Anatomy of a Pitch

1. The Beginning
   - Where you’re from / grew up
   - Where you went to college or university
   - What you did between graduation and right now

2. Your Finance / IB Spark / Why Kellogg?
   - What about your previous work combined with career research sparked your interest in finance / banking (i.e., project exposure, family business, etc.)
   - Specificity is key here – the connection to past to present must be plausible and strong

3. Why investment banking? (can blend into #2 above)
   - Logically connect your time here at Kellogg to why you’re sure banking is for you
   - Take this opportunity to insert a strong attribute about yourself that would make you a good candidate for them to consider

4. Why [Bank Name]?
   - Why this bank?
   - Why this group? Or why this generalist pool?
   - NOTE: many banks have generalist programs for MBA graduates for a short time (e.g., Morgan Stanley and certain regional office) – be aware of these structures when making comments or if you don’t know, ask what the structure is before commenting.
Cocktail Hour / Networking

1. Attire
   - See additional handout for attire standards and guidelines

2. Etiquette
   - Don’t dominate any conversation, let your friends speak
   - Allow/invite people in circles and introduce them
   - Don’t drink too much - 1 - 2 beers/wine
   - Don’t leave a circle abruptly
   - Ask for a business card before leaving. Don’t offer yours unless asked

3. What to talk about
   - Interesting topics outside of work - Ski trip, KWEST, social / clubs etc
   - try to find out common interests - through backgrounds etc
   - Talk intelligently but cautiously about deals
   - Never change a fun conversation to work talk
   - Don’t ask about lifestyle/hours/bonuses – ask 2nd years instead
   - Don’t go into technicalities of your previous work experience
   - Don’t try to impress MDs. You can’t.
   - Remember, it’s the Associates and VPs who make decisions
   - don’t talk about contentious topics such as your political leanings

4. Follow up
   - Send thank you emails – try to do so within 24 hrs of meeting the person
   - Try and setup phone calls - be mindful of time zone difference
   - Never miss calls that you had set up
   - If there was a common interest, mention it in the thank you email
Informational Interviews

1. Who to call?
   - Typically you want to focus on junior employees at first (Associates and VPs). These people are typically the easiest to relate to since you will be doing their job during the summer. Also, MDs are very busy and don’t want to be answering “describe a typical day” questions. This is not, however, a hard and fast rule. If you really connect with a senior level employee, do not be afraid to reach out to them for informationals. However, it is best to start with the junior employees.

2. When to call?
   - Try to set up the call soon after meeting the person. In your thank-you notes, it would be smart to say something along the lines of “do you think you would have 30 minutes in the next week or so to discuss [X Firm] further?”

3. Goals of informationals
   - For you to get to know the bankers / bank culture and, just as important, for them to get to know you. They should have a clear picture of who you are, why you want to do banking, and why you want to do banking at their firm at the end of the call.
   - At some banks, these are also “check the box” type exercises. They want to know you are interested in their bank. Scheduling informationals is a way for them to “track” your interest.
   - These are also good ways to get in touch with people that did not come to the kick-off even from that bank. At the end of the informational, I would ask something along the lines of “thanks for taking the time to speak with me, is there anyone else in [some group] that you recommend I speak with.” They will usually give you another Banker to reach out to.

4. Sample questions
   - Anything you are curious about.

5. Follow Up
   - Send a thank you, not immediately after they hang up, but maybe a day later. If they gave you someone else to contact, and you do reach out to them, a follow-up to the first person is a good idea. “Thanks for putting me in touch with Bob. We spoke the other day and his view on [x] was really interesting.”