> <ul style="list-style-type: none"> <input type="checkbox"/> Manage onsite logistics <input type="checkbox"/> Facilitate Main Stage set-up and AV testing <input type="checkbox"/> Oversee pitch break-out rooms set-up <input type="checkbox"/> Setup and perform onsite registration check-in and company pitch check-in <input type="checkbox"/> Manage all venue services (catering, audio/visual, computer/electronic) <input type="checkbox"/> Provide support to all tabletop displays/exhibits if applicable <input type="checkbox"/> Provide customer-service support for all attendees <input type="checkbox"/> Teams evaluate pitches and make award selections/non-selections <input type="checkbox"/> Team contracting officers award contracts to selectees and make initial payment <input type="checkbox"/> Facilitate slide presentations in pitch break-out rooms and on Main Stage <input type="checkbox"/> Confirm final attendee count and develop attendee demographics <input type="checkbox"/> Tear-down all event materials and ship back to storage facility (via FedEx, UPS, etc.) | <p style="text-align: center;">Event</p> |

| TASK | START DATE |
|--|-------------------|
| <p>Task 6. After Pitch Day Actions</p> <ul style="list-style-type: none"> <input type="checkbox"/> Create an after-action report <input type="checkbox"/> Provide formal feedback to all companies <input type="checkbox"/> Capture event details and lessons learned and share <input type="checkbox"/> Manage awards <input type="checkbox"/> Conduct any closeout or payment requirements <input type="checkbox"/> Awardees conduct customer discovery, prototyping and transition technology to end customer/user | <p>Post Event</p> |

The actual number of staff members needed onsite will all depend on the agenda for the event and how many different things are running concurrently, number of attendees, and number of pitch rooms. The list below should give you an idea of the various roles you should consider. Keep in mind that these are roles and depending on the agenda, someone may be able to fill various different roles throughout the day (i.e., someone may work registration when it is busy, then go help in the general session room during opening announcements, and then go escort in/out of the pitch rooms).

General:

- Attendee Registration Desk – at least 3 during busy times, otherwise at least 1
- Photographer/Videographer – at least 1
- Speaker and VIP Check-in Desk – at least 1
- Media/Press POC (if applicable) – at least 1

General Session Room:

- Presentation POC – at least 2 to run the presentations and ensure AV is working correctly
- Speaker Support – at least 1 to make sure they are in the room and queued up

Pitch Rooms:

- Small Business Check-in Desk – at least 1 to check them in for their pitch slot
- Escorts into Pitch Rooms – at least 1
- Escorts out of Pitch Rooms – at least 1 per room
- Pitch Room Facilitator – at least 1 per room to keep time, run presentations, etc.
- Pitch Room Panel Members – at least 3 per room to do evaluations

Contracting Room:

- Contracting Officers – at least 2 per topic
- Room Facilitator – at least 1 person to support the COs

Exhibit Booths (if applicable):

- Booth Coordinator – at least 1
- AF SBIR/STTR Booth Staff – at least 1