

IndexHalo Agency Prospect Pitch Kit

An editable working record for an agency's first meeting, discovery, scoped proposal and recurring review.

Use this document as a working record. Blank fields are for your own verified evidence and agreed decisions. Public examples illustrate the method.

1. Buyer brief

Describe the prospect's buyer and the decision your investigation will inform.

Prospect / brand

Prepared by

Meeting date

Priority buyer segment

Buyer job and decision

Required features or workflows

1. Buyer brief / continued

Why this question matters commercially

Exact buyer question

2. Collection scope and evidence

Keep the original scope and links with every finding.

Market / country

Language

Device

Sources / collection methods

Collection date and time

Usable answer count

2. Collection scope and evidence / continued

Saved report URL

Evidence owner

Finding	Count / denominator	Answer or passage link	Cited source URL	Collection date

Public example only - replace with your own evidence

Brand: Notion Finding: Named in 4 of 4 usable answers; owned website cited in 2 of 4. Scope: One question, collected 17 October 2026. Interpretation: Inspect selected answer claims and their sources before proposing a page change.

3. Claim and source review / continued

3. Claim and source review

Compare the exact claim with the relevant official source and matching scope.

Exact answer claim	Plan / currency / interval / workflow	Official source and check date	Assessment	Question or proposed next step

Status option: Confirmed by the source

Status option: Missing relevant context

Status option: Needs product-owner clarification

Status option: Contradicted by the matching source

4. Discovery notes

Use answers to change the scope, owner or priority.

Which buyer segment matters most?

4. Discovery notes / continued

Which questions recur in sales conversations?

Which product facts or plans changed recently?

Which pages already explain these requirements?

Who verifies the facts and approves updates?

What useful decision should the first engagement enable?

5. One-page pitch

Write a short opening that the prospect can inspect and share.

Buyer decision

One verified finding with scope

5. One-page pitch / continued

Business question to discuss

Proposed next step

Evidence link

Decision requested from the prospect

Public Notion example - adapt every example field

We reviewed one buyer question in a saved answer set. Notion was named in four of four usable answers, while its own website was cited in two. We propose reviewing the relevant claims and cited pages against official product information, then agreeing which explanation deserves attention.

6. Scope, effort and acceptance

Define what will be delivered and how both sides will know it is complete. Add agency fees through your normal commercial process.

Agency fee / currency / billing terms

Prospect approval contact

6. Scope, effort and acceptance / continued

Included implementation work

Review meeting date

Agreed changes to scope

Deliverable / activity	Owner	Required inputs	Estimated effort	Due date	Completion check

7. Recurring review and handover / continued

7. Recurring review and handover

Preserve stable questions, completed work and new observations as separate records.

Core questions to repeat

Markets / languages

Collection cadence

Exploratory questions

Monthly complete-search workload

Live changed-page URL and publication date

Later comparable observation and collection date

Decision: maintain / investigate / change

7. Recurring review and handover / continued

Next owner and review date

Date	Completed work or new observation	Evidence link	Decision	Owner / next date