

# How to get the most out of your pitch process

By  Vicky Gillan

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You're holding a pitch for new agency partners. This won't have been a decision taken lightly; running the pitch will be time-consuming, distracting and there's always the niggling concern that you won't find better in a new agency partner.

So, if you're at that point, how do you make sure that you get the most out of your pitch process and the agencies you select to participate?



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The first thing to consider is the incumbent relationship. Does your existing agency have the requisite skills to compete for the account (and do you want them to)? How will you keep them motivated to work on your account while the pitch is underway, while also reassuring their competitors you're not just undertaking a tire-kicking exercise?



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All prospective agencies, including the incumbent, will want to know the reasons for the pitch and what it will take to win your business. They'll also want to be clear on the scope of work and the size of the opportunity, so you should be upfront with your budgets. And finally, they will want to understand the pitch process, timetable and who the key stakeholders will be. That way they can check they'll be able to resource the pitch – and the business – properly, but they'll also start to get an idea of what you would be like to work with. Clients who don't expect to give much face-time to prospective agencies may well find they are passed over for other opportunities.

Each stage of the pitch process is vital for you in gaining insight to all the agencies involved, and for the agencies to get a deep understanding of your business.

**Visiting prospective agencies** to see how they operate in their own environment is always advisable and will help enormously in selecting your pitch list.

**An all-agency briefing** is the time to excite and motivate candidates, and an opportunity to introduce agencies to your wider team, but you should expect to offer individual Q&A as a follow up.

**Commercial and contractual discussions** should commence immediately, so that any red flags can be raised and so you can make a swift and informed decision after final presentations.

**Deep-dive sessions** into agency tools and systems, especially when selecting a media agency partner, should be factored into your pitch process and scored as part of the final decision.

**Work-in-progress meetings** will reassure you that agencies are on track for their final presentation or allow you to course-correct if necessary.

**Final presentations** should be based on a challenge or two that give you the opportunity to judge the agencies strategic smarts and creativity, without asking them to boil the ocean.



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You want all participating agencies to do well. Indeed, the best pitches result in the final decision being extremely difficult. But to ensure all pitching agencies are hungry, competitive and focused on winning your business, you need to make the process as open, thoughtful, engaging and motivating as possible, and that takes time, commitment and a degree of creativity on your part too.

## ABOUT VICKY GILLAN

Vicky joined AAR in 2007 and leads all of AAR's relationship and working practices consultancy and training programmes.

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