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# Some things to think about when you are writing a pitch brief

**Making sure that you create a relevant, pithy, challenging and inspirational brief for the pitching agencies to answer is no easy task. Though we can't give you a template that will serve every set of circumstances, the following notes will give you a checklist of things that it's worth including or thinking about when you are putting your brief together.**

## BACKGROUND

Give the agencies some context. A couple of paragraphs that talk about your business, including company or brand history, sales performance, USP, key competitors, your business objectives and the values that are important to your brand or service.

## CURRENT ACTIVITY

Give some guidance on any relevant or mandatory 'brand vehicles that you have. Tell the agencies which channels are important or effective for your brand and why.

## TARGET AUDIENCES

Define your consumer target audience as closely as possible, but don't forget to include information about other audiences that the agencies should consider or be aware of: trade, staff, shareholders, the Stock Exchange, government, the media.

## BUDGET

If the budget for your marketing plans that the agencies will need to work within has not already been revealed at an earlier stage of your search process, make sure you include clear guidance in the pitch brief.

## CURRENT AGENCY ARRANGEMENTS

Give details of your current agency roster, how long have you been working with these agencies and their respective roles in the marketing mix.

It's always good to be clear and honest about the reasons why you are calling the review. Whilst you should avoid being overly negative about your current incumbent, it is helpful for the pitching agencies to understand what went wrong and why.

## WHO'S PITCHING?

If there's no good reason not to, be open about who the pitching agencies are. They'll only all spend ages speculating and trying to guess otherwise.

## THE PITCH ITSELF

What do you want them to show on the day? Think about what you and your colleagues will need to see in order to make a comparative judgement. For example, if it's a creative pitch it could include any or all of the following:

- Team who would work on the business
- Strategic understanding of your brand
- Strategic understanding of your market/audience
- Creative solution
- Communications planning
- Remuneration

If creative ideas of any kind are going to be presented, how "finished" do you want these solutions to be?



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If you are expecting highly finished work, it is good practice to make some funds available to help the agencies with some of their third party costs.

## MANDATORIES

Make sure you include clear instructions regarding any mandatory requirements that the pitching agencies must observe, particularly around brand identity.

### What other factors will the agency be judged on?

- Chemistry with you and your team?
- Ways of working?
- Speed of response?
- Flexibility?
- Previous experience in the sector?

## RESEARCH MATERIAL

Include relevant market research and other data as appendices to the brief or indicate how this information will be made available.

## REMUNERATION

Provide a scope of work against which agencies can prepare outline remuneration proposals. Decide whether the details of the agencies' fee proposals should form part of the pitch presentation itself or be discussed at a separate meeting prior to the final presentation?

## KEY PERSONNEL

Tell the agencies which members of your team and/or company senior management will be attending the pitch presentations, indicating whether any of these people will be available to talk to in advance of the pitch. If so, give direction as to how this contact should be made.

## ACCESS

How much access do you want to give the agencies during the pitch? Do you want them to have open contact as and when they require it or access in a controlled manner, via an allotted time for a Q&A session, for example. If you choose the former approach, you should appoint a principal contact point to manage the access.

## PITCH COSTS

Are you planning to contribute towards the costs of the pitch? Pitch contributions usually fall into a range of £5-10K per agency and can be invoiced by the losing agencies following the conclusion of the pitch. It won't be necessary to pay a contribution to the successful agency.

## TIMING PLAN

Be clear on, and realistic about, your expectations regarding timings, indicating any key deadlines when any new campaign or activity must be ready for.

Give details about the pitch date, timings and venue, telling the agencies who they should contact to book their slot. ■



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