

PITCHING TO WIN

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One day at the agency...



The Client

Your ideas were really ...original.
...it was down to you and one other company

Acct Director

A close second, that's brilliant...
I'm sure they'll come back to us next time.

The Boss

There's no such thing as a close second... you failed miserably.

Acct Director

Sh*t, we've got the Bloggo pitch coming up soon,
...we've got to win that one. What should I do?

There's no point winning the creative battle only to lose the pitching war (and have your ideas nicked into the bargain). You need a strategy win. Here are some observations gathered over many years of pitching with some of the UK's top creative agencies and production companies.

Let's assume you are pitching to a new client, so there's no relationship and no trust, and that the client has little experience of commissioning creative services - no surprises there then. The key factor here is that the client is terrified of making a mistake, with all the ramifications that may have for her/his career. Your big idea is no less important than being

seen as a safe pair of hands, able to win over the sceptics in her/his organisation. That's why producers and account managers win pitches, not creatives. Pitching is, after all, selling so putting a creative in front of a client without someone to sell the agency and the production team is high risk strategy. Creativity must always be combined with confidence building.

THE BRIEF

If you can believe your eyes, most of the information you need to win a pitch is sitting right in front of you during the briefing session. At one extreme, it could be the conservative manner and general diffidence; at the other, a warm and friendly welcome and a willingness to engage in conversation. These signals tell you about the client's self-confidence and how far you can push them up the creative ladder. Don't push them any further than they are prepared to go *right now*. And make sure you give them precisely what they are asking for – whether you think it's what they need or not. You can propose alternatives, but always address the stated brief otherwise they won't be able to make meaningful comparisons, a nice gift to your competitors. Proposals are often physically scored against the brief and equal weight may be given to the creative approach and what appear to be more mundane items such as how you will manage the project.

During the brief:

- Listen
- Ask about the target audiences and their attitudes
- Ask about relevant history, previous communications, what worked or not
- Establish desired outcomes i.e. "What would be the best measure of success...?"
- Observe the corporate culture:
 - The way they communicate/brochure/meetings
 - Their premises/reception/offices/meeting rooms
 - The canteen/hospitality/decoration/flowers
 - Punctuality – on time is on task
 - Dress
 - The way they are coping/preparedness
- Companies fall into four main categories which set the parameters for your pitch:
 - Imaginative - Forward looking, risk taking (Entrepreneurs, strategists, creatives).
 - Theoretical - Information-based (Engineers, lawyers, scientists).

- Organised - Conservative, procedural (Administrators, planners)
- Emotional - Intuitive (Social workers, teachers, carers)
- Find out who makes the final decision and what sort of person they are
- Establish attitude to costs: cheapest option or best value for money
- Establish timescales, key dates and client availability
- Dress appropriately for that client. Don't indulge your scruffy creative image, especially if dealing with Government or blue chip clients. The military won't give you a second look if you're not wearing a suit and tie.
- If there's a collective brief, use the opportunity to sow confusion among the competition. Blurt out inflated budget expectations or shooting requirements. The others are likely to be influenced by your off-the-cuff suggestions, leaving you to bid much lower.

No Brief Scenario:

More and more companies are avoiding the face to face brief. Maybe the prospect of confronting all those hungry and expectant faces is too to bear. Or maybe it's the dead hand of procurement who see commissioning purely as a numbers game. This makes it that much harder to second guess the client's creative bandwidth and requires additional background research. The ideal thing here is to have access to an insider or former employee who can give you a steer.

THE PROPOSAL

The proposal document should also be seen as the script for the presentation during which each member of the production team will play his or her part. It could have the following structure:

- Client Requirement
- Audience
- Creative Approach
- Outline Structure
- Creative Team
- Credentials



- Production Schedule
- Budget
- Appendices

Creative Approach

The Theme:

Your creative approach should be based on a theme. Without a theme, you will be struggling to make sense of your specific creative ideas. The theme relates to the communication objectives, which in turn are based on the business objectives.



A theme can be something very simple like ‘no compromise on quality’, ‘people come first’ or ‘building on our success’ or ‘passionate about our products’. The theme should be implemented consistently throughout every element of the communication. A conversation about themes is a safe and constructive staging post before making that dangerous ascent up Mount Creative.

Bring it to Life:

Do everything possible to bring the project and your creative treatment to life. If it’s a video or event, use scenarios, snippets of dialogue, desired audience responses, sketches, diagrams, storyboards, models, stills – anything that will help to generate an impression of the finished job. If it’s a brochure or corporate ID, present three contrasting designs and show how it will work in different implementations. Go the extra mile and create a mock-up of a leaflet or poster that could form say, part of a communication campaign. This will go up in smoke once you get the job, but who cares? Remember, the sole objective is to win. If you have to cover a lot of detail, rather than bulking out the document, shove it in an appendix.

Copyright your ideas:

The content of the pitch document remains the copyright of the author/publisher and it's important to claim copyright on the document. It may be hard or impracticable to win compensation if a client or competitor rips off your creative but the idea is to show them that you place a high value on your ideas.

Pitch Lists:

It is common for larger organisations to have a list of favoured suppliers who will be shortlisted for future projects. The selection process may include presenting contenders with a dummy project to pitch creatively and to budget. Knowing the project isn't going to happen may be seen as an excuse to go over the top but it's better to go along with the illusion and treat it as if was for real.

E-Auctions:

The advent of e-auctions has made the process even more of a lottery and is obviously about driving down price. Signs are that companies that have used it don't actually trust the process to deliver the most effective solution but maybe their hands are tied by procurement. The old chestnut of *'How much do you charge for an hour of video?'* has even reappeared. This is where the creative element and the presentation are even more important as I expect commissioners will not want to forego a good idea and a great team for a cheaper product. But it requires nerves of steel to make that bet.

THE PRESENTATION

Before the presentation:

- Most agencies put together a team of creatives, producers and people with an inside knowledge of the company. Tick every box, cover off every query; follow the brief to the letter even if you suggest alternatives for some items.
- Don't be churlish about calling the client for more information; it's a great way to build a relationship. It also shows that you are taking the pitch seriously, that you are self-confident and that you find the project (really) interesting.
- Try to get to the decision maker while not sidelining the person who has been tasked to manage the project.

- Ask lots of questions around the brief so that you get a picture of the overall market context, their competitors and especially, any hidden agendas.
- Bounce general ideas off the client; this could save you wasted effort and provide a yardstick of their courage and imagination. But don't try to get them to commit to any solution before the official pitch.
- Wow them with your team's unbridled enthusiasm, "We are having a special team briefing this weekend to discuss your project..."
- Call to give good news - "We have pencilled an ace director, illustrator, writer, presenter, designer etc..."
- Confirm times, dates, location and the names and agendas of everyone present
- Plan and rehearse the presentation with the whole team. Turn it into a show with seamless hand-overs to colleagues to cover particular elements. If you have a time limit, make sure you don't run out of time before you pitch the big idea – it happens.

How to play it on the day:

- I sometimes detect a death wish when an agency goes into a pitch; their diffidence and sad demeanour is simply pleading for rejection. Others get too cocky and behave as if it's already in the bag.
- Before the meeting the account director should get everyone focused on the core objective; to communicate the team's total commitment and suitability to take on this project.
- At the meeting, the account director must demonstrate leadership. Take control and bring in other team members when relevant. Above all, avoid it becoming a round table discussion.
- Introduce each team member with pride; you are not just pitching ideas, you are pitching yourself and your amazing team.
- Don't fudge the status of any freelancers; sell their strengths; "We have been lucky enough to get so-and-so for this job... he/she's the best in the field." If you let the client assume a freelancer is actually a full-time staff member you have demeaned his or her status and demonstrated your own insecurity.
- Don't burden the client with a pre-digested PowerPoint showing your working methodology and all the jobs you've ever done. You are there to demonstrate what you can do for them. If they want to know about your track record, they will ask.
- Be a little formal in your approach even if the client is laid-back.

- Dress to reflect the budget and show respect for their corporate culture
- Have copies of the proposal ready but hang on to them until you have finished to prevent clients reading ahead of you, especially to the page marked Budget
- Go through the whole presentation methodically, don't skim or summarise sections. Read it out if necessary. This is your only chance to get your ideas and your company across, don't blow away all the hard work by rushing it.
- Bring something extra to the table such as suggestions for additional channels to their audience, an alternative use of the material such as a web site or CD-ROM or viral. You could call these some Phase Two ideas to avoid putting the client on the spot or raising concerns about extra costs.
- Appeal to their vanity – one chap used to win loads of work simply by saying that it would make a good TV programme and that he knew someone at the BEEB who might be interested. Another suggested syndicating a generic version of the communication to actually make some money back – totally brazen but clients often fell for it.

Qualities to portray:

- Punctuality and appropriate dress
- Interest and enthusiasm
- Creativity and insight
- Politeness and respect
- An understanding of their business issues i.e. the wider context
- The need to use resources carefully and reduce costs where possible
- An absolute conviction that you are the right person for this job
- You are very busy but this job is special and you will move heaven and earth to do it

Qualities to avoid:

- Telling client how to do their job
- Questioning the brief (fatal)
- Bragging you have worked for all their peers and competitors
- Suggesting that your ideas are provisional to be developed once you've got the job (fatal)

MAJOR PITFALLS

- You were talking to the wrong person
- They took an instant dislike to you
- You didn't really want the job, and they knew it
- You didn't read the brief 100 times
- The clients wanted to get creative and you implied their ideas were crap
- You proposed an idea they could never have lived with
- You were never going to get the job in the first place
- The job wasn't going to happen anyway
- You played too safe
- You went over the top
- You left too much to sort out later
- Someone else came up with a better idea for less money.
- It was a crap job anyway and your time is better spent dealing with your regular clients

Back at the agency...

The Boss

Congratulations on winning the Bloggo account..
...the client said your team gave a brilliant presentation.
...your bonus should definitely be up for review
...especially if you win the ACME account.

THE END

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