

Pitch perfect

Hiring the right strategic and creative agency isn't easy. Here is some advice on how businesses can find the perfect partner.

OUR THOUGHTS



1. Do your homework

Don't just consider your usual agencies. Find out which agencies are leading their field and most respected by their peers. Make a longlist in order of preference. Decide how many agencies you want to ask for pitch; but don't ask any more than five.

Plan the process, which should take about four weeks start to finish:

- You need a week to write the brief and selection criteria and secure internal sign off
- Agree who will be on your pitch panel: make sure you get a variety of experience, knowledge, ages and nationalities. If you have any important dissenters, make them part of the process. Secure their time
- Allow a few days to speak to the agencies to secure their commitment to pitch, then get confidentiality agreements signed
- Send them the brief
- Allow a minimum of two weeks for the agency to prepare, with a briefing meeting or call in the first few days
- Let the agency send you a draft proposal to review mid-way through the process to ensure they are on the right track
- Get the agency to send you their final proposal a few days before the pitch so your team has time to review it
- Don't have any more than four two hour pitches per day

- Spend two hours after all the pitches are complete discussing and coming to a decision as a panel
- Notify the agencies of your decision
- Finalise contacts and terms and conditions.

2. Creative or no creative

The biggest dilemma at this stage is whether to ask for actual strategy or creative in the pitch. My advice is always no.

Part of the joy of working with external experts is to be part of the research, strategy and creative process. Without you, they have no real insider business expert on their team. They will work intensively on producing work, investing emotional energy on something that may or may not meet your stakeholder's needs. You'll find it hard not to react subjectively as you'll have no real strategic criteria to judge their work against and they'll no longer be fresh when it comes to starting at the beginning again.

It is also a huge investment for an agency to produce actual work when they have a 20% chance of being selected. If you want strategy or creative work at pitch then pay a contribution towards it. The DBA's code of conduct expressly forbids its members to pitch creative for free.

Instead, ask them to demonstrate their strategic and creative thinking by showing examples of relevant work for previous or existing clients. Hear how they think and what sort of process they have. Be clear that you would like some insights into your

challenge and that any sketched ideas, rather than fully designed solutions, are welcome.

In this tough market most agencies will over deliver.

3. Write a really good brief

Be as clear and honest as you can. Use normal language, not pseudo business speak or in house acronyms.

Make sure the brief answers as many questions as you can:

- The business context driving change
- Why you are doing this now
- Who and what you are looking for from an agency
- Your selection criteria
- Pitch timings
- Key project milestones and timings
- Where you will be holding the pitch
- Who the decision makers and influencers are in the process; roles and responsibilities
- How you will measure the success of the work
- The budget (see below).

Demand that the pitch team is the actual team with whom you will work. Agencies often field pitch teams consisting of highly polished, well rehearsed performers who are masters in the art of persuasion, but who may not work directly with you once appointed. Only the best agencies field your actual team, trusting that experience will win the day even if they aren't the best presenters.

It is always simplest to give a ballpark budget, otherwise you may have to ask agencies to re-scope and rewrite their proposals. This is a complete waste of time and will significantly delay your ability to appoint an agency. If you can't because you need their guidance on what would be reasonable, then make sure you discuss indicative budgets on the briefing call (see below).

Ask for the proposal a few days in advance of the pitch so you have time to read it and prepare questions to ask at the pitch.

Don't eliminate an agency based on their proposal unless it is clearly a copy and paste or doesn't remotely answer your brief. Remember fees can always be negotiated.

Agencies will want to know who they are pitching against so that they can work hard to differentiate themselves from the competition. I have never heard a good reason why this a bad idea, so give them the information.

4. Conflict and confidentiality

You are now ready to call (not email) the agency's managing director or new business leader and ask them if they confidentially if they would like to be considered for pitch.

Find out if they have any conflicts of interests that may eliminate them. Tread a fine line on what would be considered a real conflict if you want to work with an agency with relevant industry experience.

But do remember that even with the best intentions, it is really hard to have effective 'Chinese walls' within an agency.

If any agencies eliminate themselves because of conflicts then ask the next one on your longlist. You now have your shortlist.

Email a confidentiality agreement to entitle them to receive the brief. Remember, the agency community is small and tends to drink in the same pubs as industry journalists so you'll have to go to great lengths for the trade press not to hear about it. If you want to control this, offer to work with the agencies on a news release about the appointment once a decision has been made, even if you have to be vague about the nature of the project.

5. Chemistry meetings

The recent trend to have pre-pitch chemistry meetings is a big mistake because it places emphasis on vague and subjective criteria. Chemistry is important, but all too often it is cited as the number one selection criteria. Don't hire them just because you like them, but because they are the best in their field that you can afford and have shown their ability to deliver success for previous clients.

6. Q&A

Put your time and effort instead into spending an hour with each agency, preferably face to face but otherwise by telephone, so that they can ask questions to make sure they have everything they need to know to shine in their proposal and pitch.

Don't take a short cut and do it as a group call because the agencies will be afraid to ask any questions which might give others competitive advantage, becoming a waste of everyone's time.

To be fair, make sure it is the same person does all the briefings so agencies get roughly the same information.

Use any insights you have gleaned from how they handled the call to shape your questions in the pitch.

7. Decision making criteria

From your brief, write your selection criteria, so that everyone on your panel has the opportunity to evaluate as consistently and objectively as possible.

Here are some suggestions:

Credentials:

- Does the agency and specifically the people who will be on your team have relevant industry and project experience?
- Is this the pitch team or the actual team? Is it the same team at pitch as outlined in the proposal?

Strategic and creative thinking:

- Have they done their homework on you, your market and the challenges and opportunities you face?
- Do they have a credible point of view on your challenges?
- Does their creative work (for other clients) express a 'big idea'?
- Is their strategic and creative thinking original? Probe their case studies.

Implementation:

- What testing do they recommend and how would they go about it?
- What partners would they work with?
- Where does their expertise start and end? Can they take you right through implementation?

Project management:

- Do you trust them to deliver?
- Is their proposal bespoke, comprehensive and clear?
- Have they provided a detailed timeline?
- Are they within your budget range?
- Can they offer you a discount for volume, visibility or value?

Chemistry

- Do you think you can work with them every day to deliver what you need?

8. The pitch

You need a big room with space around the walls for anything the agency wishes to display, as well as a good screen and projector for them to show their presentation.

Make sure they have at least 30 minutes set up time on their own and run the pitches as promptly as possible.

The presentation should last no more than an hour and a half, allowing you thirty minutes to have a conversation and ask each other questions. It does sound like a long time but agencies put a lot of effort into pitching and it isn't often you get to spend time with experts who have an opinion on the market and your business, so make the most of it.

Make sure each panellist captures his or her thoughts on the criteria sheet so you can have a constructive conversation once you've met all the agencies.

9. The decision

Make a choice while the pitches are fresh. Talk through each one in turn to make sure that last is not best just because it is freshest in you mind. Be as objective as you can.

Once you've made your choice call each agency to let them know your decision and give them honest feedback on their pitch. They have made a significant investment pitching and will appreciate understanding how they might improve their approach in the future. Start with the winning agency but don't put off having to share the bad news with the others. You never know when you might need them.

