

# Pitch Guide

This document is based on BEDA and DBA's Pitch Guide section featured in the DBA Directory and is featured by ADP as an inspiration.

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## Setting Out

Before setting out to run a pitch you should ensure that you have.

1. Developed a brief for the project you would like the designers to be considered for (see section 2)
2. Selected the designers you intend to invite (see section 3)
3. Confirmed the selection criteria for the designers you require
4. Agreed some dates that any colleagues that will be judging can attend
5. Agreed what sort of pitch you require

## Selection Criteria

When selecting designers, it is best to think about what you actually need before you start to look. This way you will not just be swayed by a piece of work you like or are familiar with in their portfolio. Think about the skills or experience you might need, the sort of projects that you would expect to see in their portfolio as well as the sort of approach you think you might need. Think also about how they demonstrate how effective they are, have they won awards, do they enter competitions or do they need to be able to explain what their creativity has done for their previous clients?

Finally, you should also be sure what sort of pitch you want to run. There are two main types of pitch that are generally understood by creative agencies, a creative pitch or a credentials pitch.

## Creative versus Credential pitch

A creative pitch is where you ask a designer to present some ideas at the meeting (i.e. they have to do some creative work prior to seeing you) against a designer who will be very happy to meet with you to show you their portfolio, which is referred to as a credentials pitch. If you need to run a creative pitch then you should expect to pay for it, after all they are working on your behalf. This can be done by setting a minimum fee that you are willing to pay, and asking the designers to work to it.

If you are setting a creative pitch you will need to be very clear what it is that you are asking them to do. Different approaches and different ideas presented will make the final selection harder as there are likely to be bits in all the presentations you like.

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Credentials pitches on the other hand still require the designer to think before the meeting but this thinking should be about you and your business needs not how the challenge can be resolved at the first meeting. Designers will have a portfolio of projects, which they will regularly present to potential clients to get work. The key here is that they will have selected projects or case studies that will be similar to the challenge facing your business to demonstrate their suitability for the task ahead.

The creative pitch is mostly used where you have both the budget and a clear idea of what you need. The credentials pitch is used mostly where you are looking for a designer to work with but where the brief is more open and you feel you would like to explore with one designer ideas going forward. By reviewing portfolios and meeting the designer you are selecting the designer you feel you would be most comfortable working with in this way.

### **How Long and How Many?**

Most pitches usually take place over the period of one day. At a push up to six agencies can be accommodated with an early start and a late finish. Each pitch should last from about an hour to an hour and a half with questions. Each pitch ideally should have time between the leaving of one agency and the arrival of the next. This time will be required for you and the pitch panel to discuss or make notes whilst the pitch is fresh in your minds. It will also be required if the incoming agency needs to set up their presentation, make sure the laptop connection works with the projector etc. If at all possible the pitch panel should retire to a separate room for discussion whilst the agency is setting up and getting used to the room.

The pitch day can be tiring for all but it is essential that you collect all the completed feedback sheet in at the end of the day. It is very difficult to try and complete these at a later date.

### **Who should attend?**

Balancing the judging panel is always an issue. Ideally, anyone with an interest or stake holding in the project being pitched for should be there, but too many on the panel will inevitably lead to problems and conflicts with the final selection process. It may also affect the timings of the pitches if too many people want to ask questions that relate to them directly and not the project itself.

Regardless of the number attending, there will always need to be a Chairperson for the sessions, someone who can start the process, welcome the agency, keep time as well as being responsible for managing the question and answer session at the end. They may not necessarily be the person responsible for the scoring sheets and feedback, usually that would fall to the project manager or director.

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## Preparing for the Pitch Day

Having identified the agencies you want to see (see section 3), you will need to invite them to the day set aside for the pitch. The earlier you can let an agency know what day you have in mind the more likely the planning will run smoothly. Ideally, you are trying to avoid changing the arrangements at all, although changes are inevitable with such a large group of people need to attend the day. Once you have alerted the agencies, you can then follow up with the running order and pitch brief.

There are no 'rules' around the allocation of a running order. Usually, done on a first come first served basis, each agency should have kept the day free and would pick whatever time slot is available (except for the last slot of course). Confirmation of each agency slot should be sent in writing to remove any confusion. This should be accompanied by a brief for the presentation itself.

The pitch brief is used to ensure that each agency attending is clear what they are expected to present. This will also help the judging panel in their approach to scoring, where they will be able to judge pitches that are closer in content. A sample pitch brief is in section 4. The brief can be as short or as long as required. All you are doing is to help the agency prepare for the meeting in a more focused way and that they have all the information they need to prepare something relevant to show.

Ideally on the day of the pitches, or perhaps the afternoon before, you will want to gather the judging panel together and brief them to ensure that they are thinking about and scoring the same issues. You could take them through the background to the project, the pitch brief or what it is that you have asked the agencies to come prepared for. You may be using the pitch record sheets (see section 5) and you should discuss the process for this as well as the time scale for the decision process and feedback. It may be that you have arranged a further meeting to discuss the overall pitch and the agencies involved on a separate day. You will therefore need to reiterate how important their scoring is and how useful their completed sheets will be for the follow up meeting.

Other things to consider before the pitch day are

- Refreshments, for the panel and the agencies
- Do you/ reception know who is coming and when?
- Have you organised the timetable to allow for breaks for the panel?
- Does all the equipment you need work/ do you know how to work it? Do you have access to someone who does?
- Does everyone know where to go? Visitors parking facilities/ maps?
- How will you provide the feedback?

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## **Successful and Unsuccessful**

You need to select someone to work with you to deliver your project and this means that there will be agencies that have attended the pitch and have put time and effort in that will want to know why they were unsuccessful.

Plan time after the decision has been made to either complete a feedback form (see section 7) or to schedule a telephone call (or if you wish a face to face meeting) with the unsuccessful agencies to give them a debrief and feedback to help them understand what you and the pitch team were looking for and why they were not selected.

Completing the scoring sheets will help in this process and will ensure that you have something useful to say. Be prepared to answer a question regarding who attended the pitch. Most agencies will want to know who they were up against and who won eventually. There are no 'rules' here either but the agencies will be interested to see which company they keep and where they were placed. Realistically, it is not wise to be telling everyone that they came 'a close second' when in fact they didn't! It is difficult to give feedback if a performance was under par but then the agency might already know this!

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