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DBA Guide to buying design



04 Pitch guide

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For use when preparing for a pitch with designers

You need to make some important decision about the process you are going to employ before you approach any designers.

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 who will be judging can attend
5. Agreed what sort of pitch you require. For additional guidance review ISBA's advice at www.thegoodpitch.com*

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?

From the outset, it is important that the pitch team is aligned on what the final decision will be based on: 'chemistry' or 'output' i.e. will you ultimately be buying the agency's culture, approach and thinking, or 'the big idea' presented on pitch day.

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

Creative versus credential pitch

A 'creative' pitch is where you ask a designer to present some entirely new ideas at the pitch meeting (i.e. they have to develop creative work prior to seeing you) whereas a 'credentials' pitch involves the designer meeting with you to show you their portfolio.

Creative pitch: It is common practice in the design industry for an agency to be compensated for their time on a creative pitch. The agency will need to allocate time and resource to produce something that will enable them to demonstrate their expertise and therefore be a useful guide for you to determine their suitability. Often these businesses will be small agencies and a contribution to their costs will enable them to sustain their businesses.

It is also important at this point to clarify what the pitch fee covers in terms of intellectual property. Legally, a payment alone does not signify the transfer of copyright. It is important for you to discuss and agree with the agency the specific terms of ownership of ideas that are produced as part of a creative pitch. One option is to set a token fee that you are willing to pay each of the pitching agencies towards their costs.

When setting a creative pitch you will need to be very clear what it is that you are asking the agency to do in order to avoid different approaches and ideas being presented. Not being absolutely clear so that you are effectively comparing 'apples to apples' can make the final selection much harder.

The creative pitch is mostly used where you have both the budget and a clear idea of what you need, and perhaps are seeking the 'big idea'.

*The Good Pitch is a joint industry initiative which brought together client and agency representative organisations to tackle the issue of pitching and best practice pitch processes. The Good Pitch microsite: www.thegoodpitch.com hosts outputs from the Good Pitch Taskforce including: 6 Pitch Principles for use by agencies and clients; results of research carried out regarding pitch practices; and an overview of the Pitch Alternatives identified.

Credentials pitch: Credentials pitches on the other hand still require the designer to think about the project in hand before the meeting but this thinking should be about you and your business needs. 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 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. Sometimes more suitable when you are seeking a 'partner' to develop ideas with, rather than looking to buy the 'big idea'. By reviewing portfolios and meeting the designer you are selecting the designer you feel you would be most comfortable working with in this way.

Having considered carefully the above factors, ask yourself if the creative pitch is the right way to go or if it presents you with more questions than it answers. For alternatives consider the DBA's partner ISBA's advice at www.thegoodpitch.com

How long and how many?

Most pitches usually take place over the period of one day. 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/score sheets at the end of the day. It is very difficult to try and complete these at a later date.

You could also consider sharing your pitch score sheet with the agencies pre pitch so that they can structure the pitch presentations accordingly to suit your needs. See section 6.

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.

Either way it is essential that, once decided, the whole pitch team and ultimate decision maker remain the same from the outset and are involved throughout.

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.

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 earliest 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 sometimes changes are inevitable when you have a large group of people needing 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. Here is where an external 3rd party can come in useful.

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, pitches that are closer in content. A sample pitch brief is in section 5. The brief can be as short or as long as required. All you are doing is helping the agency prepare for the meeting in a more focussed way and ensuring 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 remind them of the brief, 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:

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Refreshments, for the panel and the agencies
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Do you/reception know who is coming and when?
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Have you organised the timetable to allow for breaks for the panel?
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Lunch! Ensure there is appropriate time for lunch: hungry people do not concentrate well.
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Does all the equipment you need work/ do you know how to work it?
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Do you have access to someone who does?
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Does everyone know where to go? Visitors parking facilities/maps?
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How will you provide the feedback?
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Successful and unsuccessful

In every pitch situation, there will obviously be agencies that have attended the pitch, having put time and effort in that will not win the business. It is essential that these agencies are advised 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 which other agencies attended the pitch. Most agencies will want to know who they were up against and who won eventually. So feedback may need to take place after official announcement. 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!

More information

If in doubt about any part of the process or you have questions that are specific to what you are trying to achieve, ask the DBA, who will almost certainly know someone who will be able to answer your questions or help in the process.