

Top tips for a successful agency pitch



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As marketing becomes more digital, but also complex and heavily regulated, it has become the area of focus for high spends, tracking and delivery. Selecting the right agency, and the right mix of responsibility within your organisation is key, and needs to start at the pitch stage.

In a world of creativity and data, how do you utilise traditional procurement RFP processes to select a marketing agency. Here are our top tips for running a successful pitch/RFP:

1. Consider what has led you to consider an RFP?

1.1 Is a full RFP the best solution?

It can be costly for both parties, and alternative approaches, detailed below may deliver the same end result.

Alternative approaches may include:

- a) Having a candid senior level discussion to review open issues, or reset priorities and targets
- b) Refreshing the agency team with new blood or new creativity
- c) A team building day for the whole team (client and agency)
- d) Refresh client priorities and targets with the agency
- e) Improve supplier relationship management (SRM)

Service level agreements (SLA) and formal quarterly reviews are still a relatively new concept with marketing agencies and can be a great opportunity for both parties to review progress to date, budgets, and openly discuss areas of the relationship that need work. Is there something internally that might need fixing before you move to selecting a new agency. **Is it you?**

1.2 If you do need to change your agency - a pitch is needed

1.2.1 Think creatively – is portraying a formal atmosphere, actually what you want, or is your brand to have a fun and informal vibe – think and talk to your stakeholders?

- a) A focus on strategy and cultural fit could be obtained through a “chemistry” meeting where agency credentials, experiences and references in key areas are reviewed
- b) A “business challenge” where the agency is given a real life situation to work on could be used to really understand an agency’s thinking, understanding of the brief given, and approach. Make it your current need, the successful agency selected can then ‘hit the ground running’
- c) Alternative ways to respond to brief with short videos responding to the brief, or use technology to provide a more rounded picture of the agency thinking
- d) Explore how the agency would react to a brief. Hold a “pitch in a day” where the client and agency work together over a course of 1-2 days to learn about each other, this focuses on showing creativity and the thought process of an agency
- e) Visiting an agency at their offices is a fantastic opportunity to get a greater understanding of their culture and how things work inside each agency
- f) Don’t include the incumbent agency in the pitch if they don’t have a positive fighting chance of retaining the business in the minds of your stakeholders i.e. if, on the morning after the decision to retain the incumbent is taken, all you have are glum and rather dissatisfied stakeholders

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- g) Could other agencies be part of your panel? E.g. Invite your media agency to your creative pitches (as a silent partner), to know their thoughts in the feedback – this can give an interesting perspective... and wider chemistry for on-going working. Or internal stakeholders, like comms dept. or in-house production, again for stakeholder engagement

1.2.2 Get the basics right – the process will need to be done right. Avoid making decision in a hurry and compromising the process.

- a) **Keep the specification relevant.** Work out the information you really need and can't do without in your RFI/RFP. If the RFP for each agency is more than a handful of pages long, your stakeholders won't read them. The measure of the value of any question you ask should be 'will this aid us in our decision-making?'
- b) **Decide on selection criteria** at the start. Whether you share the selection criteria with the agency is optional. Will it benefit them to know or will it distort their reply? Ensure that the selection process is linked with the size of the project, i.e. don't use an overly long and complicated RFP, or call a full-blown strategic and creative beauty parade, for a relatively small task
- c) **Allow enough time for the RFP and pitch process**, by taking into account holidays etc. agencies need a suitable amount of time to respond in order to offer a good quality response
- d) **Make sure all internal stakeholders are engaged** in the process and are available or happy to nominate others. Manage your internal stakeholders with a RACI. It's good to be inclusive, but it will help if you identify who is actually responsible and accountable for decision-making, who will need to be consulted, and who simply needs to be kept informed
- e) **Don't be afraid of giving clarity on budget size** including your range of agency fees. The RFP's you receive will be more relevant and meaningful. If the agency can't deliver the required scope of work against the budget you provide, it allows them to be clear about it with you and withdraw if necessary or challenge you on scope
- f) **The process should be fair.** All agencies should be given the same amount of time to respond, and be provided with the same information, even after questions. Agencies will conduct their own scorecard for review of new business. Give them the opportunity to ask questions and follow on from individual Q&A's, share the most commonly asked questions and send the corresponding answers to all agencies in the pitch process to ensure a fair process
- g) **Insist that clear feedback** is given to participating agencies at each key stage of the selection process – don't leave agency teams hanging with no idea of where they stand when they have worked hard to meet your brief

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- h) **Teach agencies how to work with you** – you don't have to make friends with the agency, but neither should you be the 'bad cop' either. Supporting them on how to get the best out of you, will encourage early supplier engagement and will help you get the best out of them. You should be ready to check their advice aligns with your wider business needs. Identify the key outcomes you need to see. Don't get carried away with creative ideas during the pitch. Look inwards to your own organisation and define a scope you're confident is what you need
 - i) **Good chemistry** between marketing and the agencies, and the people who will **actually be handling the account**, not just the senior members participating in the pitch process. Ask who will be handling your account at the agency and push to meet face to face. Ask the question 'can I form a collaborative relationship with this individual to discuss business on a regular basis?'
 - j) **Don't set agencies up to fail.** A successful marketing pitch should clearly define and communicate SMART objectives. Seek understanding and input from agencies involved, utilise their core skills and specialist knowledge. Your expectations and ideas of success may be different to theirs, so work to align KPI measurements with a contract, ensuring ways of working and review process are all clearly defined.

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