

AGILE PITCH PROCESS

An alternative way to
select your strategic
creative agency partner

Recommended for
one-off projects and
budgets under €300k

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INTRODUCTION

The standard process for selecting and appointing a Strategic Creative agency is time-intensive for both the advertiser and the agencies engaging in the pitch. (The IAPI Guidelines for this process can be found on www.iapi.ie/guides-reports entitled: **Finding the Right Creative Agency.**)

IAPI recommends avoiding the full 12-week pitch process for briefs that either have a value of under 300k or are a one-off project. This value may be your total A&P budget or the A&P budget allocated to a single brand/product for which you need a dedicated agency.

The ultimate objective is for the advertiser to get a feel for the agency and how they think. It might not be necessary to see creative work in order to do this. A simple checklist that can be useful in making a decision may be:

- a) **Can the agency show they're smart and strategic in how they talk about case studies and examples of their work?**
- b) **Do I like the creative work they deliver for their clients?**
- c) **Do I feel I can do great work with these people?**

The new Agile Strategic pitch process can help marketers pitch more efficiently by being:

Faster – Just a 4-week turnaround.

Involved & collaborative – You will get to experience the agency's ways of working, the quality of thinking and get to know the team being put forward to work on the business day to day.

Cost-effective - The shorter timeline means less investment for both agency and client.



1. WHY ARE YOU PITCHING?

The circumstances surrounding your decision to pitch your business are unique to your brand. Any or all of the below can be determining factors in seeking out a new agency partner:

- Change of management in the client/agency business
- New direction for the brand
- A project/new product that needs a separate agency
- Changes in your current agency team
- New strategic or creative approach
- Standard agreed contractual review
- For good corporate governance
- To review costs

FIRST STEPS

If you think this new Agile Strategic Pitch is right for your business, there are a number of steps you should undertake before committing to a new pitch:

Involve the key people in the decision:

If a review is deemed to be the right course of action, ensure that your company's top management, including the procurement department, fully endorse the decision to pitch and are aware of the full process. **Ensure that key decision makers are clearly identified and enlisted from the outset so that, at no stage, can they overturn a decision made by your pitch team that will impact on the timing and cost of the pitch process.**

Check the client/agency contract

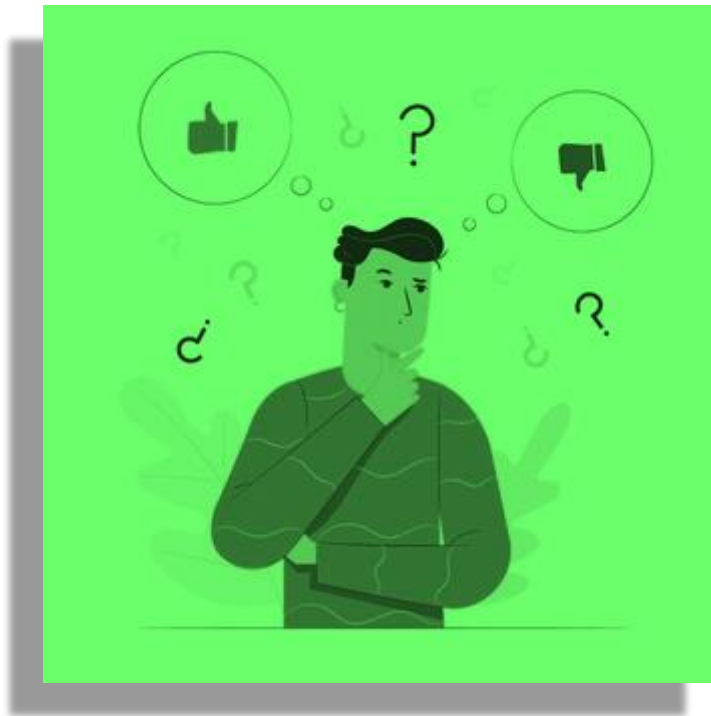
Check the contract you have with your current agency and take note of the notice period and all terms of the contract. Notice must be given to the agency in accordance with your contract if this is the route you choose.

Budget:

It is important to be aware of the budget available. **If the full A&P spend you are allocating to an agency is less than €50k we do not recommend a pitch approach.** Best practice would be to appoint one agency following the first step outlined in this document - the Chemistry Meeting.

For pitches where the agency fee income is less than €300K, we recommend the New Agile Strategic approach to pitching outlined in this document.

2. CHOOSING AN AGENCY – Where to start?



First, draw up a **list of no more than 6 agencies** that you're interested in and arrange a chemistry meeting (explained on the next page).

If you haven't worked with an agency before and need help selecting your long list, log onto <https://iapi.ie/members> where you will find a comprehensive directory of nearly 60 agencies with a summary of their services and their recent work.

If you know exactly what you're looking for and are provided with examples of work from each agency, then we advise you to appoint an agency following this first step as it will save time and effort on both sides.

If an agency cannot be appointed following this process, then we recommend that you choose no more than **two preferred agencies** for the next step in the Agile Pitch Process. It is best to talk to each of the agencies first to make sure they are happy to go ahead before contacting those who have been unsuccessful.

3. THE AGILE PITCH PROCESS - AN OVERVIEW

Step 1: The Chemistry Meeting

The pitch that wins your business should be the one that demonstrates the best understanding of the challenges your brand faces and the agency's approach to addressing these challenges. To increase the chances of that happening, agencies need to invest time and talent in gaining an understanding of your business.



This is why a chemistry meeting is a valuable and important step for them.

As part of the longlist process at the start of any pitch we recommend that you meet with no more than six (6) agencies. The chemistry meeting between client and agency can be as vital as the actual pitch as it often quickly answers some of your fundamental questions like:

- **Can we work together?**
- **Is this the sort of agency we want?**
- **Will they be effective for our business?**

The chemistry meeting is an introductory session which takes place before any tasks are given to the agency. It should be with key members of the agency and their proposed team. For a productive chemistry meeting, you should tell the agency what you hope to achieve overall in your agency relationship, what you want to see from a new agency and if possible what went right and wrong with the incumbent agency.

Agencies should be given **two-weeks' notice**, and the materials you should ask for at a chemistry meeting are:

- a) Case studies! These show how the agency thinks, their approach to business, the effectiveness of their work and their learnings.
- b) Previous creative work. If there is a particular campaign you would like to see from an agency, request it.
- c) A strategic POV of your business and the environment in which it operates.

We strongly advise that you do not settle on your final pitch shortlist until you have had brief, business-like chemistry meetings with your longlist of agencies.

Step 2: The Agile Strategic Pitch

Following the chemistry meeting, a maximum of two agencies should be shortlisted. Two weeks after the shortlist has been announced, a workshop will take place in the agency's offices where the pitching agency will set the agenda and demonstrate their strategic thinking and any proprietary tools they may use.

This process involves no speculative creative work and instead allows the client to focus on the team that will be working on their business, the agency's strategic thinking and its ability to create solutions that solve the business issues at hand.

The Agile Pitch is especially beneficial for the client as it:

- a) Focuses the agency talent and capabilities on solving the key business issues, not on the detail of rough creative work or speculative media plans.
- b) Is an ideal approach if the client faces a genuine dilemma as to the brand's position in the marketplace.
- c) Centres the discussions on key strategic issues while also giving clients an opportunity to see the quality of the agency insight and thinking, and how the agency team dynamic works.
- d) Helps determine the best agency for the future of your brand rather than speculative creative content.
- e) Judges creativity on previous successful agency work.
- f) Is more cost-effective for all involved.

Week 1	Long list of agencies. Each agency is given two week's notice to participate in a chemistry meeting.
Week 3	Chemistry meetings take place, and a shortlist of two agencies is decided.
Week 4	Agency workshops take place. Format and agenda to be set by agency.
Week 4	Decision/award contract is announced.

4. HOW TO MANAGE THE PITCH



Dealing with the incumbent

It is important to be direct and clear with the incumbent agency, giving the required notice period as stated in the contract. Serious thought should be given as to whether or not you wish the incumbent agency to pitch. Clearly identify if you do not wish to invite them to pitch, and explain your decision.

Conducting the process In-House

Many clients can and do decide to manage this process independently. The most important thing is to get your decision-making team in place as early as possible. Very often clients underestimate the time and effort required to complete a successful pitch process. We would strongly advise that key diary dates for your company's pitch team be agreed and blocked-off as soon as possible, so that your key decision makers are available and present at the vital meetings throughout the entire process.

Using a pitch consultant

Because selecting an agency is a relatively infrequent activity and because the marketing communications industry is changing so fast, it is hard to keep a finger on the pulse, especially if it is a first time for your company to undertake a pitch. One option that marketers may choose is to use a pitch consultant to help with the pitching process.

IAPI has accredited a number of pitch consultants who follow the agreed guidelines and these have been supported by the AAI.

Confidentiality

A mutual non-disclosure/confidentiality agreement (NDA) ought to be signed before undertaking any meetings.

It is of benefit to both parties to enter into such an agreement, which should cover information and materials supplied by you for the pitch and those produced by the agency in response. IAPI has a model NDA template for agency and client use available from their pitch hub on www.iapi.ie.

5. CLARIFYING YOUR REQUIREMENTS



While it is not necessary for brands to write a brief for agencies when undertaking the Agile Pitch Process, it is important that all agencies selected are given a degree of information in order to set the agenda and demonstrate their strategic thinking and any proprietary tools they may use.

It is important to remember that the workshops will be designed to assess the agency's ability to facilitate an informative and insightful discussion and for you to get to know the agency personnel who will be involved on your account. It is NOT designed to provide you with specific answers to a brand or project brief as that falls outside the remit of the Agile Pitch Process.

Please outline as much information as possible such as:

- Current life cycle of the brand and what objectives need to be achieved.
- The reason that the business is up for review and what are the brand's marketing and communication needs.
- Your budget, as this will have an influence on your agency selection.
- The nature of the services that you believe your brand requires (e.g. some or all of brand planning/strategic thinking, communications planning, creative development, digital, PR, events, etc).

6. CONCLUSION

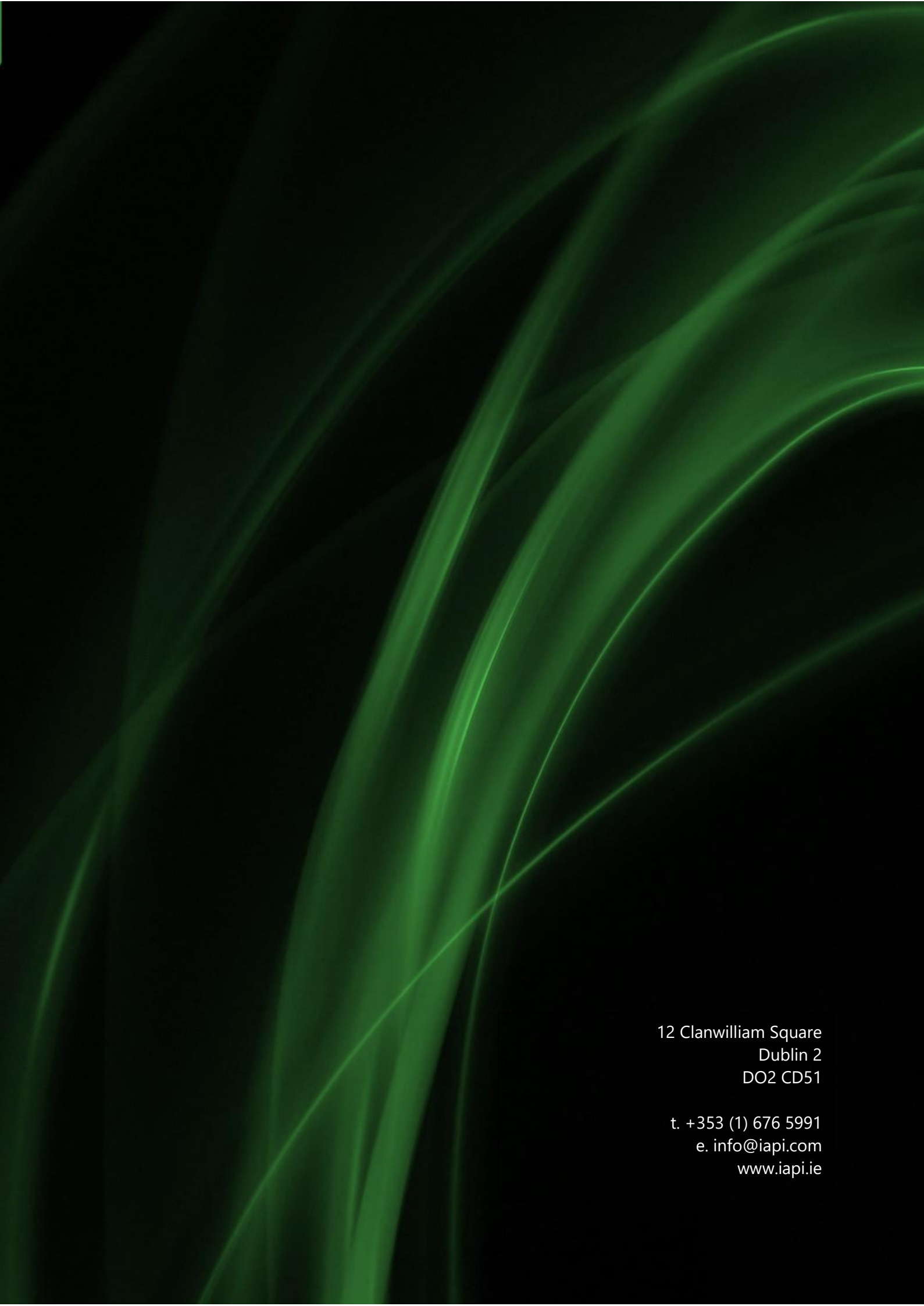
A successful pitch process takes time and effort for all those involved.

On the IAPI website you can download the following:

- **Request for information (RFI)**
- **Non-disclosure agreement (NDA)**
- **A template for an agency brief**
- **A post pitch feedback marking scheme**
- **IAPI approved standard contract**

For clients it should also be an exciting and rewarding time. Finding the right agency can result in the rejuvenation of your brand. It should unearth new insights and open exciting possibilities in the marketplace.

Yet this can only happen when there is a strong client/agency relationship established that sees beyond what the next campaign might be and looks to the future growth and development of the brand in the years ahead.

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12 Clanwilliam Square
Dublin 2
DO2 CD51

t. +353 (1) 676 5991
e. info@iapi.com
www.iapi.ie