

# LIFE'S A PITCH...

## CREATING & RUNNING A PITCH

## INTRODUCTION

I pitch. We pitch. When we pitch, we often end up discussing the pitfalls of the process with our (prospective) clients. We talk about how managing pitches, writing briefs, selecting agencies, isn't actually all that easy. With this in mind, it occurred to me I know full well it isn't, and although I've rarely run a pitch (i.e. rarely been 'client-side'), I have been doing them for nearly 15 years. So, by using observations of my own (and those of my peers) plus a few brutal truths, this guide is all about helping those of you responsible for the delightful process known as a pitch – resulting in you choosing an agency partner.

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# START AS YOU MEAN TO GO ON

Identifying the need for a pitch

First thing's first: Why have a pitch?

1. Your current agency relationship/s is/are tired. There's nowhere else to go; the agencies you're working with are all out of ideas and, as a result, your competitors are leaving you behind.
2. Attitudes. A very common reason for brands to decide its time to move agencies is as simple as a change in attitude of their incumbent – either arrogance, complacency, or just that they no longer come forward with new and exciting ideas or observations.
3. Relationships: Your account director's gone, the creative director's gone, the agency has changed hands and frankly, things just aren't the same.
4. Dynamics of your brand. Your brand is moving with the times (as it should) and you're mad keen to adapt to new consumer trends and to innovations across channels. Your agency, sadly, is not...

There is an argument to say that just because one or more of the above happens, agency relationships are just like any other supplier/partner relationships – i.e. there's a lot more to them than a short list such as the one above. Well that may be. So with that in mind, start by asking yourself this: If a staff member were displaying one or more of these traits, what would you do? Hopefully, you'd start by addressing the situation, stipulating a serious need for improvement – and setting some sensible deadlines for said improvement.

If after all attempts to rectify things, one or more of these issues is simply not going away; then do yourself (and your brand) a favour and dash on. One thing this world is definitely not short of is fresh, creative, hungry firms – all keen as mustard to explore the opportunity of working with you.

## TOO MANY DECISION-MAKERS, TOO MANY COOKS...

This was one of my mum's favourite expressions – along with “empty vessels make more noise” and “imitation is the biggest form of flattery” – all of which seem more relevant in business today, than they did when I was a young lad.

Anyway, like many other things our mums said to us, “too many cooks” genuinely can spoil the broth. With this in mind, be clear from the offset about who will be running your pitch. What will their responsibilities within the process be? Who will decide the selection criteria? Who will provide the brief? Who will meet the agencies? Who will make the final decision?

Now without wishing to over-egg the pudding (there she goes again!), clearly defining the team who will manage the pitch is very important indeed – and, if done right, will ensure an efficient and decisive process.

In stark contrast to this, a disorganised approach to the process could quickly result in ‘decision by committee’ – or (which is more common). For some reason, public sector pitches are renowned for turning out like this. Why? I can’t rightly say. Experience tells me that this is because non-marketers often run public sector pitches, which is scary to say the least. So, the basics:

1. Ensure you have a lean (manageable) group of people from your organisation;
2. Ensure that all of the group members play a specific part – e.g. a manager/owner, a marketer, a salesperson (someone ‘at the coalface’), a relationship manager – whatever you feel is needed to obtain a balanced perspective;
3. Ask yourself how inefficient it is if you have no decision-makers from your business on the team. Running a pitch with no such people present means you will end up re-presenting everything to them (out of context). You will likely be hit with a load of questions you do not have the answers to, and the decision-makers will not have met any of the agency team;
4. Ensure you’re all 100% agreed on the brief, the process and what it is you’re all looking for from your new agency.

## SEARCHING FOR (AND SELECTING) AGENCIES

So you’ve committed to having a pitch and to checking out some ‘new blood’ – good for you! Now there’s the small issue of how you select some agencies and whom you select... This is a veritable minefield, so here’s a list of things to consider:

**Recommendation:** Turns out that, regardless of anything else, word of mouth is still the best form of marketing. If people you know (and respect) suggest you have a chat with a certain agency, then crack on! Selecting an agency on this basis usually ensures that you dispense with a lot of the nonsense and time inefficiencies surrounding this process. If you don’t know anyone who can recommend an agency, perhaps check out colleagues’ LinkedIn pages – see who they’re recommending online. Or perhaps use an accredited agency roster?

**Google:** Clearly you may simply type ‘creative/digital agencies in X’ into your search engine. It’s scattergun, but if they’ve got useful websites, then you can do your own shopping from there...

**Blogs/outposts:** You digest blogs in countless other areas, so it would make sense to consider looking at the outposts you rate. See if any agency principles are writing. As you know, whilst it’s plausible that someone might write the odd blog that is not reflective of them/their business, it’s a lot more difficult to do so consistently. Read the thoughts of agencies; see what makes them tick and what drives their culture. Good comms agencies tend to be active in this area for obvious reasons. Why? Because they read the likes of Seth Godin and they’ve accepted that their businesses have to change – and that producing interruptive creative messages has an ominous future. With this in mind, they may be writing their thoughts in the hope that you like the ‘cut’ of their ‘jib’ so to speak. Wild, huh?!

**Awards:** You may wish to choose an agency that's got a raft of awards. Fair enough. Awards = recognition + achievement. Though be cautious, as unfortunately the industry is rife with awards events, which genuinely are less than credible. Ask yourself whether an award for a piece of work that didn't happen is as important as an award for an effective/measured campaign.

**Client list:** It always makes sense to review an agency's client list. Look for a depth of experience across sectors and across channels (or at least across the channels they purport to be experts in). Perhaps you're only interested in working with agencies that work with household brands; perhaps you want a B2B expert or a digital expert – i.e. you're more interested in evidence of specialism. The main thing is to evaluate the agency's client list and portfolio, alongside the agency's level of growth – and ensure there's a likely match between the agency's experience and what you need them to do for you.

**Creative:** Stating the obvious I know, but do ensure that one of the main reasons you choose an agency is due to their creativity. There are countless **creative** agencies, but they are not all creative agencies.

## HOW MANY AGENCIES TO INVITE

This is an area of great controversy – more so recently, as everyone's been made to work a little harder to acquire or retain business. For some reason unbeknown to me or anyone else in the agency business, many clients have, do and (sadly) likely always will think it's a great idea to invite up to 10 agencies to pitch for their work. This, believe it or not, is really quite stupid – for the following reasons:

1. Putting 10 agencies through round after round of the pitch process is phenomenally labour-intensive for clients and agencies alike. If, as a client, you genuinely feel you've got time to do this, reconsider. Also ask yourself whether your employers would feel it's a valid way to spend your time.
2. The cost for agencies to pitch can be incredibly high (tens of thousands). Traditionally none of this is recoupable.
3. Whilst agencies are pitching, they are diverting resources from their current client work (how would you like it if you were one of those clients? Is this in any way considerate?)
4. You can gauge a considered view regarding an agency's quality by way of the work it's already done; its awards (the real ones); and its reputation.
5. What does it say about your decision-making abilities that you have to ask so many agencies to pitch?
6. There are many agencies that refuse to be involved in a pitch of more than 4 agencies. Arrogant? In some cases I'm sure that's true. However, conversely one might also consider that they have integrity and self-respect.

In early 2010, agencies (including JWT, Ogilvy & Mather, BBDO, Saatchi & Saatchi, and McCann Erickson) in the Belgian Association of Communication Companies publicised their irritation with this issue by having a virtual strike (<http://ow.ly/7fth3>). They took a stand against ludicrously long pitch lists by replacing their home pages with a message of distain. Back in the UK, the issue has also been a hot topic, sparked again recently by Matalan – who ran a 15-way pitch, whereby every agency was required to provide creative work.

There's a good article on this subject in The Drum: <http://ow.ly/7ftID>. I think Sue Little (CEO, McCann Erickson, Manchester) sums up the best way forward: in as much as it's entirely acceptable to meet with up to 10 agencies to see credentials/meet key personnel etc., there should then be a short-listing process, whereby a smaller number of agencies is required to formally present creative/strategy etc.

The Institute of Practitioners in Advertisers (<http://www.ipa.co.uk>) provides advice to members (and non-member) on pitch best practice. You can find out more on their site here: <http://ow.ly/7fAHc>.

# WRITING A DECENT CREATIVE BRIEF

Most people find writing a creative immensely difficult and more often than not, people make a bad job of it. This is designed to be helpful advice for all, regardless of whether you're new to writing briefs or you've been in the industry for years. Like countless peers, I've spent years writing briefs. Moreover, in my various new business roles, I've received and written a vast amount of potential client/pitch briefs. In such instances, the brief is obviously the key to getting it right.

Whilst it's important for agency-side parties to be usefully inquisitive, the work you receive will be a reasonable reflection of the brief you provide in the first place (i.e. get the brief wrong and the work represented will likely be shit). So with that in mind, here's a simple guide to what that brief should consist of. The majority of this content is media/channel-neutral. It's a creative brief outline – which will work through the line.

## 1. PURPOSE OF BRIEF ('SO WHAT'S OCCURRING?')

This needs to be an outline of the business objectives and a succinct introduction to the brand, its sector, and the product/service to be launched/repositioned/put online/immortalised in advertising etc. You'll know pretty much all there is to know about your brand and your sector; therefore there is often a temptation to provide far too much information. Keep it simple; give a flavour, but try not to offload piles and piles of information if it is not relevant to the brief. Remember, the agency will ask questions, which you would hope, will be good questions. If they do not, take note. Their ability to listen is as important as their ability to create.

## 2. INSIGHTS ('WHAT SHOULD WE ASK OURSELVES TO GET THIS RIGHT?')

Assuming you're more interested in one of the agencies coming back with the right work rather than putting them to the test, it's always a good idea to drop in a couple of insightful questions around the problem. For example: "How do we hook our potential consumer, using a balance of emotive and technical messages – conveying a balance of brand personality and depth of expertise?" These questions are obviously rhetorical, but can help drive the agencies' approach far better.

## 3. TARGET AUDIENCE ('SO WHO WANTS TO KNOW?')

Tip: "Everyone" is not an insightful brief of the target market!

Obviously this can be socio-demographic information, but if you think a little deeper, you might provide an introduction to a couple of personas. For example: Tell the agency a story about 'Claire, the girl next door'; talk about where she lives/her likes/dislikes/where she shops/what sites she's likely browsing. Build a story regarding Claire – bring her to life. It's a far more interesting way to describe your target market – again, offering the opportunity for more insightful consideration.

#### **4. COMPETITION ('WHO ELSE IS DOING THIS?')**

Not a difficult area of the brief. List your top competitors and their web addresses. Leave the agencies to do the rest. It's their job to decide how relevant the competitors' marketing strategy/tactics are. However, DO provide a concise indication of your understanding of the strengths and weaknesses of what your competitors are up to. Also, if you like something they're doing – say. Your competitors are allowed to be great at what they do, after all...

#### **5. THE USP ('WHAT'S THE SINGLE MOST IMPORTANT THING WE WANT THE CUSTOMER TO KNOW?')**

Ah, the USP... This is the bit where most people get it wrong – agencies included. Why? For many reasons. 1. Because people tend to list more than one proposition (even though we're looking for the unique point); 2. Because it's not all that easy to sum absolutely all of the features and benefits of your brand/product/service into one line. Difficult, but not impossible... This is arguably the most important section of the brief. If you are ambiguous at this stage, don't be surprised if indecisive work is presented back to you. Get it right, and see the difference.

#### **6. REINFORCING THE USP ('CAN WE ACTUALLY SUPPORT/PROVE THAT?')**

Bearing in mind that the USP information should be short and sweet, this is the area where you can expand and rationalise your thoughts. Again, keep it simple; use bullet-points, all of which support your thinking. Don't ramble; don't repeat yourself. Furthermore, don't under-estimate the importance of this area of the brief (as people often do).

#### **7. LOOK & FEEL, TONE OF VOICE ('HOW SHOULD IT LOOK AND WHAT SHOULD IT SOUND LIKE?')**

You'll likely already have a set of brand guidelines or brand bible. If they're any good, they'll contain this information. Copy the more salient points and stipulations. Regardless, the key here is to give some descriptors relating to how your brand/product/service feels – how it looks – how it exists. Don't be afraid of incorporating a little passion here – after all, it's your brand!!!

#### **8. MANDATORY INCLUSIONS/EXCLUSIONS ('WHAT MUST BE IN, WHAT NEEDS TO BE OUT?')**

It's always helpful to nail down a bullet-point list of dos & don'ts, to save time. If you know full well that a certain line of messaging does not work when it comes to your brand, mention it. If the CEO's wife hates yellow (sighs), put it in the brief! This is all about making the whole process more efficient.

## **9. REQUIREMENTS ('WHAT DO WE WANT?')**

Short and simple. A bullet-point list of what you'd like to see. For example: 1. A brand identity; 2. Wire frames and a home page; 3. A suite of 'ad concepts' etc etc...

## **10. TIMINGS ('WHEN DO WE WANT IT?')**

State the pitch date and time. Do yourself a favour and give your agencies enough time to tackle the brief properly. Try to ensure the process does not end up as a rush.

## CREATIVE BRIEF

<b>CLIENT</b>	
<b>JOB NO</b>	
<b>JOB TITLE</b>	
<b>DATE</b>	
<b>DATE REQ'D</b>	
<b>BRIEF TO</b>	

**SO WHAT'S THIS ALL ABOUT THEN?**

**WHAT DO WE NEED TO ASK OURSELVES TO MAKE SURE WE EFFECTIVELY ANSWER THE BRIEF?**

**WHO'LL BE INTERESTED?**

**WHO'S ALREADY DOING THIS?**

**WHAT IS THE SINGLE MOST IMPORTANT THING WE WANT THE CUSTOMER TO KNOW?**

**CAN WE ACTUALLY SUPPORT THAT?**

**HOW SHOULD IT LOOK AND WHAT SHOULD THE TONE OF VOICE BE?**

**WHAT HAS TO BE IN, WHAT SHOULD WE LEAVE OUT?**

**IN SUMMARY: EXACTLY WHAT IS IT THAT WE NEED?**

**WHEN DOES IT HAVE TO BE DONE BY?**

## CHOOSING YOUR NEW AGENCY

It is not uncommon for clients to go about the pitch process in a rather ham-handed manner, with problematic outcomes including having to ask agencies to re-pitch, or even not choosing any agencies.

Like many, I have experienced such issues on a number of occasions. A recent example of this would be the cosmetic surgery brand MYA, who invited us to a 3-way pitch, for their new hair transplant business. We did what we do; were told it was “the best agency pitch I’ve seen in 30 years” etc and then we waited... And we waited... And we waited... After 2 weeks of silence, we contacted them – at which point they told us that they’d actually invited more than 3 agencies (more like 10) and were still undergoing the process. Hardly ideal, but that’s the way these things happen sometimes. So we waited... And we waited... And we waited... Eventually we contacted them again (because in this instance it would appear, only goes one way). Here’s the punchline: “Erm... Well... We REALLY liked your work and would’ve chosen you, however... We’re not sure whether we’re going to launch this business yet. Sorry... Would you like to pitch for our web site??” Needless to say I declined the latter offer.

Be under no illusion, this really should not be difficult and can be managed by considering just five things:

1. Be sure of your need for a pitch.
2. Research your pitch list properly – make sure all agencies are appropriate for your needs.
3. Talk to a **sensible** number of agencies.
4. Provide a great (unambiguous) brief.
5. Be VERY clear on the objectives and requirements – as well as ensuring that all agencies are marked against the same criteria.

If you’ve done all of the above and you’ve gone through the credentials/short-listing process (yes that’s right – you must meet them first), then you’re ready to see some work. So how do you rate the agencies you see? I’ve known clients follow all sorts of weird and wonderful criteria, but let’s stick to some simple rules (and mark each agency out of 10 for each category).

**Creativity:** As mentioned earlier, this is not rocket science. You’re trying to appoint a creative marketing agency; therefore creativity is key.

**Expertise:** Alas, this industry is awash with wankers. They’re arrogant, pretentious, pompous, insincere and dishonest. They pretend to be experts when they’re not. Depressing as it is, beware. Fortunately, the industry is also awash with some incredible creative and strategic talent. Ask the right questions to ensure you quickly identify their expertise.

**Attitude:** Important to some, unimportant to others. For me, it's key. You know that expression "you can lead a horse to water..." It's cock-on when it comes to ascertaining an agency's attitude in a pitch. Arrogant or confident? Reactive or proactive? Bare minimum homework or in-depth research? Settle with the brief provided or call and ask to meet to discuss more? All of these things matter. You'll be much more inclined to appoint an agency that's gone the extra mile in the pitch – visited your attraction, ridden your train, been in your shops, or used your product.

**Chemistry:** Some people say this is irrelevant. I say good luck, but no thanks. If you find an agency that has fantastic ideas – and does it without the attitude – and with a smile – then bag them. If you respect them and they respect you, you'll get the best results for your brand. I've never gone in for the whole "they're a supplier" concept – with any businesses we work with. It doesn't make sense to have such an attitude. Furthermore, in the creative business, you get the best ideas when there's nothing clouding the creation of ideas. Great chemistry = great results. The end.

**Ability (to do the job):** It's one thing to say they can do it and another to do it. As mentioned previously, agencies (especially good agency new business types) can talk the talk. Ensure that behind that, the business has resource, financial security, and a team in place to look after you. It's only what people expect of your business after all.

**References:** Remember these? You may have already had a look at LinkedIn recommendations, but how about a good old-fashioned request to speak to a couple of the agency's existing clients directly?

Notice that, at no point did I mention cost? Any agency worth their salt will easily be able to justify their costs. If you choose an agency based on cost, you're a fool. A wise old billionaire once told me "you buy cheap, you buy twice" and I couldn't agree more. That's not to say you should pay through the nose either...

Choosing an agency is not like choosing other suppliers. They'll become an extension to your marketing team; a trusted team of people that helps your brand and your business grow – maybe they'll even help you grow. You'll develop ideas together; you'll fall out; you'll have fun. Choosing an agency isn't easy, but if you do it right, you'll be with them for a long while. How long is really down to them.