

Agency *Pitches*

↳ Recommendations for
a transparent, responsible
and fair procedure



The key role of any agency, regardless of the disciplines in which it operates, is to design *successful strategies* and plans for brands. *A long-term partnership* between client and agency remains the *best way to achieve excellent results*. Strengthening *existing relationships* is often *more successful* than starting a new relationship.

An extensive pitch process to choose an agency is not always the best solution. A choice can also be made based on *credentials presentations* or on *projects delivered* by the agencies for other clients. In case of simple assignments, an agency can draw up a price offer with *minimum research* or *conceptual input*.

Tenders must be *transparent, responsible and fair*

Transparent ▾

Clients and agencies commit to providing each other, at any stage of the tender procedure, with access to all information necessary to ensure that all parties are treated equally.

When organising an extensive pitch, it is best for all parties to follow an appropriate procedure. UBA, ACC and UMA wrote recommendations to guide both parties. These recommendations save clients and agencies time and money while allowing the best results to be achieved. The guidelines are simple, logical and formulated in such a way that they benefit all parties.

Responsible ▾

Clients and agencies participate in the tender process responsibly, considering the implications and the costs that this process entails for both parties.

An agency pitch procedure must mark the beginning of a fruitful relationship between the client and the selected agency. This is key to achieving an excellent partnership together and strengthening the brand's reputation.

Fair ▾

Clients and agencies commit to ensuring the tendering process is conducted fairly.

Basic rules for clients

01

The number of agencies ↴

Organising a pitch procedure, whether it's for a long-term relationship or an ad hoc project, takes a lot of time and energy both for the client and for the agencies that are contacted.

The rules of thumb for ad hoc projects:

- ↳ For ad hoc projects, in principle a chemistry meeting with potential agencies and credentials presentations including one or two strategic questions regarding the prospect's challenge will suffice to choose the right agency.
- ↳ If a prospect decides to organise a strategic and/or conceptual pitch after all, no more than 3 agencies should be invited. Based on the average costs of pitching for the different disciplines from the ACC/UMA Pitch Surveys, and in order to avoid a financial and talent drain, the recommendation is that the annual budget should be at least:
 - ↳ 75K annual agency remuneration for a Media agency
 - ↳ 100K budget for an Activation, Branding, Content Marketing, Digital Marketing, Employer Branding, Event Marketing and/or PR/Influencer agency
 - ↳ 250K budget for an Advertising / Full Service agency

The rules of thumb for a long term relationship pitch:

- ↳ If you consider to pitch because you are unhappy with the collaboration, try to fix your partnership first via a proper evaluation. On the websites of ACC and UMA you can find links to evaluation tools for this.
- ↳ If you decide to launch a pitch anyway: invite a longlist of agencies for a credentials presentation and chemistry meeting, with cases tailored to your needs, including a timeslot for a Q&A session.
- ↳ Select a shortlist with maximum 3 agencies; invite only agencies with a real chance of winning.
- ↳ If you are required to pitch due to procurement rules or government pitching guidelines, include your incumbent agency as the 4th option only if you are satisfied with their performance.

02

The briefing ▸

Clients give short-listed agencies a clear and complete briefing. The briefing should contain:

- ↳ extensive background information, including information about the client and his brand(s); market and research data; key challenges and expectations for the tender.
- ↳ the expected deliverables of the tender: strategic recommendation, conceptual proposal, elaborated content plan, distribution approach, media strategy, etc.
- ↳ requested work in the pitch process:
 - ↳ a description of the services to be provided
 - ↳ the extent of the services to be provided
- ↳ a transparent scoring card for the decision-making process.
- ↳ limitation of strategic, planning and/or conceptual exercises to 1 or max 2 in accordance with complexity of the market and available budget.
- ↳ detailed planning of the pitch process (from briefing to final selection).
- ↳ the available budget (media, production, agency fee, ...).
- ↳ the number and names of the agencies consulted.
- ↳ reimbursement of expenses in the event of non-selection.
- ↳ identification of the person responsible for the tender.
- ↳ identification of the decision-maker(s) and confirmation of their presence at the various meetings.
- ↳ identification of the eventual external consultants -ideally familiar with the Belgian market- who supervise the process and their responsibility in the process.

There must be a true commitment to the communicated budget.

Well-founded strategic advice and strong conceptual recommendations are often based on relevant market and research data. The quality of the information provided in the briefing often determines the quality of the recommendations. The agencies undertake to treat this information with the utmost discretion. To this end, a non-disclosure agreement can be drawn up, which the agencies and external consultants will sign.

The questions asked by the clients in relation to the tender are shared with all participating parties, except for questions relating to individual strategic recommendations. Strategic agency questions will be kept confidential to preserve competitive advantages.

03

The timing ▾

Sufficient time must be allowed between the briefing and the presentation. The recommended time varies depending on whether it is a strategic/conceptual recommendation for a long-term relationship or an ad hoc assignment.

- ↳ In the case of the selection of an Integrated or Advertising agency, 4 weeks are required for a strategic recommendation, followed by a conceptual/creative proposal requiring an additional 4 weeks.
- ↳ In the case of the selection of a Media agency, 4 weeks are required for a strategic recommendation, followed by an additional 4 weeks for a financial and tactical exercise.
- ↳ In the case of the selection of an Employer Branding, Content, Digital, Event, PR, and/or Influencer Marketing agency, 3 weeks are required for a strategic recommendation, followed by an additional 2 weeks for a detailed proposal for different channels.
- ↳ This period can be shortened if the pitch process is limited to a workshop or a chemistry meeting (where no explicit strategic recommendation or conceptual/creative proposal is requested), for which there is a lesser amount of preparation required.

04

Reimbursement of expenses ▾

The agencies invest a lot of time and resources in a pitch procedure. It is therefore appropriate to grant financial compensation to the agencies that were not selected (with the exception of the outgoing agency). The amount of this fee must be clear in advance for all invited agencies.

Experience shows that pitches for which you, as the client, call on a specialised external consultant and for which the participating agencies are reimbursed are often better prepared and also produce better results. An agency that is reimbursed – even partially – for the time invested and the costs consented in hiring experts, feels recognised and respected and will work with a lot more motivation.

In case you wonder what would be an appropriate reimbursement of expenses, you can contact your association's back office.

05

The assessment ▾

The participating agencies should be informed in advance of how they will be assessed and of the expected services. The goal of the process is to choose a critical partner, not just the choice of a campaign or an executing party.

The client gives a transparent and honest debriefing of what was successful and what wasn't to the non-selected agencies on the various selection criteria, ideally also on pricing and remuneration. This is instructive for both parties.

06

The copyrights ▾

All recommendations and material produced for the selection are confidential and remain the property of the participating agencies. The information provided by the agencies is linked to the ongoing pitch process and cannot be used by any of the parties outside the framework of this pitch process.

The agencies can file their proposals with the Benelux Office for Intellectual Property. After the pitch, the copyrights will be laid down in a contract between the client and the selected agency. All mutually provided information will remain strictly confidential for all strategic and creative material, both during and after the pitch.

Basic rules for agencies

01

Transparency ▾

The agencies commit to providing clients with access to all the information necessary to ensure that all parties are treated equally.

This involves:

- ↳ detailed structure of the shareholding, as well as the structure and composition of the group to which the agency belongs.
- ↳ exhaustive list of conflicting clients managed within the agency/group based on the indications provided by the client in the tenders.
- ↳ business and financial commitments existing with sub-suppliers, media regulators, and technical service providers.
- ↳ a clear indication of an agency's contribution to the cases presented.
- ↳ identification of the person responsible for handling the tenders.
- ↳ to the extent possible: identification of the team that, in case of selection, will be responsible for the execution of the assignment, as well as an indication of whether the team members involved are permanent employees or are employed as freelancers.

02

Responsibility ▾

The agencies commit to participating responsibly to the tender process, considering the implications and the costs that this process entails.

This involves:

- ↳ compliance with the conditions set out in the tender.
- ↳ compliance with the performance requirements laid down in the tenders (no more, no less, as regards creative material).
- ↳ no presentation of a creation already proposed to a competing company during another tender procedure.
- ↳ correct estimates for technical conditions of implementation of the proposed projects, considering the necessary time needed by the agency to obtain this information from third parties.
- ↳ explicit, clear, and realistic budgets.
- ↳ legal correctness and respect for the relevant self-regulatory codes for the proposed projects.
- ↳ respect for the confidentiality of the pitch procedure and of the communication between the client and the participating agencies.

03

Fair ↘

- ↳ respect for the confidentiality and intellectual property of the information and documents provided by the company/client in connection with the tenders.
- ↳ return of the documents provided by the company/client.

The agencies commit to ensuring the tendering process is conducted fairly.

This involves among other things:

- ↳ a real commitment to the client during the tendering process.
- ↳ participation in the entire competition process or the obligation to provide a clear and written justification in the event of withdrawal.
- ↳ the prohibition of collusion with the other agencies that respond to the tenders and compliance with competition law and fair-trading practices.
- ↳ the development of a genuine proposal consistent with the proposed budgets.
- ↳ respect for the decision-making process as presented in the tender dossier.

Public enterprises, bound by the public procurement law, are requested to follow this charter within the contours permitted by the law.



Taking brands further

UBA ▾

UBA stands for 'United Brands Association' and is the Belgian advertisers association made by and for brands. Representing the interests of brand builders, UBA's mission is to create a creative, innovative and dynamic eco-system, providing space for ambitious brands to grow sustainably. The UBA community counts almost 400 companies, representing 1050 brands and more than 8000 brand builders.

➔ ubabelgium.be



ACC Belgium ▾

The purpose of the 'Association of Communication Companies' is to unite all communication Agencies in their individual interests and their collective ambitions. Our mission is to upgrade, promote and defend the added value of our 200+ members towards (future) employees, clients, authorities, press and public.

➔ acc.be



UMA ▾

UMA represents the Belgian Media Agencies in the advertising and media market as a whole: advertisers, media, research institutes, JIC's, public authorities, opinion leaders and trade press. UMA promotes media agencies' expertise, added value and diversity of the services proposed to a wide audience within the communication sector, such as advertisers, media partners, authorities and the general public.

➔ uma.be



Taking brands further