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EVERYTHING YOU EVER WANTED TO KNOW ABOUT GRAPHIC DESIGNERS BUT WERE AFRAID TO ASK.

#2

SHOWING OFF.

> RUNNING A FAIR AND SUCCESSFUL PITCH

#2

SHOWING OFF

TIME TO SHAKE THINGS UP?

Depending on how your company operates, from time to time you may need to organise a competitive 'pitch' for creative services. This could be for either an individual project or to identify a new, long-term partner. For identifying long-term design partners we'd recommend a credentials presentation but, for the sake of the article, let's assume that you've decided to run a creative pitch.

For most marketing departments, this will involve compiling and writing a detailed brief (more on that in article #4 *Who, What, When, Why? Always write a thorough brief*), establishing clear requirements, selecting the agencies they wish to invite and then managing the pitch 'process'.

Sounds simple, doesn't it? But, as we all know, life is never that easy.

Over the years, we've had the pleasure of working with many clients who have run highly organised and meticulously planned pitches. We've also witnessed some lamentable pitch practices – usually brought about by inexperience or a misunderstanding of what's reasonable to expect of an agency within the pitch process.

In this brief article I will show you how to organise and manage a structured, fair and professional pitch. Not only will this help you attract the best agencies it will also ensure you receive high quality and effective solutions that will enhance your organisation's public face and, potentially, its profitability.

However, instead of jumping straight in at the pitch stage, let's drop back a few steps to the beginning, in order to fully explain a typical cycle.

> For the purposes of clarity, we are mainly talking about individual projects with a net value of over £35K – or client accounts worth in excess of £100K per annum. Below £35K we would recommend that you consider organising a credentials pitch only, with any creative execution to follow the appointment of the final agency.

HELPING YOU CHOOSE, WHEN YOU'RE SPOILT FOR CHOICE

Let's assume that you already have your brief completed and are looking to identify new agencies to invite. The first thing to ask yourself is 'What skill sets do we need?'

The UK design industry is generally split up into seven sectors (or skill sets):

1. Branding/corporate identities

2. Print/graphics

3. Digital/interactive

4. Exhibitions/conferences

5. Packaging

6. Interiors

7. Products

Most design agencies will offer the first three as a default. The rest, to a greater or lesser extent, are seen as specialist or niche skills, as are those such as Strategy, Planning, Experiential marketing and so on.

So decide what skill sets you need and then build that into your selection criteria.

MAKE AN INFORMED DECISION

Now that you know what you want, you'll then need to find out who can deliver it. The good news is that, with over 4,500 commercial design practices operating in the UK, you're spoilt for choice. Most are micro businesses with less than 15 employees and, to give you a rough idea of agency size, 94% of them turnover less than £500K per annum.

So it's a diverse industry with a tremendous amount of choice and talent, particularly in London and the South East, where half of the UK's design agencies reside.

But this choice can sometimes be overwhelming, so where do you start?

> Ask your colleagues for referrals – but please ensure that their recommended agencies offer the skill sets that match *your* exact requirements; you want them to fit *your* needs. Your colleagues should be able to tell you how the agencies worked in practice; whether they were creative, understood your business, offered flexibility, were proactive and so on. (Please note, only seek advice from colleagues that are experienced in commissioning design.)

> Contact the Design Business Association (DBA), the trade association for the UK design industry: http://www.dba.org.uk. The DBA offers comprehensive tips and resources for clients commissioning design. With up to 450 members of all sizes, they represent 80% of the design industry by turnover. For those clients in the public sector, the DBA also offers an online, PQQ-ready members' directory, saving unnecessary duplication of time and information.

> Contact D&AD, whose remit is to stimulate, enable and award excellence in design and advertising: http://www.dandad.org. They showcase the best of the best and will be able to point you in the right direction.

> Contact the Chartered Society of Designers (CSD): http://www.csd.org.uk. CSD is the world's largest chartered body of professional designers, with members in 33 countries. If a designer has MCSD™ or FCSD™ after their name, you should expect a highly professional service.

> Contact the Design Council: http://www.designcouncil.org.uk. This is the UK Government's advisor on design and it sets the benchmark for promoting intelligent and creative design nationwide.

All the above organisations will be able to recommend experienced professional designers or agencies in the discipline(s) you're seeking – and/or signpost you to the relevant resources.

DO THE AGENCY AND YOUR PROJECT MATCH?

Make sure that your project *fits* the agency or agencies you're considering.

In other words, don't invite a large agency to pitch for a small project. It will either decline your invitation or – even worse – accept, then allocate junior members of staff to work on it. Conversely, don't expect a small agency to be able to handle a complex international branding roll out. It just won't have the infrastructure for it.

Take some time to look at the agencies' work on their websites and you should get a good idea of the types of projects they produce. If you need more information, contact them; most agencies will be delighted that you're considering them as potential future partners.

Ultimately, you should be looking to appoint an agency that's a good fit, really *wants* your business and treats you as an important and valued client.

GET THE GEOGRAPHY RIGHT

Although we live in an ever-evolving digital age, some clients still like to have their agencies physically close to them. For those clients, having the option of popping in to see their agency (or vice versa) and the opportunity to build a rapport with *real* people, face to face, is a tangible benefit. So, if proximity is important to you, then build it into your criteria.

We've come across plenty of clients – mainly in the public sector – who were duty bound to advertise tenders with no geographical exclusions, but who clearly preferred to work with a local agency (and did indeed appoint one). So try not to waste the time of distant agencies, whose location means they are unlikely to be selected.

THE PITCH

By now you should have:

> established the skill sets you require

> taken internal *and* external advice, and

> selected potential agencies that you think will be a good fit for your organisation and your budgets.

So what next?

Below we've highlighted nine key recommendations that you should follow to improve the quality and outcome of a creative pitch.

1 ***How short is a shortlist?***
You'll need to decide how many agencies to *initially* invite but don't forget, not all will accept your invitation, particularly if you invite too many. The rule of thumb is to *proceed* with up to three (four, if you intend to include the incumbent).

Note that it's very likely you'll be asked about the incumbent. Research often shows that, if they are included in the pitch, they are generally in a better position to retain the business. This is particularly true if they still have a healthy relationship with your team and the pitch is only precipitated by rigid procurement rules.

Some agencies may walk away if they discover the incumbent is still involved at this stage. Don't be offended; experience will have taught them that the odds against winning are too high. This is not a lack of proactivity; it's simply that most agencies know their industry well and will not want to get drawn into a fruitless or time-consuming 'beauty parade'.

2 ***How much should you pay for their services?***
Every agency will have its recommended charge-out rates (much more on this in our next article #3 *How much!? The cost of professional design*), which comprise fixed costs, overheads and profit.

On a well-run pitch most agencies, as a gesture of goodwill, would be prepared to reduce their fees to cover *only* fixed costs and overheads (a reduction of up to 30%, depending on their financial ratios). They may go even further, depending on how attractive your opportunity looks and how committed a potential client you appear.

Alternatively, you may decide to allocate a fixed amount to remunerate the invited agencies. For those that are unsuccessful, these rejection fees need to be realistic and commensurate with the work that is being requested.

But don't forget that the more agencies you invite, the more of your budget you'll need to set aside for the pitch stage – another good reason to be highly selective before you draw up a shortlist.

Paying your agencies to take part in a pitch shows that you respect their professionalism and are taking your commercial responsibilities seriously.

Is there any such thing as a 'free' pitch?

Some clients advocate what are disingenuously called 'free pitches.' Their expectation is that agencies will provide a comprehensive creative solution and then surrender all intellectual property (both visual and written) without payment.

These types of clients assume, often erroneously, that the 'opportunities' these pitches present are simply irresistible and the agencies will fall over themselves to pursue them.

The truth is that the vast majority of agencies (including ourselves) abhor and avoid the free pitch approach. Why? We believe it produces rushed, incomplete and poor quality solutions and demeans the client/agency relationship before it has even begun. Indeed, many agencies belong to professional bodies whose Codes of Practice *preclude* them from taking part in free pitches.

If you are drawn toward a free pitch, in our experience you may well attract agencies that you probably wouldn't want to work with in the first place, such as:

> those who are desperate for work (there's a reason for that)

> those who are inexperienced (often start-ups with lots of enthusiasm but little commercial savvy)

> those with formulaic or templated responses, and

> those with embedded pitch teams or departments (that they have to pay for, whether they're busy or not). These are almost always the larger agencies (and, again, in our experience, a questionable fit for many projects – particularly the smaller ones).

In the dim and distant past the 'free pitch' had some allure. That's because:

> the shortlists were very small and the carrot was often very large

> the business to be won was often a client 'account' that could last for years – as long as both sides remained happy, and

> the business was often very profitable and/or even high profile; both of which were attractive propositions to a creative services agency.

Today the landscape is very different. The free pitch shortlists can be very long (over ten participants is not uncommon), the process is often 'managed' remotely and/or poorly and the carrots are distinctly miniature in nature. Fact is, the allure has gone and agencies are now wise to it.

If you have a budget, say how much

Don't be coy with the budget you have allocated to a project. Clients' expectations of what can be achieved, within even the same budget, can vary considerably. Therefore, an agency needs to know if you're allocating what they would regard as a 'sensible' budget before committing what could be a considerable resource to your project.

3 ***What should I ask for?***

Please don't go through the motions of sending out a 'standard' or templated brief. What may look like a simple list of requirements can create a great deal of (unnecessary) work for all the agencies. Think about what's mandatory and what's bespoke – and then shape your brief accordingly.

Mandatory

These mandatory items should be relatively easy for an experienced agency to provide. However, if you have selected your agencies carefully, it is doubtful whether this mandatory information will help you differentiate one agency from another.

A. Company profile

Ask the agencies to keep this brief. In fact, give them a *maximum* word count so you don't receive War and Peace. This information is probably in the public domain anyway, so isn't what we would regard as 'key'.

B. Key staff profiles

As above, ask the agency to keep this brief. You should be looking for relevant professional qualifications, length of experience, areas of expertise, bespoke skill sets and previous clients. As with above, most agency websites will carry this relatively standard information.

C. Testimonials

Testimonials always help to show what other clients think of an agency and its approach. Look for examples of qualities that are important to you, such as creativity, account management, quality control or flexibility. If you wish to take up references, ask for the clients' details – but please bear in mind that clients move on, so some testimonials may be out of date (albeit still relevant).

D. Brief working methodology

Unless you are dealing with a very inexperienced agency, most of the ones you approach will have a pre-prepared, comprehensive methodology statement that will, most likely, be 'cut & pasted' into the proposal. So ask yourself what you're really looking for here. Is it just a box that needs ticking or are you expecting to find a team that works in a completely unique way (which is unlikely). If an agency has been trading successfully for years, chances are their working practices are pretty well honed.

Bespoke

These are the elements that your short-listed agencies should *tailor* to your brief:

E. Samples or case studies of previous work

Some clients expect – or hope – to see samples of very similar projects to the one that they're briefing; maybe even in their sector, possibly for a competitor. Your thinking might be that 'If you did it for them, then you can probably do it for me.' Risk averted. This can be a flawed assumption, as the work may well be 'on sector' but the *quality* may be only average. This sector familiarity may give you some quick comfort but try to look beyond that.

Instead, look for genuine, creative problem solvers – in whichever discipline you're seeking and for whatever collateral you're producing, such as a brochure, logo, microsite, mobile app and so on. That's far more important than familiarity with your company or sector. A qualified, intelligent designer will easily absorb your ethos, tone of voice and style guide in his/her stride and then focus on your specific objectives.

F. Draft schedule

As with the above, ask yourself what you're looking for here. Anyone can put together a complex-looking schedule or Gantt chart with key milestones and deadlines. But we all know that framing it in a document is a completely different exercise to delivering it well.

An experienced account manager will know how to flexibly move the dates around to accommodate the inevitable delays, without jeopardising the final deadline. This experience cannot be fully imparted in a document, so please make allowances for it. Should you be seeing the agency for a face-to-face briefing or presentation, you will have the opportunity to discuss this in much more detail.

Another thing to consider is that, unless there is an immovable date (such as a conference or annual report publication), the agency may suggest an alternative schedule to reflect the reality of what they see as being achievable.

G. Estimated costs

Please ensure everyone invited to quote is quoting on *exactly* the same deliverables, so you can genuinely compare them.

It is very common for three separate agencies to 'see' three different requirements from the same brief, prior to raising questions – and sometimes even after that.

So don't leave 'gaps' in your brief that can be misinterpreted. For example:

> Don't wait for agencies to guess how much to allow for client amends; if you expect three rounds of amends; spell that out – in detail.

> If you think there will be seven infographics, four of which are complicated, then explain that and supply visual examples of what the agencies should quote against.

> If you have an idea of word count (print or online), then tell them exactly what it is.

The list could go on, but what's important is that every agency knows exactly what it is allowing for and what demarcated costs you wish to see.

After all, you don't want Agency A to allow for everything in their estimate and for Agency B to 'hide' ambiguous or additional costs in their small print – an old trick, which we've seen many times. You need to be comparing apples with apples for any estimates to be meaningful.

H. Indicative visual or written approach

If you request this, it tends to turn the brief from a standard ITT/RFI/RFP into a full creative proposal, which can increase the response time exponentially. Note: this is the tipping point where agencies would expect to be paid for their time and to see a budget provided for realistic rejection fees.

If you want your shortlisted agencies to provide an indication of what the *actual* solution would look like (or outline the *creative or strategic approach* in writing), please demarcate *exactly* what you want each agency to present. Ask for no less and definitely no MORE. It's important for you – and for those tendering – that you are very specific.

For example, if you're not specific, it's not uncommon for an agency to say, in all innocence or enthusiasm, "Would you like us to show you the design applied to XYZ or maybe we could show you some additional routes", both of which may be well above and beyond the requirement. If an agency does this, decline their offer. If you don't, you'll be in a position where you are trying to compare unbalanced submissions. You may also be drawn to an agency that is trying to seduce you with sheer volume (over quality).

From an agency perspective, a fixed, clear requirement from you will stop them from producing far too much work at pitch stage. Whilst this may *appear* to be of great benefit to you, you may be getting solutions that are rushed rather than considered.

There is, of course, other information that you may wish to be included in an agency response – such as professional memberships, indemnity insurances, quality management accreditations, awards, audited accounts and so on.

But before you request them, ask yourself if they are really relevant to your project, as requesting this may create unnecessary work for everyone.

4 ***How much time should I allow?***
If you're unsure, ask any colleague that can give you an answer based upon previous (and relevant) commercial experience. If you've run pitches before, then you'll have a good idea. But for the sake of clarity, here are a few tips:

> ❯ Don't assume an agency can drop everything and respond to your initial enquiry immediately. They will have other client work on and will need to take time to consider and then reply to your invitation. It's best to assume that they will need up to one week before they can assess your invitation and come back to you with an indicative answer.

> ❯ The *basic* written part of a proposal shouldn't take too long to collate. Much of it will exist in template form, but it will need adjusting for the parts that are bespoke, such as samples, schedules and costs. An agency should be able to assemble a basic proposal in two to three days, assuming that any queries are simple and are answered rapidly. Allow an additional one to two days, should the quote require sourcing, collation and inclusion of third party costs, such as print, photography or copywriting.

> ❯ As for the creative element (visual or written), it purely depends on how much you're asking for at the initial stage.

> > For something like an outline annual report, with *one* creative route being provided by each agency, you should allow two to three weeks.

> > For a relatively simple corporate identity, with each agency being asked to provide one or two creative routes, allow three to four weeks. Remember, you're not trying to solve *everything* at this stage. The purpose of the pitch is to identify which partner you wish to proceed with – and for them to move onto the design development stage.

> > For small, low budget projects, such as leaflets, banner stand graphics, typesetting of print collateral from existing style guides and so on, we would recommend that this is *not* treated as a pitch – and certainly not treated as a 'creative' pitch. Either use your existing supplier or just request simple estimates. It's really not worth everyone's time, particularly yours, 'over-processing' something of relatively little value or complexity.

> > Sometimes, in order to avoid all the perceived work involved in a creative *visual* pitch, a client may innocently ask for "Your *thoughts* on how you [the agency] might answer the brief". Please be aware that if you are seeking some sort of solution, then this could also entail a great deal of work. Just because it doesn't end up in visual form doesn't mean that it's a quick or easy exercise. In fact, it would probably be regarded as a de facto full creative proposal, involving intellectual property, which, if not paid for, would be labelled a free pitch, which most credible agencies would wish to avoid.

5 **Managing the pitch process**

For an agency, there is nothing worse than working in the dark – all because the primary client contact decided to take a holiday right in the middle of the design stage (it happens!).

So always make *one* person constantly available to answer rolling questions from agencies – preferably the same person, and someone who is very experienced at the process. This will help to clarify details within the brief, which, in turn, will improve the quality of the creative responses. Please don't underestimate the time this takes.

Some clients prefer to collate all their questions and answers online, either via a microsite or group email. This makes sense as it enables you to communicate with all the agencies simultaneously, and avoids duplicating answers. But please take note of a few things:

> Log which agencies are asking the intelligent or searching questions, as this will probably be indicative of their general approach.

> Please answer the questions in real time, or at least collate and answer *daily*.

> Do *not* wait until you have collated *all* the questions and then answer them towards the end of the time available for design responses (with only one or two days left). This approach runs the risk that your answers could dramatically affect a creative solution, or even kill it stone dead, with no time left for an agency to reconsider its submission.

Depending on how large or important the project is, face-to-face briefings could be helpful to all parties. Try to facilitate this, if possible.

Allow all agencies the same access to information and thoroughness of [your] response.

If a visit to your organisation, or an opportunity to talk to your staff, is deemed helpful, offer the agencies full access. As with the above-mentioned research, sometimes great insights emerge from person-to-person interaction.

If you have any research or data available, offer it early, preferably in the brief. Some of the best solutions can be drawn from some tiny detail in the research.

The more information and feedback you give to an agency, the better its solution is likely to be. It's really simple: Quality In = Quality Out.

Don't expect everything to be solved at the initial presentation. An agency can only work within the time and budget available, so it will cut its cloth accordingly. An experienced buyer will factor that in and should be able to make a decision from the indicative work agencies have presented.

6 **The Presentation**

Should you stipulate a full creative pitch, it will be assumed that the project is of great importance, otherwise a credentials presentation would have sufficed.

In such instances, we always recommend that an agency has the opportunity to present its work *in person*. This has several client benefits, including:

> gaining a much better understanding of the solution(s) being offered

> having the facility to ask in-depth questions and engage in meaningful dialogue

> getting a 'feel' for the people who are presenting, which is especially important if you haven't previously met them, and

> clarifying – with the agency – exactly who will be working on the project. For instance, you will not want the A Team to be presenting the creative, but for the B Team to be producing it.

Having a face-to-face presentation also means that you cannot 'interpret' the work incorrectly. Even with the best intentions, this can happen when it's submitted remotely via, for example, pdf, in PowerPoint or on physical presentation boards.

Also, please try to ensure that all decision makers take the time to attend all the presentations, so the work does not need to be 're-presented' internally because then you risk the distinct possibility of Chinese Whispers creeping in.

When planning the presentation day:

> explain to the agency who will be present on the client panel – and what their respective roles are in your organisation

> confirm the time allocated

> outline what your preferred meeting agenda is, and

> provide details of the presentation room, such as size, shape and facilities available – like lighting, audio, AV projectors and so on.

7 ***Evaluating the submissions***
To avoid overly subjective analysis, always evaluate the submissions against clear criteria, which should have been clearly outlined in the brief.

Typical criteria would include, but not be limited to:

> quality of the *creative* submission

> understanding of your organisation and its objectives

> skill sets of the staff allocated to your projects

> experience

> relevance of previous work

> value for money (please note this does *not* mean lowest cost)

> working methodology, and

> personal chemistry (if you met the agency).

Of course you may well sub-divide the above categories should you want to gain more granular information with which to complete your appraisal.

Try to be as consistent as possible when evaluating submissions and please ensure that those involved in this exercise are experienced at it, otherwise the process loses its integrity.

Having been so prescriptive about the above, I would add one caveat; if you have decided to 'weight' your criteria (where you ascribe certain percentages against the listed criteria) please also use your *discretion*.

We have found that, occasionally, strictly-weighted evaluations can produce erratic results, so always give yourself the option of adding a healthy serving of common sense (this issue was addressed in detail in our article *#1 Friend or Foe? The procurement of creative services*).

8 **Awarding the contract**

Unless the creative solution(s) are being market tested, aim to make a decision within one week.

Once your decision has been made, please inform all the agencies at the same time – or at least all on the same day. Whilst it can sometimes be an awkward conversation talking to an unsuccessful agency, they will greatly appreciate a personal call and the opportunity to discuss.

Non Disclosure Agreements (if not already signed at briefing stage) may now need to be completed, prior to commencement of the project.

Please respect the Intellectual Property (IP) of all agencies. None of the work – either visual or written – from a rejected agency should be used in the final solution or passed onto the winning agency. Should you want to use part of a rejected pitch, you'll need to come to a private, commercial arrangement with that agency regarding remuneration and IP.

Please return all work to unsuccessful agencies or arrange, with them, for it to be collected.

9 **Feedback**

Agencies love feedback. Good or bad. It gives them the opportunity to see what they are doing right (or wrong). This can be incredibly helpful for future pitches or client relationships, so don't underestimate its importance.

On larger projects, where agencies have spent a great deal of time and effort on responding to your tender, offer the unsuccessful ones the opportunity to have face-to-face feedback meetings, where you can go through the specific reasons why their particular approach was unsuccessful.

A bland response such as *"Thank you for your submission. Although your approach was of a very high standard, unfortunately we will not be using your agency on this occasion"*, will not cut the mustard.

Typically, an unsuccessful agency would want to know:

> exactly where their pitch fell short (the more detail, the better)

> what the successful agency produced that convinced you to go with them (sight of the winning creative execution would be helpful)

> what the successful estimate was and how was it structured (unless it was a pre-fixed budget), and

> whether the incumbent won.

There may well be more questions, depending on the complexity of the project, but most agencies will seek assurances that the pitch process was scrupulously managed and handled in a fair manner.

No-one minds losing to a better idea or a stronger proposal, but please bear in mind that agencies get very frustrated if they feel that the decision-making process was opaque and the feedback was vague. So be transparent and communicative at every opportunity.

SUMMARY

The above should give you some *broad* guidance on the principles of running a fair and successful pitch – and some insights from an agency perspective.

It does not, and cannot, cover everything in detail, as organisations run their pitches in many different ways, whether in the public, private or third sector.

Our advice is purely to encourage best practice – so that you and your agencies work in the most professional and productive ways to deliver the results you want.

TAKE AWAY TIPS

1. Do your research thoroughly and identify the right skill set(s) needed.

2. Carefully select your agencies by seeking advice internally and externally.

3. Proceed to the pitch stage with three agencies only. One solution from each should give you sufficient variety.

4. Think carefully about whether the pitch should be a credentials one or a creative one.

5. Only request relevant information.

6. Always pay your agencies for their time.

7. Have experienced (and available) people managing the pitch.

8. Always include decision makers throughout the process.

9. Use discretion when evaluating tenders.

10. Always provide thorough and transparent feedback.

Next article

In the next article (#3 *How much!? The cost of professional design*), we will be looking at what you should be paying for design services, including:

> What's the going rate?

> How do you compare one agency with another?

> When is the right time to use a freelancer?

> Should I pay less for a regional agency?

> Should a designer charge more for conceptual design than artwork?

All this and more will be made clear in article #3 *How much!? The cost of professional design*.

#3

HOW MUCH!?
> THE COST OF PROFESSIONAL DESIGN

Articles can be downloaded from bentleyholland.co.uk

About the author

Tim Purvis is a hugely experienced communicator, having worked in the design and marketing sector since 1983.

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His experience also encompasses the public sector, where he has helped to drive behavioural change programmes for many central government departments, including Education, Health, Transport, Justice and the Home Office.

He is now sole owner and Managing Director of Bentley Holland, a through-the-line communications specialist, offering strategic insights and solutions within the brand development, stakeholder engagement, client acquisition and corporate communications arenas.

All eight articles in the series can be downloaded from **bentleyholland.co.uk**

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